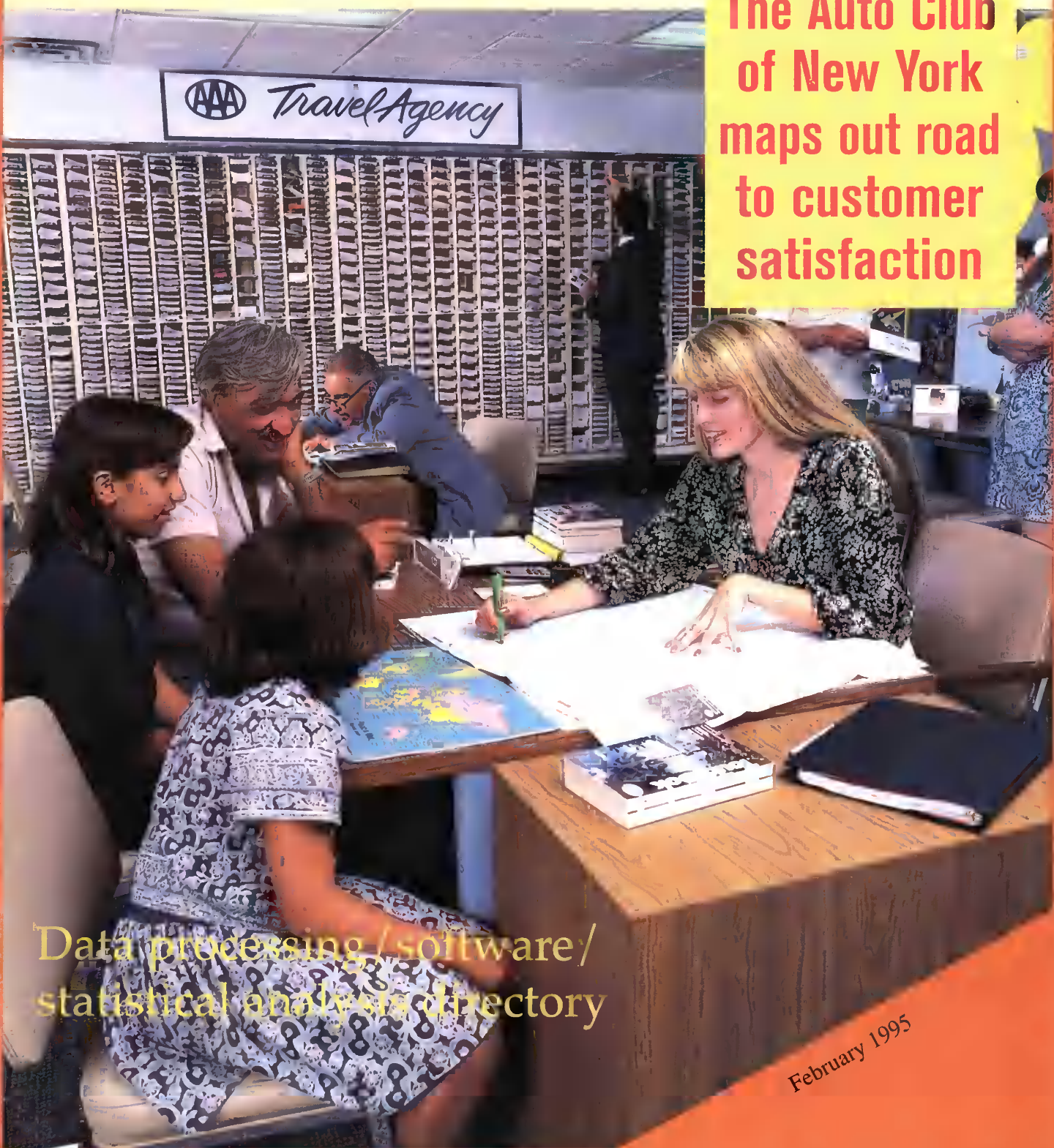


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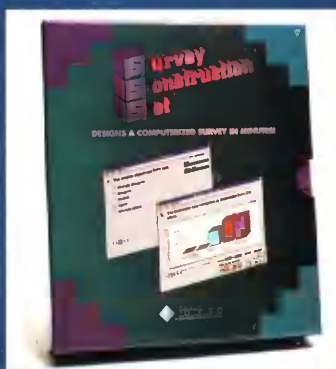
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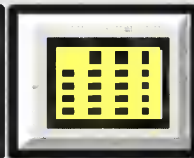
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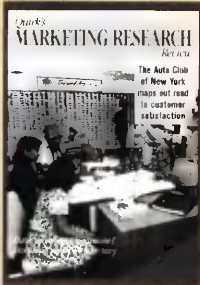
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C O N T E N T S



Volume IX, Number 2

February 1995

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The Auto Club of New York used a mail survey to check the satisfaction of its 1.1 million members. Photo courtesy of ACNY.

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Driven to satisfy

The Auto Club of New York turns to mail survey for customer feedback By William M. Bailey



Editor's note: William Bailey, Ph.D., is a statistical consultant and market analyst based in Orlando, Fla.

Serving 1.1 million customers in metro New York, Long Island, and seven upstate counties, the Auto Club of New York (ACNY) is the

eighth largest affiliate of the Automobile Association of America. In early 1993, the ACNY engaged the author to seek the opinion of its membership on the organization's service quality and provide an evaluation to management.

"Being a membership organization we wanted to make sure that we stayed

member driven," says Marshall Doney, ACNY's director, marketing and service quality.

After preliminary discussions, a mail survey was chosen as the best way to approach members. "In the past we received a good response rate from mail surveys and I like the meth-

odology," Doney says. A six-page survey was mailed to 2,500 members. To encourage response, a new one dollar bill was included with a personalized cover letter explaining the study's intent and how the results would be an integral part of the club's long range strategic plan. The letter was signed by Doney.

The questionnaire's central focus was to rate member opinion on 16 service attributes from three perspectives:

- the importance of each attribute
- the level of expectation for each attribute, and
- the member's rating of the club's performance on attribute delivery.

Figure 1 illustrates the type of attributes identified as important by members in an initial set of focus groups, and considered in this research phase.

As with most attitudinal surveys, this one sought member opinion toward the organization using basic questions involving services used, favored methods for service usage, competitive comparisons, and overall satisfaction indices.

The auto club also wanted to highlight areas where service delivery (based on performance) fell below expectations for those attributes members said were most important.

Measurable and actionable

ACNY sought to measure service quality as members defined it, as opposed to traditional quality control measures, which are often internal measurements not directly linked to the customer.

"In the past we may have assumed that we knew what members wanted," Doney says. "This research resulted in information that was measurable

and actionable. Measurability is critical because we've all done research that gives us a lot of 'nice to know' information but it's not readily actionable by management. When you know what's important and what members expect it makes it easier to allocate resources."

After a series of introductory questions, the respondent was asked to evaluate each attribute and rate its level of importance. The 10-point Likert scale ranged from "not at all important" to "extremely important." Next, the expectation of each attribute was rated.

That is, did the respondent expect very little, or were there "extremely high" expectations for the club's delivery of the particular attribute?

For example, there might be low expectations for office location since many services can be provided over the telephone. Thus, having branch offices might also be less important than other services. However, if an office is needed, one might expect it to be clean and professional looking.



Automobile Club of New York
One Million Members Strong



Figure 1
Service Attributes

- ▶ Courteous Employees
- ▶ Knowledgeable Employees
- ▶ Problem Solving Effectiveness
- ▶ Timely Service/Product Delivery
- ▶ Providing Helpful Information
- ▶ Trustworthiness
- ▶ Office Appearance
- ▶ Convenient Office Location(s)
- ▶ Having the Products & Services to Meet Your Needs
- ▶ Operators Promptly Responding to Phone Call
- ▶ Overall Opinion (performance only)

Each attribute had a description to narrow the respondent's interpretation, and the scale allowed for registering "no opinion."

The study's results were based on 1,241 member responses, a response rate just under 50%. SPSS was used for multivariate analysis, and Lotus 1-2-3 and Harvard Graphics for tabulation, graphic presentation and/or perceptual mapping. Final reporting used WordPerfect for integration of text and data.

Beyond basic descriptive statistics, regression analysis was used to highlight significance differences, and the attributes were classified using factorial analytic techniques based on how members responded to the question on the club's performance.

Using this analysis, two distinct

continued on p. 34



How to quantify the elements of brand and user imagery that drive purchase and create loyalty

By Br. Glenn Livingston and Sharon Livingston

As part of a projective exercise, respondents may be asked to imagine moments from a person's daily life and what kinds of activities they engage in. If respondents were asked about an older man, for example, they might conjure up this scene of a grandfather reading to his grandchildren at Christmas.

Editor's note: Dr. Glenn Livingston and Sharon Livingston are partners in Executive Solutions, a New York City research firm.

For decades, the marketing community has been aware that there are emotional and psychodynamic factors that drive brand selection and loyalty. Even in today's price-sensitive economy, the imagery attached to brands goes far beyond product attributes, functional benefits and price to sell products. All products and brands develop personas in consumers' minds. All project varying user images, which differ by audience. Consumers tend to buy products with imagery that is either consistent with their positive view of themselves, or which conveys a plausible aspirational model (something they would like to be and believe they could conceivably achieve).

