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Dwelling on satisfaction

Customer satisfaction research issue

October 1994

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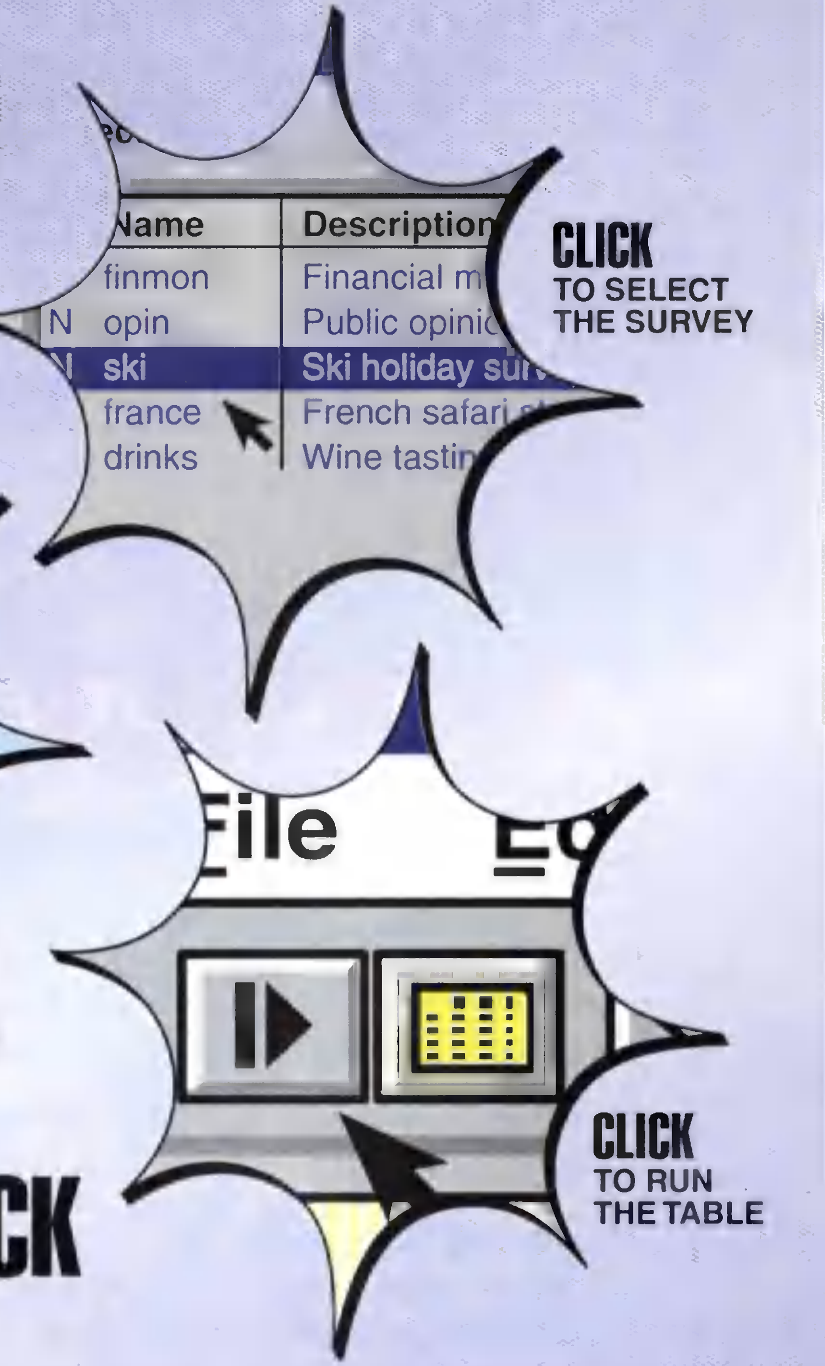

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Research keeps Homecorp in touch with resident satisfaction. Photo courtesy of Homecorp.

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Dwelling on

Customer satisfaction research is Homecorp's secret formula for success

By Joseph Rydholm
QMRR editor

Hillmeade Apartments, Nashville, Tennessee

Homecorp manages more than 70 apartment communities nationwide, serving 15,000 residents. Listening to their opinions has increased profits and reduced turnover, says Homecorp's Bryan Rader. "We felt that if we had a program that required us to focus every day, every hour, every minute on the customer that we would see our customer satisfaction results skyrocket and that has happened."

As most apartment dwellers know, tracking down the building manager or landlord when you have a problem is next to impossible. Maybe it's a leaky faucet or a noisy neighbor — whatever it is, they usually don't want to hear about it. Unless, that is, you live in a complex managed by Homecorp, in which case management may just come looking for you to find out if everything is all right.

The Montgomery, Ala., firm manages more than 70 apartment communities nationwide — its strongest presence is in the southeast — serving over 15,000 residents. Its 2-year-old customer satisfaction research effort, the Focus program, includes an annual survey and focus groups with residents. It's part of a companywide commitment to stay in touch with customers, combating rental property management's reputation as uncaring.

Homecorp goes beyond the usual industry practice of surveying customers when they move in and move out, says Bryan J. Rader, general manager of Homecorp Services.

"The Focus program came about when we realized that the rest of the industry was doing an inadequate job by measuring satisfaction at only two contact points, the move-in and move-out. If you focus on your customer only at those points, you will never satisfy them. We felt that if we had a program that required us to focus every day, every hour, every minute on the customer that we would see our customer satisfaction results skyrocket and that has happened."

Satisfaction lowers expenses

The rental housing industry has found that customer focus can lower controllable expenses dramatically. By keeping

satisfaction

residents happy, a firm reduces time and money spent on turnover (repainting, recarpeting or repairing to get an apartment back into marketable shape), minimizes the number of unrented units, and saves the costs of marketing and advertising to fill vacancies.

Homecorp still sees value in the move-in and move-out survey. The move-in survey, for example, helps Homecorp get to small problems and fix them before they become long-term drags on satisfaction. Even things such as a nail hole left by a previous resident or a burned out light bulb can create a bad initial impression that stays with the resident.

But the company strives to listen to its customers throughout their residence in a Homecorp community. (All research is done in-house, except data processing. Rader moderates all of the focus groups with residents.) Homecorp sends a customer satisfaction survey to its residents each February. The survey results are presented to community managers in April. "We want to have the information communicated to the entire property together in staff meetings so that everyone buys into the information and realizes that he or she has as much impact on satisfaction as the manager. We want a total buy-in and teamwork in addressing any challenges that come up. We also want them to share in the success."

Rader also moderates a focus group once a year at each of the communities. A random selection of residents is invited to the leasing office in the evening and asked to elaborate on issues raised in the larger survey. "We get a better definition of why they are happy or unhappy. We also ask them to propose solutions to any problems they're facing because often the best solutions come from our residents. We monitor the performance of our proposed solutions, and if they work at one property we may try them at another. If it's not working, we put plans in place to try something else.

"There is so much run-and-hide management in this and other industries. We take the opposite approach and ask residents to come and talk about these issues with us firsthand in a discussion-group setting. We've found that the appreciation they show us for inviting them is significant."

The goal is to measure the residents' contact with Homecorp representatives at every step of the way between move-in and move-out. Any interaction with a Homecorp employee, from chatting with office personnel when paying rent to running into a leasing consultant walking the property, is important.

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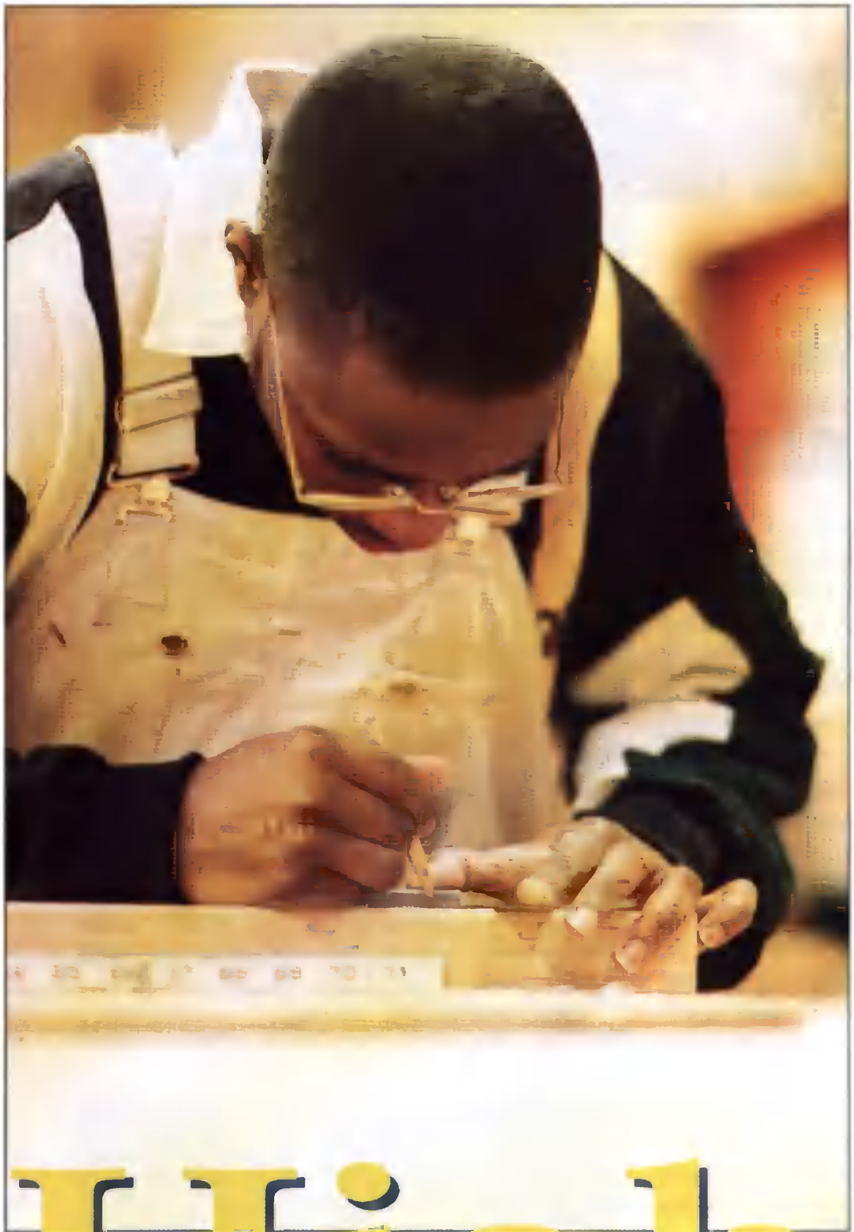
Eden Crossing Apartments, Pensacola, Florida

Jefferson Place Apartments, Baton Rouge, Louisiana

Pleasant Ridge Apartments, Little Rock, Arkansas

Hillwood Condominiums, Jacksonville, Florida



High marks

By William H. Stearrett Jr.

Editor's note: William H. Stearrett Jr. is the research specialist for the New Castle County (Del.) Vocational Technical School District.

Without a doubt, schools are a valuable asset to a community. By definition a good school provides a solid education, but it also serves as a magnet for families seeking a place to raise children. And since graduates often stay in or return to the same community to make their living, schools can have a long-lasting local influence.

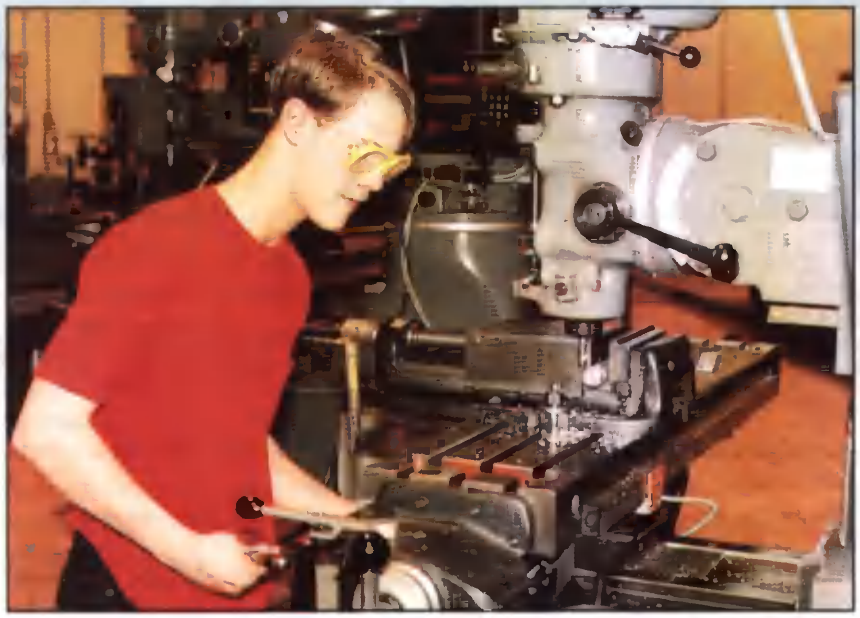
As providers of important services and tangential benefits, schools should not leave customer satisfaction to chance. But schools and school districts are not known as adroit users of marketing research. Few can match the business sector's efforts to measure customer satisfaction, market share and perceived image in the community.

The New Castle County Vocational Technical School District in Delaware is an exception. Under the leadership of Superintendent Dennis Loftus, the NCCVTSD has developed and maintains a comprehensive program of marketing research and performance reporting that compares favorably to many businesses'. The district comprises three high schools — Delcastle Technical High School, Hodgson Vocational Technical High School and Howard High School of Technology — and serves all 435 square miles of New Castle County.

Students and parents are customers

As with other community-based service organizations — such as banks and hospitals — customer satisfaction is a key performance indicator for the school district. In the program currently up and running in New Castle County, customers — students and parents — are sur-

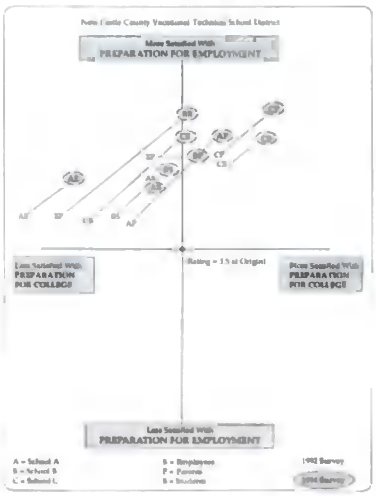
Satisfaction research helps Delaware school district set standards, improve performance



The district surveys students and parents every two years to assess overall satisfaction as well as satisfaction with a number of specific school characteristics, including quality of teachers, the school environment and teacher-parent communication.

veyed every two years to assess overall customer satisfaction as well as satisfaction with a number of specific school characteristics, including quality of teachers, the school environment and teacher-parent communication, on a 1-5 scale. Survey participants are also asked if they would recommend their school to friends (and why or why not), and what they like and dislike about their school. Their responses to the open-ended questions often confirm the mean satisfaction ratings and flesh out the statistical results. Space is also provided for respondents to make suggestions for improvement.

