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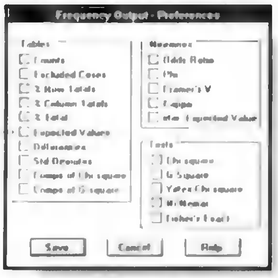

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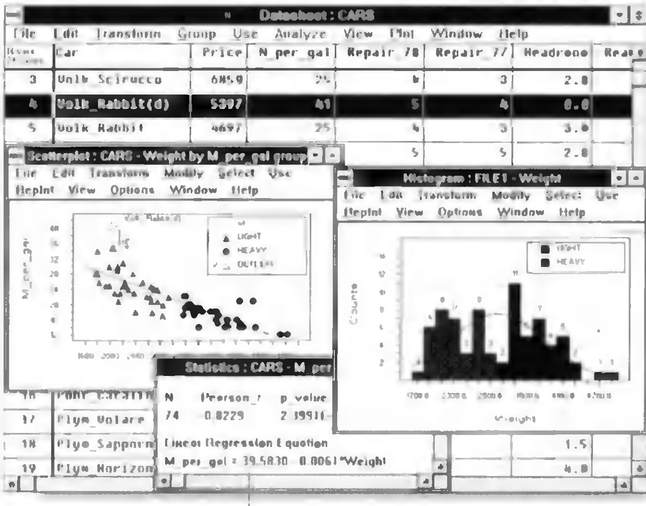

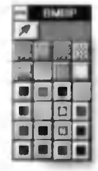

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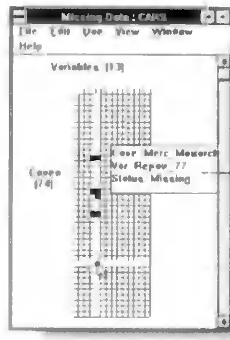

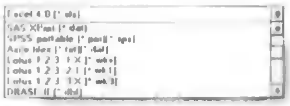

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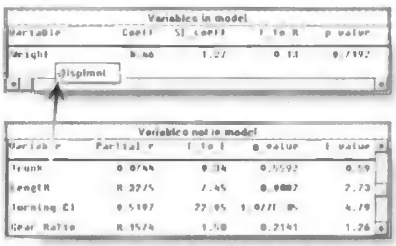

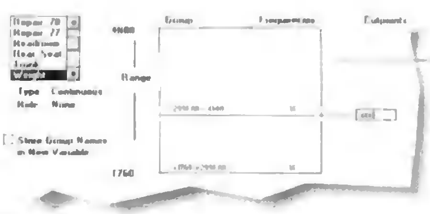

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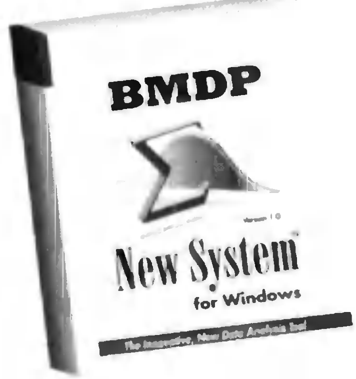

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AT&T used a mail survey to find out how its employees feel about the company-sponsored health care program. Photo by Julian Calder/ Tony Stone Worldwide.

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AT&T

Network ratings

Survey tells AT&T how well its employees manage with managed care

By Joseph Rydholm
QMRR editor

When it comes to health care for their workers, most employers seek that elusive happy medium between coverage and cost. Companies want to give workers thorough coverage without draining corporate coffers. For many, managed care is the way to do that.

Managed care exists in many forms, but at its core it places doctors, hospitals and insurers as gatekeepers who control the kind of treatment options available to patients. It also asks patients to bear some of the burden by requiring them to pay extra if they wish to seek treatment that isn't covered under their plan.

To address their shared concern over medical cost containment and quality health care delivery, AT&T and the employee unions, the International Brotherhood of Electrical Workers and Communications Workers of America, jointly introduced a managed care program in 1990 called the "health care network," which currently covers approximately 60,000 of its occupational employees. The network is actually 42 local networks across the country, each one administered by one of three different carriers — Prudential, The Travelers and Blue Cross/Blue Shield.

If employees and covered dependents choose to "go in-network," by following specific network utilization procedures, the medical plan pays a higher level of benefits for some services. If they choose to "go out-of-network," they still receive benefits, but the plan will not pay the maximum level for certain services

Not alone

AT&T isn't alone in its movement to managed care, says Steve Wetzell, executive director of the Business Health Care Action Group, a Minneapolis-based purchasing coalition of 22 large companies — including 3M, Dayton-Hudson, Pillsbury and Honeywell — that is building a managed care product for their employees and retirees.

"It varies from market to market, but you're seeing a lot of large employers moving toward strategic contracting with national carriers to get all of their employees into one national managed care network. It gives them a lot more leverage when they negotiate administrative fees when they focus all the business on one vendor," Wetzell says.

"Managed care is such a broad term that covers a whole spectrum of products with different attributes, but the more sophisticated buyers are looking toward vertical integration of the care systems, where doctors, nurses, hospitals and the health plans are all part of one accountable entity for both cost and quality."

Mail survey

Since the program was introduced in 1990, AT&T has used a mail survey to measure employee satisfaction with the network providers and service. "We wanted to get a better handle on employee attitudes towards managed care in general and various aspects of the AT&T health care plan," says Jeff Wides, quality and measurements manager, Health and Insurance Benefits Administration, AT&T.

Once the health care network was introduced, the occupational employees' unions were very interested in seeing how their members reacted to the managed care program. In addition, Wides says "We, as health insurance and benefits managers, believe that the AT&T business units and the employees are our customers. In order to provide the best service, we need to know their reactions to the products we offer."

AT&T also obtains feedback about the network from local access committee meetings which are held throughout the year and which involve both union and insurance carrier representatives.

The survey was handled in-house until 1993, when AT&T decided to obtain an outside vendor's perspective on the survey instrument. So Abt Associates, a Cambridge, Mass. research firm was retained last year to consult on questionnaire development and data analysis.

For the 1993 survey, questionnaires were mailed in eight waves from April to November to randomly selected employees who had recently submitted a claim for a physician visit. The questionnaire covered employee satisfaction levels with such items as overall network satisfaction, the most recent doctor visit, the network doctor and health care network communications, and included space for general comments. Satisfaction was measured using a five-point scale, from very satisfied to very dissatisfied.

In general, the survey and related research found that some employees didn't understand the referral process and the role of the primary care physician. "We've learned that we need to focus more on educating the employees on how to use the network."

Respondents' verbatims about a particular insurance company were shared with that insurance company, with the intention of resolving problems, Wides says. "Once AT&T received survey results, we worked together with the insurance companies and the unions to resolve identified problems and follow up on recommendations."

Analysis of returns showed that respondent concerns focused on four factors:

- network quality, as represented by service aspects such as claims processing and the network referral process;
- quality of care, including medical treatment received, amount of time the doctor spent with the respondent, and physician courtesy;
- administrative effectiveness, including doctor's and staff's understanding of network procedures for billing and referrals, and the amount of time it took to have a claim processed; and
- access to care, including convenience of doctor's office hours, time spent waiting in the office and days waiting for an appointment.

In general, the survey and related research found that some employees didn't understand the referral process and the role of the primary care physician. "We've learned that we need to focus more on educating the employees on how to use the network," Wides says.

While there is always the potential for employees to view employer-sponsored surveys as intrusive — especially those on health matters — Wides says this doesn't appear to be a problem. "We do the surveys anonymously, using only the respondents' opinions. We don't do any comparisons of the information that comes in on the survey to any other information database," he says.

Plans for '94

While the 1993 survey focused on users of the health care network, Wides says this year, AT&T plans to again survey employees who go out of the network for service (which the company had done in '91 and '92). "By doing that, we hope we'll be able to analyze such things as the effect of

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Research with health care providers:

An uncommon approach to a common problem

By Murray Simon

Editor's note: Murray Simon is president of D/R/S/ HealthCare Consultants, Charlotte, N.C.

While conducting marketing research on technical products or complex issues can be difficult, it's even more challenging when health care providers are involved.

On the quantitative side, it is difficult to generate sufficient valid responses. Unless there is an attractive incentive, health care professionals are generally too busy and inundated with outside communications to respond. Even in those projects that offer an effective incentive, if a mailed questionnaire relates to factors such as office management procedures or product-buying/usage patterns, the doctor frequently will have a staff person it fill out and then not review it before it is returned. And when the provider does respond personally, there remains the nagging question. Just how representative are these particular respondents?

On the qualitative side, the cost of recruitment and incentives is often higher than comparable technical studies outside of health care. The prevailing provider attitude toward marketing research is: If you want my learned input, you're going to have to pay for it.

At the end of qualitative projects, the client often is left wondering whether the findings are representative of the universe as a whole. During the debriefing, we emphasize that the only way to gain insights regarding potential predictability is through a quantitative study. But again, budgets are limited and costs are high — further research may not be feasible.

Both quantitative and qualitative factors tend to add cost and complexity to the development of research projects in the health care arena. As a result, clients are often looking for answers from studies that are underbudgeted (in time and money) and limited in scope — a common problem to which we applied an uncommon solution.

Are assumptions correct?

In 1993, our company was contacted by a major non-health care corporation with a familiar problem. They had a technology that they felt had potential medical applications, particularly in the area of patient-information management for psychiatrists. They wanted to know if their assumptions were correct.

Of course, the company had limited amounts of time and money it could spend to get an answer. We were conducting preliminary discussions late in October, and a go/no-go decision had to be made by the beginning of the year. In addition, this particular technological application had only recently surfaced, and market research dollars had not been budgeted for it — funds had to be begged and borrowed.

The project had the potential to establish a long-term working relationship with a major new client, so we decided to not only go ahead with a study with significant up-front limitations and problems, but to try to maximize the return on investment. In other words, we decided to show them what we could do.

One of our biggest concerns was the fact that we would have to interview psychiatrists. Costs would be high because of the expense of a relatively difficult recruit and the size of the incentive needed to generate interest.

Does it have potential?

Our first objective was to see if psychiatrists felt the technology had potential benefits. Through some networking with medical colleagues, we gained access to staff members at a major psychiatric institution for a series of on-site interviews. After two days of interviewing we came away with two conclusions:

• The technology conceivably could have significant applications in psychiatry.

• It would be important to interview psychiatrists practicing outside of the institutional setting.

We came to a client/supplier consensus that the next phase of the study had to go beyond concept confirmation/rejection, and should involve some respondent brainstorming on potential applications, which dictated a group format. Although we do a lot of face-to-face focus groups, we decided to use a telephone focus group for a number of reasons:

• We would get substantially better geographic diversity than we would with face-to-face groups.

• We would be able to hear from the small-town doctor as well as the urban practitioner.

• Respondents would not know each other — posturing among psychiatrists can be a problem.

• The recruit would be easier; respondents could participate from their home or office.

• We have a lot of experience with, and confidence in, the telephone focus group.

• Overall costs would be lower compared to traditional face-to-face groups.

The groups were done and following an analysis of the results and several client conferences, we decided that based on what we had heard, there was a strong business potential in the technology, and that a number of specific applications were possible. It's always nice to be able to tell the client that their baby is beautiful.

Unfortunately, an all too familiar question reared its head: How representative are these findings?

We were convinced that our client's technology was promising, but some broader questions had to be answered:

• How will the president's mandate for universal health care, and the laws enacted in response to it, affect the way psychiatry is practiced?

• How quickly will psychiatrists adopt new technologies?

• Which applications of this technology will have the greatest potential for success?

• How big a business can our client expect to develop from the various applications?

It wasn't possible to conduct a full-scale quantitative study — time and money were rapidly running out. But the need to know was strong, and we had a research idea that we wanted to test. We all know statistical validity can't be developed from interviews and focus groups with a relatively small number of respondents, but what if you interview specialists who routinely interact with thousands of their colleagues on a nationwide basis every year? Certain providers practice, do research, publish and give lectures at major professional conventions and seminars. Given their ongoing professional interaction, wouldn't they tend to represent a unique global perspective on their profession?

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Using paired comparisons to measure public reaction to health reform

Fueled by President Clinton's determination to reform health care, there has been a windfall of research to understand the needs and desires of the public and the many providers and purveyors of health services. Two towering hurdles that researchers must clear in conducting these studies are: translating complicated health coverage-related concepts and jargon into common language; and adopting measurements that can determine the public's priorities among the many important coverage and service components of health plans.

While the health reform debate has raged, Fact Finders Inc., a Delmar, N.Y. research firm, has been conducting research which tracks the public's experiences with health care services and priorities in health care reform. This article will focus on a technique used in the 1994 American Values and Expectations for Health Care Reform Survey, the latest of the annual surveys which the Novalis Corporation has sponsored to measure the needs and preferences of the public regarding any health plan that emerges from health care reform. These public opinion studies, conducted in January of 1992, 1993 and 1994, survey by telephone a representative sample of 1,000 U.S. adults.

In conducting these annual tracking surveys, Fact Finders has gauged public opinion by measuring reaction to underlying precepts of health plans rather than actual initiatives and their components. The challenge of developing an approach to measure receptivity to managed care is an example of the difficulty inherent in measuring public attitudes toward complicated health care initiatives. Measuring receptivity to managed care, a central operational tenet of the Clinton Health Security Act, was extremely difficult in 1993 when 75% of the U.S. population had never heard the term. Almost one-third of those who had not heard the term were actually having their care managed, as evidenced by their report that their health plans required them to call or visit their primary care physician before receiving any routine medical services.

Fact Finders has used the technique of paired comparisons to measure public opinion about health reform designs. Use of this technique has enabled the public to contribute their opinions even when they are not familiar with industry terms and legislative designs. The ensuing is a discussion of the measurement of the public's preferences for health reform.

Measuring values

Receptivity to health care reform is determined in part by the perceived goodness-of-fit between a person's own priorities in health care and the reform package. In repeated measurements in our surveys and those of others, the public continues to say that the health plan considerations that are important are: quality of services received; availability of services when needed; and freedom to choose the health care provider desired.

Historically, all of these components have been readily available to the privately insured in the United States through traditional indemnity insurance. However, with the advent of health reform which aims to include the entire United States population in a health plan, prioritizing these significant components has become increasingly important for use in health plan design. In addition, knowing the relative importance of health plan components is useful for developing marketing strategies to expedite the acceptance of health care reform.

Understanding that cost, choice, security, and quality are all important considerations, we examined the relative importance of these dimensions using the paired comparisons measurement technique. This method is more accurate and more valid than rank-order or rating-scale approaches because each dimension is directly compared to each of the other dimensions.

For measurement purposes, we operationalized the key dimensions — cost, choice, security and quality as follows:

• Choice (freedom to choose any doctor)

• Security (always being able to get medical care you need)

• Quality (you see the best-quality doctor)

• Cost (what it costs you for health care)

For the paired comparison technique, each respondent is asked six actual questions, sequentially including each of the six possible pairings, in this format.

Which is more important to you? Freedom to choose any doctor, or what it costs you for health care?

To determine which of the four dimensions ranks "most important," values for each dimension are calculated by counting the number of times each of the dimensions (cost, choice, security, quality) is chosen over any other dimension. (See figures 1 & 2)

Figure 1
Pairs of dimensions presented for judgment of importance (underline indicates greater importance)

Choice	Cost
Cost	Security
Quality	Cost
Security	Choice
Choice	Quality
Quality	Security

Sums of choices:

Cost	Quality	Choice	Security
0	1	2	3

One respondent's data comparing four dimensions of a health plan and the rank values obtained by counting the number of times each dimension is chosen as "more important."

Figure 2
Calculation of Scale Values From the Sums of the Rank Values

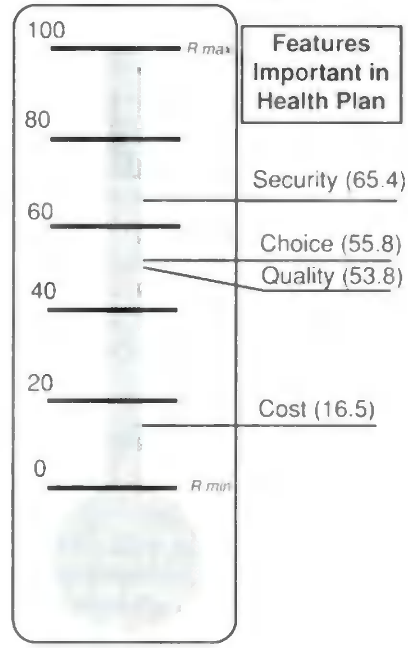
Respondent	Cost	Quality	Choice	Security	Maximum
1	0	1	2	3	3
2	0	1	2	3	3
3	0	2	2	2	3
4	1	0	2	3	3
5	0	1	2	3	3
6	0	1	2	3	3
7	0	2	2	2	3
8	1	0	3	2	3
9	1	1	2	2	3
10	1	0	2	3	3
Sum	4	9	21	26	30
Scale Values	13.33	30.00	70.00	86.67	100.00

Scale value = (the rank sum/maximum rank) (100)

By using this technique, we found that by a large margin cost is, at this time, the least important health plan consideration of the public. (See figure 3) In further analysis from the 1994 survey, opponents of national health care reform value choice over security, quality and cost. Security is most important to supporters of health care reform.

It is our conclusion that developing valid and reliable measurements of public receptivity to specific health care reform initiatives requires asking questions that focus on personal behavior and values. This allows the general public to contribute their opinions about specific reform proposals or components which are otherwise too complicated by design or too remote due to industry jargon. ❑

Figure 3
Paired Comparison Scoring



Discrete choice modeling: Understanding a "better conjoint than conjoint"

By Steven Struhl

Editor's note: Steven Struhl is vice president, senior methodologist at Total Research, Chicago.

Roughly 20 years ago, conjoint analysis was hailed as an innovative new way to determine consumers' true product and service preferences. Many companies quickly adopted it as the method for discovering the worth of a product's features. Many years' experience and a wealth of experimental evidence showed that earlier research methods simply did not produce accurate predictions of consumer response. While conjoint analysis solved many of the problems that arose with earlier methods, it also began showing some shortcomings. Discrete choice modeling was developed as an analytical technique to resolve these problems.

Nearly all methods used before conjoint came along involved asking consumers direct questions about the features they wanted in a product, often using importance-rating scales. Direct rating methods had several serious drawbacks. If given no constraints, consumers will tend to rate nearly everything as important. After all, it costs nothing to give a proposed feature a "highly important" rating when participating in a survey. In a product-feature study using a list of 20 product attributes, for instance, 15 or 17 features (if not all 20) could emerge as "crucial" for the product.

Another problem with rating scales lies in the way people tend to give what they perceive to be socially desirable answers. But what people think they should do and what they actually do often differ.

Finally, even sophisticated shoppers often have trouble stating what motivates them to choose one product over another. The choice process is something like the process of riding a bicycle in that it is largely based on types of judgment that most people find difficult to precisely describe.

Direct-question research typically resulted in overpriced products loaded with features that had little appeal to real-world consumers, and stories of failed products and services are legion.