While the importance of product imagery is clear, it is tricky to assess via direct questioning techniques. All but the most creative respondents are hard put to provide rich, detailed answers to straightforward questions such as "If this soda were a person, what kind of person would it be?" There are many reasons for this difficulty, but primarily, respondents can't answer these kinds of questions because consumers don't realize (or don't want to admit) that advertising images affect their purchase decisions. Indeed, most consumers want to believe that they purchase based solely upon rational facts such as price, value, taste and performance. Moreover, since consumers tend to deny that product imagery affects their deci-

sions, they can become anxious that their answers to direct image-related questions are a reflection of their personality. The result of all these dynamics is a relatively quiet respondent, who gives sensible, general, barely useful responses.

Despite these inherent difficulties, many researchers (who are unaware of alternative approaches) attempt to ask direct questions to assess imagery in focus groups and in-depth interviews. However, a handful of qualitative market researchers have borrowed techniques from psychology called projectives in order to obtain richer, more detailed descriptions of product imagery.

Using projective techniques to assess imagery in qualitative research

Succinctly, a technique is projective when it indirectly encourages the expression of psychologically motivating material (imagery) which the respondent is otherwise unaware of. Most projective techniques do this by presenting the question so that the consumer believes her response is part of a game which could not possibly reflect on her personality. Projectives allow research participants to sit back, relax, and to view their responses as if they were watching a movie screen, unaware, for the moment, that they wrote the film and that they hold the projector.

Returning to the soda can example, instead of simply asking the respondent "If this soda can were a person, what

kind of person might it be?" the moderator positions the question as an experience. She tells respondents they are about to engage in a fun exercise, uses some sort of relaxation technique, helps them to imagine the soda can in their mind (as opposed to directly looking at it) and then says something like "Now imagine you see a hand reaching for the Diet Sunkist... what does the hand look like? Describe it in detail. Now, what about its owner? Their occupation? etc." (She continues to get a rich description of the image).

Properly presented, projectives are experienced like a game—like playing make-believe as a child. This is markedly different from the direct, rational question "If this soda were a person, what type of person would it be?" To answer that question, most respondents feel they need a rationale to support their conclusions, which severely restricts their ability to respond. Projectives remove the need for rationale, and make it much easier to elicit potent imagery which the respondent might not really understand (and therefore cannot rationalize).

While on the surface, this question may seem quite similar to the more direct question asked above, there are some very important differences in the way it was presented. The primary differences are 1) the degree of intellectualization required of the respondent, and 2) the emotional state the respondent is in when the question is posed.

A projective technique doesn't require intellectual reasoning. For example, the respondent is instructed to imagine a hand, then to imagine the rest of the person. Properly presented, projectives are experienced like a game—like playing make-believe as a child. This is markedly different from the direct, rational question "If this soda were a person, what type of person would it be?" To answer that question, most respondents feel they need a rationale to support their conclusions, which severely restricts their ability to respond.

Projectives remove the need for rationale, and make it much easier to elicit potent imagery which the respondent might not really understand (and therefore cannot rationalize). A more detailed example of a projective technique follows.

The moderator takes respondents through a brief relaxation exercise, followed by guided imagery where they imagine seeing a door with a soda can on it. When they walk through the door, they are told they will find themselves in an entirely different scene. After having them explore that scene thoroughly, the moderator tells participants that they will find a person in that scene. They can observe a typical moment in that person's day, knowing that this particular moment is just a snapshot. After thoroughly observing the person in the moment, they can imagine what their day was like before and after that

continued on p. 26

So how tall do you want me to be?

Some thoughts on focus group recruiting

By Rhoda Schild

Editor's note: Rhoda Schild is president of Rhoda Schild Focus Group Recruiting, New York City.

A manufacturer of tall men's overcoats sits in a room behind a one-way mirror, waiting for 10 men over six feet tall to participate in a focus group. The men arrive. Two of the respondents are over six feet, five are plainly shorter. Three aren't even close.

It's a focus group nightmare. What went wrong? Did the questionnaire ask the right questions? Did the respondents lie? Did the recruiter lead the respondents, or did the respondents say, "So how tall do you want me to be?"

Low man on the totem pole, the recruiting service is often an anonymous voice that can conjure up, overnight, 10 Hassidic submarine captains from Kyoto. Unlike a list company, or the largest data bank in the world, the recruiting service has a relationship with its respondents. They possess intimate and unusual information — current beeper and car telephone numbers, illnesses a respondent has or medications they are taking, or who has the newest recipe for a home-brewed beer. Because most calls start randomly, when a respon-

dent does not fit one group, he most assuredly fits another. Amazing as it seems, people will tell you far more about their recent rash than you ever needed to know. And don't get them started about their pets.

Miss Manners would disapprove of starting a telephone conversation with a stranger by asking "What is your ethnicity?" A good recruiting service asks this daily. Ironically, everyone answers. Respondents will deliberate this question to give a perfect answer, such as "I'm a mix. My father is a Pacific Islander, my mother is half-Japanese, half-American."

To assure accurate information on age, income and other delicate or politically incorrect questions you have to ask directly, probe, be intrusive. Women lie about age and weight, men lie about income and height. Women qualify their statements by adding "But I look much younger." Men qualify by saying "I earn north of \$125,000," which probably really means they earn over \$75,000.

People will attend a focus group for personal reasons. Maybe they love to give their opinion on a subject for which they possess expertise. Perhaps they are curious and eager to hear what their peers are thinking about, particularly a topic they have a

vested interest in. Or perhaps they simply yearn to be listened to. Certainly a major factor is that they will be paid for their opinion. We are pioneers at heart and giving an opinion at a focus group is as close to "colonizing" as our times allow. When a focus group respondent later sees a product or service that was discussed in their group they feel validated.

Time is the greatest insurance that a focus group will be recruited to perfectly meet the client's requirements. When there is enough time, the respondent is recruited, sent a confirmation letter, and reconfirmed by telephone before the group is scheduled to meet. It was once standard for clients to allow two weeks for recruiting, now recruiting is often a two-day job or even an over-nighter. When recruiting is done this quickly, it is very helpful to clarify the most important specs, relax the past participation, and ease up on anything that needs time.

Respondents will not change personal or business plans to attend a focus group. From a recruiter's viewpoint, to make a very quick recruit a successful one, it's helpful to do the following: increase the incentive fee to sweeten the pot; shorten a two-

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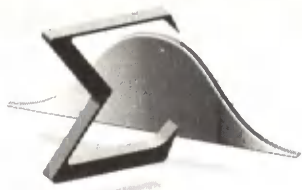
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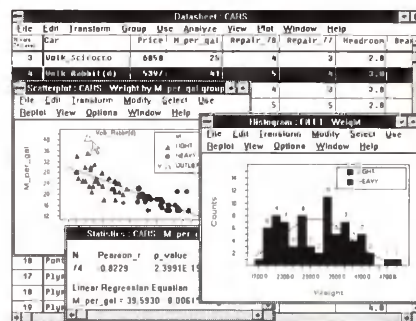
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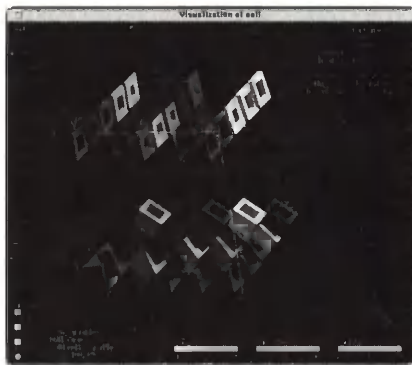
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Add new dimensions to your focus group agendas

By Jan Newman

Editor's note: Jan Newman is president of The Newman Group, Ltd., a Burlingame, Calif., research firm.

Focus groups have been a popular tool with marketing professionals since the 1960s. Early focus groups or "qualitative research investigations" primarily were directed at discussing concept generation, product positioning or advertising direction. As the techniques for focus groups evolved, so did a broader span of uses. Corporate identity programs, employee evaluations, and product sampling were just a few of the additional agendas for focus group exploration.

As marketing research became more sophisticated, the subtle nuances of conducting focus groups became more apparent. Focus groups could provide actual verbiage for an advertising campaign, check the flow of questions on a quantitative survey and provide a plethora of responses about the categories in question.

While the basic format for focus groups has remained constant, the application has grown and taken on new dimensions. As marketers we should think of new ways of benefiting from the focus group. The following two focus group agendas have been successful with many of our clients. They may add a new dimension of understanding to your product base too!

Satisfied customers or calm before the storm?

Why is it, when things are going well for your products, there is little likelihood of conducting marketing research? Marketing research is frequently used as a troubleshooting mechanism that determines possible sources of dissatisfaction with a product category. Conversely, marketing research should be used also to act as a barometer of customer

satisfaction.

One of the easiest methods for gaining an understanding of customer satisfaction is to conduct a series of focus groups, spaced several months apart, with the same respondents. Our organization refers to this type of project as a FocusTrack study. This type of focus group allows the moderator to fully explore each respondent's background, track ongoing media developments and product introductions and learn firsthand how satisfied a customer is with your products.