Teachers are also asked to participate in the survey, and a comparison of the students', parents' and teachers' responses yields valuable results that can be displayed on perceptual maps (exhibit 1). Comparisons of various segments within the student population provide an increased awareness of customer needs. For example, it's important to figure out why students in the upper grades are less satisfied than those in grades nine and 10, and why many seniors don't know what they will do after graduation. Students' future plans are critical to the district's market-positioning strategy because the schools must strike a balance between efforts to prepare students for employment (a perceived strength) and prepare them for college (a perceived weakness).[1]



Anticipating the future

The district's marketing research efforts aren't limited to customer satisfaction surveys. Parents of students in grades six, seven and eight in the district's market area were surveyed three years ago to discover image perceptions, identify misconceptions and gaps in knowledge about the district's schools, and assess the likelihood of parents' choosing a vo-tech high school education for their sons or daughters.

The research identified misconceptions about the district — regarding the proportion of female students and the proportion of graduates who go to college — that were subsequently addressed specifically in the district's application, open house invitation and recruitment video, entitled "Choices in a Changing World."

Survey results relating to parents' likely school selections matched actual market share figures, which the district tracks each year as part of the admissions process. The district has seen a steady increase in market share in recent years: This year's 1,800 applica-

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Using radar charts to present customer satisfaction data

By Renee Entinghe

Editor's note: Renee Entinghe is a research analyst with Maritz Marketing Research Inc.'s Automotive Research Group in Toledo, Ohio.

In today's complex marketplace, numerous factors affect customer satisfaction with a product or service. As a result, surveys ask people to evaluate a product or service on multiple attributes. Customer satisfaction profiles are developed from these data to show a company how well it is performing. The profiles generally take the form of charts and/or tables, but the magnitude of information they contain can overwhelm the reader, especially if competitor data are included.

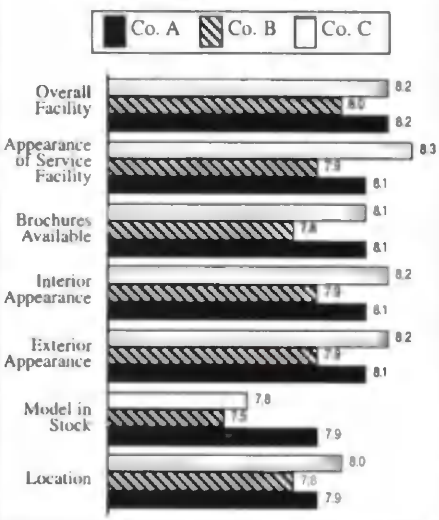
Radar charts (also called spider charts) can be an effective way to present the data. Traditional radar charts are especially useful when comparing competitors' positions on multiple attributes. They are simple, concise, and can be read quickly. Analysis of the radar chart is continuous. The attribute scores are connected in a circular fashion making the overall and individual relationships easily recognized. In addition, radar charts can be taken a step further by incorporating statistical significance testing. With these modified charts, significant differences among competitors or subgroups are more easily identified than with traditional charts, such as bar charts.

Traditional bar chart

Suppose Company A is interested in examining new car buyers' satisfaction with the dealership facilities. Assume also that Company A is especially concerned with how its dealerships compare to those representing Company B and Company C. Dealership facility satisfaction scores, obtained from the National Survey of Early Model New Car Buyers, are plotted in a traditional bar chart in Figure 1. To compare Company A's performance with that of Company B and Company C, the reader examines each cluster of bars separately. Several passes through the chart are required to determine Company A's relative position for dealership facility satisfaction.

Figure 1

Dealership Facility Profile



Comparing multiple attributes across different groups can be complicated using a bar chart – it's difficult to see the relationships.

Traditional radar chart

Compare the bar chart in Figure 1 to a traditional radar chart, using the same dealership facility satisfaction scores, in Figure 2. The radar chart is not as cluttered as the bar chart, making it more appealing to the reader. The connected pattern of the radar chart allows the reader to see the relative position of Company A to Company B and Company C quicker than with the bar chart, whether the reader is examining the attributes independently or collectively.

Plotting significance tests

In Figures 1 and 2 Company B appears to have lower satisfaction scores than Company A for all attributes, while Company C and Company A seem to be fairly comparable. However, these charts do not indicate which differ-

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(If you tried to find out where your telephone sample came from, would you be left empty handed?)

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Regression regression

By Gary M. Mullet

Editor's note: Gary M. Mullet, Ph.D., is principal of Gary Mullet Associates, Inc., a suburban Atlanta, Ga., statistical consulting/analysis firm.

Much has recently been written, on these pages and elsewhere, about using regression analysis in marketing research. In fact, awhile back in *Quirk's Marketing Research Review* there was a very enlightening, informative and somewhat heated series on using (or not using) regression analysis in determining derived attribute importance weights in customer/client satisfaction measurement studies. (cf. "Regression-based satisfaction analyses: Proceed with caution" October 1992 QMRR, "Appropriate use of regression in customer satisfaction analyses: a response to William McLauchlan" February 1993 QMRR.)

The following few paragraphs will not enter further into that fray. Instead, we'll go back into some of the more fundamental underpinnings of regression analysis, irrespective of particular applications. This is motivated by some recent questions, comments and observations from a variety of sources, all aimed at a better understanding of this fundamental statistical analysis tool. Of course, a lot of these issues have been treated elsewhere, too, but the time seems opportune for a memory refresher.

Missing data (or How come I paid for 750 interviews and your regression analysis only used 37 of 'em?)

Unlike when you took your introductory statistics course (or vice versa), real respondents frequently fail to answer every question on a survey. Consequently, many times when we run a regression analysis using canned software programs, we end up with many fewer respondents than anticipated. Why? Because, the packages assume regression analysis to be a multivariate procedure (many statisticians don't, by the way) and drop any respondent from the analysis who fails to answer even a single statement from your set of independent or dependent variables.

What to do, what to do? I'm not sure that there is a definitive answer, but here's what some analysts do. First, there's always the option of using just the respondents who've answered everything. This has the effect of you basing your research report on 50 percent or so of the respondents, sometimes less. Many times this is (subjectively) appealing, since you have the assurance that your model is based on those who answered each and every question. It's not so appealing, however, when you start with a sample of 1,000 or so and end up with only 100 of these dictating your regression results—especially if the model is to determine compensation or to forecast sales.

Many analysts prefer to use mean substitution for any values which are missing. The software packages automatically, if you tell them to, substitute the mean of everyone who did answer a particular question for the missing answer of those who, for whatever reason, didn't. Here's what can happen when you use this option:

• If there is a given question that, say, 90% don't answer, the mean answer of the remaining 10% who did is substituted and used as if that's what the other 90% said.

• A respondent who answers few, or no, questions can still be included in the analysis, unless the analyst overrides the automatic substitution of means, since a mean value is also used for the dependent regression variable. Oops!

Now, both of these things happen, probably rarely, but certainly more than they should. It seems obvious that maybe we should look at each question to see what the item non-response is and if there are questions that are particularly high on item non-response, try the regression without them. Common sense also says to exclude respondents who fail to answer the question we're using as a dependent variable (overall opinion, overall satisfaction, or some such) and also to exclude any who don't answer a specified minimum number of independent variable ratings, 75% or whatever criterion you decide on. Luckily, both of these can be easily done with the current software. Sadly, as noted, they aren't always.

An alternative that seems to be gaining favor is to use only those who've answered the dependent variable (kind of a no-brainer in most circles) and then substitute the respondent's own mean on the ones that he or she answered for the ones he or she didn't. Again, you'll probably only want to do this for those who've answered a majority of the items. This variation takes scale usage into account and is appealing because to some respondents "there ain't no tens."

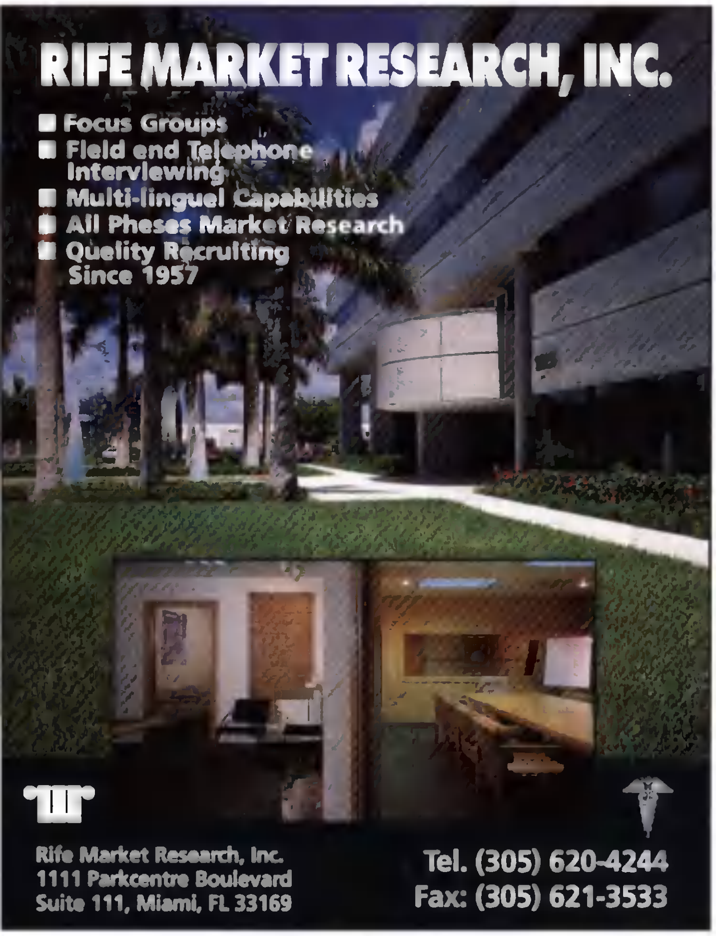
Significance testing (or If they're all significant how come no single one is?)

Regression software packages generally test two types of statistical hypotheses simultaneously. The first type has to do with all of the independent variables as a group. It can be worded in several equivalent ways: Is the percentage of variance of the dependent variable that is explained by all of the independent variables (taken as a bunch) greater than zero or can I do a better job of predicting/explaining the dependent variable using all of these independent variables than not using any of them? Anyway, you'll generally see an F-statistic and its attendant significance, which helps you make a decision about whether or not all of the variables, as a group, help out. This, by the way, is a one-sided alternative hypothesis, since you can't explain a negative portion of variance.

Next, there's usually a table which shows a regression coefficient for each variable in the model, a t-statistic for each and a two-sided significance level. (This latter can be converted to a one-sided significance level by dividing by two, which you'll need to do if, for example, you've posited a particular direction or sign, a priori, for a given regression coefficient.)

Now here's the funny thing: You will sometimes see regression results in which the overall regression (the F-statistic, above) is significant, but none of the individual coefficients are accompanied by a t-statistic which is even remotely significant. This is especially common when you are not using stepwise regression and are forcing the entire set of independent variables into the equation. How can this be? It can be because of the correlation between the independent variables. If they are highly correlated, then as a set they can have a significant effect on the dependent variable. Individually they may not.

Look at it this way. Let's say that we are measuring temperature in both degrees Fahrenheit and degrees Celsius, measuring with thermometers, rather than measuring one and



calculating the other using the formula most of us hoped we'd never have to remember beyond high school chemistry. (By measuring, given the inaccuracies of most thermometers, the computer won't give us nasty messages. It probably would if we measured only one and calculated the other.) Next let's say we're going to use these two temperatures to predict something else we've experimentally determined, like pressure. Clearly, the two temperatures together will explain a significant proportion of the pressure in a closed container. Also, maybe not as clearly, neither will individually be significant because they are correlated with each other and each is redundant given the other. That last clause is the kicker.

When you look at the significance of a regression coefficient (or the coefficient itself, for that matter) you are seeing the effect of that particular variable, given all of the others in the model. This is properly called the significance of a partial regression coefficient and the B is the partial regression coefficient itself. Either degrees Fahrenheit or degrees Celsius, alone, would be a significant predictor of pressure (this is the total regression) but either given the other, the partial effects, will not be significant.

This makes sense, I hope, and will help explain some seemingly strange regression outputs. It also leads us to the next issue.

Wrong signs (or How can the slope be negative when the correlation isn't?)

This happens all the time. You know that overall satisfaction and convenience are positively correlated—higher ratings on one of these go with higher ratings on the other and the lower ratings go together, too. Yet in a multiple regression, the sign of the coefficient for convenience is negative. How come?

There are a couple of things which can be going on. First, the t-statistic for the coefficient may not be statistically significant. We interpret this as an indication that the coefficient is not significantly different from zero and, hence, the sign (and magnitude for that matter) of the coefficient are spurious. Fully half the time, for a truly non significant effect, the sign will be "wrong."

The other thing that can be happening is the partialling effect noted above. It could be that the slope is negative given the effect of the other variables in the regression (partial) even though all by itself the variable shows a positive correlation and slope (total).

Try this. Here's a small data set.

Resp. #	OVERALL	Package	Value	Taste	Color
1	5	6	9	13	11
2	3	8	9	13	9
3	9	8	9	11	11
4	7	10	9	11	9
5	13	10	11	9	11
6	11	12	11	9	9
7	17	12	11	7	11
8	15	14	11	7	9

Let OVERALL be the dependent variable and run various regressions, first with each independent variable by itself and then with various combinations of the independent variables. Some things to look for are:

• Correlations between all variables, both in magnitude and sign;

• Sign and magnitude of regression coefficients (B) when each variable is by itself as a predictor;

• Sign and magnitude of regression coefficients for the variables when they are working with the other variable(s).

You should see some interesting things with respect to both the magnitude and sign of some of the regression coefficients. Are the signs sometimes "wrong?" If so, are they wrong when the variable is used alone or wrong in later models? Possibly they are wrong neither time, they just happen to not agree. By the way, checking the F-statistic for the models including more than one predictor and the individual t-statistics will also hammer home some of the earlier points.

Conclusions

The preceding paragraphs have addressed three or four pragmatic issues about using regression analysis. While they do more than scratch the surface, there are certainly other regression fundamentals that were neglected. However, taking the small data set provided and doing a thorough set of regressions should allay many of the qualms of that regression analysts face.

Ensuring satisfaction

With research as its guide, General American Insurance restructures for the future

By Sally Martin and Susan Spaulding

Editor's note: Sally Martin is a management consultant with General American Insurance, St. Louis, and Susan Spaulding is president of Market Directions, Inc., a Kansas City, Mo., research firm.

Whether or not the Clinton administration finds a way to get its health care reforms through Congress, insurance companies in the 1990s and beyond will have to be extremely competitive to survive. Even if the administration fails, the continuing explosive growth of the industry will demand further consolidation.

To retain their customer base, health insurance providers large and small must be very attuned to meeting customers' needs. Nowhere is that need more apparent than in group coverage — the meat and potatoes of industry earnings.