Enter conjoint analysis

Conjoint analysis made product and service testing more realistic. Its most common form, full-profile conjoint analysis, presents the study participant with a series of product descriptions (or other representations). The participant is asked to look at the descriptions and make a series of choices similar to those they would make in the real world. The results of the study allow the value of various product features to be derived mathematically.

Figure 1 shows a typical conjoint profile, or card.

Full-Profile Conjoint Card

Sample conjoint card, showing 11 attributes (shown in italics), each at a given level, or variation. Other cards will show other variations of the attributes in specific combinations. Respondents will rank or rate these cards.

Card 16

Chain Holiday Inn

Price $50.00

Location Near airport, away from downtown

Clientele Primarily business travelers (individual)

Room Basic hotel room, not cramped but little workspace

Lobby and Public Areas Basic, ordinary lobby and public areas

Health Club Facilities On premises or nearby

Check-Out Speed Express check-out, never over 3 minutes

Parking Ample free parking

Restaurant in Hotel Moderate, not fancy

Non-Smoking Rooms No special rooms or floors

Conjoint analysis has several basic analytical requirements or ground rules. First, it requires that the products or services tested be treated as sets of distinct attributes (or features). It also requires a limited set of variations (or levels) for each feature. In a test of hotel features, for example, one feature might be the type of hotel lobby. Suppose this attribute had three levels: plain and simple, small and opulent, and large and ostentatious. Four to ten other hotel attributes might be varied in similar ways to develop the product profiles.

In most cases, full-profile conjoint analysis uses a special type of experimental design that selects a specific subset of the many possible combinations of attributes that could be tested. For instance, suppose that in our hotel example, we decided to test seven attributes, three of which had three levels and four of which had two levels. This would lead to 432 possible combinations of attribute levels (3 x 3 x 3 x 2 x 2 x 2 x 2).

Full-profile conjoint analysis could estimate the worth of all these possible combinations using just 16 product profiles. This is good, because the average respondent could not be counted upon to rate 432 different product profiles without heavy use of certain illegal stimulants. Use of experimental design methods clearly can extract a great deal more information than you could get otherwise.

Conjoint analysis predicts consumer choices better than rating scales because participants in a conjoint analysis-based study look at relatively realistic product profiles and make trade offs among various product features, selecting some combinations of attributes as better than others. Hence, conjoint analysis is called a multi-attribute trade-off technique.

Why discrete choice modeling?

For all its strengths, conjoint analysis also shows some weaknesses, particularly in testing branded products. In conjoint analysis, brand often gets treated as a product feature, with various brands as the levels. Problems arise when brand appears as an attribute to be tested along with other attributes. Since each level of each attribute must appear with each other attribute level, impossible combinations of brands and features can appear. Impossible brand-price combinations are especially likely to appear. Also, when the brand name itself signals a degree of product quality, it cannot be traded accurately against other attributes.

Problems also can arise in asking respondents to rate or rank product profiles. If the procedure is to work at all, study participants must rank or rate all the conjoint profiles. Sometimes rankings prove difficult. Looking at a series of 16 product profiles, most of us probably could select the one we like best and the one we like the least. We probably also would have little trouble identifying our second favorite and our next-to-least favored choices. It's harder to decide which should be ranked fifth or sixth. Forcing respondents to carefully rank or rate alternatives they would never choose can make the task imposed by conjoint somewhat different from real-world product selection behavior. And unfortunately, accurate rankings or ratings of all the product profiles are needed for conjoint analysis to provide meaningful results.

Discrete choice modeling avoids impossible combination and forced choice problems, while preserving — and even extending — the estimating power of conjoint. With DCM, respondents see products or services alongside competitive products in a series of market scenarios. They are asked to look at each scenario, and answer a simple question: If these were all the choices available, which would you choose, if any?

Once the respondent has done this, he or she simply goes on to the next scenario and makes the same simple decision. Figure 2 shows a sample DCM scenario.

Sample DCM Scenario

Which one, if any, would you choose?

Chain	Holiday Inn	Marriott	Hyatt Regency	Westin	None of these
Price	[illegible]	$83.00	$100.00	$113.00	(I would choose to stay somewhere else.)
Location	Near airport away from downtown	Downtown	Near airport away from downtown	Near airport away from downtown	
Clientele	Primarily business travelers	Heavy convention and meeting business	Primarily business travelers	Business and family travelers	
Room	Basic room not cramped but little workspace	Large and spacious with desk and table	Large and spacious with desk and table	Suite with bedroom and sitting room	
Lobby and Public Areas	Basic ordinary lobby	Large elegant and impressive	Large elegant and impressive	Large elegant and impressive	
Health club facilities	No health club associated with hotel	On premises	On premises or nearby	On premises or nearby	
Check Out Speed	Standard check out	Express check out never over 3 minutes	Express check out never over 3 minutes	Express check out never over 3 minutes	
Parking	Ample free parking	Ample free parking	Ample free parking	Parking typical for airport area	
Restaurant in Hotel	Moderate, not fancy	Nice but not exceptional	Nice but not exceptional	One of the best in town	
No smoking rooms	No special rooms or floors	No special rooms or floors	No special rooms or floors	Special floors	

DCM's approach has several benefits, aside from posing a more realistic and natural task. Perhaps most importantly, the question asked is the question researchers care about most. The respondent makes a choice, decision or purchase, rather than just stating a preference. In addition to having a great deal of theoretical support, the DCM approach has high face validity with nontechnical (managerial) audiences.

Further, representations of brands can be customized to match marketplace reality. Each brand can have its own attributes and attribute levels. Attributes can vary for different brands. Several products with the same brand name can appear side by side in the scenarios, allowing for direct measurement of product line effects.

DCM can even be set up to have one or several products missing from some scenarios, which allows for the measurement of marketplace effects of product introduction or withdrawal.

DCM also handles certain experimental designs more easily than conjoint. With DCM, many products can share one large experimental design, or each product can have its own conjoint-style design. Products can share experimental designs (for instance, two experimental designs can be split among six products). Very large designs (requiring, say, 32 or 64 product scenarios) can be fractionalized (split apart) very easily; the downside is that fractionalization requires larger samples. However, it is still much easier than the complex gyrations required when splitting conjoint designs, which tend to become messy and produce less than ideal results.

With large enough samples, you can even use random designs with DCM. With DCM, random designs do not have the exact formulations of experimental designs. Instead, they put levels of attributes together in a different random configuration for each respondent. Sawtooth Software's CBC product does this.

You can also use DCM to analyze data collected with no explicit design, an approach called "revealed preference analysis" that has long been used in econometrics. However, any design departing from strict experimental design principals must be tested carefully.

Key characteristics

DCM analysis necessarily involves choices among alternative products or services, typically shown side-by-side in scenarios. In addition, DCM typically uses estimation by logistic regression procedures. Multinomial (or polytomous) logistic regression is used for choices among more than two alternatives. When more than two alternatives are tested, DCM also must make an important mathematical assumption, the independence of irrelevant alternatives (IIA). IIA is a key property of DCM.

Conditional variables

DCM differs from most other forms of analysis in that it often uses conditional variables. Conditional variables exist only for one or a few of the choices available. They also can have different levels for the various choices. Again considering hotels, suppose Marriott was the only chain that offered an automated robot bar in each room. The automated bar could be a small refrigerator that electronically recorded drinks you took from it, or a smaller wall-mounted unit. With DCM, "automated bar" could appear as a conditional variable only in connection with the Marriott. Since this feature would not be offered by the other hotels in the real world it would not appear as a feature tested in connection with them.

Aggregate level analysis

DCM also has one salient limitation: Analysis can be done at the aggregate level only. This is a consequence of logistic regression, which works in terms of likelihoods or odds.

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Through the glass:

Setting the tone for effective observation

Editor's note: Martha Wilson, M.A., is director of qualitative research with Freeman, Sullivan & Co., a San Francisco research firm.

By Martha P. Wilson

As a data collection tool, focus groups continue to grow in importance and popularity. Unfortunately, too many client-observers succumb to the partylike atmosphere behind the mirror and fail to take part in the science of focus group observations.

The client-observer can have a great deal of influence in the observation room and on how group feedback is interpreted and used. The attitude, expectations, level of experience and preconceived notions of the observers will guide their perceptions of the focus group and its outcome.

When interpreting group output, client-observers often differ with each another and with the moderator. More frequently, client-observers listen selectively, finding feedback they expect or want to hear while failing to recognize or acknowledge information they don't want to hear.

Similarly, some clients dismiss contributions by focus group participants whom they disregard for some reason. Perhaps the participant has expressed a common complaint that the client feels powerless to rectify. Sometimes a participant's mannerisms, speech or behavior create some dislike or discomfort in the client. Many moderators have heard a client diagnose a participant as sick, a hypochondriac, crazy or flaky. The client then ignores information provided by the participant.

The client-observer loses, because important information is lost. Since the theory behind focus group research is that each participant represents others with similar views, any dismissal of a viewpoint is worrisome at least.

There are effective ways to manage focus group observation to improve the overall quality of sessions. It's helpful to incorporate an observer orientation into the focus group process.

Four keys to observer orientation

1. *Observer's logistics guide.* As part of the pre-focus group routine, the moderator receives a list of the names and titles of all observers. Each observer receives an logistics guide that includes the date, time and location of the focus group, directions and parking instructions, arrangements for private entry into the facility and rules of confidentiality and etiquette for the focus group facility and, especially, the observation room. The guide serves as a good reminder for both new and experienced client-observers.

2. *Observer orientation.* Many moderators hold a briefing just prior to the focus group. Client-observers are reminded of the session's objectives. Details of the demographic characteristics of the group (and any previous or subsequent groups, if the group is part of a series) are described, as are any special recruitment techniques. Questions are fielded and clarification provided before the focus group starts.

The moderator should then provide a

short, precise orientation on the art and science of observation. The moderator can set the tone with an overview of the underlying assumptions in focus group research:

• A focus group is made up of individuals. They only become a group when the facilitator identifies what they have in common. The focus group is designed to obtain the individual viewpoint and to use the group dynamic to elicit certain kinds of information.

• The facilitator will attempt to give each individual approximately equal time since no participant's viewpoint is more important than another's.

• Regardless of their behavior or appearance, each person in the focus group represents others in the target population, and their input represents that of others who think and/or behave similarly. When decisions are made about customer satisfaction, service provision or product orientation, the feedback from all participants should be part of the consideration.

• Focus groups are not necessarily designed to gain consensus. Often, the diversity of perspectives is as important as any agreement reached.

• In those instances where a consensus is reached, it is important to note the things that seemed to be influential in the process.

Once the ideas behind the process are laid out, the moderator can address the need for the kind of observation that capitalizes on the information provided by the focus group, and offer tips for effective observation:

• Observe with an open mind. Be aware of your expectations for the outcome of the group. What is it you expect to hear? Why? What is it you want to hear? Why? Are there any things you hope not to hear, and why don't you want to hear them?

• Observe without judgment. Are there particular kinds of participants you dread? Who are they and what is it about them that disturbs you? Are these types of people important in your target group? If so, are you able to let go of your reaction in order to really hear their input?

• Listen and observe with the project's goal in mind. If each participant represents a key part of the target audience, how can each be approached or marketed to?

• Be aware of your own personal/professional investment. How will the outcome affect the project you are working on? Have you made assertions, commitments or plans based on how you hope the group will come out?

• Listen as though it were you, or someone close to you, speaking. Even if the topic seems somewhat mundane, putting yourself in the place of the participant may help to emphasize how important it is to really listen and seriously consider each participant's comments.

• Listen for something you do not already know. Is this your umpteenth focus group on this topic? Is it hard to listen to the same moderator questions yet again? Clear your mind and freshen your perspective by trying to observe and listen with new eyes and ears.

• Take notes. Use the seating chart to make notes of ideas, thoughts, comments or questions that come to mind during the discussion. Note at which

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Survey Monitor

Dream homes in the country prove popular with execs

People who can live wherever they want — well-to-do executives across the nation — would eschew glitzy apartments and mammoth mansions in favor of dream homes in the country if given the chance. So says *Country Home* magazine, which recently conducted a survey in an attempt to understand what the American residential fantasy is these days. Asked where they would most like to live and given the choice of a Beverly Hills mansion, a four-bedroom Tudor in the suburbs, a designer loft in Manhattan or a country farmhouse on several acres with a pond, 54% of the executives chose the country house. Only 8% wanted the mansion in Beverly Hills, 9% wanted the loft, and 29% wanted the suburban Tudor.

Similar preferences were expressed when the same group logged in on dream romantic weekend vacation spots. The choices included a weekend of theater and shopping in Manhattan (21%), a weekend of gambling and shows in Las Vegas (8%), and a weekend at a health spa in Arizona (16%). The most popular pick was a weekend at a log cabin on a mountain lake in Montana, which drew 56% of the respondents. The survey's findings seem to indicate that the high and mighty like to get back to the country when it comes to down time.

New York-based Beta Research and Executive Omnibus conducted the data collection, tabulations and statistical analysis for the survey. The sample consisted of a nationwide, geographically representative group of 350 men and women aged 25 and older. The majority were men between the ages of 40 and 59 who earn between $100,000 and $300,000 per year.

Country Home is published by Meredith Corp., Des Moines, Iowa. For more information, call Bobbi Schlesinger or Cathy O'Brien at 212-489-8585.

HMOs still attracting scores of new clients

Membership in health maintenance organizations continues to grow. The results of a recent Chilton poll — conducted by the Healthcare Group of Chilton Research Services, Radnor, Pa. — indicate that 20% of Americans are members of an HMO. People are pleased with their choice, too — more than four out of five HMO (81%) members said they are satisfied with the service provided by their HMO. Members of smaller households (one or two people) tend to be more satisfied with their HMOs than those in families of three or more.

The poll also shows that people with health care coverage frequently switch health insurance plans — HMOs or otherwise. One out of every six of those surveyed had changed their health insur-

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ance plan in the preceding 12 months. Higher income meant more change: Of those with a household income of $50,000 or more, 23% had changed their health insurance in the past year; of those with at least some college education, 21% had switched. The survey further reveals that a majority of Americans (57%) are covered by a health insurance program offered by their employer or their spouse's employer. Still, 6% of full-time workers and 14% of part-timers do not have any health insurance.

One in 10 households are burdened with the responsibility for managing the health care of a family member at home, according to the poll. The responsibility for providing home health care falls similarly on all families, regardless of age, income or employment status. Not terribly surprisingly, people living in larger households are more likely to have to care for a family member at home. The Chilton poll was conducted in March and April 1994 by telephone among a random sample of 961 adults 18 and older. For more information, call Barbara Nuessle at 610-964-4694.

Brits lead European electronic game craze . . .

Kids' preoccupation with the latest video games has become an international phenomenon. Available in a wide variety of formats, electronic games such as Mortal Kombat and Street Fighter II now enjoy massive popularity in Europe as well as the United States, though Europeans' predilection for FIFA Football (a soccer game) may not translate into U.S. sales until after the World Cup sweeps through the country.

According to statistics compiled by Datamonitor, a strategic management consultancy in London, the European toys and games market totaled $9.1 billion in 1992. That figure represented an average annual growth rate of 13.9% for the years 1987 through 1992. The United Kingdom and Germany each accounted for a fifth of the market, while the U.K. and Italy showed the sharpest average annual growth rates for the period (138.1% and 112% respectively). Across Europe, electronic games showed growth over the five-year span of 88.9%; no other segment in the product grew more than 8%. Electronic games accounted for just under 5% ($263 million) of total toys and games sales ($5.43 billion) in 1987. In 1992, with sales of $3.3 billion, the electronic segment represented 36.6% of the total market. At $777 million in '92, the United Kingdom is by far the largest market for electronic games. Germany is second at $653 million. Datamonitor estimates that the total European toys and games market will grow to $12 billion by 1997. The company predicts significant growth across the continent. For more information, contact Sophie Smith at 44-71-625-8548, or 106 Baker St., London, W1M 1LA.

. . . but they're not going into debt to do it

Research by Datamonitor, London, indicates that British credit card holders are whittling down their debt. While average annual outstanding credit per card grew from 1989 to 1991, it has fallen each of the last two years. In addition, the debit card is gaining popularity. The total number of debit cards in use in the United Kingdom has risen from just under 15 million in 1989 to around 25 million in 1993. More significantly for the future perhaps, public awareness of debit cards has increased dramatically over the same period.

Credit and charge card companies aren't going to give up without a fight, though. They have massively increased their spending on advertising in the last couple years. Ad expenditures by credit card companies last year totaled roughly $35.4 million — the most spent since 1988. Visa, for example, increased its total ad outlay from $6.75 million in 1992 to $10.5 million in 1993. For more information, contact Sophie Smith at 44-71-625-8548, or 106 Baker St. London, W1M 1LA.

Sales of sports clothes level, but name shoes keep jumping

Even though it seems that nobody wears anything but sports apparel these days, the Sporting Goods Manufacturers Association, North Palm Beach, Fla., reports that growth in the sector has flattened. According to SGMA's most recent study, retail dollar sales showed an increase of 0.9% and unit purchases increased 2.2%

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Names of Note

G. Erica Phillips has been named senior account manager in *Simmons Market Research Bureau Inc.*'s recently opened Western Region office in Los Angeles. Meanwhile, **Ellen R. Weinstein** has been named vice president/sales manager in the company's New York headquarters. She will be responsible for sales of Simmons' syndicated research studies to advertisers, advertising agencies and electronic media.

Frank P. Bossu has assumed a newly created position, vice president-new product consulting services, at *Elrick & Lavidge*, a subsidiary of Equifax Inc., Atlanta. Bossu's responsibilities include helping clients bring the consumer insight element to new product development and increasing the marketplace success of their new product programs.

Three executive promotions have been made at *Maritz Marketing Research Inc.*, St. Louis. **Ronald P. Lipovsky** has been installed as president of the company, succeeding Bill Lewellen, who has retired. Lipovsky also serves as a corporate vice president of parent firm Maritz Inc. **Michael D. Phillips** has been named executive vice president. He is also a corporate vice president of the parent company. **William "Tim" Rogers** has succeeded Lipovsky as vice president of the automotive research group. He was named a Maritz corporate vice president in April.


Lipovsky


Phillips


Rogers


Peiffer

Nancy Peiffer has been added to the staff of *Northwest Research Group Inc.*, Bellevue, Wash. She will assist the firm's project managers in various aspects of questionnaire design, programming and interviewer/project supervision.

Curtis Cates has been named director of the mall, field and focus group facilities for *Consumer Pulse* of Charlotte, N.C.

Adam S. Weinstein has joined *Woelfel Research Inc.*, Vienna, Va., as field director. Weinstein is responsible for directing, selecting, training and monitoring all field studies for the company. He will also evaluate mall and other field facilities, and direct all focus group, local intercept and central location testing operations. In addition, Weinstein will be responsible for new business development for WRI's local field services.

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Research Company News

New York-based **Simmons Market Research Bureau Inc.** has opened an office in Los Angeles. Erica Phillips will serve as senior account manager in the company's new Western Region location. The new facility's address is 6500 Wilshire Blvd., Los Angeles, CA 90048; telephone is 213-951-1540.