This technique is especially useful with service organizations such as banks, savings and loans, brokerage houses, mortgage or insurance agencies, or with products that require continued association with the manufacturer's customer service (automobiles, computers).

Charting the life of your customer is another way of determining how your product will succeed in a changing environment. Time doesn't stand still, so developing an ongoing dialogue with selective customers may alert you to events that you might not normally be aware of! Does your product perform the same way after four months as it did when it was brand new? After a year, is your product performing to the industry standards or is it thought of as obsolete due to advances in technology? What kind of service or maintenance experiences has your customer had after the extended warranty has expired? Answering these questions can help develop a product that will ultimately earn high marks for satisfaction.

During a FocusTrack project on its new housing development, one of our clients gained insightful information toward customer service that helped avoid a consumer revolt. Some information came to light in one of these discussions that enabled the builder to immediately alter several procedures to better meet the needs of its buyers.

Much like quantitative panels that chart the behavior of an individual over time, a focus group series can address issues over time with the added advantage of speaking to people individually or communally. As repeat groups are conducted a comfort level and team spirit usually develops. Respondents often find the dynamics of a group to be the catalyst for their comments. One idea sparks the thought process. The exchange of ideas that occurs in a focus group often validates the respondent's actions and feelings.

A cognitive approach toward providing customer satisfaction will best succeed when a marketer begins to understand the longer term motivations behind a customer's feelings and actions.

Is your competitor researching you?

Due to the increasingly competitive environment in which most products are marketed, more and more marketers are conducting focus groups on their competitors' products. It's quite possible that your competition may sponsor a focus group with your target market. Turn this around and think about conducting focus groups about your competition to learn how the consumer thinks and feels about their products or services.

More often than not, a category investigation about your

Due to the increasingly competitive environment in which most products are marketed, more and more marketers are conducting focus groups on their competitors' products. It's quite possible that your competition may sponsor a focus group with your target market. Turn this around and think about conducting focus groups about your competition to learn how the consumer thinks and feels about their products or services.

competition will unveil something new and interesting. Just one idea can be the breakthrough for a successful product launch or marketing campaign. The participating respondents are not required to know who is sponsoring a marketing research project. They can be told that a manufacturer of a specific product or category of products is interested in knowing more about the subject in question. Client anonymity is preserved.

The computer software field is particularly vulnerable to quick changes in market trends. Our clients often discuss new versions of competitive software with a group of target users to determine positives, negatives and modifications for future updated versions of these programs. This format will also generate input to design the next generation of products for their own company.

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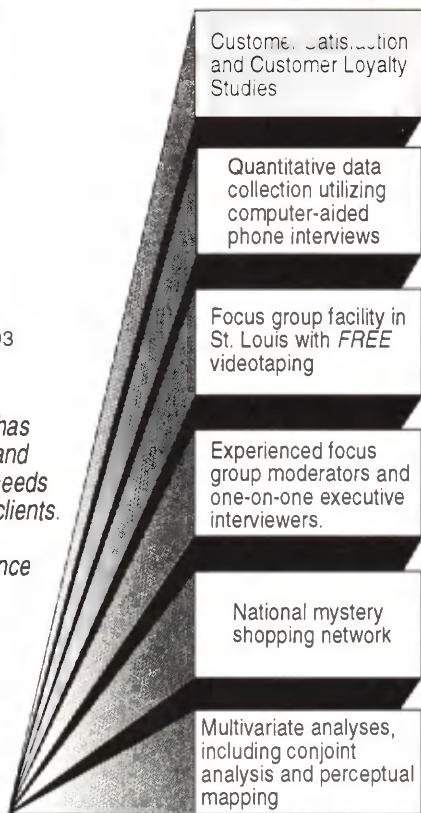
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are held to determine the level of satisfaction with a competing product, or discuss advertising direction or company image.

A project for a paint company was directed at building brand personalities. A series of questions in a focus group session unveiled an intimate understanding of how people perceived competing paint brands.

Recently our firm worked on a focus group project for a national manufacturer exploring juice drinks. Part of the task

Time doesn't stand still, so developing an ongoing dialogue with selective customers may alert you to events that you might not normally be aware of! Does your product perform the same way after four months as it did when it was brand new? After a year, is your product performing to the industry standards or is it thought of as obsolete due to advances in technology? What kind of service or maintenance experiences has your customer had after the extended warranty has expired? Answering these questions can help develop a product that will ultimately earn high marks for satisfaction.

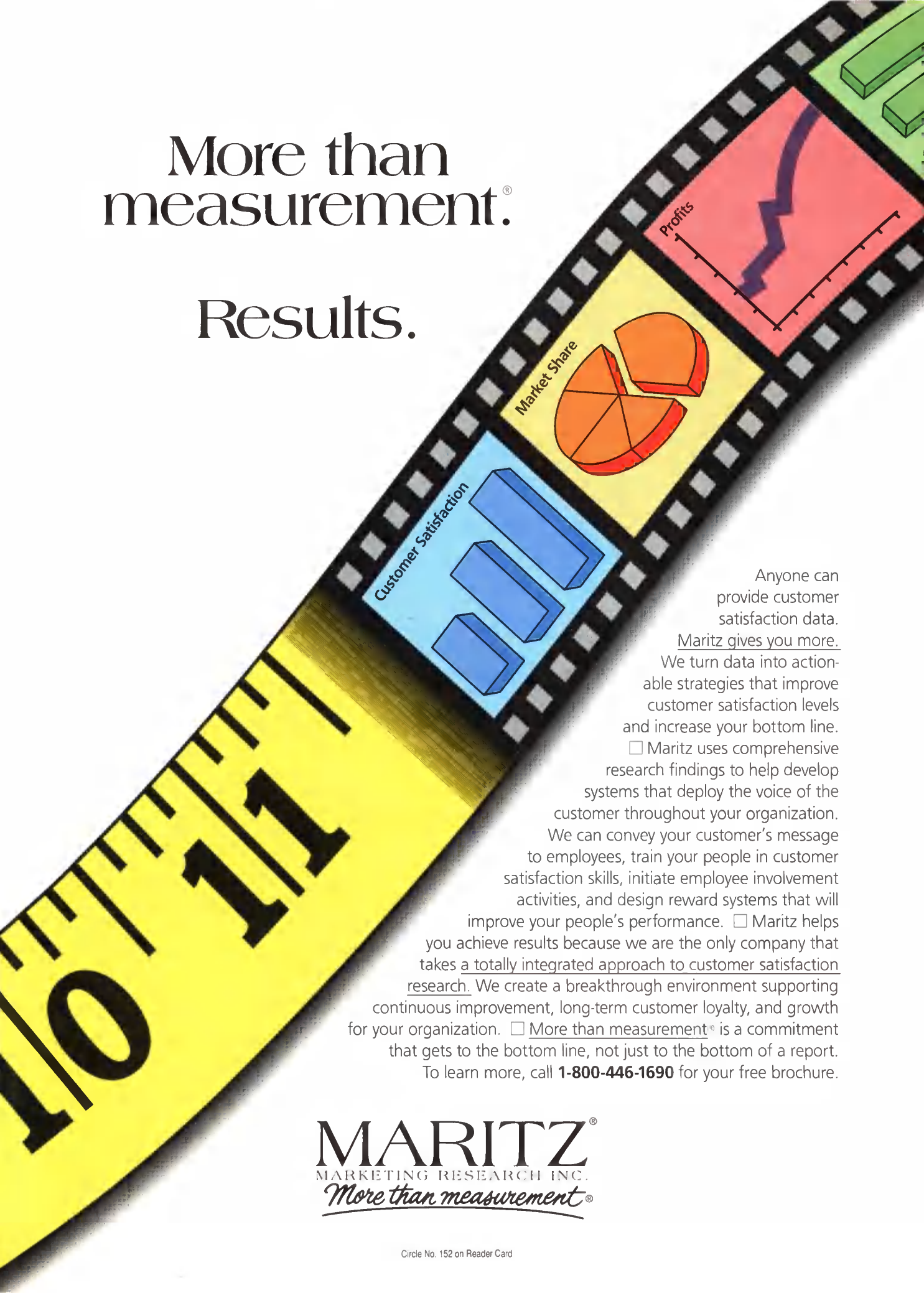
was to evaluate advertising placed by their competitors to help gain an understanding of the most important characteristics in selling their products. During the course of this focus group discussion problems were discovered with the verbiage for a competitor's print advertising message. When competitive advertising was reviewed specific product claims in the ads were misinterpreted. Respondents thought that the claim "100 percent natural" meant the drink was "100 percent pure fruit juice." This was not the case. As a result, our client revamped its advertising to avoid any product misrepresentations. Knowing this vulnerability helped our client position itself successfully in the minds of the consumers.

Due to the rapid turnaround time for most focus group projects, from two to four weeks, as compared to a quantitative project, focus groups can be used to get an initial reading on a new competitive product, an advertising campaign or a modification of an existing product. Focus groups can act as a preliminary screening device for many marketing needs. Whatever the questions, a prompt and timely focus group project can often prevent or minimize future problems.

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War stories:

True life tales in marketing research

By Art Shulman

Editor's note: In this regular feature, Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. Readers are invited to call or write Shulman with stories of their own.