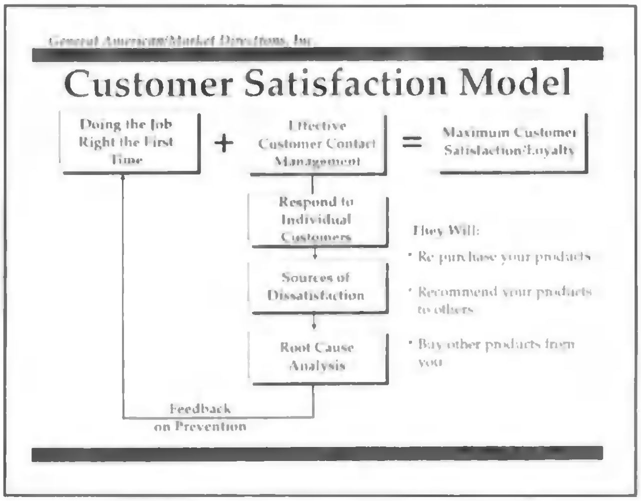
General American Insurance, a St. Louis firm with $197 billion in life insurance and $8.6 billion in assets, recently launched an internal and external assessment of customer satisfaction with its group insurance operations. General American has 2,000 group insurance clients, covering 2 million employees and dependents with group medical and life insurance.

The company's management consulting services, which structured and managed the project, sought the help of two firms with the research. It called on TARP Inc., an Arlington, Va., customer service consulting firm, for help with creating a model of how General American's employees contribute to customer satisfaction. To talk to its customers, General American retained Market Directions, Inc., a Kansas City, Mo., research firm.

Market Directions explored customers' satisfaction and dissatisfaction through in-depth interviews, focus groups and telephone interviews, and then prioritized the factors that respondents said contributed most to satisfaction.

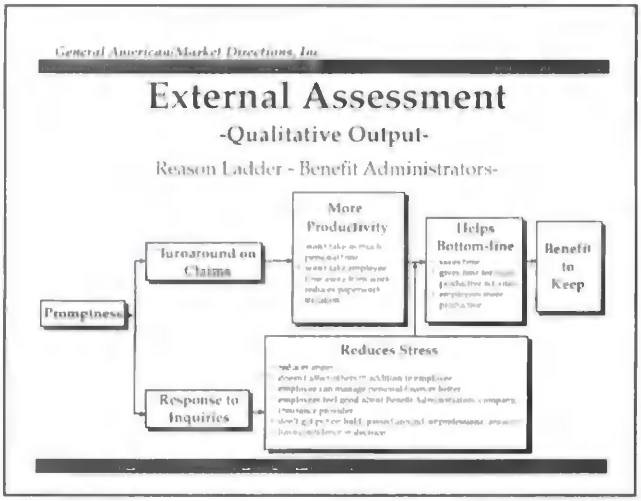
Service gaps

While the external assessment focused on the gap between the service customers wanted and what they felt they were receiving, the internal assessment focused on the gap between the service employees felt they were delivering versus what they would like to deliver. For the internal research, General American's consulting group looked into the effectiveness of the existing customer service system, relying heavily on observation and staff interviews. The General American consulting group monitored service representatives and interviewed 160 employees, most of whom worked in Group Operations.



The internal assessment was launched to identify organizational and operational barriers that prevented the company from delivering outstanding customer service. The system General American had in place for handling customer contact was analyzed using TARP's 19-function framework, which assesses the effectiveness of 19 customer contact functions such as screening calls, formulating responses to customer inquiries and using customer contact data to shape internal policies. General American employees were asked to identify what was preventing them from serving their customers better.

In the external assessment, Market Directions used qualitative and quantitative techniques, exploring satisfaction in various areas though interviews with brokers, benefit administrators and employees of client companies. Focus groups



were conducted with benefit administrators and employees; in-depth telephone interviews were conducted with brokers.

The group sessions began by defining satisfaction in the eyes of General American customers. The core elements of satisfaction were then prioritized based on importance. Using a probing technique called laddering, the most important factors were explored, helping Market Directions uncover the ultimate benefit of each to the individual and, therefore, to General American.

The results of the qualitative assessment provided the basis for the quantification, the objectives of which were to investigate overall satisfaction, validate which factors were important to satisfaction, learn how well the insurance company performs and determine which factors most directly affect customer satisfaction. Based on what they found, General American's consulting group and Market Directions recommended areas needing improvement.

Hundreds of interviews

After conducting more than 300 telephone interviews with benefit administrators and 500 personal interviews with client-company employees, Market Directions compiled rankings of the most important factors involved in customer satisfaction. The employees noted claims processing, consistent coverage, and prompt, professional telephone service, among others.

The exact areas of customer satisfaction Market Directions

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Survey Monitor

Americans grow crazy

The stereotype has the woman working the garden while the man of the house relaxes in a hammock — and the facts concur, with regard to tending flowers anyway. In a survey for the new Simmons Study of Media and Markets, issued by Simmons Market Research Bureau Inc., New York, 33 percent of the female respondents said they till the bed for the blooms, as opposed to 21 percent of the men. The survey further profiled America's hobby gardeners: People between the ages of 54 and 65 are 30 percent more likely to have flower gardens than the average population, and the Midwest is the hotbed of floriculture — 22 percent more folks there have flower gardens. You can find rakes in the homes of 33 percent of those surveyed, and while you're at it you might look for garden shears (25 percent), hoes (24 percent) and wheel barrows (18 percent). And in a blow for equality, men are just as likely as women to dig vegetable gardening. And middle-aged, married Midwesterners are the most fervid growers of vegetables. For more information, call 212-916-8952.

Garden in a box proves popular

An Ohio State University researcher thinks so-called convenience or planned gardens have the potential to bring out the green thumb in just about anyone. Prepackaged collections of bedding plants that come complete with design diagrams and instructions make it easy for even the horticulturally challenged to grow something green and beautiful. Jeanne Youger-Comaty of OSU's Consumer Horticultural Center says that one area seed company is offering 26 different prepackaged convenience gardens this year.

While Youger-Comaty praises the prefab gardens for their time-saving and confidence-boosting qualities, she offers her blessing with some caveats. You must, for example, check out the plan before buying to make sure it's suitable for your gardening space — even the easiest-to-grow plants need the right conditions.

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Vice President
Director

David Miller, formerly with Kapuler Marketing Research, has joined *Conway/Milliken & Associates*, a Chicago marketing research company. Miller is a vice president for the company. **Sharon Swanson** has joined CMA as an account manager, **Jeananne Turner** becomes a project manager, and **Matt Le** is data manager for the firm. Swanson, Turner and Le also came to CMA from Kapuler. Meanwhile, **Joanne Robbibaro** has signed on as vice president, data collection. She joins CMA from M/A/R/C, Irving, Texas, where she was director of field data collection.

Ellen Boisvert has been named to the *Public Relations Society of America's Research Committee*. Boisvert is director of research for Dudley Research, Exeter, N.H. The PRSA's Research Committee explores specifications for research that will set standards for measuring and evaluating public relations, find ways to make better use of PRSA's accreditation process, and present a forum on research at the PRSA's national conference in 1995.

Les Leathem and **Annemarie Menges** have joined *Healthcare Communications Inc.*, Princeton, N.J.


Leathem


Menges

Leathem is vice president/marketing. In his new position, he will draw on his background in the pharmaceuticals industry to help HCI clients apply the firm's products and services to their marketing efforts. Menges has assumed the role of advertising rate-card coordinator.

Gail Maffai and **David Schafer** have joined Arlington Heights, Ill.-based *Market Facts Inc.* as vice presidents.


Maffai


Schafer

Maffai will work out of the company's New York office, while Schafer moves into its Boston facility. Previously, Maffai was director of corporate accounts for the NPD Group Inc. Schafer

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Research Company News

ICT Research Services, a division of Langhorne, Penn.-based ICT Group Inc., has moved. ICT Research Services is the umbrella company under which Valley Forge Information Service, Solution Research Services and Princeton Data Search operate. ICT Research Services' address and phone numbers are: 584 Middletown Blvd., Langhorne, PA 19047-1822; 215-702-9300 and 215-702-9303 (fax). VFIS also has moved to the same facility.

Chicago-based **Information Resources Inc.** has formed a partnership with the 2,000-member National Housewares Manufacturers Association to provide point-of-sale scan data to housewares manufacturers. The scanning data from the service will be available from mass merchandisers, drug stores and various other outlets. Black & Decker is the first NHMA member to participate in the POS program.

In other IRI-related news: A federal district court jury decided in June that the company and four of its top officers had not violated federal securities laws in a case that revolved around comments made in 1989 about the company's earnings prospects. Plaintiffs in the class action, filed on behalf of IRI stockholders, had sought compensatory and punitive damages from the company and individual directors, including Chairman Gian M. Fulgoni.

IRI has signed a letter of intent to acquire a minority interest in Cyprus-based **MEMRB International**. MEMRB provides syndicated market tracking and custom research services through a network of offices in 22 countries and its operations in the Middle East, the Mediterranean, Eastern Europe, the Commonwealth of Independent States and Africa. The company was founded in 1962 by the late George Vassiliou, who was then president of Cyprus. It offers retail audits, media research, continuous public opinion studies and ad hoc consumer and business-to-business research. MEMRB recently has introduced audit services in Russia, Poland, Hungary and the Czech Republic. Terms of and a schedule for the proposed acquisition were not revealed.

Further, IRI has announced revenues for the quarter ended June 30, 1994, of $92.2 million, a 12.3 percent increase over 1993 second-quarter earnings. The company reported essentially no net income during the period and a net loss of almost $8 million in the first six months of '94 — the result, the company says, of litigation costs precipitated by an abortive merger with Survey Research Group.

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Product & Service Update

Updated gardening study forthcoming

Organic Gardening, published by Rodale Press, Emmaus, Pa., will release its second "Gardening in America" study in early 1995. The magazine promises the most comprehensive look at green thumbs in the United States. The new study will build on the first "Gardening in America," issued in 1992. The questionnaire for the new study will include many of the same questions as the first, allowing researchers to make comparisons and identify trends. While the original survey looked specifically at the country's 61 million gardeners, "Gardening in America '95" will include answers reported by nongardeners and gardeners alike for comparison's sake. The study is designed to offer a detailed psychographic profile of America's gardeners, and will include information on gardeners' plans to go organic, factors influencing power equipment purchases, and home gardening habits. The survey will be conducted by Greenwich, Conn.-based NFO Research. When issued, it will be available in three formats: a descriptive executive summary; a tabulation report consisting of several hundred pages of annotated tables; and a database for PCs. For more information, call Scott Overholt at 610-967-8556.

SPSS seminars scheduled

SPSS's one-day seminar on customer satisfaction measurements is currently touring North America. SPSS is based in Chicago. The seminar is designed to give professionals the information they need to conduct in-house programs on customer satisfaction. Covering techniques and strategies for building programs, the seminar agenda includes a question-and-answer session with SPSS market research professionals wherein sample questionnaires and surveys are analyzed. Participants learn how customer satisfaction measurement fits into a total quality management program; discover which measurement strategies fits their needs; determine which characteristics of the products and services their company offers should be measured; learn how to select a sample, design a questionnaire that asks the right questions, analyze data and present results, and use results to implement change. The seminar will be offered on Nov. 29 at the Delta Hotel Office Tower In Ottawa, Ontario, and on Dec. 7 at the Wyndham Garden in Costa Mesa, Calif. For details, call SPSS at 800-543-6607.

Quantum offers customer profiling system

The Customer Profile System from

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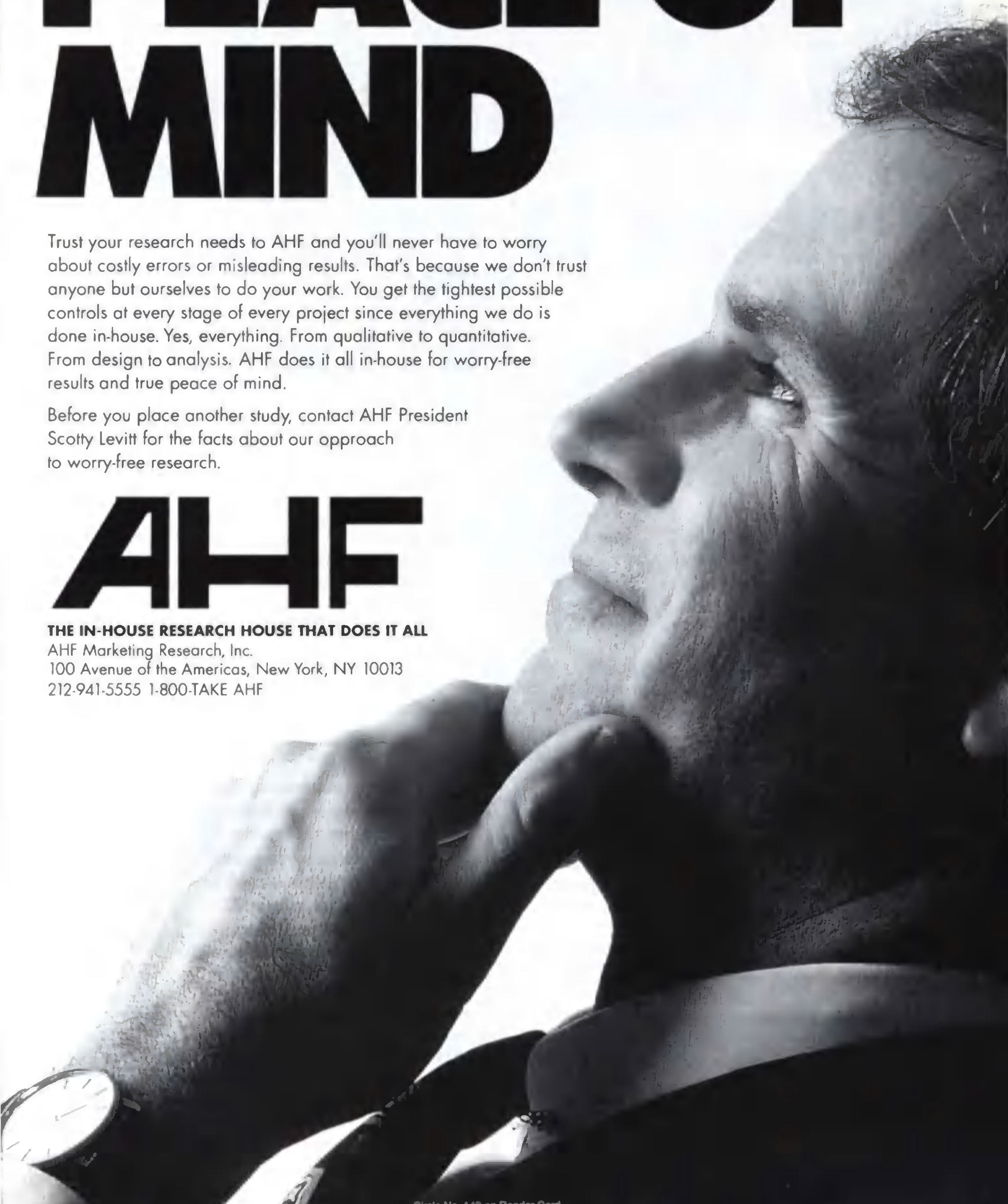


Circle No. 143 on Reader Card

The need for customer satisfaction research will continue to GROW

By Kenneth Long

Editor's note: Kenneth Long is the director of Penton Research Services, a full-service research group in Cleveland. The study findings presented in this article are taken from a series of PRO Reports published by Penton.