Effective July 1, **Wolff/Altschul/Callahan, Inc.,** has moved to 60 Madison Ave., 5th flr., New York, NY 10010. Phone and fax numbers remain the same.

Research Mentors has opened in Chicago. The company is designed to be an assemblage of people with experience and educational backgrounds that are unusual in marketing research. Research Mentors was founded by Richard J. Vondruska, who serves as its president. The address for the company is One Magnificent Mile, 980 N. Michigan Ave., Suite 1400, Chicago, IL 60611; telephone is 312-214-3517; fax is 312-214-3510.

Barnes Research Inc., Grand Rapids, Mich., has added a Grandville, Mich., office to its group of facilities. The company also has a location in Holland, Mich. For more information, call Jean Laurin at 616-363-7643.

Censydiam, a European marketing research firm, has opened a U.S. branch. Censydiam USA, offering psychology-based qualitative and quantitative research. The company's address is 147 Lakeshore Dr., Oakland, NJ 07436; telephone is 201-405-0805; fax is 201-405-0971.

Christine Balthaser and Freddi Wayne are principals in a new Denver-based firm called **Eagle Research**. The company has opened a facility with two focus group suites, a multipurpose room that can seat 75 theater style or 45 classroom style, and a 70-line WATS phone center. The address is 12157 W. Cedar Drive, Denver, CO 80228; telephone is 303-980-1909; fax is 303-980-2270.

ICT Group Inc., an independent telephone marketing service with headquarters in Langhorne, Pa., has acquired the assets of Spantel Inc., a Miami-based Hispanic telemarketing service bureau. The move gives ICT entrée into the Hispanic market. Terms of the acquisition were not revealed. For further information, call 215-757-0200.

The Chicago-based research firm **Fieldwork Inc.** has opened a new facility, Fieldwork Chicago-West. The new location's address is 1450 E. American Lane, Suite 1880, Schaumburg, IL 60173; telephone is 708-413-9040; fax is 708-413-9064.

Opinions of Sacramento has moved. The company's new address is 2025 Hurley Way, Suite 110, Sacramento, CA 95825; telephone is 916-568-1226; fax is 916-568-6725. For more information, contact Magda M. Cooling.

Chicago-based **Information Resources Inc.**, has signed an agreement in principle with Tokyo-based **Mitsui & Co. Ltd.** to form a joint venture called Information Resources

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Product & Service Update

Doane to survey bST users

Doane Marketing Research Inc., St. Louis, is offering a shared-cost syndicated study designed to present the opinions and evaluations of U.S. dairy producers using the Posilac brand of bovine somatotropin. The study will solicit feedback from early adapters of Posilac and veterinarians who service dairy producers using Posilac. Emphasis will be placed on the changes made, if any, in dairy cow-feeding programs, and changes made by suppliers of feed products. Producers and veterinarians will also be asked to evaluate Monsanto's direct sales program and product results. To obtain a prospectus, or more information, contact David Tugend at 314-878-7707.

Nat'l Register issues corporate affiliation, DM directories

National Register Publishing, New Providence, N.J., has available two new industry-specific reference titles. *The 1994 Directory of Corporate Affiliations* is a 10,933-page, six-volume edition that lists information on public and private companies in the United States and overseas which have at least $10 million in revenue per year. Over 114,000 companies are profiled, and the listings include current information on ownership, contact names and numbers, reporting relationships, annual sales, assets and liabilities. The volumes are indexed alphabetically and by brand name, personnel, geography and SIC codes. Quarterly updates provide information on mergers, acquisitions and changes to personnel and corporate listings. An entire set costs $950; single volumes are also available.

Information on decision makers in more than 9,500 companies in direct marketing and related fields is provided in *1994 Direct Marketing Market Place*. Some 22,000 individuals are represented. Entries are listed alphabetically by category and cross-referenced in alphabetical and geographic indexes. Listings show each company's name and address, telephone and fax numbers, key executives by title, product/service description, number of employees, gross sales or billings, and direct marketing expenditures for various media. The 1,150-page 1994 edition of the reference book costs $179.

For more information on either publication, call 800-521-8110.

BiblioData releases guide to CompuServe

BiblioData, Needham Heights, Mass., has published *CompuServe Companion: Finding Newspapers and Magazines Online*, a book that lists the publications available on CompuServe and guides users through the commands needed to get them. It also offers details, such as dates of coverage and lag times, and subject/geographic indexes. *CompuServe*

Companion describes the various "go" commands that lead users to publications, and indicates which of these are least expensive. The guide costs $29.95 plus postage. For more information, call 800-247-6553.

NFO initiates consumer research study of Latin America

The PSI division of NFO Research Inc., Greenwich, Conn., has begun a syndicated consumer research project called International Card Monitor — Latin America. The project is designed to profile household ownership and usage of payment cards (debit, credit and charge) in Argentina, Brazil, Chile, Columbia, Mexico and Venezuela. Sponsors of the study include Latin American and U.S. financial institutions, card issuers and international card associations. ICM Latin America, which will be directed by PSI Senior Vice President John J. DeMarco, will involve in-person interviews with financial-decision makers in more than 5,000 households. The study of 2,000 households in Mexico and 700 in each of the other five countries will include interviews with people who already carry one of the major global cards, such as Visa, MasterCard and American Express, and with a random sample of the population. The survey instrument will be customized for each country to reflect payment products currently available as well as cultural differences. For more information, contact Melanie Mumper-Dickerson at 419-661-8560.

CACI offers demographics data

CACI Marketing Systems, a division of CACI International Inc., Arlington, Va., has released 1994 demographics and 1999 demographic projections. The updated data, which includes population, income and household information, reveals those areas, counties and states experiencing growth or decline in population. The data is available for any part or all of the United States. For more information, call Michael Johnson at 703-841-2918.

Nonprofits get deal on Harte-Hanks list audit service

Harte-Hanks Market Research, River Edge, N.J., is offering its list audit service to nonprofit organizations at cost. The service is a telephone interview-based technique that determines the percentage of names on a list that actually possess the specific attributes for which they were selected. Mailers use a list audit report to compare lists without incurring the expense of test mailing them, and to gain insight into mailing results. The list audit at cost offer is available to any organization mailing under a nonprofit indicia and will be available until further notice. For more information, call Harry Seymour at 201-342-6400.

Health care database planned

Jenkintown, Pa.-based Healthcare Products Information Services Inc., a newly formed corporation staffed by in-

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AT&T

continued from p. 7

frequency of use, whether there's any pattern associated with recency of use, and the attitudes of people who use the system versus people who don't."

Proposed plans for the year-end 1994 survey are for each carrier to have access to all survey results, with the exception of verbatims. Each insurance company would only see its own verbatims. This would repeat the process followed in 1993. In 1991 and 1992, each carrier saw only its own results. Letting the carriers see each other's results will give them a fuller understanding of the results and allow them to compare their administrative services with the services of the other carriers, Wides says.

Another plan for '94 is to make the survey more event-focused, asking about specific visits, for example, rather than continuing to ask broad questions about overall satisfaction, says Bill Gammell, senior associate, Abt Associates.

"What we're hoping to do this year is to enhance the questionnaire so that the data we collect will be able to sustain some satisfaction modeling we can use to identify key drivers of satisfaction. That way, we can assist AT&T better in identifying those things that are the best candidates for quality improvements.

"An effective satisfaction survey has to ask questions that can identify key drivers of satisfaction. A lot of satisfaction surveys ask how satisfied a respondent is with a certain service dimension. I think the purchasers of those kinds of studies go away unfulfilled because those surveys can't attach the relative importance of those dimensions to the things that contribute to satisfaction.

"That's why I think satisfaction modeling is important. We do regression modeling that identifies the key contributors to overall satisfaction and then we have some proprietary methods that derive the importance of each of those drivers and determine how much they contribute to overall satisfaction, so that the client has an idea of where their resources should be dedicated."

Gammell sees health care satisfaction research turning towards outcomes measurement. "I think employers and insurance companies and HMOs have been using employee or customer satisfaction alone as a proxy for quality. In the future, I think they'll be using customer satisfaction programs that are used in concert with other kinds of outcome measures to evaluate the effectiveness and quality of health plans."

Involve carriers

AT&T plans to involve the insurance carriers in the development of the mid-year survey, with an eye toward shifting the administration of the annual year-end survey to them.

"Our plan is to have the carriers administer an end-of-year survey using a common instrument that they've participated in developing," Wides says. "They'll contribute to the interim questionnaire and that questionnaire will probably serve as the basis for a year end survey that will be administered by the carriers."

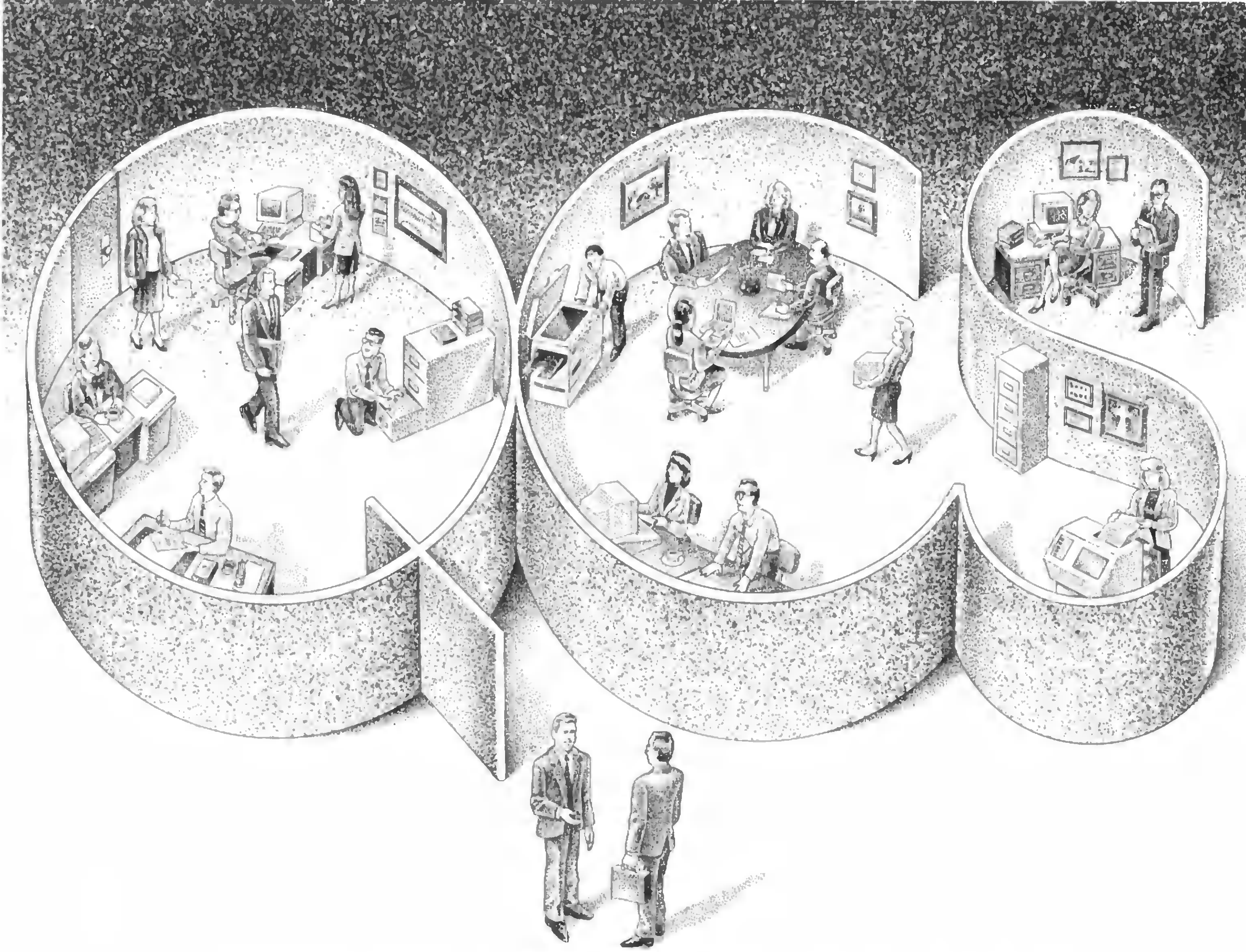
The national trend is a move toward managed care programs, and as the quality of health care delivery and customer satisfaction become increasingly important to the insurance companies, there will also be a move toward developing a more systematic approach to collecting and analyzing data. In the future, the carriers may be able to compare the information about network satisfaction and utilization collected for AT&T with the same type of data collected from their other clients.

More aggressive

Companies aren't waiting to see what happens in the health care debate, the Business Health Care Action Group's Steve Wetzell says. "The larger employers in particular are being even more aggressive because they want to demonstrate that the private sector is solving the problem rather than waiting for regulation to take over. It's a movement towards things like managed care, vertical integration and outcomes measures.

"The primary problem with past cost containment efforts has been the financial incentives and lack of accountability we've had with the consumers and the providers of care. They've had very little economic stake in the health care system."

Not anymore. In the age of managed care, everyone is sharing the load. ❑



Uncommon approach

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Leading edge

After lengthy discussions with our client — which included repeated warnings about the difference between statistical validity and educated inferences — the decision was made to proceed. Once again, we decided to use a telephone focus group because our potential respondents were spread all over the map. Since these people are leading-edge specialists, we decided to pay a higher than normal incentive.

To begin the recruitment process, random calls were made to psychiatrists who had attended regional or national seminars within the previous two years. The doctors were asked for the names of prominent colleagues who often give presentations at professional meetings. Some were uncooperative, perhaps even a bit annoyed at having been called, but enough positive responses were received to generate a list of approximately 20 names. It was our hope that networking this preliminary list would not only result in the recruitment of qualified respondents, but would also expand the list as well.

We decided to screen for psychiatrists who:

- were currently practicing an average of 32 hours per week;

An analysis of the transcripts convinced us that we had a good grasp of what was happening in the field of psychiatry, and the directions the client should take with the technology became quite clear.

- had given presentations at regional (not state) or national psychiatric meetings at least three times per year over the past three years, and/or;
- had been on one of the American Psychiatric Association's national committees within the past three years.

We also asked the yes-no screener question, Would you classify yourself as someone who is very much in tune with the changes taking place throughout the country in the practice of psychiatry?

Ego factor

Although the process required calling those who didn't qualify to get the names of those who did, once we had a starter list the recruit went quite smoothly and quickly. The groups were to be conducted by telephone in the evening, which made participating easy and convenient for the respondents; the financial incentive was attractive; and the ego factor kicked in immediately — the psychiatrists considered their input essential to any forum on anticipated changes in the field. They were also eager to hear what their colleagues had to say about the future of their profession; several gave us the names of others to call. Included in the groups were a consultant with the National Institutes of Health, three heads of major psychiatric institutions, a former president of the American Psychiatric Association and several practitioners with teaching institution affiliations. All were currently active in lecturing on a national and international basis.

The groups went well, and the client was pleased and excited with the results. The discussions were lively and interactive, participants answered questions in a very self-assured manner and, with minor exceptions, there was a strong consensus among the respondents with regard to the major issues discussed. An analysis of the transcripts convinced us that we had a good grasp of what was happening in the field of psychiatry, and the directions the client should take with the technology became quite clear.

It's true that the study's findings cannot be validated without a parallel quantitative study. And to some degree, only time will tell if the assumptions made from this study are valid. We do not advocate the use of this approach as a bargain-basement substitute for good quantitative research. Then again, as market researchers we do have an obligation to provide our clients with as much usable information as possible within the limits established up-front. We hope the ideas and thoughts used to solve the problem we faced help others do just that. ❑

Effective observation

continued from p. 17

point in the discussion they occurred to you. What provoked your reaction?

Once the client-observers have been briefed, the discussion is opened for questions and comments about observation techniques.

3. *Observation guidelines.* The client-observers should receive a handout that reviews the main points of the orientation and has room for note taking during the focus group. Guidelines should be concise and written in a very upbeat, engaging style.

4. *Focus group debriefing.* As the moderator facilitates the routine client debriefing following the focus group, observation debriefing questions or probes can be beneficial for both the client and the moderator. For the client, a review of what they saw and heard is usually routine during the debriefing. However, it can be enlightening to delve just a bit deeper into the client's perceptions. The moderator can follow up with questions such as, What did you hear that you expected to hear? What did you hear that you did not expect to hear? What, if anything, surprised you about what you heard? Ask clients to describe the most important information they heard and say why it was important.

Feedback from experienced client-observers indicates that they greatly appreciate reminders and ideas that help them to keep an open mind and a fresh perspective, particularly during a long series of focus groups covering the same material.

Real results

The four-key approach not only helps educate the client about observation-related issues, it also helps the moderator manage the client during both the debriefing and the process of developing the findings. As a result, some clients are less likely to dismiss input from participants they find annoying. Others are less likely to single out and emphasize that one comment they wanted to hear. Clients seem generally more willing to acknowledge all participants, rather than just those who support their expectations. Of course, it is not a cure-all, but the orientation does have a marked influence on the process.

Observers seem to be better behaved in the observation room after this kind of briefing. There is less noise, more respect for the participants and best of all, fewer instances of making light of the participants or their comments. In a sense, the observers seem to take a more serious approach to their role as researchers or at least participants in important research.

Novice observers have been pleased to receive observation pointers along with the other guidelines. Their feedback suggests that they often are bewildered about what to do with all the information they get from focus groups. The observer briefing helps to put their task into perspective.

Feedback from experienced client-observers indicates that they greatly appreciate reminders and ideas that help them to keep an open mind and a fresh perspective, particularly during a long series of focus groups covering the same material. One client commented that the briefing converted him from an "I've heard this before" observer to an "I'm open to anything" observer.

Proceed with caution

As with any approach, certain missteps can undermine the effectiveness of this approach. It is critical that the moderator providing the observer orientation be careful not to sound too preachy. Experienced clients may feel talked down to, while inexperienced clients might feel underestimated. Personal style will influence the presentation a great deal. The orientation should be molded to accommodate the particular client-observers; just as each focus group is different, so is each observer group. The moderator must read the observer group the same way she or he reads the participants in the focus group to anticipate mood, cohesiveness and cooperativeness, then gauge the presentation accordingly.

Setting the tone for client-observers not only improves the experience for the client, it also enhances the overall quality of focus group research. ❑

Survey Monitor

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in the first eight months of 1993, compared to the same period of 1992. For the period from January to August 1993, the organization reports sales of sports apparel totaled $21.2 billion, versus $21 billion during the same period of 1992.

The men's market grew 4.8% in dollars, while both the women's and children's markets failed to grow at all. In terms of units, the men's market grew 5.7%, while the women's (2.8%) and the children's (1.6%) grew just slightly. Despite little overall growth in women's and children's sports clothes, the study found the biggest gains among both brand and unbranded/private-label apparel in women's sweat/jogging suits (up 24%), socks (up 18%) and sweat pants (up 15%), and children's sweat/jogging suits (up 16%). Men's and women's shorts (each down 14%) were the biggest losers. The slowdown in growth hurt department stores — such as Dillard's and Macy's — and chain stores — such as Sears, Penneys and Ward's — each of which lost a full percentage point of market share in 1993. Meanwhile, discount stores — such as Target and Caldor — increased their share of the market to 27%, and variety stores and warehouse clubs boosted their collective share to 14% of the total sports apparel market.