A few years ago, while trying out for a quiz show, I identified myself as a market research consultant. The emcee asked what a market research consultant does, and I explained that we determine why people buy products. When he asked for an example, all I could come up with was, "We've found that little girls are more likely to buy something if it's the color pink."

He then queried, "And exactly how much did your client pay you for that consultation?"

I was embarrassed. But no more embarrassed than Janice Strickler was when, early in her career while conducting door-to-door interviews, the opening door revealed a naked woman who asked how she could be of help.

Strickler, ever the professional, proceeded with the interview on detergents, neither woman bringing up the respondent's nudity. In the midst of the interview the woman's children returned from school and walked by

Speaking of door-to-door interviews, a few years ago a meticulous but unnamed field director was trying to complete a study where the research design called for in-person interviews using a detailed sampling

Joel Lowell of Eclectica, a market research consulting firm, remembers a mall survey, attended by his client, where mall traffic was slow and the interviewing service had trouble obtaining qualified women to participate in the study. Se Lowell's client, not a professional marketing researcher, stood on the mall asking women under the age of 35 as they passed by, "How'd you like to make \$20?" Mall security seen put a stop to that!

as if nothing out of the ordinary was occurring. Maybe the woman wasn't wearing anything because all of her clothes were in the wash.

plan he insisted needed to be carefully adhered to. When the New Orleans interviewing service reported

continued on p. 32



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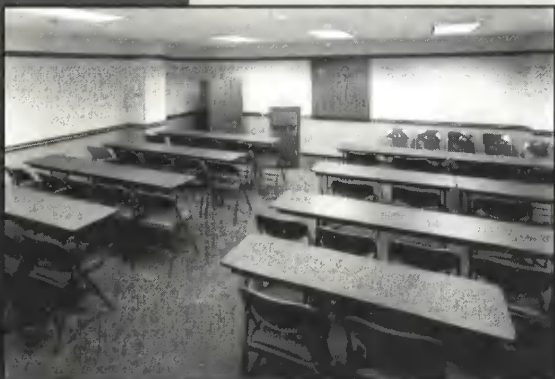
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Survey Monitor

Oh Christmas tree, oh ersatz Christmas tree

In a survey conducted before Christmas last year, 86 percent of respondents to a survey by Maritz Marketing Research, St. Louis, said they planned to have a Christmas tree in their house. The sad news is, nearly half of those folks chose an artificial tree. Among Americans who put up trees, the synthetic type was most popular with older folks. Sixty-three percent of those 45 and over chose artificial trees; 61 percent under age

45 still planned to choose the real thing. People enjoyed Christmas decorations on the outsides of their homes as well. Fifty-seven percent of all Americans put up exterior decorations for the holidays. Those with incomes of \$35,000 or more were most likely to dress up their exteriors (70 percent vs. 49 percent of those earning less than \$35,000).

Most Americans — 77 percent — typically attend at least one holiday party each year. Nearly one-third (32 percent) said they attend three or more. Younger people are more likely

to party during the holidays. Eighty-eight percent of adults 18-44 years old attend at least one party, versus 64 percent of those 45 and up.

Not surprisingly, 72 percent of Americans planned to travel for Christmas, with younger people more likely to hit the road. Eighty-one percent of those 18-44 travel for the holidays, compared to 62 percent of Americans over 45.

Women's entrepreneurship grows worldwide

Women around the world are diving into entrepreneurial endeavors in increasing numbers, partially because significant opportunities draw them into the game and partially because poor economies and musty thinking in already-established companies deny them chances to succeed. Sixteen women, each an executive officer in Les Femmes Chef's d'Entreprises Mondiales (the World Association of Women Entrepreneurs), participated in a study sponsored by Avon Products Inc., New York, and conducted by Roper Starch Worldwide, New York. Each of the 16 reported on the state of distaff entrepreneurship in her country and offered her opinion on directions things are likely to take in the future.

Based on what local observers say, Portugal, Canada and the United States have shown the sharpest increases in the number of women launching ventures, though women in Eastern European countries, likely because of tremendous economic stress, are also employing themselves

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at increasing rates. In France, 28 percent of new businesses are started by women. In Guinea, Cameroon and Tunisia, the number of women-owned businesses remains small, but its recent 20-25 percent growth is outpacing the country's population growth rates. European women, in particular, tend to start businesses to ensure opportunity for their kids, which makes sense, since five out of eight European women inherited the family business.

Most often, women open retail businesses. Business and professional services are the second most frequently launched endeavors, followed by manufacturing and personal care businesses. The archetypal female entrepreneur is a middle-class wife and mother between 34 and 45 who has a secondary or technical education. Women in the U.S. are prone to starting businesses because they can't shatter the glass ceilings installed in many corporations, while elsewhere women start businesses because there are no jobs or they can't get the jobs that are available.

Not too surprisingly, lack of capital is the principle deterrent women face. But they don't often go to government for help; they find a way to fund ventures themselves. Around the world, women cited independence from their husbands and families as a significant benefit of business ownership. For more information, call Ellen LaNicca at 212-505-9332.

Jackson's a hit

Marketing researchers are a fickle sort. Proof lies in a report on the most-often surveyed cities in a recent issue of "The Frame," a newsletter issued by Survey Sampling Inc., Fairfield, Conn. Compiled every two years, top 25 lists of the most heavily canvassed metro areas show remarkable variation; only Cincinnati and Kansas City appear in each of the 1990, '92 and '94 lists. The 1994 top 10 areas, in order, were Jackson, Mich.; Boise, Idaho; Sioux Falls, S.D.; San Diego, Calif.; Akron, Ohio; Rochester, Minn.; South Bend, Ind.; San Francisco; Miami; Charleston, W.V.

continued on p. 30

N E T W O R K



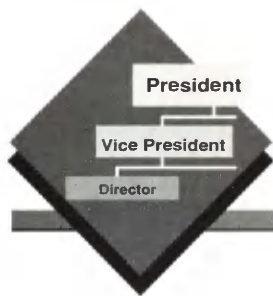
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Names of Note

Dennis Black, Barbara Beutler and **Catherine Zdechlik** have been promoted by *C.J. Olson Market Research*, Minneapolis. Black has been named data processing manager/statistician, and Beutler is data processing assistant manager. Zdechlik is now a research analyst.

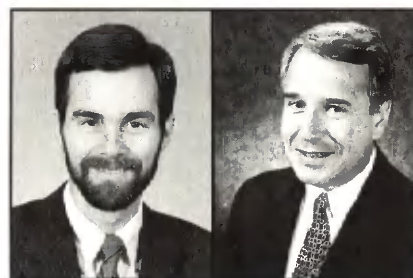
Alhert Angrisani and **Roger Thomas** have been named to the board of directors at *Total Research Corp.*, Princeton, N.J. Angrisani served as the assistant secretary of labor under President Ronald Reagan and is now presi-

dent of Princeton Management Co. He will serve as senior financial advisor to Total Research Chairman and CEO Lorin Zissman, President Hugh Devine and the rest of the board. Thomas is the managing director of Total Research's European headquarters office, BMS-Total Research, in London, and his appointment to the board comes as a result of Total Research's recent purchase of Business Marketing Services. The appointments are subject to the approval of the company's stockholders. Meanwhile, **Jeffrey Harris** has been promoted to vice president and manager of

Total Research's Information Technologies Division. Harris will manage the activities of the division, which specializes in research for clients in the information systems, electronics and telecommunications industries.

David Schreier has joined *Suburban Associates Marketing Research*, Ridgewood, N.J., as manager of the Woodbridge Conference Center in Iselin, N.J. He has responsibility for focus groups, in-depth interviewing, telephone interviewing and field work conducted at the conference center.

J.C. Savage Jr. has joined the Central States Division of New York-based *Audits & Surveys Worldwide*. Savage will work out of the Central States Division office in Minneapolis, where he will become part of the company's client service team, conducting custom marketing research.



Savage Jr. **Mularz**

Thomas E. Mularz has been promoted to vice president in the Arlington Heights headquarters of *Market Facts Inc.* Mularz will continue to manage Telenation, the company's weekly national telephone survey.

Ellen Colvin has been promoted to
continued on p. 31

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- ◆ *AMA/ASQC 7th Annual Customer Satisfaction & Quality Measurement Conference*, Dallas, TX, Feb. 19-21, 1995
- ◆ *Institute for International Research Customer Value Management Conference*, Orlando, FL, Feb. 22-24
- ◆ *The Conference Board Annual Quality Conference*, New York, NY, March 21-22
- ◆ *Institute for International Research Customer Satisfaction Surveys Conference*, Orlando, FL, March 29-31
- ◆ *AMA Fifth Annual Congress on Customer Satisfaction*, Orlando, FL, May 21-24
- ◆ *Institute for International Research 6th Annual Measuring and Improving Customer Satisfaction Conference*, Las Vegas, NV, June 11-14





Research Company News

Donow & Associates Inc. has moved. The company's new address is 25 W. 43rd St., Suite 423, New York, NY 10036. Donow's phone numbers remain 212-354-3666 and 212-382-2307 (fax).