Spending on customer satisfaction research by American industry has grown tremendously in recent years, and a number of trends suggest that the need for this type of research will continue to rise in the years ahead, particularly among firms that sell to other organizations.

Companies are buying more, but from fewer suppliers

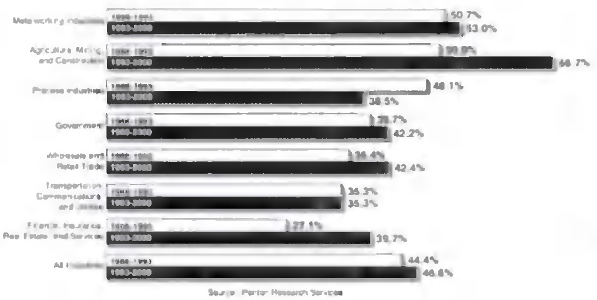
Business and government markets are growing, but getting tougher to sell to. Organizations bought more than $8.3 trillion worth of goods and services in 1993, according to Penton Research Services' estimates. Spending has increased every year since 1982, even during the 1990-91 recession.

Companies forced to downsize in recent years are now buying many of the goods and services they used to produce internally. Goods-producing industries outsource the most, although government — which is privatizing a number of operations — and many service firms expect to do more outsourcing in the years ahead (Figure 1). Total business and government purchases are expected to double over the next decade, reaching $17.5 trillion by the year 2005.

Figure 1

How the Use of Outsourcing Is Growing

Percent of Purchase Decision Makers Who Reported an Increase in the Amount of Outsourcing Done by Their Organization From 1988-1993 and Who Expect the Amount of Outsourcing Done To Increase From 1993-2000



However, it's also becoming more difficult for suppliers to get — and keep — customers. A Penton Research Services study found that 40% of large business and government units are buying from fewer suppliers than they were five years ago, even though the amount purchased is up. And nine out of ten purchasing executives at Fortune 1000 companies surveyed by the Center for Advanced Purchasing Studies (91%) expect to use fewer sources of supply in the year 2000.

Business and government buyers want to establish partnerships with their suppliers. Properly-conducted customer satisfaction research can help a company build stronger relationships with both current clients and key prospects.

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Business-to-business customer satisfaction research comes of age

By William Bucker

Editor's note: William Ducker is senior partner of Ducker Research Co. Inc., Bloomfield Hills, Mich.

The concept of customer satisfaction is not new. Thirty years ago, sales managers in industrial companies were interested in the views of their customers. The information-gathering process was informal and little effort was expended ascertaining the views of prospective customers or lost customers.

Today, managers in all departments, not just sales, are called on to produce solid information that will benefit the company in very tangible ways. Further, information-gathering techniques are much more sophisticated, the information developed is more comprehensive, and companies base a broader spectrum of decisions on customer-satisfaction findings.

What's more, the term customer satisfaction has come to apply to projects that go well beyond customers. These days, noncustomers and former customers usually are included in business-to-business research projects, and no study is complete if it doesn't address competitors. Employees also often are included.

Customer satisfaction debuts

In the 1960s, sales and field service managers at industrial companies were interested in customer views, but the information was not deemed critical. Product design and manufacturing departments had little to no interest in the results of whatever customer satisfaction surveys were done. Top management was interested only if a serious problem emerged or if a major customer who had the ear of senior executives was involved.

All that having been said, firms did do business-to-business marketing research. A great deal of work was underway in new product research, market segmentation research, product positioning studies, distribution studies and advertising effectiveness studies. Companies obtained customer views as a by-product of these efforts.

Information about customers' atti-

tudes was used almost entirely in the interactions between sales and field service staff. Product design and manufacturing rarely received any feedback, and research and development departments received only minimal reports. In fact, most new product studies were conducted after the product was developed.

Beyond suggestion boxes and a few formal programs, input from employees was seldom sought and was mostly ignored when received.

Growing pains

In the '70s, the term "marketing" gained popularity. Sales and marketing managers as well as research and development managers and senior managers sought customer and user input on new products early in the development process. Sales and marketing managers also wanted to better understand the purchase-decision process, and senior managers were very interested in segmented market-size determinations with comprehensive growth projections.

During this stage in the development of customer satisfaction, companies became increasingly interested in customer attitudes toward them. In particular, there was a great deal of activity in dedicated studies of customer buying practices. Specific audiences were addressed: customers at the top of the 20/80 pyramid and OEM customers separate from replacement customers and distributors, for example. Marketing managers wanted to understand the influences on the purchase-decision process and they wanted to know who was making the decisions.

Gathering customer information, however, was still a one-shot process: Ongoing programs were nonexistent, the manufacturing process remained uninfluenced, and employees still had no input. Further, even though overseas clients were looking at U.S. markets, few stateside companies took a global approach and studied overseas operations.

The studies were based on in-person and telephone interviews. Some mail was used and industrial focus groups gained popularity. Techniques such as conjoint analysis were developed and marketing researchers started to assign importance characteristics to purchase-decision criteria.

Coming of age

Customer satisfaction really came of age in the '80s. Driven by top management, business-to-business customer satisfaction studies started with big customers, then encompassed all customers. Competitors were considered in performance assessments. Late in the decade, noncustomers and lost customers began to be included. Industrial companies started to do formal satisfaction studies among employees.

Companies began taking a more serious and formal approach to business-to-business customer satisfaction programs. Extensive pretest fieldwork, including focus groups, was conducted to define factors in customers' terms. Respondents assigned numerical importance values to criteria. Sponsoring companies and competitors were evaluated against those criteria.

Studies began to be multidivisional and often international in scope. Update studies were conducted. Results were fed back to all departments, including product design and manufacturing. Industrial companies started to seek out the voice of the customer before conducting research and development. Customer satisfaction input became an important part of both Malcolm Baldrige Award evaluations and total quality management programs. Experts in the field — such as John Ettlie, director of the Office of Manufacturing Management Research at the University of Michigan's School of Business Administration — become convinced of the importance of client feedback. "Manufacturing management must have consistent, reliable input from customers if TQM programs are to be effective," Ettlie says.

As the '80s moved along, dozens of analytical techniques emerged: strategic improvement analysis, top box/bottom box analysis and reward penalty analysis, just to name a few. Many companies came to depend on customer satisfaction indexes as a measure of progress. Some even tied employee compensation to customer satisfaction index measurements.

All of these analytical techniques proved valuable, but market researchers went too far. Too many numbers and too much detailed input amounted to micromanagement. Researchers went far beyond the detail needed to run even the largest industrial companies. It became difficult to tie customer satisfaction to actual sales results. Management was not getting, but now is insisting on, results the company can immediately put to use.

Forward into the future

Numerical input still is very important, but researchers need to provide a great deal more qualitative input if the results of customer satisfaction efforts are to lead to feasible, worthwhile recommendations. Performance ratings have to be used wisely and judiciously. Perspective must be applied to findings of dissatisfaction. (What does "dissatisfied" really mean?) Companies and the research firms they hire should define customer expectations and customers' versions of ideal performance.

Best-in-class benchmarking studies are popular. They can and should be incorporated into customer satisfaction studies. Further, best-in-class determinations need not be confined to the sponsor's industry or country.

Industrial market researchers should be taking an even more formal approach. Early planning that includes input from management and key employees is essential. Pretest interviews should include competitors, noncustomers and perhaps even representatives of other industries. Frequent review meetings should be scheduled with all participants.

Business-to-business customer satisfaction must be measured on a continuous basis. All departments of a company should be involved — design and manufacturing as well as sales and marketing. Today, projects often are conducted around the world-wide: analysis is done at corporate headquarters.

In addition to conventional analytical techniques, market researchers are exploring alternative scenarios, asking respondents "what if?" questions regarding possible moves by the sponsoring company. Trade-off analyses are conducted: respondents are asked to define the relative value of a client's actions. Analyses that predict returns on investment are not at all uncommon.

Business-to-business customer satisfaction has become an integral part of industrial corporate management. "Customer satisfaction studies have become so complex that management finds it difficult to interpret results. We need, and now are getting, skilled analyses that present results in an understandable format upon which management can base sound decisions," says Edward Donnelly, worldwide director of DuPont Automotive Finishes.

Business-to-business marketing research professionals must pay attention to the qualitative side as well as the numerical and continue to strive for customer satisfaction findings that lead to usable results. ❑

Dwelling on satisfaction

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"We feel that the accumulation of all those contact points adds up to a customer's perceived value of their experience and customer satisfaction. That's what makes us unique and that is what's not being measured by the industry.

"A lot of people don't measure all the components of staff. It's more than how the staff performs overall. We break it down into six or seven categories which include a lot of attitude-related things: willingness to go the extra mile, timeliness, a sense of genuine concern, and their ability to administer policy. If you measure all of those things that gives you a much more comprehensive measure of how our staff does."

"That's the secret formula: to have an office staff that is genuinely concerned with the residents' happiness, is responsive to their needs and is willing to go the extra mile. We're not out to meet expectations, we are out to exceed them, and exceeding expectations is what drives long-term loyalty."

Seek their input

It was important at the outset to seek residents' input on which issues the research should measure, Rader says.

"We're measuring what they perceive as the most important items for us to do well on. That includes things that people may overlook in our business. It may be how they perceive their relationship with their neighbors — that's very important and a lot of management companies overlook it. It's a difficult thing for us to respond to, but it's something that we like to know about."

Measuring specific service aspects makes it easier to act on what the research uncovers, Rader says, citing the satisfaction surveys distributed on restaurant tables and at hotel checkout as examples of reactive rather than proactive research. "They may point out a problem, but by then it's too late. We want to do research that tells us not only if there's a problem but how we can solve it."

Secret formula

Results of the ongoing program are given to the entire company annually at Homecorp's national seminar and then are passed on to managers, who meet with their respective staffs.

"In running cross tabs we found that ratings of office staff were the single greatest predictor of customer satisfaction. And office staff is the single largest thing we have control over, so we realized that when customers aren't happy we have no one to blame but ourselves. That's the secret formula: to have an office staff that is genuinely concerned with the residents' happiness, is responsive to their needs and is willing to go the extra mile. We're not out to meet expectations, we are out to exceed them, and exceeding expectations is what drives long-term loyalty."

Selected Homecorp managers meet to discuss results from the national satisfaction and employee studies and generate ideas.

Homecorp also measures employee satisfaction, thereby supplying the last part of the customer satisfaction equation. "If you don't have a satisfied employee you can't have satisfied customers. Our associate-satisfaction study focuses on communication between management and associates, personal and professional growth and idea generation for improved satisfaction with work environment, all of which we know have an impact on customer satisfaction."

Satisfaction can be profitable

Like many companies that have taken up the customer satisfaction gauntlet, Homecorp has learned that doing good can mean doing well. "Without a doubt it is much more profitable to focus on satisfying the customer," Rader says. "It's probably the most profitable way to improve your business. The second thing is it's the most rewarding way of doing business, not just for us in the corporate office but the people on-site every day.

"The program has been a huge success, has increased bottom-line profits significantly, reduced turnover, and we've seen satisfaction grow by property in the last two years dramatically."

It's difficult to assess trends at this point, Rader says, due to the newness of the survey and the fact that there isn't a lot of other industry research with which Homecorp's can be compared.

Since the program is only a few years old, wholesale changes aren't in the works. Homecorp is confident that by continually asking residents what's important to them, the company won't lose touch, Rader says. "We don't want to measure the wrong things, and if you're out talking to your customers every year at each of your properties it would be hard to measure the wrong thing. Our goal is to never let our surveys become antiquated.

"Listening to our customers and our associates has been the cornerstone of our success with this program. That listening has generated new ideas and resulted in a stronger bond between us and our residents." ❑

Survey Monitor

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She also warns against choosing a package that's too big, and says that the convenience garden should be a starting point, not an end. Once you get some dirt under your nails, take the opportunity to improvise and let your garden grow.

Soccer — America's sport of the future

After watching Brazilian defender Leonardo's flying elbow crack American Tab Ramos' skull in a World Cup match this summer, U.S. parents may be a tad less convinced that they can sign up their kids for *futbol* without worry. The reality, though, is that the sport doesn't get too terribly wild until you start playing for the honor of your country. Up to that point, soccer's relative purity makes it ideal for and immensely appealing to kids, and numbers published by the Soccer Industry Council of America, North Palm Beach, Fla., attest to its growing popularity in America. In 1993, 16.4 million people played soccer at least once — a 7.9 percent increase over the previous year's total. Among kids under 12, only basketball attracts more players, and soccer is the fourth most popular participation sport among under-18s. Most players are male, but the gap is narrowing: In 1992, 38 percent of all players were females, but last year 41 percent of all players were female. The number of frequent players (more than 24 days per year) increased, too — from 40 percent of all players in '92 to 44 percent in '93. The SICA reports that there are 3.3 million soccer aficionados — for whom soccer is their favorite activity — in the United States.

The SICA's figures are derived from the National Soccer Participation Survey, a syndicated tracking study conducted by American Sports Data Inc., Hartsdale, N.Y. For more information, call 407-840-1171.

Sports medicine sales bulk up

Sales of sports clothing are down. The decline could be chalked up to Americans reestablishing their love affair with laziness, but a recent study by New York-based Packaged Facts seems to indicate that sales likely have fallen off because folks are laid up at home with a pulled groin or some other nasty sports-related injury. People are either playing more or playing harder — whatever the case, they're getting bumped and bruised doing it.

According to the study, retail sales of over-the-counter sports medicine products grew 10 percent in 1993 to $551 million. There are three product categories in the market: topical analgesics (43 percent of retail sales for a total of $235 million in '93); athlete's foot/jock itch remedies (38 percent, $210 million); and elastic wraps and braces (19 percent, $106 million). The total market is expected to be worth $603 million in 1994, a 9 percent gain. After that, 10 percent annual growth is projected through 1998, when sales will reach $879 million — because a lot of people will be hurting. For more information, call 212-627-3228.

Ad agencies' 1992 numbers show strong gains

Final tabulations show that in 1992, after three years of declines, the nation's publicly traded advertising agencies increased operating income by 12.6 percent to $672.5 million and saw operating cash flow grow 9.1 percent to $904 million. Findings from the 11th annual *Communications Industry Report*, published by the New York investment banking firm of Veronis, Suhler & Associates Inc., offer further proof of a vigorous climate for large ad agencies. The report reveals operating income margins at 8.7 percent, up five-tenths of a point from 1991 and operating cash flow margins of 11.6 percent, up three-tenths of a point; operating income returns on assets at 6.6 percent, up five-tenths of a point; and cash flow returns on assets of 8.8 percent, up four-tenths of a point. Revenues for the group were up 6.4 percent to $7.8 billion. The year's positive results excluded the huge restructuring charges and writedowns recorded by Saatchi & Saatchi.