The downward trend does a bit of an about-face when it comes to branded athletic footwear. SGMA's latest report indicates that from September 1992 to August 1993, branded shoes garnered a 68.1% share of all athletic footwear unit purchases, up from 64.8% during the previous 12-month period. The downside of the trend is that while total retail sales of nonathletic footwear grew by 1.8% during the 12-month period ending August 1993, the athletic sector showed no overall dollar sales gain. Total athletic footwear unit volume declined by 0.4% to 377.9 million pairs, with a dollar value of $11.8 billion. Men's units increased by 4.3%, but dollars increased by only 2%. Both the women's and the children's markets declined slightly in terms of both units and dollars. Athletic shoes stores, such as Athlete's Foot and Foot Locker, increased their share of unit sales to 12.2%, but discount stores and department stores each lost nearly one percentage point of market share.

For further information on either study, contact Mike May at 407-840-1165, or Sebastian DiCasoli at 407-840-1120.

Exercise equipment pumped through the roof

Sloth would appear to remain unfashionable. That's assuming all the people who are buying fitness and conditioning equipment are using it. Retail sales of exercise machines are expected to reach $3.02 billion in 1997, according to a study by the New York-based research firm Find/SVP. The company expects cross-country ski exercisers, stair climbers, treadmills and multipurpose home gyms to show strong sustained growth through 1997.

Over the next few years, interest is likely to grow in strength training, since the American College of Sports Medicine and others have begun to emphasize the importance of a balance between strength and cardiovascular exercise.

Find/SVP estimates that manufacturers' sales of physical fitness equipment to the institutional sector reached $356 million in 1993. The company estimates that there are 53,000 fitness facilities in the country. And although commercial clubs make up only about 23% of the total number of fitness centers in the country, they remain responsible for some 50% of total equipment expenditures. For more information, call James Demas at 212-645-4500.

Americans display strong travelin' jones

In the past year, 91.1 million Americans — half the adult population — made trips that took them at least 100 miles away from home. A study by New York-based Simmons Market Research Bureau Inc. indicates that while one in five travelers were on business trips, the vast majority (60%) traveled for vacation or personal business (37%). The study also found that sojourners are as likely to stay with friends or relatives (25%) as they are to rent a hotel or motel room (27%). The family car is the most popular means of locomotion (30%), followed airplanes, coach class (14%). Those who are most likely to take domestic vacation trips are college graduates, people between 35 and 54, working women and those in households with a total income of $50,000 or more. Less than a fifth of American adults (17%) have ventured beyond U.S. borders in the past three years. The majority of those traveling beyond the confines of the lower 48 (63%) were on vacation. World travelers tend to be well-educated, affluent, married suburbanites. The top five destinations were Canada, Mexico, Hawaii, the United Kingdom and Germany. For further information, call Jerry Ohlsten at 212-916-8952.

Customers speak up

The Consumer Network Inc., Philadelphia, has deployed its troops: An army of 5,000 mystery shoppers, intensely focused and practiced customers who are members of the firm's smart shopper panel. Based on the panelists' feedback, the Consumer Network has compiled a list of answers to questions crucial to food retailers:

• What do employees tell shoppers who can't find a price? Sending customers to a special check-out aisle when they can't find a price is infuriating, one shopper said.

• What happens in stores when an ad item is mispriced? A customer who was given a mispriced item for free was impressed, but she became committed to returning to the store when the cashier apologized for the error on the store's behalf.

• What is the store communicating about recycling? A store that puts its opinions on the shelf — stocking and promoting environmentally friendly items — is likely to win the respect and patronage of customers.

• What kinds of signs indicate to shoppers that the store they're about to enter may not be trustworthy? Customers are turned off when a store has a sign in its window with huge price listings and small type in the corner that reads, "with coupon." Some sense of a desire to deceive is bound to result.

• How do younger shoppers react to a store's signage? A 28-year-old mother of three said that a supermarket in her town as so full of signs, coupons and endless shelves that she "couldn't breathe, let alone think." She said she would not shop at the store again.

For more information, contact Mona Doyle or Nicky Sigel at 215-561-2921.

Popularity of air shows climbs

Last year, 440 air shows in North America drew a total of 25.9 million fans, a 6% increase over 1992 attendance of 24.4 million. Perhaps most pleased by the development was the International Council of Air Shows, which determined the record figure. The ICAS, a Jackson, Miss.-based membership association serving the air show industry, has tracked air show attendance since 1987. If the last year's growth rate keeps up, some 27.5 million people will catch air shows in 1994 — and the record will be broken again. The ICAS' numbers match up well against some serious competition. The 6% increase in air show attendance bested a 4% increase in automobile race attendance and a 1% increase in the number of fans — hawgs, dawgs or otherwise — attending National Football League games. (According to figures published by Goodyear, 13.7 million people attended auto races, while the NFL reported a 1992 attendance figure of 13.8 million.) Only baseball added more significantly to its fan pool in 1993, with a 20% jump to 70.2 million people.

Not counting "mega" events that include free shows, such as those held along the Chicago lakefront and the St. Louis riverfront, and military shows drawing more than a million spectators, the average paid attendance at civilian air shows last year was 32,067. For more information, call Linda Singer at 517-782-2424.

Americans keep thinking thin to win

Dissatisfaction runs rampant, few seem to be happy at their current weight and dieting remains a nationwide obsession. Recent research completed by New York-based Simmons Market Research Bureau Inc. indicates that 49.8 million Americans — 26.8% of the total adult population — are dieting. The Simmons study further reveals that both sexes and all ages diet, though more women (30.5%) than men (22.7%) tightly control their nutritional intake. Middle-aged Americans — those 45 to 54 — are most likely to diet. College graduates and those in households with incomes of more than $74,999 are 22% more likely to diet than the national average. Not surprisingly, the vast majority of dieters (84.9%) are trying to lose weight. Others diet to control fat intake (31.5%) or cholesterol levels (25.6%). People also diet because of hypertension, or to watch their salt intake, or to maintain an appropriate blood-sugar level. An exclusive group, 1.3 million adults (3.5% of all dieters) are trying to gain weight. For further information, call Jerry Ohlsten 212-916-8952.

Consumers fall for ad circulars

Of all forms of retail advertising, ad circulars are rated No. 1 when it comes to getting consumers' attention, according to the second annual Gallup "Print Advertising and Its Impact on Consumer Shopping Behavior" study, which was commissioned and released by the International Mass Retail Association, Washington. The Gallup Organization surveyed 1,010 people by phone for this year's study, which was completed in April. The study found that a growing number of consumers shop at home using ad circulars before going to the store. Four out of five respondents in the study recalled mass retail stores' and category-dominant retail stores' advertising circulars that they had seen in the preceding 30 days. Compared to all other forms of advertising, ad circulars were remembered by the greatest number of survey respondents (83%), though other ad forms were also frequently recalled: television ads 76%; run-of-press newspaper ads, 56%; radio ads, 49%; magazine ads, 39%; and billboards, 29%. The study found that direct mail ads, a source not measured in the 1993 survey, were recalled by 58% of the respondents. Those most likely to recall ad circular advertising were the more affluent respondents (91%), females (86%), people who spend an average of more than $100 a month at discount stores (86%) and residents of the North Central United States (85%). Frequently cited important attributes of circulars included price (83%), information on a money-back guarantee (74%), product description (68%), store address (68%) and a photograph of the item for sale (63%). For more information, contact the IRMA's Stephen Sibert at 202-861-0774 or Gallup's Michael Roselius at 402-489-8700.

Poverty hits elderly in rural areas hardest

The poverty rate among Americans 65 and older declined from 35% in 1959 to 11% in 1989, but the poverty rate for elderly rural residents is higher than it is for those in inner-city areas, according research conducted in Penn State University's College of Agricultural Sciences. The only detected distinguishing demographic characteristic, however, is a slightly lower level of education. Researchers Diane McLaughlin and Leif Jensen, both assistant professors of rural sociology, tracked people into and through their later years using the Panel Study of Income Dynamics. First conducted in 1968 with a sample of about 5,000 U.S. families, the study has annually surveyed the same families about work and income. The accumulated data describe the movement of people into and out of poverty over many years.

The researchers discovered that between the ages of 65 and 75, 34% of rural elders were in poverty at some time, compared to 14% of metropolitan elders. What's more, while 15% of rural elders were poor for five or more of those 10 years, only 5% of metropolitan elders experienced as many years of poverty. Between the ages of 65 and 74, 43% of nonmetro residents endured two or more poverty spells, while 27% of metro residents suffered the same fate. Compared to metropolitan-area employment, jobs in rural areas tend to offer lower wages and require fewer skills. Rural jobs are more likely to be seasonal or interrupted by changes in product demand, and are less likely to be unionized or have pension coverage. As a result, rural elderly are not well prepared for retirement. McLaughlin and Jensen's findings take on greater importance considering projections for the future that indicate the percentage of elderly in the United States is expected to increase from 13% today to 22% by 2050. For more information, call Leif Jensen at 814-863-8642.

Sex sells — except when it offends

Eight out of 10 American women (81%) think today's advertisements are too sexy, according a recent issue of "EDK Forecast," published by EDK Associates, New York. Half (49%) say that sexy or intimate commercials on TV have made them feel embarrassed in front of their family or the man in their life. And almost half (47%) have opted not to purchase a product because they found the advertisement for it offensive. Most women (73%) believe that companies should be responsible for when and how they advertise their products, but only one in five (21%) think the government should step in with more regulations of commercials. For more information call 212-582-4504.

Packaged food purchases split between restaurants and institutional feeders

The Foodservice Research Institute, Oak Park, Ill., has completed research into the brand purchasing habits and preferences of restaurant operators and institutional feeders. The organ-ization's "BEST Report" examines, among other things, the ratio of commercial (restaurant) to non-commercial (institutional) purchases in specific product categories. As a general rule, 60% to 70% of total aggregate volume of all products is purchased by the commercial sector, while institutions such as schools, hospitals and employee feeders make up the balance. Several categories, such as aerosol whipped topping (95% commercial, 5% non-commercial), decaffeinated coffee (89%, 11%) and pre-cooked bacon (86%, 14%), are heavily skewed to the commercial sector. Other products, such as cup yogurt (71% non-commercial, 29% commercial), frozen burritos (58%, 42%), portion controlled pancake syrup (54%, 46%) and juices/drinks in sealed plastic cups (67%, 33%), find greater preference in the institutional marketplace. For more information, call Joseph E. Brady at 708-386-7579.

Hispanic population notes: on language, AIDS, home repair projects

Hispanics prefer to speak Spanish in almost every situation, but aren't hearing much about AIDS. And Hispanic men are firmly inclined toward taking home repair matters into their own hands. Recent findings released by Strategy Research Corp., Miami, and Market Development Inc., San Diego, reveal some specific characteristics of the U.S. Hispanic population.

SRC used data from the 1990 Census to discover that Hispanics speak Spanish in the home because they prefer to, not because they are limited by an inability to speak and understand English. Spanish is spoken in the home by 92% of adults 18 and older, and 79% of children 5 to 17. Of the adults who prefer to speak Spanish, 46% said they speak English "very well." Overall, 89% of U.S. Hispanics prefer to speak Spanish at home. Not surprisingly, given this information, they also prefer their media in the Spanish language.

A lack of Spanish-language media attention is perhaps to blame for the fact that almost a tenth of U.S. Hispanics have not heard of AIDS. The findings of an SRC public opinion survey indicate that 9% of Hispanics — some 2,250,000 people — know nothing of the fatal disease. Only 2% of the general population falls into the same category.

In the most recent MDI Hispanic Poll, which is conducted quarterly by Market Development Inc., 83% of the 500 self-identified Hispanic males who took part said that they had done some kind of maintenance work in their home in the past year. Those surveyed were 18- to 64-year-old residents of Houston, Los Angeles, Miami, New York or San Antonio. Homeowners (87%) were only slightly more likely than renters (79%) to have done repairs or maintenance work on their abodes. Painting (47%) was the task most frequently mentioned, followed by plumbing (44%), installation of window coverings (41%), repair/replacement of door locks (34%), repair/replacement of flooring (23%), and repair/replacement of cabinets (16%). The type of chore required affected whether the respondent did the work himself or had the work done by someone else. And not surprisingly, homeowners (84%) were more likely to handle longer-lasting repairs such as cabinet replacement/repair than renters (44%), while renters were just as likely as owners to install window coverings (about 53% each) — when such tasks were necessary. Even in situations where they did not actually do the repair or maintenance work themselves, those surveyed indicated that they were actively involved in the process, calling in either an outside contractor or a friend/relative to do the work.

For more information on the SRC research, which is part of the company's "1994 Hispanic Market Study," call Marta M. Casas-Celaya at 305-358-7949. For more information on MDI's Hispanic Poll, call Tony Lovitt at 619-232-5628.

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Japan Ltd. Within the packaged goods industry, the venture will offer efficient consumer response initiatives based on IRI's QScan and LogiCNet technologies, which use electronic scanner point-of-sale information from retailers to forecast product replenishment needs. In addition, the initiatives will form the basis of a syndicated market tracking service. Information Resources Japan will also license some of IRI's Express-based software products and provide consulting services that address business issues facing the packaged goods industry. In the pharmaceutical, financial services, telecommunications, transportation, utilities and government markets, the joint venture will offer Express-based business intelligence software products and consulting designed to help clients integrate corporate and external information relevant to their enterprise. Products and services will be available in both Japanese and English. The joint venture is expected to initiate operations on Oct. 1, 1994. The terms and conditions of the agreement were not disclosed. For more information, call James G. Andress at 312-726-1221.

IRI also has announced that the results of the 1994 Survey of Scanner Data Users — conducted annually by Mercer Management Consulting — show that for the sixth year in a row, IRI's InfoScan product in rated No. 1 in customer satisfaction. IRI further has noted that its software products were also rated highest by the Mercer findings. For more information, call Bob Bregenzer at 312-726-1221.

IRI also has announced that following a complaint filed by the company last year, the director of Investigation and Research at the Bureau of Competition Policy, part of the government of Canada, has filed an application alleging that A.C. Nielsen Canada has engaged in a practice of anti-competitive acts contrary to the Canadian Competition Act. Information Resources hopes that this action will enable it to launch its InfoScan service in Canada by the end of the year. For further information, call Peter Daboll at 416-221-2100, or at 312-726-1221.

Market Facts Inc., Arlington Heights, Ill., has agreed to purchase full ownership of **Market Facts of Canada Ltd.**, its Canadian affiliate since 1962. The transaction involves the acquisition of the 50 percent interest in Market Facts of Canada that the U.S. company does not already own. Market Facts of Canada has offices in Toronto and Montreal, and in 1993 posted revenue of $6 million (U.S.). The company provides marketing research information on Canadian consumers to Canadian, American and other international clients. For more information, call Timothy J. Sullivan at 708-590-7000.

Lewis Communications Inc. — a Mobile, Ala., company offering advertising and public relations services — has created a market research division. **Lewis Market Research** has been established to provide consumer and business-to-business information compilation. The market research division will specialize in such areas as customer satisfaction measurement, image/awareness studies, product/concept testing, demographic/behavioral profiling, site/location studies, identification of purchase decision criteria, market segmentation, public opinion polls, direct mail response models, product profitability models and secondary research. The company's address is 1668 Government St., P.O. Box 6829, Mobile, AL. 36660-0829; telephone is 205-476-2507. For more information, contact David Nichol.

Data Use

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Odds, of course, only can be estimated at the group or aggregate level. Some experts say you need, at a minimum, the moral equivalent of six people to do any estimation with logistic regression.

Aggregate-level analysis makes it relatively easy to fractionalize large DCM tasks. Fractionalization is done most efficiently by splitting the scenarios randomly among respondents. For a large design that has many attributes and levels, and that requires 32 scenarios, you can simply give each respondent 16 scenarios at random. This would require a larger sample, of course; in this case, double the initial number. Assuming respondents could handle a lengthy task, you also could try a 50 percent boost in sample size with each respondent rating 24 scenarios.

The ease of splitting tasks between respondents leads back to the idea of using the moral equivalent of a certain number of people. But sampling error is a factor in DCM just as it is in other survey research. Given this, you will want to use samples adequate for accurate estimation. There is nothing moral about a sample of six.

Greater complexity

Analytical complexity is, unfortunately, another key aspect of DCM. A few software packages have addressed the issue, building in analytical procedures that, to varying degrees, make DCM somewhat simpler. Still, DCM remains far more difficult than conjoint when it comes to analysis and model specification. You may need special designs to capture interactions (e.g., so-called response surface-type designs, which standard conjoint design programs cannot generate, or other more esoteric designs).

DCM models also characteristically include testing for relations beyond the raw data. For example, you might look at effects based upon squared or cubed variables, especially in investigating the effects of price. You also usually would test for interactions between key variables.

Iterative analytical procedures and models that must "converge"

Multinomial logit itself works differently from many multivariate procedures. It runs iteratively until it converges upon a solution, making it at least roughly akin to K-Means clustering, which runs and reruns solutions until two consecutive runs fall within some acceptable tolerance of each other. Unfortunately, while clustering models usually converge, or behave, DCM models may not.

Several factors can cause nonconvergence with DCM:

• multicollinear variables (variables highly correlated with each other or some combination of other variables);

• the presence among the choices in the scenarios of one or more alternatives selected very infrequently; and

• the presence in the design of any highly infrequent variable or variables. Infrequent variables can arise because DCM allows variables to be conditional, to apply to only one of the choices being tested.

Unfortunately, it is unclear how infrequent a variable or an alternative can be without causing problems. If the model does not converge, though, infrequent alternatives within the scenarios and infrequent variables should be among the first suspects discarded from the model.

DCM models may not work on the first half dozens tries. Even when a model works, it may be far from the best in terms of what you need to find. So DCM usually requires more exploration of alternatives than other methods, such as conjoint analysis.

Simulations closely related to scenarios

Simulations must be closely tied to the scenarios presented to respondents. If five products appear in all the DCM scenarios, you cannot do accurate estimations of what might happen if there were only four, or if another product entered the market as a sixth competitor. Such contingencies must be considered as part of the initial DCM design. Conjoint provides more flexibility, allowing you to make unplanned, after the fact estimations of effects.

Reasons favoring the logistic model

Given that the logistic model can be harder to get right than the models used in many other procedures, you may well ask why it is worth the bother. The simple answer is that it provides more analytical precision and power. Logistic regression models handle problems with discrete (not continuous) dependent variables that ordinary linear regression cannot. Linear regression definitely does not work correctly when you are trying to predict a variable that can take only two values, such as choose vs. don't choose, yes vs. no, or 0 vs. 1. Linear regression is not bounded by the values that you are trying to predict in this case. Predictions from linear regression can take any value, so instead of just the 0 or 1 you are hoping to predict, it might produce a prediction of 0.1 or two, or even a negative number. The correct answer always would be either 0 or 1 (or yes or no) when considering a single product and a single choice between two alternatives, so linear regression definitely is not the best method for analyzing that situation.