Opinion Access Corp. has opened a 50-station CRT interviewing facility in New York City. The center features full predictive dialing capabilities and TelATHENA CRT interviewing software. Opinion Access Corp. has a strategic alliance with CRC Data Systems, a provider of data processing services. For more information call Scott Waller at 212-620-5678.

Barnes Research has moved to 4920 Plainfield N.E., Grand Rapids, MI 49505. The phone number and fax number remain the same: 616-363-7643 and 616-363-8227.

The Mead Corporation, Dayton, Ohio, has accepted a \$1.5 million bid for Mead Data Central, Dayton, from the international concern **Reed Elsevier plc**. Reed Elsevier has decided to change Mead Data Central's name to LEXIS-NEXIS. Completion of the deal is expected as soon as it clears U.S. antitrust laws and certain related third-party licenses are transferred. The company now called LEXIS-NEXIS is a provider of on-line information services and information management tools.

The Gillette Co., Boston, has chosen **IRI Software**, Waltham, Mass., to help with the design and implementation of the former's Trade Management Information System. The

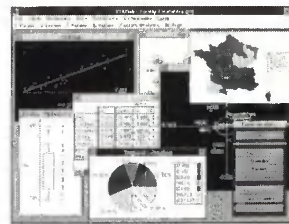
TMIS, which will integrate scanner data with shipping information and promotion history, will use IRI Software's DataServer as its foundation. The system is supposed to make it easier for Gillette to efficiently plan profitable promotions. IRI Software is a division of the Chicago-based

Information Resources Inc.

Higginbotham Associates, Scottsdale, Ariz., has moved. The firm's new address and phone numbers are 8010 E. McDowell Road, Suite 208, Scottsdale, AZ 85257; 602-946-7535 and 602-946-1170 (fax).

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B Y S L P



Product & Service Update

MapInfo launches new program, offers European street maps

MapInfo Corp., Troy, N.Y., has launched a new program, dubbed MapOpen, designed to make more kinds of information usable in desktop mapping applications. The program encompasses two new products, a worldwide technology and marketing program and, as previously announced, the inclusion of MapInfo mapping technology in future ver-

sions of some of Microsoft Corp.'s general business applications. ArcLink 3.0 and AG*Link are data translation products that allow information from different formats to be used with MapInfo software. ArcLink 3.0, which costs \$595 (upgrade \$150) facilitates the sharing of data between ESRI's ARC/INFO and MapInfo. AG*Link (\$95) transfers Strategic Mapping Inc.'s Atlas GIS files into MapInfo's data file format. Atlas GIS data can also be transferred automatically into MapInfo's relational file

structure. The Data Partner Program will give data vendors access to a variety of MapInfo's software engineering tools so they can develop and market data that is compatible with MapInfo software. The company's partners in the project to date include Claritas, Geographic Data Technology, American Digital Cartography, Etak, GisDATA Ltd. and Tele Atlas.

Meanwhile, MapInfo and Tele Atlas, a supplier of geographic data in Europe, have also teamed up to offer street maps of the Netherlands and Belgium for use in desktop mapping systems. The two electronic data maps are the first in a series called StreetInfo Europe. Both companies will sell the products in the series; StreetInfo for Germany and Italy will be the next products released. StreetInfo contains detailed information on all streets, highways, railroads, waterways and municipal boundaries. StreetInfo for the Netherlands and Belgium are available in Windows, Macintosh, DOS, Sun and HP formats. StreetInfo for the Netherlands is \$29,800; for Belgium, \$21,700. Regional StreetInfo maps can also be purchased; prices range from \$1,550 to \$5,575. For more information, call 518-282-600.

Market research report designer debuts

Fassino Associates Inc., Media, Pa., offers SmartReport, software that allows users to create and distribute interactive multimedia market research reports. The program lets users integrate qualitative and quantitative research findings. It has built-in analyzing tools that can be used to



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create cross tabs, do statistical analysis or enter information into a database. Text and graphics in tracking studies can be updated and complex statistical models, such as conjoint simulators, can be integrated. Windows and Macintosh versions of the program, both of which are Internet-ready, are available. Obtain a free demo disk by calling Susan Pine at 610-566-4210; e-mail her at Mfission@Delphi.com.

Nexis gains bulk

LEXIS-NEXIS, Dayton, Ohio, has added 33 U.S. newspapers to the 31 that were already available through the NEXIS online service. The NEXIS service allows users to search full-text versions of the newspapers it offers by topic; the service provides one file of all of the articles on the topic in reverse chronological order. Among the new offerings are *The Denver Post*, *The Sun* (Baltimore), *The Salt Lake City Tribune*, *The Times Union* (Albany, N.Y.) and the *Omaha World Herald*. NEXIS-LEXIS plans

to add seven more papers to its NEXIS offerings soon. Formerly known as Mead Data Central, LEXIS-NEXIS acquired its new name when it was purchased by Reed Elsevier plc (cf. Research Company News). For more information, call 513-865-1058.

New Snap debuts

Newburyport, Mass.-based Mercator Corp., a subsidiary of Bristol, England-based Mercator Computer Systems, has updated its SNAP Professional survey design and analysis software for PCs. The software can be used to produce questionnaires, enter results and analyze and present data. Version 3 of SNAP Professional allows for fast data entry and import and export between SNAP surveys of selected variables and data as well as entire surveys and raw data files. The new issue also has an index facility in batch production that lists the contents of each table produced. Windows metafile output for both tables and charts for direct linking to word processing software

is an available option. SNAP Professional starts at \$795 per single-user license. For more information, call 508-463-4093.

NCS packages survey software

Minneapolis-based National Computer Systems has put together the NCS Survey software package, in an effort to make low- to mid-volume surveys easier and more cost efficient to conduct. The software is designed to be used with an optical mark read scanner — either NCS Sentry or OpScan models — and enables users to customize scannable survey forms, automatically enter survey data, tabulate results and prepare reports. The company has endeavored to make the Windows-based software, which comes with nine customizable survey template forms, easy to learn and use. The NCS Survey software costs \$795. For more information, call NCS at 800-347-7226.

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Projectives

continued from p. 9

moment. When they open their eyes, respondents are asked to talk about the people they observed. Following are two sample responses. (The results are for illustrative purposes only, and are based upon only one respondent's answers.)

Diet Sunkist — *"I saw a young woman in her 20s drive up to a local convenience store. She was driving a red sporty convertible (I guess it was a Mustang) with the top down. She had just finished a game of tennis and was very thirsty. She wanted something light, sweet and sparkly. She went into the store and got the Sunkist. At the register, the guy flirted with her. She smiled at him, paid for the soda and jumped back into her car. It was a Sunday, the weather was warm, but not too hot. She took a long drink of her soda, felt refreshed and drove off to spend the afternoon with some friends."*

Diet A&W Root Beer — *"A man in his mid 40s pulls up to the same store in his pick-up. He feels depressed and upset because he had an argument with his wife this morning. She told him he was getting fat and flabby and looking just like his father. They had a blow up about it. He gave her a hard time, but he really felt bad. He walked into the store wanting to soothe himself with some ice cream. On the way to the freezer, he passed the soda case and noticed the Diet A&W. He remembered how much he used to love root beer when he was a kid. He picked up the diet soda and paid for it. He opened it up and took a swig and was surprised at how good it tasted. He got back in his truck and headed home, feeling hopeful and excited to tell his wife that he had taken a first step in the right direction."*

A little imagination should convince the reader that projective exercises like this one can yield a wealth of imagery, and frequently some very useful creative insights. However, many in the field have raised concerns over the interpretation of projective techniques. Their concerns are:

- The complicated manner in which

the questions are asked, and the indirect manner in which they are answered, makes it very difficult to translate responses into concrete, useful marketing information.

- The commonly agreed upon purpose of qualitative research is to develop hypotheses which later need to be validated in quantitative research. Traditionally, the rich imagery uncovered in projectives has been very difficult to quantitatively verify. The most common practice is to revert back to direct questions about attributes in a quantitative questionnaire.

- Because of the difficulty in quantifying projective methods, it has also been difficult to determine which specific aspects of the imagery elicited from these techniques actually drive purchase interest.

How can projective imagery be validly assessed quantitatively?

Traditionally, imagery is quantified via simple attribute check lists or semantic differentials. These are extremely limited direct methods which leave little or no room for the respondent's free associations and imagination. They are also subject to the same response-inhibiting effects as direct questions about imagery in qualitative research.

However, it is possible to use the same types of projective techniques quantitatively, in a reliable and valid manner, with just a few simple modifications. A description of a sample quantitative projective procedure follows:

The technique to be used is first pretested and refined in one-on-ones for the particular product and target to be assessed. Then, the moderator is videotaped giving the instructions for the projective technique. Qualified respondents are recruited to a central location. There they view the videotape, which also instructs them to write down their projective experience as a detailed story with a beginning, middle and end (a field interviewer sits outside the room to answer any questions). They are also asked to respond to a series of written prompts regarding specific characteristics of their fantasy (e.g., about

how old was the person they imagined, what sex, etc.). Any more traditional quantitative questions (like purchase interest) are presented last.