The robust 1992 advertising revenues and operating income trends, which continued into 1993, reflect increased acquisition activity in the United States and abroad, modest improvement in the domestic economy, and advertising activity surrounding a number of high-profile special events, such as the Olympics, that attracted substantial advertising dollars.

Omnicom was 1992's most active acquiring company. It spent a total of $80.9 million for TBWA International (a stock swap), Canada's McKim Advertising and the portions of Goodby, Berlin & Silverstein and Baker Lovick BBDO that Omnicom did not already hold.

Publicly traded companies earned 55 percent of all U.S. agencies' worldwide revenues in 1992. Since 1988, revenues of publicly owned agencies have risen overall by 5.2 percent, compounded annually — well above the 1.8 percent growth rate of total U.S. measured media advertising. For more information, call 212-935-4990.

Popularity of malls droops

Malls, once firmly established as the epicenters of American pop culture, have lost some of their appeal, according to the results of a study done by Maritz Marketing Research Inc., St. Louis. Of those surveyed, 32 percent said they are using malls less frequently than they were a year ago. The new study confirms a 1990 Maritz survey that also showed malls' popularity waning. Store owners may be particularly distressed to learn that women are leading the charge away from malls. Over a third of the women surveyed (36 percent, compared to 28 percent of the men) said they are shopping at malls less often. Only 14.2 percent of those surveyed said they are hitting the mall more frequently.

Money and time factor heavily in the mall equation. Nearly a fourth of those surveyed (24 percent) don't use malls as much because the stores are too expensive (11 percent said they think mall shops are more expensive than discount stores). Another 16 percent are too busy or don't have the time to shop at malls: 8 percent said traffic and parking are problems. A number of people think malls are too crowded (26 percent). Surprisingly, 18- to 34-year-olds are most likely to cite crowds as the biggest drawback (36 percent, compared to 21 percent for all other age groups).

Still, those surveyed stop at the mall 2.6 times per month on average. Those 18 to 24 years old shop most frequently — an average of 3.8 times a month. The survey indicates that 83 percent of Americans visit the mall at least once a month. Not surprisingly, what many people (42 percent) like about malls is the large selection of stores. One-stop shopping attracts some (25 percent), while convenience lures another group (11 percent). The survey revealed that the average shopping trip to a mall lasts 2.1 hours, and, in support of an unfortunate stereotype, women tend to spend more time (2.5 hours) on each trip to the mall than men (1.8 hours). The Maritz AmeriPoll is a national consumer opinion poll conducted regularly. For the poll, 1,000 adults — women and men in equal measure — are surveyed by telephone. For additional information, call Phil Wiseman at 314-827-1610.

California's retail market proves a jumble

After analyzing 11,475 general merchandise stores' actual retail sales from 1990 to 1993, the *California Retail Survey*, Carmichael, Calif., has discovered that it's difficult to generalize about the state's retail market. While California's general economy has been sluggish — 83 of the 220 local markets experienced declining sales during the period — stores in 51 communities saw sales grow by more than 10 percent per year. Twenty of the 51 had average growth of more than 30 percent. The *C.R.S.*, an annual publication that tracks and analyzes short- and long-term retail trends, discovered average sales growth of 3.4 percent over the last three years. According to the survey, general merchandise stores control some 18.1 percent of the retail market in California. For more information, call 916-486-9403.

Convenience stores change or die

Could it be that Ho-Ho's have lost some of their appeal? The convenience store industry, which enjoyed explosive growth from 1952 to 1990, has taken a hit lately, according to a study published by FIND/SVP, New York. The number of stores climbed from 44,100 in 1980 to 71,200 in 1990, but since then, 3,300 stores have closed. While it's tempting to proffer the notion that health consciousness has turned folks away from the local Kwik-E-Mart, economics drove the fall: Customers perceive that convenience store items are not competitively priced. Yet irony reigns supreme at the checkout counter, as people with relatively low household incomes are more likely to shop at convenience stores than those with incomes in excess of $50,000. Convenience store shoppers are also tend to live in households with three or more members but no female parent figure. Customers also tend to be African-Americans who did not graduate from high school and work in a blue-collar position.

The findings are collected in The Market for *Convenience Foods in Convenience Stores*, written by Catherine Roberts and published by FIND/SVP. The publication estimates that the market for convenience-store food added up to $2.21 billion in 1993. The sales breakdown included deli products (excluding sandwiches), 26.3 percent; fresh sandwiches, 23.5 percent; foods cooked on site, 17.2 percent; other fast foods, 17 percent; and frozen sandwiches, 15.9 percent. Roberts believes that in the coming years, successful convenience stores (and g-stores, which are operated by petroleum marketers) will sell more fresh sandwiches, foods cooked on site and other fast foods, though frozen sandwiches are likely to continue to be offered in more stores than any other single item. She also predicts that stores will continue to downsize and look to partnerships with fast-food chains for opportunities to create programs specifically tailored to convenience stores' customers. For more information, call James Demas at 212-645-4500.

Technophobia runs rampant

For most Americans, the cutting edge is out of sight. Interactive media has industry insiders all atwitter, but more than anything else, the average joe is still in the dark. *(Ed. note: I resent that remark.)* "Tele-Nation," the national telephone research newsletter published by Market Facts, Arlington Heights, Ill., reports that in a survey it conducted for *Advertising Age* magazine, only 19 percent of those contacted claimed to be aware of the concept of interactive media. Only 7 percent of respondents said they were very interested in getting interactive media on their home TV; 26 percent were somewhat interested; 66 percent couldn't give a hoot. The upside for media marketers is that younger and more affluent people responded somewhat more enthusiastically (47 percent said they were somewhat interested and 9 percent were very interested), and 40 percent of all respondents said they would be willing to pay for the new media. Those who are interested in interactive media say they are most interested in movies on-demand and TV programs (55 percent), educational children's shows (48 percent), travel reservations/information (40 percent), TV game shows (33 percent), sporting events (31 percent), electronic mail (27 percent), video games (26 percent), music-channel shopping services (25 percent), online services such as Prodigy (25 percent) and home shopping (22 percent).

Yet the problem remains: People generally don't buy stuff they don't understand — it would seem those would like to sell interactive media have some explaining to do first. For more information, call 708-590-7000.

Celebs sway fashion choices

Maybe posing gravid and naked on the cover of *Vanity Fair* wasn't such a bad idea after all — the young women of America seem to think Demi Moore is extremely hip. According to a recently completed *Us* magazine survey, women 18 to 34 most want to look like actress Demi Moore. Moore, at 21.1 percent, was significantly more frequently picked than Cindy Crawford, the No. 2 choice at 15.6 percent. The list was, ahem, rounded out by singer Janet Jackson (15 percent), actresses Julia Roberts (14.2 percent) and Sharon Stone (14 percent), and ubermodel Paulina (9.7 percent). Those surveyed also most frequently picked Moore (19.7 percent) as the primary influence on their fashion choices for evenings out. Tellingly though, 25 percent of the women surveyed said they would like their husband or boyfriend to tell them they look like Crawford, promoting the idea that women admire well-rounded celebs while believing that the men in their lives want a woman who's curvaceous more than anything else. What's more, respondents believe that Crawford (19.3 percent) has the most exciting lifestyle. Moore pulled up second at 18.3 percent.

Entertainers in general get more of young American women's respect than models do. Product endorsements from entertainers (52.5 percent) are more likely to be believed than those from models (47.5 percent). Respondents more often eyed entertainers' fashions (57.4 percent), and more of them took tips from actress, singers and the like (60.2 percent). On the other hand, 24.5 percent of the respondents in the survey said they took makeup tips from Cindy C., as opposed to 17.6 percent from Moore. Maybe they just want that mole.

Women go for green things

Women want manufacturers to get hip to environmental consciousness. A vast majority of women surveyed by EDK Associates, New York, say they want the federal government to force companies to stop polluting the environment. While a similarly large majority (94 percent) believe they can help the cause by recycling, women increasingly are interested in influencing the environment with their pocketbooks. Of those surveyed, 66 percent said they're thinking green when they go shopping. Women of all age groups, incomes and occupational status bring an environmental agenda along with them when they hit the stores, but 45- to 54-year-olds (73 percent), those with a household income of $45,000 to $54,999 (75 percent) and homemakers (75 percent) most often said they made purchases with the health of Earth in mind. Those 65 and older (59 percent), women with a household income of less than $25,000 (65 percent) and full-time workers (62 percent) represented the not-too-distant other end of the scale.

While 38 percent of those surveyed said their biggest fear was that pollution would affect their health, a far larger portion (58 percent) worry about the next generation. Three-quarters of the 18- to 24-year-olds surveyed are most worried about the environmental legacy future generations will have to grapple with. More than a third (37 percent) cited the limits pollution puts on their outdoor activities as their top concern.

More often than not, women look at labels to find "environmentally safe" products: 63 percent get their information right from the can, while a much smaller group (12 percent) relies on the media for warnings. This presents manufacturers with a significant opportunity to do their bit by educating their customers. Despite their desire to buy right, almost half of EDK's green shoppers (48 percent) don't know why certain brands of toilet paper, jeans, detergent and appliances are safer for the environment than others. (Toilet paper made from recycled materials, jeans made with natural dyes and organically grown fibers, phosphate-free detergents and energy-efficient appliances get the green stamp.) EDK's research leads the company to believe that green shopping isn't just a trendy thing to do that will fade in popularity. The company expects environmental concerns to influence purchasing decisions even more significantly in the future.

EDK surveyed 500 women nationwide January 24-26 and reported its findings *EDK Forecast*, the company's newsletter. For more information, call 212-582-4504.

Ensuring satisfaction

continued from p. 17

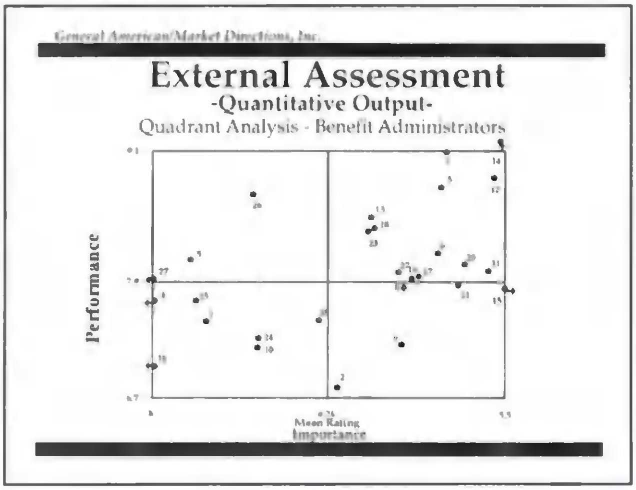
measured were reliability (performing promised service adequately); responsiveness (willingness to help customers and provide prompt service); competence (having the skill and knowledge needed to perform the service); courtesy (demonstrating respect, consideration and friendliness); access (being readily approachable and easily contacted); communication (informing customers in a way they understand); and customer needs (understanding what the customer wants).

Advanced analysis was applied to routine cross tabs. Quadrant analysis provided an excellent look into the external assessment of General American and showed the company what was important and what needed to be improved on for high performance ratings. Factor analysis identified which attributes were most important, and regression analysis showed which factors carried the most impact on overall customer satisfaction.

Prioritize improvement

A joint presentation was made to several levels of General American management using detailed charts and graphs to express what was learned. The company plans to improve communication with its customers and has acted to meet customer requirements. The research helped prioritize improvement efforts based on what is most important to the customer and it is driving General American's long-range (1995-1997) planning.

In addition, the results of the research will be used to create targeted surveys on particular aspects of the insurance company's service. This in-depth research will enable General American to become much more cost-efficient and will lead the company to



improved sales and longer-term relationships with its clients.

By investing in market research General American received solid, reliable information on what its customers want in an insurance company. The data will help it chart a path that it confidently can take into the future.

General American is certainly not alone. Many insurance companies are doing the same in the way of reengineering, because market pressures are forcing higher levels of efficiency and productivity among competitors. With so much competition in the industry, companies that are not reorganizing to provide better customer service might be in for dark days not too far down the road. ❑

Product & Service Update

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Quantum Management Group, Charlotte, N.C., is an integral part of the Performance Marketing packages that the company customizes for its clients. The system tells client companies how many people visited them, where the visitors are from, why they visited and why they chose a particular product or company over others. The Customer Profile System tracks results, measures impact and monitors market fluctuations. The information is provided in concise, understandable terms. Quantum uses state-of-the-art computer mapping programs, integrated with other data, to give management at client companies access to critical information. For more information, call 704-342-4488.

Audits & Surveys starts vending machine, pet products projects

Audits & Surveys, New York, has begun an audit of vending machines called VENDtrack and a study of the pet food and other products marketplace called PETS. With a sample of more than 3,000 candy/snack and beverage vending machines, VENDtrack offers nationally projectable information on an ongoing basis. The survey of machines will yield data on distribution and price, as well as breakdowns of product categories and a detailed analysis by brand within product categories. PETS, officially known as Pet Products Evaluating Tracking System, will offer a bimonthly overview of the $12 billion pet food and products market. Thousands of stores — pet shops, veterinarians' offices, farm feed businesses and pet "superstores" — will be visited and thoroughly audited each year. The latest point-of-sale information from those outlets where it is available also will be included. Audits & Surveys will provide clients with nationally projectable information on market shares and trends. For more information, call 212-627-9700.

Wright turns Apple's Newton into a data collection tool

San Diego-based Wright Strategies' OmniForm mobile data collection software is designed to be used by survey specialists, market researchers and others looking for sophisticated and accurate field data collection and forms creation capabilities. The system is based on combining the portability of Apple's Newton Personal Digital Assistant with the power of a Macintosh computer or a Windows-equipped PC. The system's form builder, used on the Mac or PC, allows users to create forms as a series of fields, each containing a question or prompt with a specific type of acceptable input. The forms are downloaded onto a Newton. Each field has an associated script, and each answer leads to an appropriate question — users don't have to skip around, and form designers can use the scripts to create forms that cannot be completed incorrectly. Data from a completed survey is transferred by modem or serial cable back to the host PC. The system offers permanent memory storage, an easy-to-use interface, handwriting recognition and advanced communications architecture. For further information, call 619-274-1047.