The theory of linear regression also states that it should not be used when the dependent variable can take only a few discrete values. So linear regression often will not work well even when the consumer can make several choices at once (for instance, choosing which types of soft drink and how many of each to buy on a shopping trip).

Discriminant analysis, not linear regression, is the linear-model technique that should be used to predict which choices consumers make. Multi-nomial logit (MNL) can be thought of as similar to multiple discriminant analysis in several ways. Predictions of group memberships (or which thing gets chosen) from both discriminant and MNL often will be highly similar — assuming that discriminant analysis can handle the problem in question. Some statisticians even use MNL as a sort of superset of discriminant analysis, capable of handling more complex analytical questions. However, MNL has different theoretical underpinnings than discriminant analysis. MNL works in terms of likelihoods and odds. As such, its approach and the output it produces are more closely related to the question of choice than the assumptions and output of discriminant analysis.

Logistic models: Beyond a simple straight-line approach

The logistic model is not linear and additive. It does not assume that just adding a few utilities will accurately model how people respond. Rather, it assumes an S-shaped (sigmoidal) response curve. Figure 3 shows a typical S-curve. You can think of this curve as representing a view or theory of how consumers will respond to a product.

When utilities are near zero, utility must increase by a large amount to get consumers to a middling position. In other words, it takes a lot for a product or service to move consumers from indifference to some interest.

In the middle range of utilities, small improvements (or gains in utility) can lead to sharp increases in consumers' likelihood to respond. It only takes a little extra utility (or perceived value) to generate strong interest in a product among people who already have some interest in it. The end of the logistic curve gets flat like the beginning. In other words, it takes a lot of extra utility to move people from interest to action.

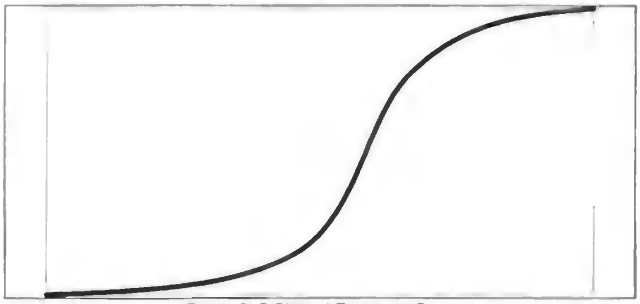

Figure 3: S-Shaped Response Curve

Not all writers on the subject see the logistic curve in quite this way, but it certainly goes with the shape of the logistic function. It is a helpful way to think of how logistic models work.

The nonlinear nature of the logistic response curve has some practical implications as well. First, you cannot directly estimate the value of an alternative by summing the utilities that it includes. With conjoint analysis, you simply add up the utilities of all the product/attribute variations of interest to you, and the total is what the product is worth. Not with DCM. Instead, you typically must run simulations through the MNL estimation program.

DCM and the independence of irrelevant alternatives

Strictly, the independence of irrelevant alternatives is a mathematical property of error terms that the MNL model assumes to exist. It is something like the assumption in linear regression that errors in estimations have a common variance and are independent (homoskedasticity).

Practically, though, assuming IIA works as a property of DCM means that you are assuming the odds of selecting one alternative versus another are not influenced by the presence of other alternatives that you are not actively considering. As a result, some critics have called the MNL model unrealistic as a representation of peoples' behavior. They argue that consumers always consider all alternatives in making any choice, even if many of the choices are things they would never select. Defenders of MNL say that if your decision comes down to a choice between A and B, the presence of any number of other alternatives makes no difference.

Arguments like these can go on all night, with each involved party more certain of the correctness of their position at the end. Recall though, that IIA is simply a consequence of reasonable assumptions about error terms. Fortunately, in practice, violations of IIA do not appear too often, and when they do, they usually prove remediable. However, the remedy involves experimenting with the DCM model until it no longer violates the IIA assumption.

The special properties and requirements of conditional variables

Conditional variables exist for one (or a few) of the alternatives being tested, but not for all. Using conditional variables allows each product to have its own unique attributes and levels. Conditional variables require special coding of variables. Normally, nominal-level variables are handled in analytical procedures by the use of dummy variables. These variables take on values of 1 or 0, corresponding to the attribute being present or absent.

A nominal-level variable that has three levels would get translated into two dummy variables. For instance, in the hotel lobby example, we would create two dummy variables to describe the three types of lobby:

Type of lobby	*Var. 1*	*Var. 2*
1. plain and simple	1	0
2. small and opulent	0	1
3. large and ostentatious	0	0

Conditional variables may require a different scheme, since a code of 0 is best used to stand for an attribute level that is absent in an alternative. Rather than using the usual 0 vs. 1 form, codes of -1 and 1 are used, eliminating the chance of confusion between a code for an attribute level and the "level absent" code.

DCM: No individual-level utilities

Aggregate-level analysis means no individual-level utilities of the type obtained from conjoint. And the absence of individual-level utilities means segmentation is not available from DCM results. Segmentation based on conjoint utilities often provides tremendously useful results. The groups that emerge usually have sharply different wants and needs related to the product in question.

It's likely that it will be possible to infer individual-level utilities from DCM before long. On one side, the academics are rushing to the rescue, which means a batch of not terribly readable articles about something called latent class models are available. A few papers also have been presented by proponents at conferences. And a some academics even claim to have used such models.

Latent class models may become interesting, if not useful, at about the time Intel introduces the 80986 chip. The models now take a week or two to run on very large machines (faster and bigger than a fully loaded Pentium). At a recent conference, one academic stated that he simply had his department buy a Sun Computers work station (a highly powerful machine, something on the order of the most powerful computer in the world as of 1980). It was then a simple matter to run this machine for two or three weeks straight every time he needed to solve one of these problems. The academic failed to see why some listeners found this less than practical.

Other practitioners are investigating alternative approaches, but so far nothing promising has emerged.

In the meantime, nothing prevents you from clustering on other criteria, then running the DCM among the groups or segments developed in the clustering.

DCM: Evaluating the results

Once you have completed a DCM analysis, there are several criteria you can examine to see how well the model has performed. The first thing that needs to happen is simple: The model must run, or converge. Sometimes getting a model to converge takes some doing. You may need to drop some terms or add some others. Highly correlated variables can spoil a DCM model — something like the problem of multicollinearity in regular linear regression. You may need to transform some of the basic variables. (Squaring, cubing and taking the square roots of numerical variables are some of the more common transformations.) You may need to eliminate infrequent choices from consideration.

Once the model runs, one of the most straightforward ways to diagnose its goodness is to check the variables that emerge as significant. As in regular linear regression models, the variables entered into DCM models may or may not prove to contribute significantly. With DCM models, you also need to be particularly careful about variables that emerge as significant but have signs that seem backwards (a variable that you expect to have a positive effect emerges as apparently having a negative effect). This can happen when the model has too many terms (again, due to problems similar to multicollinearity in linear regression), or too few terms (you left out something important).

DCM also has a few standard measurements that help you assess the goodness of a model. One of these, the Rho-squared, is like the R-squared (explained variance) in linear regression. There is one caution here: The more terms or variables you have in the final model, the more likely you are to get a "good" Rho-squared. This again is like regular linear regression. A regression equation with 100 or so variables is likely to explain more variance than a model with just a few terms in it. As a result, big, complicated DCM models often look pretty good, based on the Rho-squared statistic. Below are listed some guidelines for reading the Rho-squared values that emerge from a DCM analysis. The figures from Williams and Louviere seem more fitted to large models. If you keep just a few of the most important variables — which after all, is what many clients want and need — some alternative interpretations become available.

	Interpretation	
Rho Squared Value	Williams/Louviere (Large Models)	Struhl (Small Models)
0.0 - 0.2	Poor	Poor
0.2 - 0.3	Poor-Reasonable	Fair
0.3 - 0.5	Reasonable-Good	Good
0.5 - 0.8	Good-Excellent	Excellent
0.8 - 1.0	Excellent	Wow!

Another key measure of a model's goodness is a correct classification table. You read these much as you read the correct classification table in a discriminant analysis. The correct classification table shows how often each choice was selected, and how often it would be predicted as the choice, based on the best DCM model that could be generated. The following table shows a simple DCM example that did not come out very well.

The table shows that consumers had four choices in each scenario (three products and "none of these"). Let's review what the data in the table show for the first alternative, or product. The first product, was actually chosen 740 times. That number appears at the end of the first row. Of those 740 actual choices, we would predict 495 choices based on the best DCM model. This leads to the "% correct" classification of 66.89% for this alternative (shown at the bottom of the first column).

Overall, we would predict that the first alternative would be chosen some 1,650 times, with 260 of the choices coming from those who actually chose the second alternative, 490 from those who actually chose the third and 405 from those who actually chose the fourth (none of these). The figures can all be found in the first column of numbers, which corresponds to the first alternative.

Although the model performs well predicting choices of the first alternative, it does not do well elsewhere. It predicts that nobody would choose the second or fourth alternatives, with correct classification rates of 0 percent for each. Overall correct classification is 29 percent, not appreciably better than the level of 25 percent that would be expected based on chance.

CLASSIFICATION TABLE

Observed	Predicted Alternative				
Altern	1	2	3	4	TOTAL
1	495 000	000000	245 000	000000	740 000
2	260 000	000000	120 000	000000	380 000
3	490 000	000000	210 000	000000	700 000
4	405 000	000000	170 000	000000	575 000
TOTAL	1650 00	000000	745 000	000000	2395 00
% Correct	66 8919	000000	30 0000	000000	29 4363

In short, the table shows that the model did not do a good job of predicting choices, unless our only interest was in discovering why people selected the first alternative. Incidentally, this fictional data led to an overall model fit (Rho-squared) of 0.21 — just marginally acceptable even by the most lenient standards. If we could do no better than this with a DCM model in real life, we might find the results somewhat disappointing. Fortunately, all the real-world models I have seen have performed significantly better than this one.

DCM to do it yourself: The analytical alternatives

Two new programs, CBC from Sawtooth Software, and Ntelogit from Intelligent Marketing Systems, make it possible for the nonspecialist to analyze a DCM problem. For some years, the analytically more advanced (or more brazen) could use multinomial logit programs from Systat and SAS to perform many of the same tasks. (The May issue of *QMRR* contains a review of the two new programs.)

DCM — a two-minute summary

DCM is a powerful technique that can solve many problems better than full-profile conjoint analysis. It is not an overstatement to say that DCM provides the ultimate in product and service testing.

DCM uses the most realistic methods available for measuring consumers' choices. Consumers respond to products and services as they would in the marketplace. All the products shown can have the attributes that they would in the marketplace. They do not need to share the same attributes and the attributes do not have to vary in the same ways, as in conjoint. Several products from a given manufacturer can be included in a single DCM task, allowing for the explicit modeling of product-line effects. Products can appear in some scenarios and not others, which leads to realistic testing of the elimination or introduction of new products.

Often, DCM gets applied to complex problems with many attributes. In fact, more attributes and levels actually can make it easier to fit a model closely to the data.

Even at its most accessible (for the moment, CBC from Sawtooth Software), DCM is more difficult to do than standard conjoint. It requires understanding of model specification and strategies for trouble-shooting.

Highly complex problems probably require an expert. However, not all experts necessarily will give the same answers. Even the authorities in the field are still debating the best approaches to intricate DCM problems. Unless you have some analytical sophistication, you may not want to try DCM by yourself — at least the first time. Regardless of how you try the technique, though, it definitely merits serious investigation, given its great analytical power and the tremendous amount of useful information it can provide. ❑

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Spier Research Group

EDUCATION
In-depth Probing & Practical Reports

ENTERTAINMENT
Sweeney International, Ltd.

ENVIRONMENTAL
Diener & Associates, Inc.

EXECUTIVES
Creative & Response Rsch. Svcs.
Dolobowsky Qual. Svcs., Inc.
First Market Research (J. Heiman)
First Market Research (J. Reynolds)
Intersearch Corporation
PACE, Inc.
James Spanier Associates
Sweeney International, Ltd.

FINANCIAL SVCS.
Access Research, Inc.
Cambridge Research, Inc.
Creative & Response Rsch. Svcs.
The Davon Group
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Intersearch Corporation
Maritz Marketing Research (MO)
Matrixx Marketing-Research Div.
Nordhaus Research, Inc.
The Research Center
Rockwood Research Corporation
James Spanier Associates
Sweeney Int'l. Ltd.

FOOD PRODUCTS
Creative & Response Rsch. Svcs.
Doyle Research Associates
Kehr Research, Inc.
KidFacts Research
Leichliter Associates
Rockwood Research Corporation
James Spanier Associates
Thorne Creative Research

HEALTH & BEAUTY PRODUCTS
The Answer Group
Maritz Marketing Research (MO)
Thorne Creative Research

HEALTH CARE
Access Research, Inc.
George I. Balch
Consumer/Industrial Research (C/IR)
Diener & Associates, Inc.
Dolobowsky Qual. Svces., Inc.
D/R/S HealthCare Consultants
Elrick and Lavidge
Erlich Transcultural Consultants
Find/SVP
First Market Research (L. Lynch)
First Market Research (J. Reynolds)
Freeman, Sullivan & Co.
Intersearch Corporation
Irvine Consulting, Inc.
Kehr Research, Inc.
Maritz Marketing Research (MO)
Market Navigation, Inc.
Matrixx Marketing-Research Div.
MedProbe Medical Mktg. Rsch.
Medical Marketing Research, Inc.
Nordhaus Research, Inc.
James Spanier Associates

HISPANIC
Analysis Research Ltd.
Data & Management Counsel, Inc.
Ebony Marketing Research, Inc.
Erlich Transcultural Consultants
Hispanic Marketing
Communication Research
Strategy Research Corporation

IDEA GENERATION
Analysis Research Ltd.
George I. Balch
Brand Consulting Group
Creative & Response Rsch. Svcs.
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Kehr Research, Inc.
Leichliter Associates
The Marketing Partnership
Matrixx Marketing-Research Div.
Sweeney International, Ltd.
Thorne Creative Research

INDUSTRIAL
First Market Research (J. Heiman)
Intersearch Corporation
Maritz Marketing Research (MO)
Market Navigation, Inc.
Strategic Research, Inc.
Sweeney International, Ltd.
Dan Wiese Marketing Research

MANAGEMENT
In-depth Probing & Practical Reports

MEDICAL PROFESSION
Diener & Associates, Inc.
D/R/S HealthCare Consultants
Pat Henry Market Research, Inc.
Intersearch Corporation
Kehr Research, Inc.
Nancy Low & Associates, Inc.
Matrixx Marketing-Research Div.
MedProbe Medical Mktg. Rsch.
Medical Marketing Research, Inc.
Nordhaus Research, Inc.

MODERATOR TRAINING
Cunninghis Associates

NEW PRODUCT DEVELOPMENT
Brand Consulting Group
The Clowes Partnership
Creative & Response Rsch. Svcs.
Data & Management Counsel, Inc.
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
First Market Research (J. Heiman)
First Market Research (L. Lynch)
Intersearch Corporation
Kehr Research, Inc.
KidFacts Research
Leichliter Associates
Maritz Marketing Research (MI)
The Marketing Partnership
James Spanier Associates

PACKAGED GOODS
The Answer Group
Creative & Response Rsch. Svcs.
Doyle Research Associates
Kehr Research, Inc.
Maritz Marketing Research (MO)
Strategy Research Corporation
Thorne Creative Research

PARENTS
Doyle Research Associates

PET PRODUCTS
Cambridge Research, Inc.
Kehr Research, Inc.
Rockwood Research Corporation
Thorne Creative Research

PHARMACEUTICALS
The Answer Group
Creative & Response Rsch. Svcs.
D/R/S HealthCare Consultants
In-depth Probing & Practical Reports
Intersearch Corporation
Irvine Consulting, Inc.
Kehr Research, Inc.
Market Navigation, Inc.
MedProbe Medical Mktg. Rsch.
Medical Marketing Research, Inc.

POLITICAL RESEARCH
Chamberlain Research Cnsltnts.

PRODUCT DESIGN
In-depth Probing & Practical Reports

PUBLIC POLICY RESEARCH
George I. Balch
The Davon Group

PUBLISHING
First Market Research (J. Heiman)
Thorne Creative Research
Dan Wiese Marketing Research

RETAIL
Brand Consulting Group
First Market Research (L. Lynch)
Pat Henry Market Research, Inc.

SENIORS
Diener & Associates, Inc.
Erlich Transcultural Consultants
In-depth Probing & Practical Reports
Strategic Directions Group, Inc.

SMALL BUSINESS/ ENTREPRENEURS
Yarnell Inc.

SOFT DRINKS, BEER, WINE
Access Research, Inc.
Creative & Response Rsch. Svcs.
Grieco Research Group, Inc.
Thorne Creative Research

TEENAGERS
Creative & Response Rsch. Svcs.
Doyle Research Associates
KidFacts Research
Matrixx Marketing-Research Div.
Thorne Creative Research

TELECOMMUNICATIONS
Cunninghis Associates
Elrick and Lavidge
Find/SVP
First Market Research (J. Heiman)
Horowitz Associates Inc.
Intersearch Corporation
Maritz Marketing Research (MO)

TELECONFERENCING
Cambridge Research, Inc.
Rockwood Research Corporation

TELEPHONE FOCUS GROUPS
Consumer/Industrial Research (C/IR)
Creative & Response Rsch. Svcs.
Intersearch Corporation
Market Navigation, Inc.
Medical Marketing Research, Inc.

TOYS/GAMES
KidFacts Research

TRANSPORTATION SERVICES
Sweeney International, Ltd

TRAVEL
James Spanier Associates
Spier Research Group
Sweeney International, Ltd

UTILITIES
Chamberlain Research Cnsltnts.
Freeman, Sullivan & Co.
Nordhaus Research, Inc.

WEALTHY
In-depth Probing & Practical Reports

YOUTH
Doyle Research Associates

Product & Service Update
continued from p. 25

dividuals with lengthy experience in the health care information industry, will join forces with the Health Industry Distributors Association to develop a new database. The venture is designed to provide distributors and manufacturers with information on the growing alternate-site and physician's office markets. Medical product sales data collected will be segmented by zip code and by provider type. The company estimates that approximately 75% of distributor sales volume in the alternate care and physician's office market will be captured within a two-year period. For more information, call 215-886-8856.

BMDP ships Windows-based data analysis software

BMDP Statistical Software Inc., Los Angeles, has issued BMDP New System for Windows, a data analysis software package designed to appeal to a broad range of scientific and business users. A true Windows application, the software supports features such as pop-up menus, dialog boxes and point-and-click operations. New System's object-oriented design allows for dynamic interaction with data. BMDP New System for Windows Version 1.0 features the most commonly used statistical routines, including descriptive statistics, t-tests, nonparametric tests, ANOVA, frequency tables and simple/multiple linear regressions. Each statistic is based on existing time-proven algorithms. Fully interactive, high-resolution graphics include scatterplots, boxplots, histograms, bar charts, mean comparison charts, normal probability plots and regression diagnostic plots. The introductory price of New System is $99.95. For additional information, call 800-238-2637 or 310-479-7799.