Respondents' stories are analyzed using a variety of scales which have been proven reliable and valid for analyzing fantasy material. For example, many psychological scales used for 25 years in the study of dreams and daydreams can be applied. These include scales of induced mood, creativity, masculinity and femininity, assertiveness, aggression, anxiety, satisfaction and many others. Of course, the traditional attributes are available, with the pointed difference that they were elicited via free associative/non-intellectual methods — which is the way that imagery influences purchase motivation.

The result is that every dimension of imagery thought to be important in a particular category is quantified! Statistical analyses can be run to determine which dimensions predict purchase interest, and which are less important.

Here is an example of the use of quantified projective imagery:

A food manufacturer wanted to test two packaging options for a new line of fat free, low sodium soups. Because lowered fat and sodium levels are associated with reduced taste perceptions, brand management strongly believed that the product packaging had to create the impression of a zippy, zesty, spicy and delicious product. The target was the primary grocery shopper aged 25-54.

Both packaging options were taken to qualitative (a third was actually eliminated there). There, projective techniques like the one described previously revealed three very different sets of imagery:

Option A: For the most part this version created the impression of a user who was a young, urban woman. The majority described her as a career woman in her late 20s, concerned with keeping fit as well as feeding her family healthy things. She worked out regularly, had a few close friends who understood that she just barely had time for them, and was happily married with small children.

Data Processing For Marketing Research

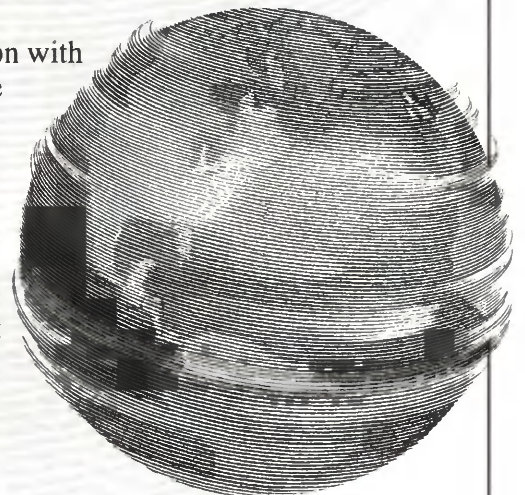
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Option B: Created the impression of a slightly overweight man in his 40s or 50s. His wife bought the soup because she is trying to get him to take better care of his high cholesterol. Most felt that the wife didn't consume the soup herself and didn't feed it to her teenage children.

Given the vastly different images created, the projective was submitted for quantitative verification. Four hundred interviews were conducted (one in each of four geographically dispersed cities). In addition to the projective, traditional measures such as purchase interest were taken. Last, respondents were asked what element of the packaging first drew their attention.

Stories were scored for activity, satisfaction, overall mood, imagination and anxiety. (Anxiety refers to respondent mentions of types of anxiety — guilt, separation, shame or other non-specific forms — in their stories. An example of guilt anxiety related in a story is: "The woman I saw was in a candy store. She bought some jelly

beans even though she knew she was getting fat.") Respondents were also asked how old the person behind the imaginary door was, what their gender was, how much they liked this person and how similar the imagined person was to themselves.

Package A yielded purchase interest almost identical to package B. This was the case across demographic segments.

With regards to imagery, however, package A was significantly different from package B in five respects:

- The package A user was seen as significantly younger than the B user.
- The package A user was seen as significantly more active than the B user.
- Package A elicited significantly more anxious stories than package B.
- The package A user was described as significantly more dissimilar to the respondent than was package B.
- Respondents liked the package A user significantly more than the package B user.

The quantitative results matched

the qualitative in that package A created the image of a young, active person whom the respondents seemed to like. However, this did not seem like enough to base a packaging decision upon, since package A also created more anxiety than package B, and package B made respondents think of users who were more like themselves. Clearly more statistical analysis was required.

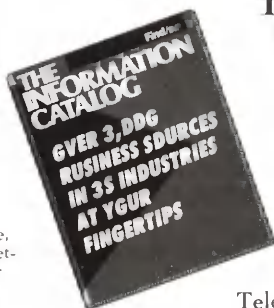
First, it was necessary to know which of the dimensions assessed actually were correlated with purchase interest. The answer turned out to be activity, youth, liking, and anxiety. The more active and younger the imagery was, the higher the respondent's purchase interest. Likewise, the more they liked the imagined person, the higher was their purchase interest. Perceived similarity to the respondent made no difference. However, the more anxious the elicited stories were, the lower was purchase interest. This was the largest correlation.

Statistical adjustments (via an analysis of covariance) were made to

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remove the effects of the anxiety on purchase interest. Under these conditions, package A clearly elicited much higher purchase interest.

At this point it seemed that package A would be the preferred option, if only the cause of the anxiety could be determined and removed. An exploratory CHAID analysis with the anxiety score as the dependent variable revealed that respondents who gave anxious stories were much more likely to say that the first thing that drew their attention on the packaging were the words "low sodium." Many more of these people had seen package A than package B.

Analysis showed that package A's purchase interest was deflated by anxiety caused by the prominence of the words low sodium. (Both low sodium and fat free were indeed more pronounced in package A.) It was recommended that the client de-emphasize low sodium and go with package A. It was also suggested that the client conduct more qualitative research to determine why reminding consumers about the sodium content in these soups caused anxiety.

It is noteworthy that without the quantification of the projective techniques in this example, there would have been little solid evidence upon which to base a packaging choice. (Recall that overall purchase interest was equal.) Because of the availability of quantitative projective dimensions, it was possible to isolate what was bothering people about package A (and suppressing otherwise higher purchase interest).

Summary

All brands and products project an image, which is at least partially responsible for variance in purchase interest. Because imagery is difficult to assess by traditional direct questioning methods, projective techniques have been borrowed from the behavioral sciences. Projectives are simple psychological exercises which encourage the expression of unconscious motivational material while protecting respondents' self perception (i.e., their need to believe that

they are not motivated by such things as product imagery).

Until recently, projective techniques have been used only in qualitative research, and only by a handful of skilled moderators. Use in this manner has been criticized because there has been no way to quantitatively test hypotheses generated in focus groups by projectives, and their interpretation has therefore been open to wild speculation.

This article presented a simple

method for the large scale administration and scoring of projective techniques. In addition to rendering the results of such techniques testable, the benefits of projective quantification include 1) the addition of several rich dimensions to more traditional quantitative tests, 2) the ability to determine which particular aspects of product imagery drive purchase interest in a given category, 3) the ability to quantitatively isolate what aspects of a product are creating a particular image or feeling. □

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M. Isabel Valdés - President

Survey Monitor

continued from p. 21

Boise is the only city that appears in both the 1992 and 1994 top 10s. 1992's No. 1, Midland, Texas, did not even make the 1994 top 25.

Top dog Jackson was crawling with researchers because its median age of 34.0 and median "effective buying income" of \$32,752 are, not surprisingly, quite close to the U.S. median age of 33.4 and EBI of \$33,178. The Jackson area has a population of roughly 152,000 in some 55,000 households.

Meanwhile, "The Frame" also notes that personal interviewing and mail surveys are expected to gain popularity among researchers in coming years. In consumer research, the use of mall surveys should continue to grow. On the flip side, Survey Sampling's poll discovered that researchers believe that international research and telephone surveying will take hits in the near term. What's more, small research firms (with fewer

than five people) are getting smaller, while larger firms (especially those with between 4 and 20 employees) are adding staff. For more information, call 203-255-4200.

Firms define drug policies

Research conducted by Lakewood Research and *Training* magazine, Minneapolis, indicates that in the past six years, more companies have adopted well-defined drug policies for workers. In 1988, 16 percent of the 821 firms responding to Lakewood's queries tested job applicants for drugs; in 1994, 36 percent of 1,194 respondents did so. The percentage that had formal substance abuse policies increased from 60 to 83. Unfortunately, only 28 percent of 1994 respondents said they regularly conduct or sponsor substance abuse training and 56 percent offer assistance to employees trying to deal with substance abuse. Both percentages had in-

creased from the '88 survey, and it's logical to assume that as more companies define policies they will follow up with help for employees who need it. For more information, call 612-340-4963.

Why they buy

If you want to sell to folks in charge of MIS at the local corporation, best put yourself in their shoes. While they'd probably like to buy the neatest, fastest, best new hardware and software available, what they really need is the stuff that's going to get the job done right, cheap. Here in the '90s, everybody's tense about job security, and MIS staff are no different: According to a survey conducted by the Connecticut Research Group Inc., Westport, Conn., what MIS decision makers most want outside vendors and service firms to do is help them do their jobs. The survey of 600 executives at small, medium-sized and large firms found that personal concerns weighed just as heavily as technical considerations in MIS purchase decisions.

To a significant degree, MIS managers' shift in priorities — a 1990 survey by CRG found that technological superiority, minimum downtime and the availability and quality of broad support activities were most important to purchasers of MIS needs — can be chalked up to the parity of products on the market and the uniform service standard demanded from all providers. On the MIS front these days, management above all else wants systems, networks and work stations up and running 24 hours a day, seven days a week, and a high level of user productivity, which requires everybody to have access to all of the information and equipment they need all the time. Now that MIS managers know that information can be handled in a variety of ways they want their suppliers to ensure that their systems matches their requirements perfectly — and makes them look good. For more information, call 203-255-4450.