CMR develops nutrition and fitness program

Children's Market Research Inc., New York, has developed a program designed to educate children and teens about nutrition and fitness. The company has available materials that support the program. Kids' Pyramid Power should heighten kids' nutritional savvy by explaining the USDA's food pyramid concept in a way children can understand so they can apply the concepts to their lives. The first phase of the program is the "Kids' Pyramid Power Report" — a 50-page report providing facts, teaching methods and promotions. The report also includes the complete proposal for the Kids' Pyramid Power program. The proposal details the objectives of the program and explains exactly how they will be realized. Other elements are in development and will be introduced in 1995: curriculum guides, activity guides, a promotion involving school cafeterias nationwide, a weekly television series, a video game, music cassettes, the Kids' Pyramid Power home game and home videos. The report is based on 1994 information and research. The $295 price of the report includes enrollment in the Kids' Pyramid Power Network, through which information about kids and nutrition, new products and services, and promotions and premiums will be provided. For further information, call 212-794-0983.

International demographic comparison tool debuts

First Cut, an electronic reference sheet, facilitates quick comparison of 196 countries in terms of 16 different demographic variables — GNP per capita, for example. The result of a joint project conducted by Population Reference Bureau, Washington; Sherbank Marketing, Toronto; and W-Two Publications, Ithaca, N.Y., First Cut uses data from Population Reference Bureau's "World Population Data Sheet" and runs under Windows. First Cut users can browse through the program, ranking countries on different variables. It costs $29.95 and comes on a single diskette with a copy of the "World Population Data Sheet." For more information, call 607-277-0934.

Claritas data coming to SAS System

SAS Institute, Cary, N.C., and Claritas Inc., Alexandria, Va., have reached an agreement that will make 100 different Claritas demographic and marketing databases available to users of SAS/GIS software, the new geographic information system component of the SAS System. The SAS system is an integrated suite of software that enables enterprisewide information delivery. The databases will be formatted for SAS users in a way that provides an easy link between Claritas and the SAS System, allowing access to geographics, media usage, PRIZM lifestyle, health care, retail, crime and environmental hazards databases, among others. For more information or a catalog of Claritas data available in the SAS format, call 800-284-4868.

Customer satisfaction growth

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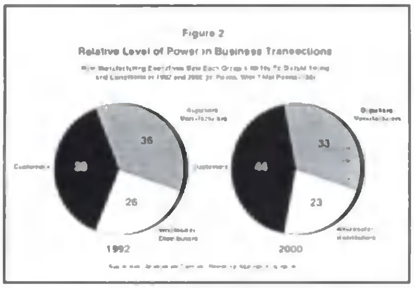
Customer power is increasing

The balance of power in business transactions is shifting to the customer. According to a study conducted by Arthur Andersen in conjunction with the Distribution Research and Education Foundation, the buyer's ability to dictate such terms and conditions as billing and pricing is expected to increase during the '90s, while the power of suppliers/manufacturers and wholesaler-distributors decreases (Figure 2).

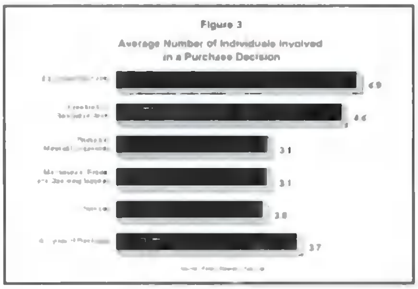


As buyers gain power, they'll have increased leverage to set standards for product quality and specifications, delivery time, and service. More than half of the executives surveyed by the Gallup Organization (53%) report that demands from their company's customers are rising or changing a great deal.

Research allows a supplier to truly hear the voice of the customer and tailor its product/service mix to changing buyer needs.

Suppliers need to satisfy multiple buying influences

Companies selling to industry have to please a number of different individuals within customer organizations, each with their own needs and agendas. According to a Penton Research Services survey, the number of people involved in a buying decision ranges from about three, for services and items used in day-to-day operations, to almost five, for such high-ticket purchases as construction work and machinery (Figure 3).



A Forsyth Group analysis of buying decisions at one large firm, Harnischfeger, showed that the number of individuals involved in the purchase of a single type of product can exceed 50. And it's not going to get any easier for suppliers. A Center for Advanced Purchasing Studies survey found that 87% of the purchasing executives at Fortune 1000 companies expect teams of people from different departments and functions to be making buying decisions in the year 2000.

A well-designed customer satisfaction measurement program that targets key buying influences can help keep current customers sold and identify ways to win over non-customers.

Quality is still job one

Customers want a good price, but refuse to sacrifice quality or service to get it. A Penton Research Services survey of business and government decision-makers found that quality is the single most important factor in choosing a supplier. Price received the second largest number of mentions, followed by reputation, delivery time, and technical assistance.

In fact, nine out of 10 business buyers believe that paying a higher price for quality is more cost-effective in the long run (Figure 4), and according to a study conducted by Kane, Parsons & Associates, most executives (86%) prefer to do business with suppliers that have made a formal commitment to quality improvement and customer satisfaction.

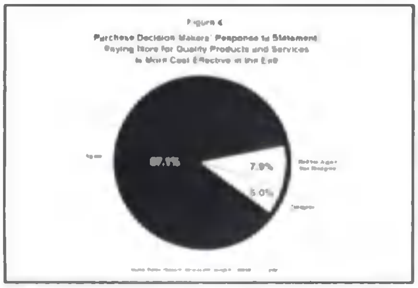


Figure 4
Purchase Decision Makers' Response to Statement Paying More for Quality Products and Services Is More Cost Effective in the End

The buyer, not the seller, determines what attributes of a product or service constitute quality, and research can provide an objective measure of what customers think, correctly or incorrectly, about a company and its competition.

The rate of change is fast and getting faster

American industry is in a continual state of flux. There are more than 8,200 new business incorporations, failures, acquisitions, address changes, and name changes on the average business day.

The buying influences that suppliers need to keep satisfied are also constantly changing. A Penton Research Services analysis of changes among managers, engineers, and purchasing agents found that more than 20% leave their company, change job titles, or transfer to another location over the course of a year. This means that more than half of the buying influences will probably change in some way within three years.

Most of the executives surveyed by the Gallup Organization believe that the current rate of change at their company is rapid or extremely rapid, and 61% of them think that the pace of change will accelerate in the future (Fig. 5).

Companies selling to industry have to continually monitor the marketplace to be able to respond quickly to changes in buying procedures, factors influencing the purchase, and the people making the buying decision. Customer satisfaction research will be needed more than ever by firms that want to survive — and thrive — in the challenging years ahead. ❑

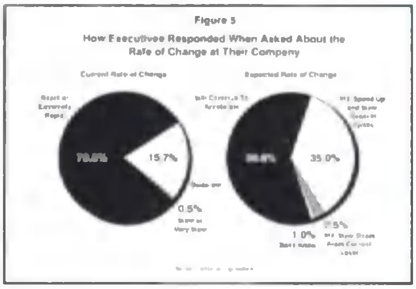


Figure 5
How Executives Responded When Asked About the Rate of Change at Their Company

Names of Note

continued from p. 22

was senior vice president of Quick Test. In addition to its headquarters and Boston and New York bureaus, Market Facts has offices in Washington, Los Angeles, Cincinnati, Toronto and Montreal.

Priscilla Light has been named senior project director at *Research 100*, a marketing firm based in Princeton, N.J. Light, who ran her own communications and marketing research company before joining Research 100, is responsible for the direction of research projects and client service.

Larry G. Chiagouris has joined New York-based *Creamer Dickson Basford Inc.* as executive vice president and director of client and strategic services. Chiagouris, who holds a Ph.D. in consumer behavior, is responsible for directing agencywide business development and the company's Research Services and Information Services departments, in addition to setting strategic standards on CDB account work and marketing the firm in general. Chiagouris comes to CDB from Backer Spielvogel Bates.


Chiagouris


Houghton

Jay Houghton has joined the *Dohring Co. Inc.*, Glendale, Calif. Houghton will serve as the company's account manager—OEM, and as such has opened a Detroit office for Dohring, an automotive research firm. In his new position, Houghton oversees the company's OEM and dealer advertising association activities.

Nicole Kane, Alison Munsch and **Anthony Vedugo** have joined *Market Segment Research Inc.*, a qualitative and quantitative market research concern with headquarters in Coral Gables, Fla. Kane becomes vice president of strategic planning. She comes from Leo Burnett Co., Chicago, where she did market planning, research and consulting. Munsch is senior project director/moderator. She came to MSR from Kraft General Foods, where she served as market research supervisor, and has experience in research techniques used in both long-term strategic planning and short-term opportunity assessments. Verdugo is a project director for MSR. He has managed various aspects of qualitative and quantitative research, and provided strategic analysis.

Jeffery Etherton has joined *Northwest Research Group Inc.* as qualitative research manager. Etherton will supervise and manage all aspects of the firm's qualitative research projects, including bidding, booking and the supervision of


Etherton


Dixon

recruiting. He will also supervise the facility coordinator and recruiting supervisor. **Joe Dixon** has joined Northwest as a research associate. At Northwest, Dixon is responsible for managing quantitative research projects. He previously was the principal at InfoBase in Kirkland, Wash.

Bob O'Brien has been named vice president and general manager of *NPD CREST*, Chicago.

Jeffrey J. Linenfelser has been named senior project director for *Stander Research Associates Inc.*, St. Clair Shores, Mich. **William G. Larkin** has been tabbed as project coordinator for the company.

Robert A. Hill has been made president of *Rockwood Research*, a St. Paul, Minn.-based a subsidiary of Farm Journal Inc. Hill comes to Rockwood from

Martiz Marketing Research, where he was senior research manager.

Todd Williford has been made the director of the *National Survey Center*, Arlington, Texas. The center is owned and operated by Decision Analyst Inc., also based in Arlington.

Gregg Stickeler has been promoted at *Interviewing Service of America Inc.*, Van Nuys, Calif., and **Jennifer Von Schneidau** has joined the company. Stickeler has assumed the role of vice president, data collection services, while Von Schneidau becomes vice president, project and client services.

Karen Flannery has been made a vice president for the Philadelphia-based *Response Center*. She will work out of the company's newly opened Chicago office.

Dean J. Kilpatrick has been named president of *ICT Research Services*, the market research division of the Langhorne, Pa.-based ICT Group Inc. Kilpatrick is responsible for managing the overall direction of ICT Research and expanding the division's client base and service capabilities. At the same time, the parent company has named **Robert Howling** as vice president of finance and has promoted **John "Jack" Magee** to executive vice president of operations, and **Robert Small** to senior vice president of client services. (For further information, see Research Company News.)

Kilpatrick

Thomas

Jerry W. Thomas has been named chairman of the Advisory Board of the *University of Texas at Arlington's* Master of Science in Marketing Research degree program. Thomas is the president and CEO of Arlington-based Decision Analyst Inc. The school's program is designed to prepare students for careers in marketing research, product of brand management, marketing management, advertising and strategic planning.

Karole N. Friemann has joined *Three Cedars Inc.*, Omaha, Neb., as vice president of market research. Friemann leads the market research staff and will spearhead the expansion of the company's research division.

Teri Williams has joined *Atlanta Focus* as project manager. She is responsible for all qualitative research projects and new business development for the company.

Thomas E. Miller has rejoined *FIND/SVP Inc.*, New York. Miller helped found the company in 1969; he left in 1982, but has returned to become a vice president of the company's new Emerging Technologies Group. He will direct the group's activities as it conducts a series of major multiclient studies assessing consumer and home-office information use and demand. He also will spearhead FIND/SVP's participation in the development of new products and services for the information superhighway.

The *Marketing Research Association* has presented **Linda K. Tessar** with its 1994 Distinguished Service Award and **Christine O. Adams** with its 1994 Award of Excellence. The Distinguished Service Award is given in recognition of extensive and notable service to both the association and the marketing research industry in general. The Award of Excellence is given to recognize service to the association and to local chapters. Tessar is president of NETWORK, Covington, Ky., a coalition of industry leaders involved in data collection and field management services. Adams is vice president of operations for the BASES Group, a company specializing in new product evaluation and forecasting using simulated test markets and test models. The Bases Group is also in Covington.

Tim McPartlin and **D.J. Jefferson** both have been promoted to senior vice president positions at *Lieberman Research West*, Los Angeles. The promotions coincide with LRW's opening of three Centers of Excellence. McPartlin will head the International Research Center while Jefferson leads the Litigation Support Center. **Maria Stark**, a vice president with the company, has been tabbed to head the Qualitative Research Center. (See Research Company News.)

Phil Brantley has become a vice president of *Creative Research Services Inc*. He also will serve as the managing director of the company's Cincinnati headquarters.

Atlanta-based *SDR Inc.* has added **Shahrzad Amirani** and **Chuck Mobley** to its *Marketing Services Group*. Amirani will serve as senior consultant, research methods. She will consult with both research-company and corporate clients in designing and executing advanced methodological approaches to strategic marketing issues. Mobley is an experienced programmer in several statistical packages, specializing in SAS.

SDR also has established account and project management teams, adding and promoting personnel in the process: Operations manager **Ann Morrell** will add responsibility for all mailing services to her duties. Midwest regional manager **Laura Mirkin** will take on responsibility for managing all nonmail data collection. She also will assume additional business development and account-management functions. **Paula Schultz** has been promoted to account manager in SDR's Chicago office; **Robyn Atchison** and **Janet Moss** have been named account managers in the Atlanta office; **Lynda Bennett**, **Greg Gorczynski** and **Katie Baron** have been made project managers in the Atlanta office; and **Angela Phillips** and **Hank Menzel** have been named project managers in the company's Chicago office.

Jenifer Gordon has joined the *Paria Group*, Orem, Utah, as a research analyst. She primarily will be responsible for programming questionnaires into

Gordon

Gardner

the company's computer-assisted telephone interviewing system, coordinating research projects and providing clients with data analysis and reports. Meanwhile, **Dahl Gardner** has been promoted to vice president of operations at the Paria Group. He will oversee research productivity and project efficiency and continue in his role as the director of health care research projects.

Michael Mowbray has been promoted to vice president—marketing research at *Waldbillig & Besteman*, Madison, Wis. Mowbray formerly was the company's director of marketing.

High marks

continued from p. 9

tions exceeded enrollment openings by roughly 800 students. The district plans to again survey prospective customers in the community in January 1995.

The district also conducts an annual graduate follow-up survey to check on the status of students six to 12 months after graduation and to obtain retrospective comments on satisfaction and suggestions for improvement. The research design for the graduate survey includes an initial mail survey and subsequent data collection via phone, with multiple call-backs to ensure randomness, minimize nonresponse bias and attain a majority response rate. To date, results by mail have not differed significantly from results obtained by phone. The district also surveys exiting students to uncover their reasons for leaving. The school separates factors it can influence, such as dislike of the school, from reasons for leaving that it can not affect, such as relocation.

Selecting indicators and setting standards

District officials get a complete picture of school performance by combining information on customer satisfaction and market position with traditional measures of the quality of a school — school climate and student achievement. Taking a cue from successful service businesses, the NCCVTSD utilizes measures of customer satisfaction and market share in its regular reporting procedures to school administrators. Other, more traditional school performance indicators are also measured: student attendance, staff attendance, outside suspension rate, infraction rate, test scores, grade distribution, enrollment retention, co-op employment, and graduate follow-up status.