Rebuilt PRIZM segmentation system unveiled by Claritas

Sweeping demographic changes, the availability of new data from the Census Bureau and innovations in Claritas' segmentation methods have led the Alexandria, Va., company to rebuild its PRIZM lifestyle segmentation system, rather than simply update it, as it has in the past. PRIZM classifies each micro-neighborhood in the United States in terms of 62 types, or "clusters." Each cluster has distinct media, product and lifestyle preferences, revealed by PRIZM links to many survey databases. Among the dozens of new clusters in PRIZM are four Latino clusters, including Latino America and Mobility Blues. Asian immigration also is reflected. Several new clusters underscore the increased variety of family structures among U.S. households. Since communities in smaller cities have consumer traits that differ from their major-metro counterparts, the new PRIZM system differentiates between them. The new model incorporates a more precise means of measuring population density and assigning suburbs to urban centers. For more information, call Mike Reinemer at 703-739-3135.

Cardiff releases new version of Teleform

Cardiff Software Inc., Solana Beach, Calif., has unveiled Teleform for Win-

Place
Postage
Here

Quirk's
MARKETING RESEARCH
Review

P.O. Box 23536
Minneapolis, MN 55423

dows Version 3.0. Teleform performs direct data entry from fax machines and scanners, placing information in databases and spreadsheets. The software interprets hand-printed, typed and preprinted text, as well as filled-in bubbles. The new version's Designer module includes a tool bar and button bar that revamp the user interface and increase ease of use and productivity during forms creation. Unlimited font selections, color capabilities and a customized grid view for precise alignment have also been added to the package. Teleform also now includes BasicScript, a language for nonprogrammers to use in implementing complex operations. The software's recognition power is 40 percent faster and more accurate. This improves the accuracy of electronic interpretation of faxed data. Teleform for Windows is sold in multi- and single-user packages. The single-user version is $1,495; upgrade from Version 2.0 to Version 3.0 is $249. For more information, call 800-659-8755 or 619-259-6444.

Strategic Mapping introduces lifestyle segmentation system

Strategic Mapping Inc., Santa Clara, Calif., has rolled out ClusterPLUS 2000. The segmentation system integrates consumer behavior into every phase of the cluster development process; treats household-level data as an essential element in the development of clusters; includes socio-economic characteristics as fundamental building blocks; and captures the changes in geographic definitions, neighborhood demographics and behavioral trends between the 1980 Census and the 1990 Census. ClusterPLUS 2000 classifies U.S. neighborhoods (blocks and block groups) and postal areas (ZIP codes and ZIP+4s) into 60 totally unique lifestyle segments. It is available in a variety of forms; cost depends on the application and the form in which the product is delivered.

Strategic Mapping also has available Atlas GIS for Windows 2.0. The software sports built-in SQL connectivity for users in client/server and work-group computing environments. It provides nationwide geocoding by address or ZIP+4 code, presentation features such as multiple map insets, a customization tool kit based on Microsoft Visual Basic and advanced geographic analysis capabilities such as complex "donut" buffering and the ability to assign data from one feature or layer to another. Atlas GIS for Windows 2.0 costs $1,595; the international version is $1,995. "LAN Paks" are also available.

For information on either product, call 408-970-9600.

Youth marketing research reports debut

The Young Author's Magazine Anthology Program, part of TheraPlan, Lincoln, Neb., has launched a series of bimonthly research reports called *KidTRACKER*. The reports incorporate monthly mail surveys with content analysis programs. Four specialized tracking features — "SnackTRACKS," "BrandTRACKS," "HotTRACKS" and "KidIDEAS" — are presented in each report. The issues are designed to allow clients to monitor youth marketplace trends and events every 30 days. Two panels of kids and parents respond to monthly surveys in each tracking area, allowing *KidTRACKER* to monitor product usage, purchasing behavior, personal values and marketplace attitudes. The *KidTRACKER* program uses special e-mail programs to collect surveys from panelists within minutes of completion. Data is converted into paginated reports, which are stored on an interactive fax system. Clients download data to computers or fax machines. For more information, call John Austin at 402-421-3172.

Equifax offers demographic updates and projections

Equifax/Nation Decision Systems, San Diego, has available new 1994 demographic updates and 1999 projections. The information, provided through the company's strategic relationship with the WEFA Group, Bala Cynwyd, Pa., includes 1994 estimates for population, households, income, ethnicity and age by gender, and 1999 projections for the same categories. The proprietary methodology used to generate these updates and projections integrates indicators on employment, housing starts, population migration, inflation, interest rates, household wealth and influential factors in the national and world economy. In addition to the indicated information, time series projections for all variables are available for the intervening years. The information is available at the county level in the United States and is updated twice each calendar year. The 1994 update and 1999 projection information is available in a variety of forms, and can be delivered via fax or online. For more information, call 800-866-6510 (Ext. 2).

MapInfo adds to its desktop mapping offerings

MapInfo Corp., Troy, N.Y., has introduced MapInfo 3.0, software designed to make desktop mapping accessible to a wide range of users. This version of the software has advanced data visualization and geographic analysis functionality and new ease-of-use features. MapInfo's available SQL DataLink connectivity module provides clients/servers with remote data access to standard corporate databases for MapInfo applications, allowing nontechnical users to get up to speed quickly. Experienced programmers can use the software for demanding mapping applications. With MapInfo 3.0, SQL DataLink is extended for use in the UNIX and Macintosh environments, in addition to Windows, connecting to Oracle and Sybase databases. MapInfo also has released version 3.0 of its MapBasic Development Environment. Enhancements to MapBasic make it easier for hundreds of MapInfo partners and corporate developers to build vertical mapping applications. MapBasic programmers also have access now to remote database query and update capability, enabling the development of customized client/server MapInfo applications. Price depends on platform and/or upgrade needed. For more information, call 518-285-6000.

IRI, Simmons launch venture aimed at magazine readers

Information Resources Inc., Chicago, and Simmons Market Research Bureau Inc., New York, together will develop new research services designed to measure the product purchases of magazine readers. The new services will combine data on the purchase of UPC-coded products from IRI's InfoScan panel of 60,000 households with a Simmons measurement of magazine readership in the same households. Initially, two different services are planned; Simmons will market both. One will be a semi-annual syndicated report that will facilitate the evaluation of individual magazines on the basis of their appropriateness as carriers of advertising for specific categories and brands of packaged goods. The second will permit analyses, on a proprietary basis, of the effectiveness of the magazine advertising of specific brands. It is anticipated that both services will be commercially operational next year. In addition to working together to develop the new services, IRI and Simmons will be testing the merger of segments of their existing databases. For more information, call Rudy Nadilo at IRI, 203-662-7074, or Ed Bartz at Simmons, 212-916-8986.

Technosearch debuts at Becker Research

The Becker Research Co., Princeton, N.J., has introduced Technosearch, a service designed to locate technologies available for license, joint venture or acquisition. The product is made for the research and development, and business development communities in the chemical, toiletry, cosmetic and household products industries. Technosearch is a customized service. The client specifies the technology of interest and Technosearch scans the world for pertinent technologies. The service reports on the companies with the targeted technology as well as the technology itself. For more information, call 609-951-8570.

Database marketing system released by Customer Insight

Customer Insight Co. Inc., Denver, has issued a database system designed exclusively for marketing applications. The system, called AnalytiX, offers nonsummarized, nonaggregated access to customer information, including transaction-level data. The system provides desktop access to organizations with analytical requirements involving very large databases. The design of the underlying database structure allows users to take nonextracted customer data from diverse sources and integrate them in one database. AnalytiX uses a Windows-based graphic interface. It has quick count capability; a module specifically dedicated to custom report design; a module that allows users to view customer information at record and transaction levels; and an export feature that lets users utilize database information in other applications. For more information, call Peter Penfield at 303-397-7772.

Data Description speeds up Data Desk

Data Description Inc., Ithaca, N.Y., has introduced Data Desk 4.2, exploratory data analysis software designed to run in native PowerPC mode. The new version of the software is four to six times faster than "compatibility mode" and 680X0-based machines. Running Data Desk on a PowerPC provides users with workstation-class numeric calculation power that can be used for data exploration such as animating graphs of large data sets. This version supports the entire

Macintosh product line while keeping data files compatible across machines. Data Desk occupies 1.1MB of disk space and can run in 1MB of RAM. The price is $45 to Data Desk 4.0/4.1 users. For more information, call 607-257-1000.

SPSS ships positioning analysis software

SPSS Inc., Chicago, has introduced SPSS/PC+ StrateGen 5.0, a positioning analysis tool that allows users to generate strategies by mapping market research data in 3-D perceptual maps, then change attributes to suggest alternate strategies. The DOS-based system uses the statistical computing capabilities of the SPSS/PC+ Base system and the SPSS/PC+ Professional Statistics module to form a complete positioning analysis system. It employs preference-rating scale data to generate position strategies through "what-if" analysis; 3-D perceptual maps offer detailed pictures of product positioning, allowing the user to visualize the relationship between products. The package costs $995 until October 1994; then $1,195. A bundle with SPSS Base, Professional Statistics and StrateGen 5.0 is $1,595 until October 1994; then $1,885. For more information, call 800-543-9262.

Find/SVP opens research hotline

Find/SVP, New York, is offering free information about available research reports via an 800-number hotline. FREESEARCH gives callers a comprehensive listing that contains information on market research reports, industry studies, directories, competitive intelligence reports and business and marketing reference sources. Users call the hotline, indicate what they are looking for, and within a couple of days, FREESEARCH calls them back with information on available relevant reports. Most reports can then be shipped overnight. Industries and topics covered by FREESEARCH include food and beverages, business and financial services, biotechnology, chemicals, computers, construction, consumer durables, demographics and lifestyles, drugs, electronics, energy, health care, packaging, household products, international business, manufacturing, industrial, media, waste management, plastics and telecommunications. FREESEARCH's number is 800-346-3787.

English firm introduces modeling and forecasting software

London-based Right Information Systems has introduced 4Thought, its Windows-based modeling and forecasting software, to the U.S. market. The software applies the pattern recognition capability of neural net technology to business data. Its applications include measuring advertising effectiveness, price pointing, sales forecasting, credit ratings and bond dealings. Using data input by the user or imported from other spreadsheet files or databases, 4Thought can reliably identify patterns and relationships in the data and then present the findings in a format that is immediately useful to business managers.

Rather than using standard, statistical algorithms, 4Thought uses neural networking techniques that mimic the learning process of the human brain, attempting to discern basic connections and building on this knowledge to establish more sophisticated models. The software is able to quickly build working models and forecasts. The price for a single-user copy of 4Thought is $15,000. Call 800-803-0933 for more information.

Polk powers up online bulletin board system

R.L. Polk, Detroit, has introduced its online Electronic Data Transfer Bulletin Board System, which the company says will significantly reduce data delivery time. The system allows users to bypass the process of producing magnetic tapes, labels or manuscripts — making data available far sooner than was previously possible. EDT BBS currently serves more than 40 clients, who access *TotalList*, Polk's 90 million consumer-household database, at their convenience via PC modems. The Polk EDT BBS is responding to more than 300 requests per month. Continuous power backup ensures reliability. EDT BBS is completely separate from any other Polk online service, with an independent telephone access number. Registered users are issued an EDT BBS ID and password. They call the nationwide, toll-free number, follow the directions on their computer screen, and instead of waiting days for data, they download what they want to their desktop PCs in minutes. For more information, call Suzanne Orlicki at 313-393-4758.

Portable electronic polling system offered by Ortek

Ortek Data Systems, Beaverton, Ore., is offering a new, wireless group data collections system, the Express 500. The portable electronic polling system can survey as many as 500 respondents at once. The Express 500 provides unbiased feedback and instant results from meetings or research sessions. In an Express meeting, attendees are provided with hand-held keypads — called Responders — similar to those used by audiences on some TV shows. Each member of the group can privately answer the moderator's questions by simply pressing a button. Within seconds after each question, the data are electronically collected with a computer and a summary of the participants' answers is displayed as a color graph on a screen.

A companion model, the Express 500C, can monitor responses continuously. In addition to the keypad, the Model 500C Responder has a dial that continuously registers responses to audio/visual material such as TV commercials, movies, music, presentations and speeches. As their feelings change about the material presented, respondents express those changes by turning the dial. The computer displays a moving line-graph, or "EKG," which represents the group's overall response. With Ortek's video subsystem option, Rate, the group's "EKG" graph can be simultaneously overlaid onto the same video image that the group is watching, and recorded.

The Express 500 connects to the user's host PC through an ordinary serial interface. All setup, control, analysis and graphic display functions are provided by the Orsoft operating software included with the system. The basic Express 500, priced at $3,990, includes 10 Responders, a Transponder (which connects to most IBM AT-compatible PCs) and Orsoft control software (MS-DOS compatible). Express can be expanded by adding more responders. For more information, call James Strelchun at 503-626-0171.

IRI's all-store tracking service close to completion

Chicago-based Information Resources Inc. has announced that InfoScan's conversion to a census (all-stores) service will be completed by the end of the year. The transition began three years ago with the creation of QScan, and it makes InfoScan the only national retail sales tracking service in the food and drug industry that is based on the collection of data from all stores in individual retail chains rather than just samples. Effective immediately, the service name "QScan" will be reserved for the company's retailer census services, while the service name "InfoScan-Census" will be used to emphasize the nature of this database enhancement. Currently, data from a total of 5,000 stores are being released to clients. Beginning in September 1994, the company's InfoScan clients can expect to have access to over 11,000 stores, including all-store reporting for 127 retail chains out of a total of 192 releasable key retail accounts. At that time, InfoScan will convert to standard census-based reporting at the market and key chain account level. In addition, one to two years of back data will be available for historical analysis and year-on-year comparisons. Further, daily overnight reporting through the company's joint venture with Catalina Marketing Corp. is being expanded to cover the 8,000 stores currently available through the Catalina Marketing network.

Wessex offers geographic and demographic info on CD-ROM

Winnetka, Ill.-based Wessex, a publisher of CD-ROM-based geographic and demographic data for desktop mapping applications, is offering the Tiger 92 U.S. streets and boundaries files, with 60% more addresses than the previous version and 12 sets of boundaries. The files are available on eight CDs, ready to load, in ArcView, ArcINFO, AutoCAD and MapInfo's Windows formats. In addition, Wessex offers the Pro/Filer demographic series: the demographic data from the 1990 Census on five CDs, ready to extract and manipulate with Pro/Filer software. For more information, call Bob Ruschman at 708-501-3662.

Trans Union reintroduces income estimator

Trans Union, a Chicago-based consumer credit information company, has refined and reintroduced the Trans Union Income Estimator (TIE), which precisely estimates an individual's income. Use of TIE enhances a prescreened list for preapproved credit offers, helps segment any type of mailing list, and is effective in creating customer cross-sell strategies. TIE was redeveloped based on a national sample of mortgage applicants with verified individual income. Credit characteristics from Trans Union Corp.'s national consumer credit database, which is updated every seven days, were overlaid on the sample to determine those characteristics predictive of income.

TIE incorporates 23 behavioral characteristics, including borrowing and payment data, and assigns a weight to each. TIE then adds up the values to arrive at an estimated income. The enhanced version of TIE also computes an estimated debt-to-income ratio and outputs it along with the income estimate, eliminating the need to calculate debt burden manually. In addition, two scorecards that automatically segment individuals based on the length of their credit history have been incorporated into TIE. This permits TIE to provide a more refined income estimate by scoring consumers with a limited credit history differently from established consumers. The scorecards are transparent to the user. To help clients determine TIE's effectiveness for their specific products, Trans Union also offers validation tools and consultation services for solicitation and online strategies. For more information, call Michelle Blechman at 312-466-8567.

MarketPulse rolls out enhancement to its marketing software

MarketPulse, Cambridge, Mass., has introduced MarketPulse Version 1.4, an enhancement to its database marketing system. The upgrade allows users to target and identify customer prospects while controlling marketing-program costs. Features of MarketPulse Version 1.4 include: max per value, which narrows the results of query selection plan or direct mail campaign to create a selectively distributed and prioritized subset of target records; summary file extraction, which allows users to extract and print out summary information for groups of records in a single line and in one step; and cross-tab ranges, which allow users to filter out excess information by specifying ranges of values to be used for rows or columns of a cross tab rather than using each distinct value of a field for a separate row or column. Market-Pulse Version 1.4 runs on an IBM mainframe or IBM P/370 workstation and supports both OS/2 and Windows. Pricing starts at $75,000. For more information, contact Victoria Winston at 617-868-6220.

Names of Note
continued from p. 22

Steve Walker has been appointed president and CEO of Indianapolis-

Walker

based *DataSource*, a subsidiary of Walker Group, also in Indianapolis. Walker also serves as president and CEO of Walker Direct, a telephone and database marketing services subsidiary of Walker Group. Meanwhile, **Phillip A. Bounsall** has been named vice president and chief financial officer at Walker Group. Bounsall will be responsible for the company's financial operations and the development and implementation of financial strategies for the entities comprising the company. He will also develop and maintain financial operations for Walker Group companies that operate in the United States and abroad.

Patricia Belczynski has been named assistant research director at *Cramer-Krasselt*, a Milwaukee-based marketing communications firm. She will work on a number of the company's accounts.

Julia Kagan is the new senior vice president of *EDK Associates*, a New York research company. She has in the past served as editor of *Psychology Today*, *Working Woman* and *McCall's*. For EDK, Kagan will design and analyze public opinion research on a variety of issues, including public policy and women's and family issues. She will also edit the firm's executive newsletter, *EDK Forecast*, which tracks women consumers' attitudes, values and lifestyles.

Stephen R. Polk, president of *R.L. Polk & Co.*, Detroit, has added the chief executive officer's duties to his job description. **John M. O'Hara**, CEO for the last eight years, will continue as chairman of the company until his retirement in August.

David Jacobson has been promoted to vice president/research director of *Creamer Dickson Basford Inc.*, a New York public relations concern. At the same time, **Ed Stevens** has joined the agency and will serve as its director of business development research and associate research director. Jacobson will be responsible for helping plan and conduct marketing and opinion research as well as ensuring the quality and quantity of the company's research work. He also will continue to direct studies for CDB clients and outside corporations. Stevens' primary responsibility will be providing research support for the agency's business-development efforts.

Daniel P. Brosnan is the new president of *Kirk Tyson International*, a Chicago-based business intelligence firm. Brosnan comes to Tyson from Applied Learning International Inc., where he was vice president of both consulting services and marketing.

Section One Alphabetical Listing

Editor's Note: This list was developed by mailing forms to those organizations we have found who offer omnibus/syndicated research studies in their advertisements, publicity or other published material.