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Names of Note

continued from p. 22

associate project manager at *Northwest Research Group*, Bellevue, Wash. She joined the firm in June 1994 as a research assistant.

Ella L. Kelley has joined *Groups Plus Inc.*, Wilton, Conn., as an associate. She will be conducting focus group research and consulting services for corporations in the packaged goods, financial services, health and beauty aids and industrial products industries.

Sue Stark has signed on at *Directions for Decisions Inc.*, Jersey City, N.J., as a senior vice president. At *Directions for Decisions*, she will handle client development in communications research, package testing, name testing and out-of-home advertising testing.

D. Joseph Gersuk has been tabbed to serve as vice president and chief financial officer for *MapInfo*, Troy, N.Y. He comes to his new position from *DataEase Sapphire International Inc.*, Trumbull, Conn. At *MapInfo*, Gersuk is responsible for all financial aspects of the company's operations.

Kathy Nicolini and **Ralph Wedholm** have joined *Bruskini/Goldring Research*, Edison, N.J. Nicolini will serve as vice president — client services in the company's Chicago office. Wedholm is a vice president — client services in the New Jersey office.

Susan M. Miller is now on the staff role at *Langer Associates Inc.*, New York. She is in charge of the company's telephone studies and will also conduct focus groups and in-person interviews.

Michelle Carter and **LeeAnn Coopridier** have been promoted at *Decision Analyst Inc.*, Arlington, Texas. Carter is now the national field director, and as such she is responsible for all surveys that require *Decision Analyst* to subcontract out to other research companies. She also validates all subcontracted survey research. Coopridier is the company's new sampling manager. She develops sampling plans for research projects and is responsible for coordinating *Decision*

Analyst's national American Consumer Opinion Panel. She also is involved in demographic research.

Melisa Linder and **Kayci Cockrell** have been added to the analysis and project management staff at *Rockwood Research*, St. Paul. Cockrell is fresh out of college, while Linder comes from *Satisfaction Management Systems Inc.*

Steven Walker has been tabbed to serve as president and chief operating officer of *Walker Group*, Indianapo-

lis. He represents the third generation of Walkers to lead the company.

Della Welch, **Marcia Vertz** and **Linda Smith** have joined *Barnes Research, Inc.*, Grand Rapids, Mich. Welch will serve as the company's human resource supervisor, Vertz will be night supervisor and Smith will manage the company's Grandville office. In addition, **Belinda Welch** has been promoted to day supervisor and **Rick Kramer** to assistant night supervisor.

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War stories

continued from p. 16

difficulties, he flew there and knocked on the doors his sampling plan directed him to. And that was how he successfully interviewed one of the most notorious madams in New Orleans, who'd serviced folks with strange appetites in her time, but never one who got his jollies by asking opinions about urban renewal.

Sometimes clients can be coarse. Joel Lowell of Eclectica, a market research consulting firm, remembers a mall survey, attended by his client, where mall traffic was slow and the interviewing service had trouble obtaining qualified women to participate in the study. So Lowell's client, not a professional marketing researcher, stood on the mall asking women under the age of 35 as they passed by, "How'd you like to make \$20?" Mall security soon put a stop to

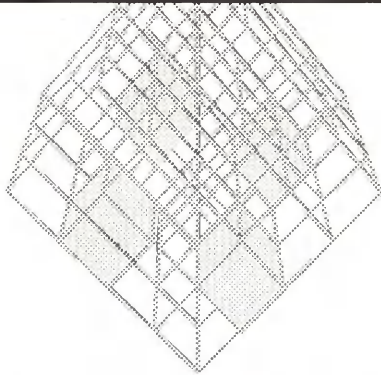
that!

One procedure my firm uses for testing the appeal of new toys is setting out an array of toys, handing out some play money, and asking moms and their kids which toys they'd buy. A day after participating in such a study, a mother called back and reported that when she returned home, her 5-year-old daughter went directly to her room, took out all her toys, neatly arranging them around the room, and began to play a game in which she bought toys, called "market research interview."

In order to be effective, researchers must ensure that management and clients have confidence in them. Harry Heller is a master at making clients feel everything is under control. In his office at the advertising agency we worked at, a curious assistant account exec asked one of those questions to which there is no exact answer: "How many cities do you need to conduct a valid copy test?" Without batting an eyelash, Heller asserted, "Six." The assistant account executive walked away with a piece of learning he was confident he could use the rest of his career.

Trade-Off Marketing's Harris Goldstein reports he conducted a survey where the computer printout revealed a relatively high percentage of no answers when Canadian men were asked what type of underwear they wore — boxer shorts or briefs. Suspicious of the high number of no answers, Goldstein investigated further and found no interviewer or data processing errors. His conclusion: a relatively high percentage of Canadian men don't wear underwear.

In future installments of this column, we'll report on more quirky, loopy and strange happenings in the world of market research. Whether you're a research provider or a client, if you'd like your story to be told — anything related to marketing research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires — please call me (818-782-4252) or, better yet, write it up and fax it to me (818-782-3014). □



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Recruiting

continued from p. 10

hour group to 90 minutes; shorten a 90-minute group to one hour; do one-on-ones or dyads to allow the respondent more time options; over-recruit; be flexible on time.

The more specific the qualifications are on a screener, the more reliable the recruit will be. A carefully masked screener will insure a respondent does not know the subject matter. A money question such as "How often, on average, do you make a transaction?" needs to be clarified. Does "make a transaction" mean buy, sell, roll-over, open, or close? The word "average" needs to be

Miss Manners would disapprove of starting a telephone conversation with a stranger by asking "What is your ethnicity?" A good recruiting service asks this daily. Ironically, everyone answers. Respondents will deliberate this question to give a perfect answer, such as "I'm a mix. My father is a Pacific Islander, my mother is half-Japanese, half-American."

emphasized as "Is this your average year after year?" Some recruiting services write screeners, some recruiting services need very specific direction.

There is a tendency to add a "creative" question to determine a respondent's verbal skills. Sometimes this sounds like a trick question. Respect the respondent, and keep the question appropriate to the subject matter. One client has successfully used "If you could travel anywhere in time and take a picture, who and what would you take a picture of?" One respondent answered "My parents' childhood." Another answered, "The Wall Street Journal three days in advance of today."

Traditionally the most difficult focus groups are chief executive officers. However, even this group can sometimes be recruited. Acknowledge a one-month time frame, send a letter to the CEO, indicating a telephone call will follow, at which time they can pick any time they choose for an interviewer to come to their office. If they cannot do it, ask them to suggest someone who can do it in their stead. Once this appointment is set up try not to change the day or time.

A more realistic approach for this group is a teleconference call. A good recruiting service will let you know if they have the capabilities and experience to do this type of recruiting.

Another very difficult recruit is the high risk respondent. The respondent is unreliable for myriad reasons. A high over-recruit is the best assurance. This may seem extravagant, but a very low show rate costs the client more than a high over-recruit.

Over the years a recruiting service develops its contacts, allowing it to specialize. This specialization may make it possible to recruit a group of million-

aires or a group of cardio-thoracic surgeons. A reliable service will let you know up front who they are capable of recruiting.

In the final analysis, recruiting is done through a very personally developed database, purchased professional lists, networking, from a client's specialized list, cold random calling and special contacts. It is invitation, romance, seduction and money that ultimately bring in articulate focus group respondents. Working in harmony with and for a client and bringing in the client's exact specifications is the ultimate goal of a recruiting service. □

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ACNY

continued from p. 7

factors were detected and described as "service access" and "service delivery." (For the analytical reader: The classification is considered excellent based on the Kaiser-Meyer-Olkin statistic [.93] that tests partial correlations. Further, reliability tests were performed on each factor. The Reliability Alpha, which tests the internal consistency of variables in each factor, ranged from +.81 to +.91 and is considered excellent.)

To maintain simplicity, data presentation included bar and pie charts, and detail tables. However, the actual interpretation was based on the comparison between an attribute's importance mean rating and the difference between the attribute's mean performance and its mean expectation, called the P-E gap. (Refer to Figure 2.)

A positive P-E gap for an attribute is favorable and means that the organization's performance exceeds

expectations. This study found most of the gaps to be negative; that is, performance is below expectations.

ceptual map shown in Figure 3 very useful. The map used in this research does not form its basis on pure quad-

Figure 2
Service Attributes
Listed by Order of Importance

I	Attribute	E	P	P-E
9.56	Knowledgeable Employees	9.06	8.57	-0.51
9.45	Trustworthiness	9.07	8.57	-0.50
9.41	Courteous Employees	8.95	8.89	-0.06
9.22	Problem Solving Efficiency	8.78	8.04	-0.72
9.14	Provide Helpful Information	8.84	8.32	-0.52
9.01	Considerate Personnel	8.78	8.5	-0.28
8.86	Having the Products & Services to Meet Your Needs	8.51	7.94	-0.57
8.75	Operators Promptly Respond to Your Phone Call	8.42	7.73	-0.69
8.68	Convenient Office Hours	8.23	7.59	-0.64
7.75	Convenient Office Locations	7.4	6.38	-1.02
7.14	Office Appearance	7.19	6.34	-0.85

NOTE: I - Importance E - Expectation P - Performance Overall P-E Gap = -0.59

However, one can consider a new line of interpretation when you allow for attribute importance. Further, the interaction between the mean response for importance and mean P-E gap highlights the very significant attributes.