For each of these measures, the district has set a standard of acceptance and a standard of excellence based on discussions with administrators, teachers, members of the business advisory committees and parents. The starting point for establishing standards is an honest appraisal of both current performance and the ability of the schools to meet objectives in the future. State and regional averages, past performance within the district and the performance of respected competitors serve as guidelines.

It is important that performance standards be measurable, reliable, valid, reasonably attainable, related to strategic objectives and action plans, based on internal appraisal and relevant competitive comparisons, and described in terms that are easy to understand.

School report cards

Each school's actual performance is not only tracked, it's also evaluated according to the standards that have been set. At the end of each marking period — when the students get their report cards — each of the schools also gets a report card. Measures that do not meet the standard of acceptance are accompanied by a check mark and require explanation and a plan for improvement from the school's principal.

A principal also provides reasons for progress when a substantial improvement in performance is realized, allowing other schools to share successful tactics and strategies. To record their reports, principals use a form specifically designed for the task. The forms are designed to associate events and activities that may affect school performance.

The reports — three marking-period reports and a final, more detailed annual report — have focused attention on performance improvement and led to welcome change. Since the 1989-1990 school year, attendance has improved by 3 percentage points and outside suspension rates have declined by 50 percent. Compared with the first customer satisfaction survey of parents (conducted in 1992), the second survey (1994) revealed a significant improvement in the rating of overall satisfaction (from 3.83 to 4.01 on a 1-5 scale) and an increase in the percentage of responding parents whose expectations were met or exceeded (from 87 percent to 90 percent).

Foresight and support

The foresight and support of district administration encouraged the development of both the comprehensive marketing research program and the performance reporting system. The information on the performance reports is recognized as important to the administrative and teaching staff and is used by district administration and the Board of Education in strategic planning and goal-setting.

The NCCVTSD is on a path that few secondary school systems have traveled. The journey continues to inform the district's efforts—convincing administrators to learn more about its customers and its perceived image, and helping them develop helpful and useful questions and measurements.

The NCCVTSD is on a path that few secondary school systems have traveled. The journey continues to inform the district's efforts — convincing administrators to learn more about its customers and its perceived image, and helping them develop helpful and useful questions and measurements.

Since the coming years likely will witness the offering of more choices for education, schools with a track record of marketing research and performance reporting will be best positioned to succeed as a respected part of the community and as a preparer of young adults. Marketing research and performance reporting have certainly enabled the New Castle County Vocational Technical School District to be better prepared for the future. ❑

Research Company News

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FIND/SVP, New York, has purchased **Industrial Decision Support International Inc.**, a New York-based consulting firm that specializes in customer satisfaction measurement studies. IDSI President Stephan Sigaud will become managing director of FIND/SVP's new Customer Satisfaction Strategies Division, which will take on all of IDSI's staff and business. IDSI's client list includes Alcoa, American Airlines, Rohm & Haas, Engelhard, Cytec and Praxair. Terms of the acquisition were not disclosed. FIND/SVP intends to continue to look for opportunities to buy small, profitable consulting and research organizations.

Further, FIND/SVP has formed an new unit called the Emerging Technologies Group. The new unit operates within the company's Published Products Division. Thomas E. Miller heads the group. (See Names of Note.)

Sorensen Associates Inc. — a Portland, Ore., company that does consumer research exclusively in supermarkets — has developed an interviewer training and certification program that addresses issues facing interviewers working in supermarkets. The company has honed the program over the past 20 years in an attempt to help standardize its nationwide research. In the program, interviewers watch a training video and read an accompanying training manual. To be named certified interviewers, they must score 80 percent or better on an exam covering the material in the video and manual. Once certified, interviewers are given identification numbers that allow Sorensen to track their work by response rate achieved during in-home studies, placements or interviews per hour, comments made by respondents, and data comparability and reliability. For more information, call 800-542-4321.

Gerry Linda has reestablished **Gerry Linda & Associates** in Glenview, Ill. The firm was previously in operation from 1986 through 1989. Linda's background is in advertising and qualitative marketing research, and the firm offers services ranging from business planning and brand personality development to marketing research and strategy. Its address is: 2100 Fir St., Suite 3000, Glenview, IL 60025-2815. Phone/fax is 708-729-3403.

The International Research Institutes, — a multinational marketing and social research consortium based in Brussels, Belgium — has selected Response Analysis Corp., Princeton, N.J., as the U.S. member of its partnership. Formerly, IRIS comprised 16 European firms conducting research for Western European companies. Response Analysis Corp. is its first non-European member. The consortium plans to announce Mexican and Asian partners soon.

Barbara Leflein, a former senior vice president of Bruskin/Goldring Research, has formed her own company, **Leflein Associates Inc.**, in

Leflein

Teaneck, N.J. The company will specialize in innovative research services while developing new analytical tools as well as syndicated products. In addition to drawing on Leflein's experience, the firm will use a network of research specialists. Leflein and Associates' address and phone numbers are: 8 Millay Court, Teaneck, NJ 07666. 201-801-0159/(fax) 201-801-0748.

Total Research Corp., Princeton, N.J., has purchased the assets and business of Business Marketing Services Ltd., London, for 243,000 shares of Total Research stock and approximately $1.6 million in cash. BMS becomes a wholly owned subsidiary known as BMS-Total Research. The finalized agreement creates a marketing research firm that Total Research believes could earn as much as $20 million in the fiscal year that began July 1, 1994. The new subsidiary will continue to serve BMS clients such as Dow Europe, Swissair, Lufthansa, Texaco Europe, Motorola, BP and British Airways. According to information supplied by Total Research, BMS grew at an average annual rate of 14 percent over the last five years despite a severe recession in Europe, and had gross revenues of $2.5 million in 1993. Total Research had gross revenues of $12.6 million in fiscal '93. Ten-year-old BMS has 25 employees and conducts 75 percent of its business on the European continent. BMS and Total Research conducted joint marketing seminars on advanced research technologies in London last June.

Meanwhile, Total Research also has released financial figures from its third-quarter reporting. While revenues for the quarter dipped slightly compared to last year's third-quarter number, net income increased. Nine-month totals showed growth for both revenues and net profits. Reported revenue from signed contracts totaled $5,706,920 as of March 31, an increase of more than $1 million over the December 31, 1993 figure. Net income for the quarter was $157,847, or 2 cents per share, on revenues of $3,208,293 — compared to net income of $127,419, or 2 cents per share, on revenues of $3,257,994 for the same period last fiscal year. For nine months, net income increased 59.5 percent over last year to $499,959, or 5 cents per share, on revenues of $10,105,742.

Macro International has opened an office in Moscow. The company, which has been expanding into Eastern Europe, hopes the new location will induce a two-fold increase in business in that part of the world. Macro provides market research and consulting services to companies that want to get their products or services into developing markets. Macro also has offices in Warsaw, Prague, Budapest and Györ, Hungary. Macro's Moscow address is: 12 Krasnopresnenskaya nab., Suite 1128, M2, 123610 Moscow, Russia. The telephone number is 7095-253-1128.

The Tribune Co., Chicago, has agreed to purchase **Farm Journal Inc.**, Philadelphia, the parent company of **Rockwood Research**, a St. Paul firm specializing in market research for the ag industry. Terms of the sale, which should be completed in the third quarter of 1994, were not revealed.

Lieberman Research West, Los Angeles, has formed three versions of what it calls a Center of Excellence — one for International Research, one for Litigation Support and one for Qualitative Research. The International Research Center will employ LRW's worldwide network of affiliated data-collection services, which the company hopes to expand to 150 affiliates by the end of 1995. LRW says the network, which covers Europe, Asia, Central and South America, Mexico, Canada, Russia and much of the Middle East, will help it maintain tighter control over projects and conduct research more quickly and cheaply. The Litigation Support Center will aid clients in trademark and copyright infringement cases, advertising-claim substantiation and antitrust work. The Qualitative Research Center's four focus group moderators will offer clients interviewing and focus group services. The company says it grew 68 percent during the two-year period in which the centers were developed. For more information, call 310-553-0550.

Metromail Corp., Lombard, Ill., a wholly owned subsidiary of R.R. Donnelley & Sons Co., has acquired the assets of Customer Insight Co. Inc., a provider of marketing database products and services for PCs. CIC employs 85 people at its Denver facility. According to the new parent company, CIC had 1993 earnings of approximately $10 million. Metromail will maintain CIC's Denver facility and staff, and the wholly owned subsidiary will continue to operate under the same name. CIC President Tery Larrew and his management team will report to Metromail National Marketing Division President Majorie Lucchetti. Terms of the acquisition were not disclosed.

Roper Starch Worldwide, New York, has acquired the **Crossley Surveys division of Westat Inc.**, Rockville, Md. Roper Starch expects the purchase to help it expand its services in a number of areas, particularly the health care sector. Crossley, which was founded in 1926, produces an annual syndicated study of diabetes patients in the United States. During the past year, the company extended the study to Canada and Western Europe, and demand exists for further expansion, according to Roper Starch. Terms of the purchase were not disclosed.

Atlanta-based **Jackson Associates Inc.** has opened a Washington, D.C., mall/focus facility. The new Jackson outpost includes a focus room with client viewing and a private lounge, three private interviewing rooms and a full kitchen with adjacent taste test center. The office opened October 1 for mall intercept work, and later in the month, it will host focus groups, prerecruits and executive and local studies. Call Margaret Hicks or Marisa Pope at 404-394-8700 for more information.

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Elrick and Lavidge
Erlich Transcultural Consultants
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First Market Research (J. Reynolds)
Freeman, Sullivan & Co.
Infotech Research Studies
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Sweeney International, Ltd.
Dan Wiese Marketing Research

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James A. Lumpp

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PUBLIC POLICY RSCH
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Marketing Advantage Research
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Fader, William & Associates
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Nordhaus Research, Inc.

WEALTHY
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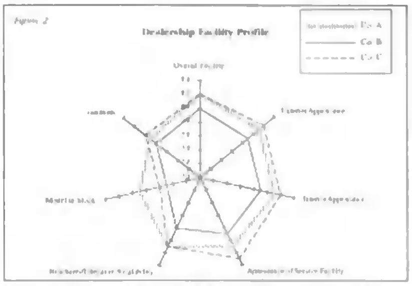
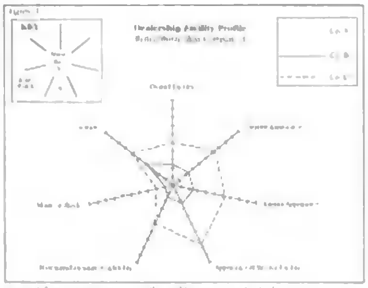
Radar charts
continued from p. 10

ences are meaningful. Radar charts can be modified to illustrate significant dif-





ferences between competitors. By plotting the results of two-sample z-tests and incorporating the confidence level into the radar chart, the reader can determine where significant differences occur between manufacturers.

For example, the modified radar chart in Figure 3 shows differences between Company A and its domestic competitors. Company A is represented by the shaded band, which is a 90% confidence level (see key in Figure 3). Points that lie on the band are not statistically different from Company A. Points inside the band represent attribute scores that are significantly worse, whereas points outside the band represent scores that are significantly better than Company A's.

From the radar chart in Figure 3, the reader can quickly conclude the following:

• Company B is significantly worse than Company A for every attribute measuring dealership facility, especially availability of model in stock.

• Company C is rated significantly better than Company A for several of the dealership attributes. Company C has the largest advantage for appearance of service facility, but is disadvantaged for model in stock. Company A and Company C earn comparable ratings for overall facility and availability of brochures.

Other considerations

Because z-scores are plotted on the modified radar chart, care must be taken when interpreting the values on the chart. The points plotted reflect the difference between the competitor and Company A; they do not represent the actual satisfaction scores of that competitor. For example, in Figure 3 Company B's largest plotted value is for location. Because this Company B data point is closest to the significance band, it implies that the smallest difference between Company A and Company B occurs for location, not that Company B dealerships received the highest score for this attribute.

Conclusions about significant differences can only be drawn regarding the company being profiled, i.e., Company A. For example, in Figure 3 Company C and Company B are significantly worse than Company A for model in stock. Although it appears from Figure 3 that Company C has a higher satisfaction score for model in stock than Company B, it cannot be determined from the chart if this difference is significant. Providing additional charts in which competitors are compared can resolve this situation.

Conclusions

Radar charts are a simple but effective device for presenting complicated data and plotting significance. They are particularly useful when comparing competitors or subgroups on a series of related attributes. Besides customer satisfaction studies, modified radar charts can be effectively used to show significant differences in image, product, and corporate evaluations. ❑

Quirk's MARKETING RESEARCH Review

1994

Customer satisfaction directory

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

ACG RESEARCH SOLUTIONS

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

ACG Research Solutions, a full-service market research company, provides clients with customer satisfaction/loyalty/return studies using a proprietary model. Our data center includes 30 computer-equipped stations using Ci2 software. Our qualitative capabilities include experienced moderators on staff and a state-of-the-art focus group facility. In addition, we offer clients a national mystery-shopping network that examines customer satisfaction from an evaluative point of view.
(See advertisement on p. 56)

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Dr. John Anderson, President

Answers Research
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Ph. 619-792-4660
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Lynne Weber, Principal

H&AMCR, Inc.

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A division of H&AMRC, Inc.
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Tarrytown, NY 10591
Ph. 914-332-5300
Kate Permut, V.P. Marketing

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

Better Marketing Associates, Inc.
P.O. Box 190
Oaks, PA 19456
Ph. 800-355-5040
Peter Thorwarth, President

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Robert C. Kallstrand, Vice President-Research

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(See advertisement on p. 57)

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Des Plaines, IL 60018
Ph. 708-297-7515
Irwin Broh, President

Bruskin/Goldring Research
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(See advertisement on p. 58)

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Business Dynamics, Inc.
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Eagan, MN 55121
Ph. 612-452-8632
Gayle Kaplan, Practice Leader-Marketing Effectiveness Practice

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Anne Bailey Berman, Principal

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Ph. 312-828-9200
Stephen Turner, President

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Owings Mills, MD 21117
Ph. 410-356-3566
Elizabeth Beirne, Field Director

Chilton Research Services
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Radnor, PA 19089-0193
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Ph. 312-828-9200
Chris de Braun, Exec. V.P.

Creative Research Systems
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Petaluma, CA 94928-4728
Ph. 707-765-1001
Lisa Bacon, Vice President Sales

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Ph. 416-591-6655
Brian Collins, President

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Ph. 815-397-8041
Sylvia Kacheris, Sales & Marketing

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Customer Satisfaction Strategies
A division of FIND/SVP
420 Lexington Ave., Ste. 2746
New York, NY 10170
Ph. 212-867-8757
Elly Malpa

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(See advertisement on p. 60)

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Data Reconginition Corporation
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Minnetonka, MN 55345
Ph. 612-935-5900

Data Recognition Corporation provides custom survey processing services to include project management, questionnaire layout, printing, variable intelligent pringting, material distribution/mailing, collection, optical and IMAGE scanning, key entry, programming, reporting, statistical analysis and verbatim comment typing and coding to the business, government and education markets.
(See advertisement on p. 43)

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Indianapolis, IN 46280-0432
Ph. 800-800-8370
Maureen O'Keafe, V.P. Mktg. & Bus. Dev.