Advertising Research Corp. (ARC)
77 Brant Avenue
Clark, NJ 07066
Ph. 908-388-5955
Fax 908-388-5645
Contact: Sallie Bernard
ARC 1994 Yellow Pages Ad Size Study (S)
ARC Measurement Study of Yellow Pages (S)
ARC/TAG Voice Information Svce. Study (S)
COMPPARE Comparison of Media Product Purchase and Research Evaluation (S)
Impact of 800 vs. Local Numbers in Yellow Pages Ads (S)
Impact of Cover Ads in Yellow Pages (S)

American Sports Data, Inc.
234 N. Central Ave.
Hartsdale, NY 10530
Ph. 914-328-8877
Fax 914-328-1823
Contact: Harvey Lauer
American Sports Analysis (S)
Sports Awareness Monitor (S)
Sports Media Index (S)
Sports Brand Intelligence Report (S)
Health Club Trend Report (S)

BAI
580 White Plains Rd.
Tarrytown, NY 10591
Ph. 914-332-5300
Fax 914-631-8300
Contact: Robert Skolnick
Mail Monitor (S)

Behavior Research Center, Inc.
P.O. Box 13178
Phoenix, AZ 85002
Ph. 602-258-4554
Fax 602-252-2729
Contact: Earl de Berge
Business Track (S)
Consumertrack (O)
Hispanic Track (S/O)
Southern AZ - Sonora Business Study (S)
Metrotrack (O)

Beta Research Corporation
6400 Jericho Turnpike
Syosset, NY 11791
Ph. 516-935-3800
Fax 516-935-4092
Contact: Richard Welch
BOE - Beta Omnibus Exchange - Audits (O)
BOE - Beta Omnibus Exchange - Business-To-Business (O)
BOE - Beta Omnibus Exchange - Healthcare (O)
SPACE - Syndicated Pharmaceutical Advertising Communicative Evaluator (S)

Irwin Broh & Associates, Inc.
1011 E. Touhy Avenue
Des Plaines, IL 60018
Ph. 708-297-7515
Fax 708-297-7847
Contact: David Waitz
Marcom (O)
Electric Appliance Studies (S)
Hardware Studies (S)
Home Health Care (S)
Home Entertainment (S)
Marine Products (S)
Outdoor Power, Lawn, Patio (S)
Sporting Goods Studies (S)
Travel Industry Report Card (S)

Bruskin/Goldring Research
100 Metroplex Dr.
Edison, NJ 08817
Ph. 908-572-7300
Fax 908-572-7980
Contact: Dick Hare
OmniTel - Weekly national consumer study. For times when you need answers to a few marketing questions. It furnishes the same data quality as well-run dedicated surveys. (O)

1994 SYNDICATED/OMNIBUS DIRECTORY

Integrated Survey Information System-ISIS - Weekly national consumer study. For custom surveys up to 15 minutes in length. It also furnishes the same data quality as well-run dedicated surveys. (O)
(See advertisement on p. 2)

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

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

Chemark Consulting
10260 Alliance Rd.
Cincinnati, OH 45242
Ph. 513-891-9502
Fax 513-891-2196
Contact: Howard Ellerhorst
Chemical Industry Studies-Coatings (S)

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

Com-Sci Systems, Inc.
444 Frontage Rd.
Northfield, IL 60093
Ph. 708-446-0446
Fax 708-446-0504
Contact: Richard J. Schlesinger
BPI Brand Performance Index (S)
On-Premise Beer, Wine & Spirits Studies (S)

Creative Research International, Inc.
100 Sheppard Ave. E., Ste. 700
Toronto, ONT M2M 6N5
Ph. 416-250-8500
Fax 416-250-8515
Contact: Liz Jaye
Yankelovich Monitor™ In Canada (S)

Custom Research, Inc.
10301 Wayzata Blvd.
Minneapolis, MN 55426-0695
Ph. 612-542-0824
Fax 612-542-0864
Contact: Mark Michicich/Joan Palmquist
Criterion Omnibus™ Concept Screening Sys. (O)

Warehouse Club Store Syndicated Study (S)

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

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

Doane Marketing Research, Inc.
1807 Park 270 Drive, Ste. 300
St. Louis, MO 63146
Ph. 314-878-7707
Fax 314-878-7616
Contact: David M. Tugend
U.S. Animal Health Market Study - Quarterly study identifies market share of beef, dairy & swine anthelmintics, feed modications/additives, implants and pharmaceuticals used on U.S. livestock farms. (S)
High Volume Swine Producer Study (S)
U.S. Pesticide Profile™ - Hard copy and database identifying the crop protection products used for traditional agricultural crops as well as specialty crops. Done annually. (S)
U.S. Corn Seed Market Study - Annual study identifies specific hybrid brand shares of corn seed planted on U.S. farms. (S)
Genetically-Enhanced Corn Seed Study (S)
Weed Control Study (S)
(See advertisement on p. 54)

Ehrhart-Babic Associates
120 Route 9W
Englewood Cliffs, NJ 07632
Ph. 201-461-6700
Fax 201-461-0435
Contact: Tracy Bacon
National Alcoholic Beverage Index (S)
National Retail Tracking Index (S)

Elrick & Lavidge
1990 Lakeside Parkway, 3rd Flr.
Tucker, GA 30084
Ph. 800-253-0221
Fax 201-599-9896
Contact: Mark Perline
Multi-Mall℠ - Need in-person consumer feedback but don't have the time or budget for a full-scale custom study? Buy research by the question with Multi-Mall℠, the new mall omnibus from Elrick & Lavidge. You'll get the answers you neod quickly, affordably, and reliably. It's another way Elrick & Lavidge, a national full-service custom research firm, responds to your needs. (O)
(See advertisement on p. 54)

Erdos & Morgan/MPG
116 East 27th Street
New York, NY 10016
Ph. 212-685-9393
Fax 212-685-9629
Contact: Irene Ochs-Lilien
Opinion Leaders (S)
Purchase Influence In American Business (S)
The U.S. Professional Investment Community (S)

S=SYNDICATED STUDY
O=OMNIBUS STUDY

Gallup Canada, Inc.
180 Bloor St. W., 10th Floor
Toronto, ONT M5S 2V6
Ph. 416-961-2811
Fax 416-961-3662
Contact: Gerald Germany
Gallup Canada Omnibus (O)
Gallup Financial Services Customer Satisfaction Audit (S)
Gallup Life Insurance Service Customer Satisfaction Audit (S)

Gallup & Robinson, Inc.
575 Ewing Street
Princeton, NJ 08540
Ph. 609-924-3400
Fax 609-921-2748
Contact: Jane Sherry
Advertising Impact Research Services (S)

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

HealthFocus, Inc.
4108 Oak Forest Dr.
Des Moines, IA 50312
Ph. 515-274-1307
Fax 515-274-3107
Contact: Linda Gilbert
HealthFocus On U.S. Consumers (O)

Hospital Research Associates
One Gothic Plaza, Hollywood Ave.,
Rt. 46 West
Fairfield, NJ 07004
Ph. 201-575-3650
Fax 201-575-5366
Contact: William Soriano
Medical Trends® - Antibiotics (S)
Medical Trends® - Hospital Formulary Committee (S)
Medical Trends® - H2 Antagonists (S)
Prelaunch Product Awareness (S)
Anesthesia Audit (S)
Telephone Omnibus (O)

ICR Survey Research Group
605 West State Street
Media, PA 19063
Ph. 610-565-9280
Fax 610-565-2369
Contact: Fred Soulas
EXCEL - Two independent samples of 1,000 each weekly. CRT telephone interviewing conducted in 5 days and results available on the 6th day. (O)
Teen EXCEL - Same procedure as regular EXCEL except the weekly sample size is 125, of which half are male teens and half are female teens. (O)
(See advertisement on pp. 53, 55, 57)

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

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Information Resources, Inc.
150 N. Clinton St.
Chicago, IL 60661
Ph. 312-726-1221
Contact: Nancy Bauko
InfoScan Census (S)

IntelliQuest, Inc.
1250 Capitol of Texas Hwy. S.
Bldg. 2, Plaza One
Austin, TX 78746
Ph. 512-329-0808
Fax 512-329-0888
Contact: Client Svces. Coordinator
Desktop Computer Tracking Study (S)
Portable Computer Tracking Study (S)
Computer Printer Tracking Study (S)
Color Printer Tracking Study (S)
Work Station Tracking Study (S)
Networking Tracking Study (S)
Home Computing Tracking Study (S)
International Technology Tracking Study (S)
Distribution Channel Tracking Study (S)
Technology Adoption Tracking Study (S)
(all studies offer an omnibus option)

International Demographics, Inc.
3355 W. Alabama, Ste. 500
Houston, TX 77098
Ph. 713-626-0333
Fax 713-626-0418
Contact: Bob Jordan
The Media Audit (S)

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

Issues and Answers Network, Inc.
5151 Bonney Road
Virginia Beach, VA 23462
Ph. 804-456-1100
Fax 804-456-0377
Contact: Carla Lindemann
Telepulse (O)

Gene Kroupa & Associates
Box 5258, 222 N. Midvale Blvd., Ste. 29
Madison, WI 53705
Ph. 608-231-2250
Fax 608-231-6952
Contact: Dr. Gene Kroupa
BadgerTrak (O)
DaneTrak (O)

MRCA Information Sources
20 Sumner Street
Stamford, CT 06902
Ph. 203-324-9600
Fax 203-348-4087
Contact: Ken Murphy
National Consumer Purchase Panel (S)
Menu Census, Casual Apparel Usage, OTC/Use (S)
Communication Awareness (S)

S=SYNDICATED STUDY
O=OMNIBUS STUDY

MacKay & Company
One Imperial Place, #300
Lombard, IL 60148
Ph. 708-916-6110
Fax 708-916-4661
Agricultural Equipment Parts Market (S)
U.S. & Canadian Heavy Truck Parts Market (S)

Maritz Marketing Research, Inc.
1297 North Highway Drive
Fenton, MO 63099
Ph. 314-827-1610
Contact: Roy Cleveland
Farmers' Pesticide Use Study - Annual syndicated study among 30,000 growers which provides brand share and tracking of farm pesticide usage in the U.S. and Canada. (S)
Farmers' Pesticide Satisfaction Study - Annual syndicated study with growers providing information on

growers' satisfaction with pesticide products. (S)
Golf Course Pesticide Use Study - Study with 1,500 golf course superintendents determines pesticide use practices and brand share in the U.S. (S)
Pesticide Use Study On Specialty Crops - Study provides brand and dollar expenditures for pesticides on 19 vegetable and 18 fruit, nut and vine crops. (S)
(See advertisement on p. 5)

Maritz Marketing Research, Inc.
3035 Moffat Drive
Toledo, OH 43615
Ph. 419-841-2831
Fax 419-841-8349
Contact: Tim Rogers
Second Ouarter New Car Lessee Study - Primary research study of 6,500 new car lessees regarding preduct satisfaction, purchase consideration, shopping patterns, leasing issues, trading dynamics and demographics. Report released in September. (S)
Early Model New Car and Truck Buyer Study - Primary research study of 24,000 new car buyers and 6,000 new truck buyers regarding product satisfaction, purchase considerations, shopping patterns, dealer satisfaction, trading dynamics, and demographics. Report released in March. (S)
Second Quarter New Car and Truck Buyer Study - Primary research study of 36,000 new car buyers and 9,000 new truck buyers regarding product satisfaction, purchase considerations, shopping patterns, alternative fuels, trading dynamics, and household demographics. Report released in August. (S)
Canadian New Car and Truck Buyer Satisfaction - Primary research among 21,000 new car buyers and 7,500 new truck buyers regarding product satisfaction, purchase considerations, dealer satisfaction, trading dynamics, and household demographics. Report released in September. (S)
(See advertisement on p. 5)

Market Development, Inc. (MDI)
1643 6th Ave.
San Diego, CA 92101
Ph. 619-232-5628
Fax 619-232-0373
Contact: Doug Spaulding
MDI Hispanic Omnibus - MDI's Hispanic Omnibus is conducted among 1000 Hispanic respondents between the ages of 18 and 64, half male, half female. Markets: Los Angeles, New York, Miami, Houston, San Antonio; interviews conducted in Spanish or English depending on respondent's preference. Price includes: consultation on questions, adaptation, fieldwork, coding, data entry, data processing, and proprietary data tabulations; lower prices for reduced sample sizes. (O)
(See advertisement on p. 55)

Market Direction
911 Main St., Ste. 300
Kansas City, MO 64105
Ph. 816-842-0020
Fax 816-472-5177
Contact: Susan Spaulding
Farming's Immediate Future (S)

Market Facts
3040 W. Salt Creek Lane
Arlington Heights, IL 60005
Ph. 708-590-7000
Fax 708-590-7010
Contact: Tom Payne
TeleNation (O)
Data Gage (O)
Mini Screen (O)
National Show Case (O)

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

Market Opinion Research
31700 Middlebelt Road, Ste. 200
Farmington Hills, MI 48334
Ph. 810-737-5300
Fax 810-737-5315
Contact: Jeffrey Leiman
M.O.R. Reports (O)

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Market Segment Research, Inc.
1320 S. Dixie Hwy., #120
Coral Gables, FL 33146
Ph. 305-669-3900
Fax 305-669-3901
Contact: Gary Berman
MSR Ethnic Market Report (S)

Market Trends
3633 136th Place SE, #110
Bellevue, WA 98006
Ph. 206-562-4900
Fax 206-562-4843
Contact: Leslie Huberty
Washington Opinion Monitor (O)
Oregon Opinion Monitor (O)

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

Mature Marketing Research Int'l.
65 E. Indian Row, Ste. 29F
Boston, MA 02110
Ph. 617-720-4158
Fax 617-723-1254
Contact: Dr. Leslie Harris
50 Plus (O)

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

Monroe Mendelsohn Research
841 Broadway
New York, NY 10003
Ph. 212-677-8100
Fax 212-677-8833
Contact: Tony Motta
Mendelsohn Affluent Omnibus (O)
Mendelsohn Affluent Survey (S)
Affluent Recontact Survey (S)

NFO Research, Inc.
2 Pickwick Plaza
Greenwich, CT 06830
203-629-8888
Multicard (O)
Share of Intake Panel (S)
NYPM - National Yellow Pages Monitor (S)

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

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

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

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

Opinion Research Corporation
P.O. Box 183
Princeton, NJ 08542
Ph. 800-999-0213
Fax 800-759-5785
Contact: Judi Lescher
Caravan® - National telephone omnibus survey of 1,000 adults conducted weekly, Thursday through Sunday. Preliminary results available on Monday. Full tabulations delivered on Tuesday. CATI interviewing utilizing state-of-the-art RDD sample. In-house professional interviewers and data processing staff. (O)
Executive Caravan - Conducted monthly in the U.S. (O)
Corporate Reputations and Business Issues Today - Three coordinated annual studies (1) General Public Corporate Reputations, (2) Executive Corporate Reputations conducted in the U.S. and three European countries - U.K., France and Germany, (3) Business and the Media. Focus of these studies is on perceptions of participating companies and benchmarked companies, their competitors, their industries and business in general. (O)
(See advertisement on p. 56)

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

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

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Rockwood Research Corp.
1751 W. County Road B
St. Paul, MN 55113
Ph. 612-631-1977
Fax 612-631-8198
Contact: Kevin Macken
Mail Monitor - National study of direct mail received by consumers in select markets, conducted annually. Measures 1) volume of direct mail received, 2) readership of each direct mail piece, and 3) action resulting from each piece. Participants receive a copy of all industry-related direct mail collected. (S)
Ag-Tel Crop and Livestock Study - National telephone survey of crop and livestock producers, now expanded to include feed dealers and veterinarians. Conducted 12 times a year, the survey covers the following segments: cow/calf operators, feed dealers, hog producers, wheat growers, dairy farmers, farmer cattle feeders, veterinarians, corn growers, peanut farmers, cotton growers, and soybean growers. (O)
(See advertisement on p. 47)

Roper Starch Worldwide
205 East 42nd Street
New York, NY 10017
Ph. 212-599-0700
Fax 212-867-7008
Contact: Peter Stisser
Roper CollegeTrack (S)
Roper High School Report (S)
Roper Reports (S)
Roper Youth Report (S)
Roper Green Gauge (Environmental Marketing) (S)
Roper Limobus Service (O)
Roper's Logomotive (Logo Testing Omnibus) (O)
Roper 18-29 Report (S)
Starch Plus (S)
Starch Ad Readership Studies (S)
Starch Editorial Research Service (S)

Scarborough Research Corp.
11 West 42nd St., 12th Flr.
New York, NY 10036
Ph. 212-789-3560
Newspaper Marketing Report (S)

Simmons Market Research Bureau
420 Lexington Ave.
New York, NY 10170
Ph. 212-916-8900
Fax 212-916-8918
Contact: Jerry Ohlsten
The Kid's Study (S)
Simmons Teen Age Research Study (S)
Study of Media and Markets (S)
Top Management Insight (S)

Lee Slurzberg Research, Inc.
158 Linwood Plaza
Ft. Lee, NJ 07024
Ph. 201-461-6100
Contact: Lee Slurzberg
LSR New York Hispanic Omnibus (O)

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O=OMNIBUS STUDY

Southeastern Institute of Research
2325 W. Broad Street
Richmond, VA 23220
Ph. 804-358-8981
Fax 804-358-9761
Contact: Robert Miller
Baltimore Insight (O)
Washington Insight (O)
Richmond Insight (O)
Norfolk/Portsmouth/Virginia Beach/Hampton (O)

Strategic Vision
P.O. Box 420429
San Diego, CA 92142
Ph. 619-576-7141
Fax 619-576-9235
Contact: Dr. Darrel Edwards
Values In America™ (S)

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

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

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

Thompson Lightstone & Co.
1027 Yonge Street, Ste. 100
Toronto, ONT M4W 2K9
Ph. 416-922-1140
Fax 416-922-8014
Contact: Peggy Richardson-McKee
Omnitel (O)

Total Research Corporation
5 Independence Way, CN 5305
Princeton, NJ 08543-5305
Ph. 609-520-9100
Fax 609-987-8839
Contact: James Alleborn
EQUITREND (S)

TrenData, Inc.
9 Mott Ave., Ste. 201
Norwalk, CT 06850
Ph. 203-866-3113
Fax 201-853-2228
Contact: Louis Pappalardo
TrenData Report (S)

The Unidex Reports
1827 Powers Ferry Rd.
Atlanta, GA 30067
Ph. 800-528-5342
Fax 404-956-9933
Contact: Matthew Ford
The Unidex Report (S)
The High Balance Quarterly (S)
The Business Owner & Professional Quarterly (S)
The Unidex Quarterly (S)

U.S. Travel Data Center
1133 21st Street N.W.
Washington DC 20036
Ph. 202-293-1040
Fax 202-293-3155
Contact: Steven Jones
National Travel Survey (O)
Quick Travel Fax (O)
Cooperative Travel Survey (S)

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

The Wagner Group, Inc.
53 West 21st Street
New York, NY 10010
Ph. 212-627-0066
Contact: Jeffrey Wagner
College Scan (O)

West Group Mktg. Rsch., Inc.
1110 E. Missouri Ave., #780
Phoenix, AZ 85014
Ph. 602-264-4915
Fax 602-631-6844
Contact: Ted Apostol
WestTrack Phoenix (O)
WestTrack Arizona (O)

The Youth Research Co.
36 Tamarack Ave., Ste. 107
Danbury, CT 06811
Ph. 203-797-0666
Fax 203-748-1735
Contact: Karen Forcade
Quarterly Children's Omnibus (O)

Section Two
Specialty Cross Index

Advertising

Advertising Research Corp. (ARC) (S)
Beta Research Corp. (S)
Erdos & Morgan/MPG (S)
Gallup & Robinson (S)
Gallup Canada, Inc. (O)
Graham Research Service (O)
Healthcare Communications (S)
International Demographics (S)

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Market Opinion Research (O)
Marketing Evaluation/TVQ (S)
NFO Research (S)
Rockwood Research Corp. (S)
Roper Starch Worldwide (S)
Strategic Vision (S)
U.S. Travel Data Center (O)
Video Storyboard Tests (S)

African American

Market Segment Research, Inc. (S)

Agricultural

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

Airlines

J.D. Power and Associates (S)

Asian Americans

Interviewing Service of America (S)
Market Segment Research, Inc. (S)

Automotive

Gallup Canada, Inc. (S)
IMR Research (S)
Maritz Marketing Research (S)
Market Opinion Research (O)
J. D. Power and Associates (S)
Strategic Vision (S)

Business-To-Business

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

Carpeting

NFO Research (S)

Chemical Industry

Chemark Consulting (S)

Children

Children's Market Research (S)
ICR Survey Research Group (O)
Market Facts, Inc. (O)
Opinion Research Corp. (O)
Roper Starch Worldwide (S)
Simmons Market Research Bureau (S)
The Youth Research Co. (O)

College Students

Roper Starch Worldwide (S)
Simmons Market Research Bureau (S)
The Wagner Group (O)

Computers

IntelliQuest, Inc. (S)

Consumer (Local)

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

Consumer-Canada

Canadian Facts (O)
Creative Research International, Inc. (S)
Gallup Canada, Inc. (S)
Gallup Canada, Inc. (O)
IMR Research (S)
Maritz Marketing Research (S)
Market Facts of Canada (O)
Market Facts of Canada (S)
Market Opinion Research (O)
Thompson Lightstone & Co. (O)

Consumer-U.S.

Beta Research Corporation (O)
Irwin Broh & Ascts. (S)
Bruskin/Goldring Research, Inc. (O)
Cambridge Reports/Research International (O)
Cambridge Reports/Research International (S)
Custom Research Inc. (O)
Custom Research Inc. (S)
Elrick & Lavidge (O)
ICR Survey Research Group (O)
Issues & Answers Network (O)
Maritz Marketing Research (S)
Market Facts, Inc. (O)
Market Opinion Research (O)
Market Research Solutions (O)
Market Segment Research (S)
Mediamark Research Inc. (S)
Monroe Mendelsohn Research (S)
Monroe Mendelsohn Research (O)
MRCA Information Svcs. (S)
NFO Research (O)
A.C. Nielsen (S)
The NPD Group (S)
Opinion Research Corp. (O)
J. D. Power and Associates (S)
Roper Starch Worldwide (O)
Roper Starch Worldwide (S)
Strategic Vision (S)
Total Research Corp. (S)
TrenData Inc. (S)
U.S. Travel Data Center (O)

Entertainment

Market Opinion Research (O)
Roper Starch Worldwide (S)

Environmental

Market Directions (S)
Market Opinion Research (O)
Roper Starch Worldwide (S)

Executives

Opinion Research Corp. (O)
Erdos & Morgan/MPG (S)

Financial

BAI (S)
Erdos & Morgan/MPG (S)
Gallup Canada, Inc. (S)
Market Facts of Canada (S)
Market Opinion Research (O)
Strategic Vision (S)
The Unidex Reports (S)

Food/Beverage

Children's Market Research (S)
Com-Sci Systems (S)
Custom Research Inc. (O)
Custom Research Inc. (S)
Danis Research (S)
Ehrhart-Babic Ascts. (S)
HealthFocus, Inc. (O)
Information Resources, Inc. (S)
Market Facts of Canada (S)
Market Opinion Research (O)
MRCA Information Svcs. (S)
The NPD Group (S)
Strategic Vision (S)

Health Care/Medical

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

Hispanic

Behavior Research Center (S)
Market Development, Inc. (MDI) (O)
Market Segment Research (S)
NuStats, Inc. (S)
Lee Slurzberg Research, Inc. (O)
Strategy Research Corporation (S)
Strategy Research Corporation (O)

Insurance

Erdos & Morgan/MPG (S)
Gallup Canada, Inc. (S)
Market Opinion Research (O)
Strategic Vision (S)

International

Behavior Research Center (S)
Opinion Research Corp. (O)

Lodging Industry

U.S. Travel Data Center (O)

Management

Opinion Research Corp. (O)
Simmons Market Research Bureau (S)

Media

Advertising Research Corp. (S)
American Sports Data (S)
Beta Research Corporation (S)
International Demographics (S)
Market Opinion Research (O)
Marketing Evaluations/TVQ (S)
Mediamark Research, Inc. (S)
Opinion Research Corp. (O)
Roper Starch Worldwide (S)
Scarborough Research Corp. (S)
Simmons Market Research Bureau (S)
Strategic Vision (S)
Strategy Research Corporation (S)

Mothers

Children's Market Research
Market Facts, Inc. (O)

Pet Foods

Custom Research Inc. (O)

Political Affairs

Market Opinion Research (O)

Public Policy Issues

Market Opinion Research (O)

Restaurants/Fast Foods

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

Retail

Custom Research Inc. (S)
Ehrhart-Babic Ascts. (S)
Information Resources (S)
Market Opinion Research (O)
MRCA Information Svcs. (S)
A. C. Nielsen (S)
Strategic Vision (S)

Seniors/Mature/Elderly

Mature Marketing Research (O)

Sports

American Sports Data, Inc. (S)
Irwin Broh Ascts. (S)
Children's Market Research (S)
Marketing Evaluations/TVO (S)
MRCA Information Svcs. (S)

Teens

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

Textiles

MRCA Information Svcs. (S)

Transportation

Market Opinion Research (O)

Travel

Irwin Broh & Ascts. (S)
Canadian Facts (O)
Market Opinion Research (O)
NFO Research (S)
Strategic Vision (S)
U.S. Travel Data Center (O)

Trucking

MacKay & Company (S)
Maritz Marketing Research (S)

Classified Ads

Trade Talk

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member of the very market these manufacturers are trying to reach — Myers' opinions carry extra weight. She cites many personal experiences with companies that have pleased/angered her.

Early chapters focus on the do's and don'ts of marketing to women, with Myers dispelling some myths about women as consumers, for example, and offering advice to marketers and their front-line employees. The real strength of the book lies in the chapters where Myers presents page after page of the success/failure stories of companies that have tried to market to women. The best of these is an examination of the hidebound automotive industry's strides and stumbles in becoming more sensitive to women's automotive-buying needs. Myers also includes a section that looks to the future of retailing, travel, politics, advertising and the like.

If you're trying to reach this lucrative market, this book is for you. By reading about the experiences of others, perhaps you'll avoid the mistakes they made. After all, if you have to learn from mistakes, it's always better to do it from someone else's.

The last stop on our summer book tour is a look at another set of consumer groups that manufacturers ignore at their peril: the growing U.S. ethnic populations. *Multicultural Marketing: Selling to a Diverse America*, by Marlene Rossman, focuses on marketing to Hispanics, Asian-Americans and African-Americans, using interviews with marketers at U.S. companies that have successfully reached these and other ethnic markets. As Rossman makes clear, marketing to these consumers isn't easy and shouldn't be rushed into: it requires careful thought and sensitivity, but the payoffs can be huge.

Each of these ethnic groups easily merits its own book, but Rossman — president of Rossman, Graham Associates, a New York City marketing, research and consulting firm — has produced an informed book for marketers who need an easy-reading introduction to these growing, varied consumer groups. ❑

The Complete Guide to Focus Group Marketing Research for Higher Education *($29, softcover, 84 pages), by Robert S. Topor, is published by Educational Catalyst Publishing. Call 415-961-6121 or write Topor & Associates, 280 Easy St., Ste. 114, Mountain View, CA 94043-3736. Include $3 for postage.*

Market Segmentation *($32.50, hardcover, 313 pages), by Art Weinstein, and* Targeting the New Professional Woman *($32.50, hardcover, 259 pages), by Gerry Myers, are published by Probus Publishing. For ordering information, see page 31.*

Multicultural Marketing: Selling to a Diverse America *($22.95, hardcover, 192 pages), by Marlene Rossman, is published by AMACOM Books, 800-262-9699.*

Listing Additions

Please add the following firm to the 1994 Ethnic Research Directory:

The Winters Group Inc.
14 Franklin St., Ste. 920
Rochester, NY 14604
Mary-Frances Winters, President
Ph. 716-546-7480
Fax 716-546-7427
1 - African-American, Hispanic, Asian, Native American

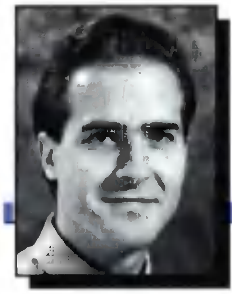
Please add the following firm to the 1994 Telephone Interviewing Facilities Directory:

The Blackstone Group
360 No. Michigan Ave.
Chicago, IL 60601
Ashref Hashim, President
Ph. 800-666-9847
Fax 312-419-8419
40-40-40-40

Sales Offices

Headquarters: Evan Tweed, *Quirk's Marketing Research Review*, 6607 18th Ave. So., Minneapolis, MN 55423, Phone: 612-861-8051, Fax: 612-861-1836

West Coast: Lane Weiss, Lane Weiss & Associates, 10 Black Log Rd., Kentfield, CA 94904, Phone: 415-461-1404, Fax: 415-461-9555



Trade Talk

By Joseph Rydholm/QMRR editor

Book reviews: Market segmentation and other fun topics

It's summertime and you have loads of spare time, right? Instead of wasting it with the latest potboiler (which will probably emerge next summer as a Tom Cruise/Julia Roberts vehicle anyway), why not spend it wisely by reading about market segmentation and other fun topics? Here are four page-turners for your consideration.

The subject of the first book is summed up in its title: *The Complete Guide to Focus Group Marketing Research for Higher Education*. This slim (84-page) book by Robert S. Topor is a primer for college and university administrators who may be considering a research project to learn more about readership of alumni publications, for example, or local perceptions of the school.

Topor, president of Topor & Associates, Mountain View, Calif., is a moderator and consultant to higher education. In the book, he walks the reader through the focus group process, from determining if groups are necessary through recruiting, holding the sessions, and analyzing the results. While the book is brief, Topor covers all the bases, imparting his information in a straightforward fashion.

The second book, *Market Segmentation* by Art Weinstein, is a snappily written look at the various ways to segment consumer groups — by where they live, how much they make, what they buy, etc. Weinstein is an associate professor of marketing at Nova University in Ft. Lauderdale, Fla. He also has been a senior marketing research representative for A.C. Nielsen Co.

He emphasizes applications and includes plenty of instructive information. Some of it is obviously geared toward the academic setting — included are several "Segmentation Skillbuilders," assignments to do a little homework on segmentation and/or put your knowledge of segmentation to the test. But some of the assignments, such as the one called "Using segmentation grids to identify benefit segments for your company," should be useful to those in the professional world.

Part one of the book is an overview of segmentation, its role in the marketing plan, and planning and researching guidelines for segmentation analysis. Part two addresses various segmenting approaches (geographic, psychographic, etc.) and the markets to which you can apply them. Parts three and four focus on segmentation strategy and case histories.

Many segmentation approaches and techniques overlap, so it can get a bit difficult to keep them straight. In essence, they're all trying to do the same thing, they just go about it in different ways. But Weinstein's book should help you determine which ways are best for you.

In the third book, *Targeting the New Professional Woman*, author Gerry Myers uses interviews and articles from the business press and other sources to focus on the efforts of companies that have recognized the potential of marketing to women.

Myers is president of the Myers Group, a Dallas consulting firm. As a successful professional woman — a

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- 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
- Cincinnati — Aug. 1-3
- New York — Aug. 29-31
- Cincinnati — Sept. 19-21
- Detroit — Oct. 10-12
- Toronto — Oct. 31-Nov. 2
- New Orleans — Nov. 21-23
- San Antonio — Dec. 12-14

104. Questionnaire Construction Workshop
- New York — Jan. 24-26
- Cincinnati — Mar. 7-9
- Boston — Apr. 4-6
- Cincinnati — May 2-4
- Toronto — June 20-22
- Cincinnati — Aug. 8-10
- New York — Sept. 12-14
- Boca Raton — Nov. 14-16

105. Questionnaire Design
- New York — Jan. 27-28
- Cincinnati — Mar. 10-11
- Boston — Apr. 7-8
- Cincinnati — May 5-6
- Toronto — June 23-24
- Cincinnati — Aug. 11-12
- New York — Sept. 15-16
- Boca Raton — Nov. 17-18

201. Focus Groups
- Boston — Feb. 24-25
- Toronto — Apr. 21-22
- Atlanta — July 21-22
- Chicago — October 20-21

202. Focus Group Moderator Training
- Cincinnati — Jan. 18-21
- Cincinnati — Mar. 15-18
- Cincinnati — May 10-13
- Cincinnati — June 14-17
- Cincinnati — July 12-15
- Cincinnati — Aug. 16-19
- Cincinnati — Oct. 4-7
- Cincinnati — Dec. 5-8

203. Focus Group Applications
- Cincinnati — Dec. 13-14

204. Qualitative Research Reports
- Cincinnati — Dec. 15-16

301. Communicating Marketing Research
- Boston — Feb. 7-9
- Cincinnati — Mar. 21-23
- New York — May 23-25
- Cincinnati — Aug. 22-24
- Boca Raton — Sept. 27-29
- Boston — Nov. 7-9

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

501. Applications of Marketing Research
- Cincinnati — Mar. 3-4
- Chicago — May 19-20
- Atlanta — June 30-July 1
- Cincinnati — Aug. 4-5
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- Cincinnati — June 2-3
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- Cincinnati — Oct. 27-28

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- Cincinnati — Oct. 25-26

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- Boca Raton — Feb. 3-4
- New York — May 26-27
- New York — Sept. 1-2
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601. Translating Data into Actionable Information
- Boston — Mar. 31-Apr. 1
- Cincinnati — June 9-10
- Cincinnati — Sept. 22-23
- Cincinnati — Dec. 19-20

602. Tools and Techniques of Data Analysis
- Boston — Jan. 18-21
- Cincinnati — Mar. 15-18
- Cincinnati — May 10-13
- New York — July 19-22
- Cincinnati — Aug. 16-19
- Chicago — Oct. 18-21
- Cincinnati — Dec. 6-9

603. Practical Multivariate Analysis
- New York — Jan. 10-12
- Boston — Feb. 21-23
- Cincinnati — Apr. 11-13
- Cincinnati — July 5-8
- San Fran. — Sept. 27-30
- Cincinnati — Nov. 29-Dec. 2

701. International Marketing Research
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702. Business to Business Marketing Research
- Cincinnati — May 23-25
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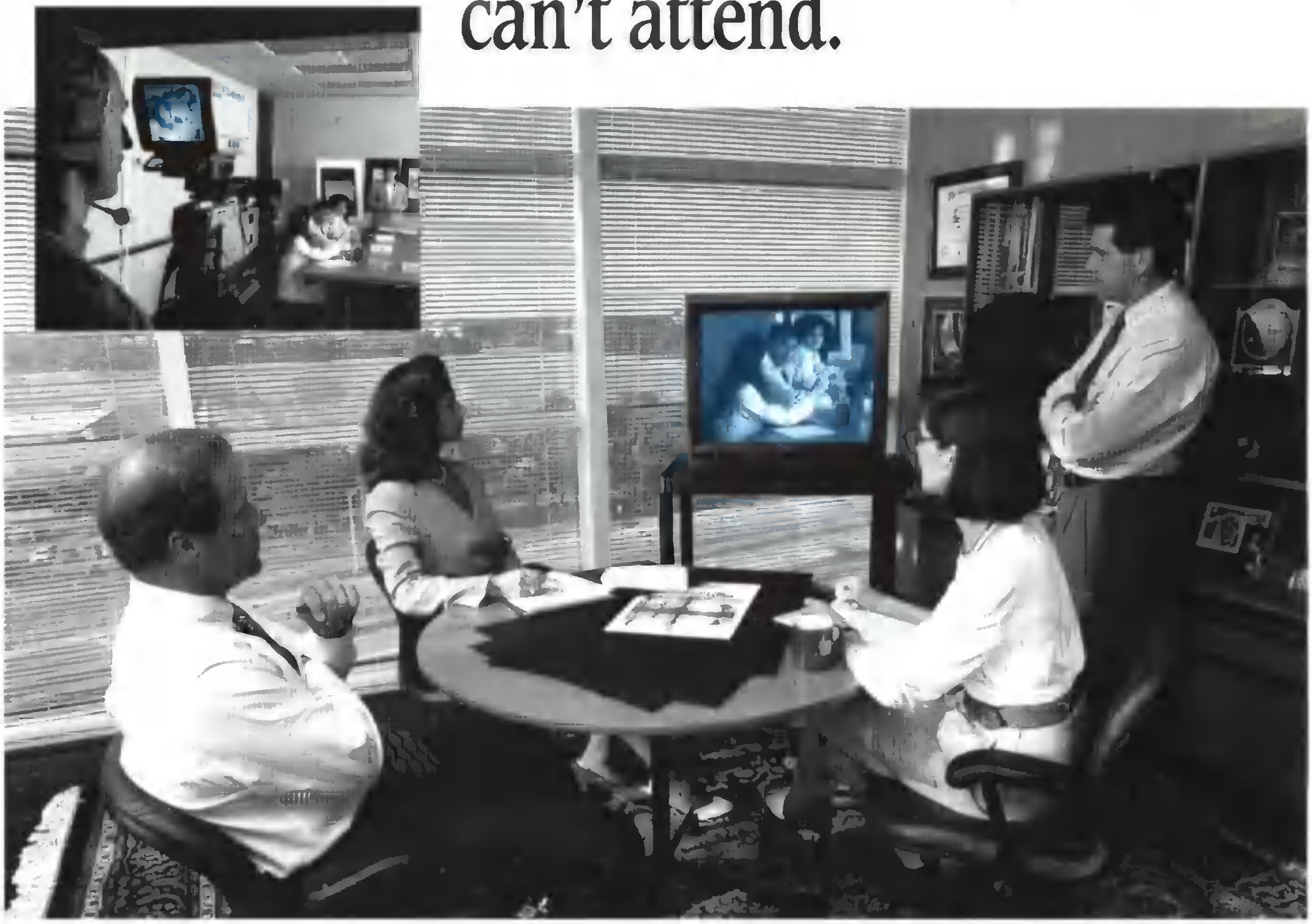

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