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

Discovery Research Group
5525 S. 900 E., #300
Salt Lake City, UT 84084-3612
Ph. 800-678-3748
Tom McNiven, Partner

Dodge Business Research
3208 W. Lake St., Ste. 110
Minneapolis, MN 55416
Ph. 800-685-7934
Anthony Dodge, Principal

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

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Syosset, NY 11791
Ph. 516-921-7500
Edward Epstein, President

Eshelman & Townsend, Ltd.
313 Maple Ave.
Wyncote, PA 19095
Ph. 215-884-9060
MaryAnne Eshelman, Ph.D., President

Freeman, Sullivan & Co.
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San Francisco, CA 94105
Ph. 415-777-0707
Ann Garbarino, Marketing Director

Fuller Research Services, Inc.
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Portsmouth, VA 23705-0008
Ph. 804-393-1411
H. Grace Fuller, President

GLS Research
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San Francisco, CA 94111
Ph. 415-394-7085
Gary Stieger, President

Goldstein/Krall Marketing Resources
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25 Third St
Stamford, CT 06905
Ph. 203-359-2820
Frederick A. Goldstein, President

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Ph. 515-964-7378
Terry Grapentine, Principal

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San Francisco, CA 94111
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Christine McCulloch

Hancock Information Group
2180 West S.R. 434, Ste. 3170
Orlando, FL 32779
Ph. 407-682-1556
Lori A. Sprague, Vice President, Operations

Harte-Hanks Market Research
65 Rte. 4 E.
River Edge, NJ 07661
Ph. 201-342-6400
Harry Seymour

HBRS, Inc.
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Madison, WI 53711
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(See advertisement on p. 15)

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(See advertisements on pp. 31, 33, 35)

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Ph. 215-295-6726
Dr. William Strahle, Managing Partner

Ingram Research, Inc.
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P.O. Box 175
Winfield, IL 60190
Ph. 708-462-0402
Roland G. Ingram, President

Intersearch Corp.
132 Welsh Rd.
Horsham, PA 19044
Ph. 215-657-6400
Alan Widra, Chairman/CEO

JRP Marketing Research Services
100 Granite Dr., terrace level
Media, PA 19063
Ph. 610-565-8840
Paul R. Frattaroli, President

Kearney & Associates, Inc.
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Denver, CO 80204
Ph. 303-534-3044
Kevin J. Kearney, President

Keller Rosen & Associates
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Minneapolis, MN 55425
Ph. 612-854-5623
Stuart Rosen, Vice President

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

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(See advertisement on p. 65)

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Ph. 503-297-0511
Donald T. Jacobson CMC

MARITZ
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Phil Wiseman, Director, Marketing Services

Maritz Marketing Research Inc. specializes in customized solutions to service quality needs. Utilizing customer satisfaction measurement, customer-focused training, reward and recognition systems and communications programs, Maritz supports and drives performance improvement strategies throughout an organization. Whether you need measurement or a totally integrated solution, Maritz is the answer — nationally and internationally.
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Paramus, NJ 07652
Ph. 201-599-0790
Terry Vavra, President

Marketing Perspectives, Inc.
101 E. Park Blvd., Ste. 600
Plano, TX 75074
Ph. 214-516-3833
Jean Laswell, President

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

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(See advertisement on p. 66)

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(See advertisement on p. 67)

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Green Bay, WI 54302
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Terri Matousek, President

McLauchlan & Associates, Inc.
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Cincinnati, OH 45208
Ph. 513-871-8666
Staci McLauchlan, President

Meyers Research Center:
TradeSmart Survey™ Division
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New York, NY 10018
Ph. 212-391-0166
Arthur Zimbalist, Senior Vice President

Michelson & Associates, Inc.
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Atlanta, GA 30339
Ph. 404-955-5400
Mark Michelson, President/CEO

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Ph. 312-726-2010
Doug Squeo, Vice President

Murphy Marketing Research
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Milwaukee, WI 53217
Ph. 414-964-6604
Alison Murphy, Partner

National Analysts
1700 Market St.
Philadelphia, PA 19103
Ph. 215-496-6800
David C. Lineweber, Vice President

National Survey Research Center
10107 Brecksville Rd., Ste. 340
Brecksville, OH 44141
Ph. 800-837-7894
Lauren Wagner, Manager, Customer Relations

National Survey Systems
15375-A Barranca, Ste. 216
Irvine, CA 92718
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Robert Mirman, President

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Consumer Surveys Company
Chicago, Ill.

Superior Surveys
St. Louis, Mo.

McMillion Research Service
Charleston, W.V.

Probe Research, Inc.
Dallas, Texas
(See advertisement on p. 68)

Next Generation Research Inc.

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

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Patrick O'Neill, President

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Amarillo, TX 79121
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(See advertisement on p. 64)

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Kenneth Long, Director

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Boca Raton, FL 33427-2613
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47 Marlboro St.
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Ph. 603-352-9500
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(See advertisement on p. 71)

THE QUESTION SHOP, inc.

The Question Shop, Inc.
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Ph. 312-482-8500
Michelle Elster, Vice President

Randolph & Daniel
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Belmont, MA 02178
Ph. 617-484-6225
Stephen Daniel, President

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

The Research Center
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Wichita, KS 67201-0820
Ph. 316-268-6532
Marna Young, Research Manager

The Response Center, Inc.

The Response Center
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(See advertisement on p. 70)

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Rockwood Research Corp.
1751 W. County Rd. B
St. Paul, MN 55113
Ph. 612-639-1977
Robert A. Hill, President

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Satisfaction Management Systems, Inc.
Baker Technology Plaza
5959 Baker Rd., Ste. 300
Minnetonka, MN 55345-5957
Ph. 800-966-5561 ext. 4333
Steven Erickson, Director, System Design

Service Strategies International, Inc.
12001 N. Central, Ste. 350
Dallas, TX 75243
Ph. 214-233-3010
Dr. Cindy Ford, V.P./Dir. of Research

Service Strategies International Inc. specializes in customer satisfaction research (qualitative and quantitative) and employee satisfaction research. We understand total quality management and the importance of continuous process improvement within our client's business. We utilize advance customer satisfaction measurement capabilities with actionable reports that are user-friendly. Expertise in implementation, consulting and customer service training.
(See advertisement on p. 73)

Shugoll Research
7475 Wisconsin Ave., Ste. 200
Bethesda, MD 20814
Ph. 301-656-0310
Merrill Shugoll, Exec. Vice President

Southeastern Institute of Research
2325 W. Broad St.
Richmond, VA 23220
Ph. 800-807-8981
Robert M. Miller, President

Strategic Alternatives, Inc.
194 Main St.
Norwalk, CT 06851
Ph. 203-849-1217
Lynn Losen, President

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

Survey Service, Inc.
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Buffalo, NY 14223
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Thomas Industrial Research
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Houston, TX 77006
Ph. 713-861-7373
J. Frank Williamson, President

TOTAL RESEARCH
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James M. Salter II, Managing Director — The Delphi Group

Total Research Corporation is a full-service marketing research and consulting firm that has pioneered the industry standard in customized, actionable, client-tested quality management processes. Total Research/Quality Management™ is a process that identifies, monitors and deploys critical elements of customer satisfaction and quality to provide actionable information to manage and improve quality. It combines custom design, advanced analytical techniques and improvement-oriented output (action planning). Total Research's Delphi Group provides quality-improvement consulting and implementation services: deployment of customer requirements, strategy development, benchmarking, team building and Baldridge Award assessments.
(See advertisement on p. 74)

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Robert S. Weekley, President

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(See advertisement on p. 75)

Walker: Customer Satisfaction Measurements
3939 Priority Way, South Dr.
P.O. Box 80432
Indianapolis, IN 46240-0432
Ph. 317-843-8554
Michele Kirby, Marketing Support Manager

Walker: Customer Satisfaction Measurements (Walker: CSM), an information and consulting company, is a worldwide leader and pioneer in the areas of customer and employee relationship measurement and management. This leadership is the result of a 20-year dedication to providing integrated, reliable and actionable information for external (CSM) and internal (in>sight to excellence™) assessment and change.
(See advertisement on p. 75)

WestGroup Marketing Research, Inc.
1110 E. Missouri Ave., Ste. 780
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Ted Apostol, President

Widener Burrows & Associates
130 Holiday Ct., Ste. 108
Annapolis, MD 21401
Ph. 410-266-5343
Dawne Widener-Burrows, President

Wiese Research Associates, Inc.
10707 Pacific St., Ste. 202
Omaha, NE 68114
Ph. 402-391-7734
Tom Wiese, President

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(See advertisement on p. 29)

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Ph. 212-725-8840
Dr. James Frisch, Senior Vice President

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

Yee/Minard & Associates, Inc.
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Southfield, MI 48034
Ph. 313-352-3300
Lynne Goodman, Vice President

Listing Additions

Please note the following corrections to the 1994-95 Researcher SourceBook:

On page 132, the "see advertisement" references beneath the Performance Plus, Inc. listings should read "See advertisement on p. 257."

In the advertisement for Ebony Marketing Research on page 175, the phone number should read 718-217-0842.

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

The Blackstone Group
360 N. Michigan Ave.
Chicago, IL 60601
Ashref Hashim
Ph. 312-419-0400
Fax 312-419-8419
60-60-60-60

The Center for Research and Public Policy
35 Elm St.
New Haven, CT 06510
Jerry C. Lindsley
Ph. 203-776-9222
Fax 203-777-1807
25-25-25-0

The Center for Research and Public Policy
2000 W. Loop So., 16th fl.
Houston, TX 77027
Jerry C. Lindsley
Ph. 203-776-9222
Fax 203-777-1807
25-25-25-0

Marketing Resource Group, Inc.
225 S. Washington Sq.
Lansing, MI 48933
Paul King
Ph. 517-372-4400
Fax 517-372-4045
25-0-25-0

Ouantum Research Services Inc.
1830 17th St.
Boulder, CO 80304
Andrew Smith
Ph. 303-786-9500
37-30-37-37

Please add the following firms to the 1994 Directory of Syndicated/ Omnibus Studies

Health Focus, Inc.
4108 Oak Forest Dr.
Des Moines, IA 50312
Ph. 515-274-1307
Fax 515-274-3117
Contact: Linda Gilbert
Healthfocus Survey of U.S. Consumer Healthy Food Trends (S)

Northwest Research Group, Inc.
400 108th Ave. N.E., Ste. 200
Bellevue, WA 98004
Ph. 206-635-7481
Fax 206-635-7482
Contact: Ellen Colvin
SoundStats (O)

Classified Ads

Sales Offices

Headquarters: Evan Tweed, *Quirk's Marketing Research Review*, 6607 18th Avenue 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

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Trade Talk

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percent) and estheticians/dermatologists (26 percent) were the most influential sources of advice. Advertising's poor showing proves that something is wrong with the way marketers are communicating, Zuckerman says. "Advertising of a different kind is needed. It has to be more factual and believable. Companies should let the women try the product through samples so they can see the benefits. Don't just sell them hope."

• Eighty percent of those surveyed say they are eating less fat, more fruits and vegetables, less protein and less sugar. Eighty-five percent say they read nutrition labels.

• Over half (59 percent) of the respondents work full-time; 33 percent own their own business; 35 percent said that most of their day is spent caring for their home and family.

• Eighty-five percent reported skin care problems.

• The three most important factors that influence a woman to stay with a cosmetic or skin care product or brand are performance (31 percent), reliability (24 percent) and safety (22 percent).

• Nearly three-quarters of the panel said they colored their hair. Ninety-six percent said the appearance of their hair was very important.

• Citing a lack of time, only 31 percent belong to a health club. Forty-five percent have been to a spa at least once.

Marketing opportunities

The survey points up marketing opportunities for companies other than cosmetics makers; shoe makers, for example. Half of the panelists said they now wear lower-heeled shoes. ("An awful lot of older women wear sneakers because they no longer want to wear heels," Zuckerman says.) Forty percent reported changes in their feet (dryness, bunions, soreness) yet only 20 percent were doing something about the changes. They may have specific needs in orthopedic shoes, but don't want to wear shoes that aren't attractive, Zuckerman says.

In general, service providers have to learn that aging baby boomers will need more patience and explanation when it comes to choosing product and services.

Despite the size and potential of the market, cosmetic manufacturers aren't rushing to introduce product lines tailored to older women, Zuckerman says. "As it becomes clear that it will benefit them financially to cater to this group, more of them will do so. But very few companies want to be the first. They want to wait and make sure that they will make money before they get into it. But I don't think companies can afford not to do something." ❑

Index of Advertisers

Trade Talk

By Joseph Rydholm/QMRR editor

A more than cosmetic change

As a veteran of the cosmetics industry, Gabriella Zuckerman puts her experience to work every day. Zuckerman is president of Gabriella Z Ltd., a New York City consulting firm that identifies and develops new product opportunities for cosmetic and personal care companies. She's a cosmetic chemist who's steered worldwide new product development for Revlon and worked for other top cosmetic firms. But it was her experience as a consumer that spurred her to do a bit of research this past summer.

After she and other staff members realized that most cosmetic companies were ignoring a potentially lucrative market segment — women over age 45 — her firm decided to conduct the first installment of an ongoing study of the beauty, health and personal care needs of women 45-65 years of age. "I have a number of consultants working with me and it happens that three of us are between the ages of 45-53. It was apparent from our experience that this age group wasn't being serviced," Zuckerman says.

The firm mailed ten-page questionnaires to 350 affluent women in major metropolitan areas in May and June of this year. To understand how the women were dealing with the physical and emotional effects of aging, the survey included questions on their health and lifestyle and their purchasing habits and product needs in skin care and color cosmetics, fragrance, hair care, hand/foot care and eye care.

(Zuckerman acknowledges that the findings aren't projectable but nevertheless says that the opinions of this segment are valuable because new developments in the cosmetic product category have frequently started with upper-income women who can afford to pay special attention to their skin.)

Leading edge

Zuckerman sought the opinions of these women because they represent the leading edge in understanding the effects of changes in their body due to aging. (Sixty-seven percent identified themselves as menopausal or post-menopausal.) They tend to be better informed about the options available to solve their ongoing problems.

"It's always fascinated me that menopause is something that nobody talks about. When I started the survey people said no one would give me answers to menopause-related questions; no one wants to talk about it. But we got more answers on that area than any other in the survey," Zuckerman says.

Some findings:

• Forty percent of the women felt that there weren't products on the market that addressed their aging-related problems.

• When asked what influences their skin care and cosmetic purchases, only nine percent cited advertising. Friends (38

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