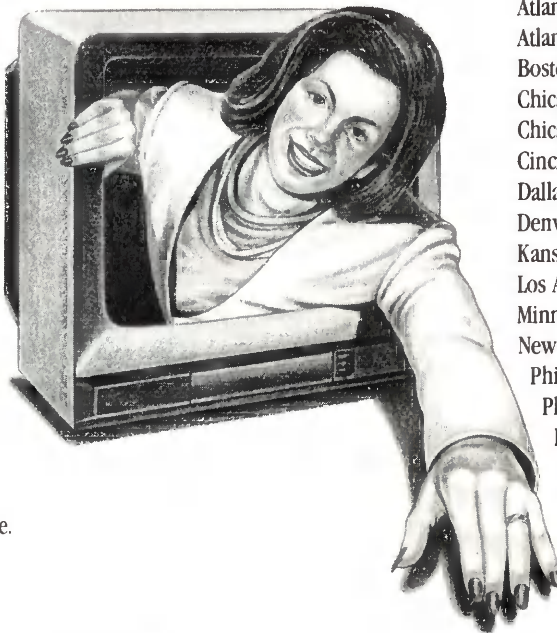
ACNY management found the per-

rant theory but is an extension of an earlier theory that involved "market acceptance" models using "cash cows" and "dogs" to segment products based on their market attractiveness and competitive positioning. Here we relate attractiveness to importance, while the P-E gap is a gauge

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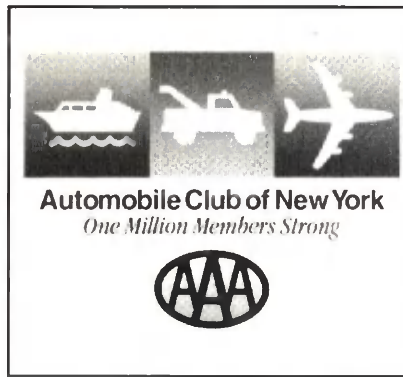
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of perceived market position. Figure 3 clearly exposes attributes that have a high level of importance to the membership, as defined by its mean rating, but have a low performance-to-expectation deviate (P-E gap).

When the P-E gap is considered, those attributes with a large negative value (performance below expectation), warrant further investigation. Within the secondary box displayed in Figure 3, there clearly is one at-

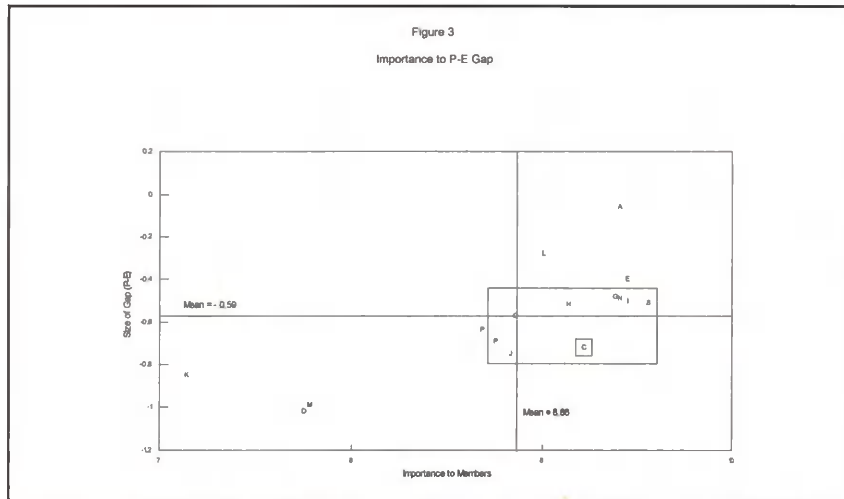


tribute that needs immediate management attention. There also are several that are simply "average" when compared to the overall rating means (that define the quadrants). For the organization to improve, average is not a competitive advantage, especially for an organization (not necessarily this one) that competes on value of service and cannot compete on the cost of service delivery.

Market driven

The research helped ACNY prioritize quality improvement programs and allocate resources that focus on the critical issues that affect service quality. The organization is now more in tune with member expectations, making it a true market driven provider.

"If you're committed to quality, this type of research allows you to make sure you're focusing on what's important to customers. We plan on doing this over time to measure how we're succeeding in closing the gap and how our members perceive our service quality performance." □



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Moderators

Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 612-861-8651/ fax 612-861-1836.

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Thorne Creative Research

TELECOMMUNICATIONS

BAI
Cunninghis Associates
Erick and Lavidge
Find/SVP

First Market Research (J. Heiman)
Horowitz Associates Inc.
Intersearch Corporation
Marketing Advantage Research
Strategy Research Corporation

TELECONFERENCING

Cambridge Research, Inc.

TELEPHONE FOCUS GROUPS

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

TOYS/GAMES

Carlson Marketing Consultants
Fader, William & Associates
KidFacts Research

TRANSPORTATION SVCS.

Sweeney International, Ltd.

TRAVEL

Michael Carraher Discovery Rsch.
James A. Lumpp
James Spanier Associates
Spier Research Group
Sweeney International, Ltd.

UTILITIES

Fader, William & Associates
Freeman, Sullivan & Co.
Nordhaus Research, Inc.

WEALTHY

Strategy Research Corporation

YOUTH

Doyle Research Associates
Fader, William & Associates
Outsmart Marketing

1995

Data Processing/ Statistical Analysis/ Software Directory

Section I (p. 42-54):

Providers of data processing and statistical analysis services

Section II (p. 54-75):

Providers of software programs for use with PCs

Section III (p. 75-81):

Providers of software programs for use with mainframes

Each section contains company listings and a cross-index of the services the companies provide.

PROVIDERS OF DATA PROCESSING & STATISTICAL ANALYSIS SERVICES

The Accutab Company
125 Marsellus Pl.
Garfield, NJ 07026
Ph. 201-546-7100
Fax 201-546-9687
Jon Brunetti, Principal

Acquadata Entry Services Inc.
3040 E. Tremont Ave.
Bronx, NY 10461
Ph. 718-824-8887
Fax 718-824-8856
Susan Acquafredda

Adapt, Inc.
12400 Whitewater Dr., #165
Minnetonka, MN 55343
Ph. 612-939-0538
Fax 612-939-0361
Karen Koch



Analytical
COMPUTER SERVICE, INC.

Analytical Computer Service, Inc.
640 N. LaSalle Dr.
Chicago, IL 60610
Ph. 312-751-2915
Fax: 312-337-2551
Jerry Madansky, President

Branch office:
8687 E. Via de Ventura
Scottsdale, AZ 85258
Ph. 602-483-2700
Fax 602-483-9388
Jack Pollack, Vice President

Data processing service bureau for 25 years providing coding, data entry, data cleaning, cross tabulations and multivariate analysis. Developer and marketer of ACS-QUERY, PC-based CATI and CAPI system, WINCROSS, a production-oriented Windows-based PC cross tab package, KNOCKOUT, for data entry, and JUGGLER, to match/merge/sort ASCII and column binary data files, randomize files and pick every nth number.
(See advertisement on p. 42)

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Apian Software
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Menlo Park, CA 94026
Ph. 800-237-4565
Fax 415-694-2904

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(See advertisement on p. 43)

Ardisson & Associates, Inc.
2399 Lawrenceville Hwy., Ste. 4
Lawrenceville, GA 30244
Ph. 404-339-1091
Fax 404-339-1092
Tom Ardisson, President

Atlantic Marketing Research Co., Inc.
109 State St., 4th fl.
Boston, MA 02109
Ph. 617-720-0174
Fax 617-589-3731
Peter F. Hooper

AutoData Systems
6111 Blue Circle Dr.
Minnetonka, MN 55343-9108
Ph. 612-938-4710
Fax 612-938-4693
Ken Sourbeck, Sales Manager

Bruce Bell & Ascts.
425 Main St., Ste. 10
Canyon City, CO 81212
Ph. 800-359-7738
Fax 719-275-1664
Jim Parnau

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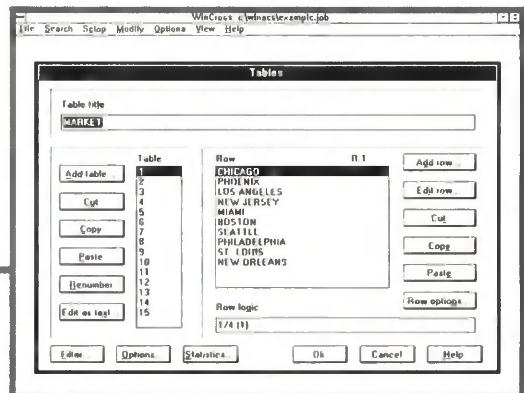
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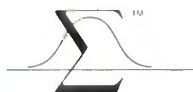


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Analytical Computer Software, Inc.
640 North LaSalle Drive Chicago, Illinois 60610 312/751-2915
8687 East Via de Ventura Scottsdale, Arizona 85258 602/483-2700

1-800-WINCROSS

Michael Blatt & Co., Inc.
606 Sespe Ave., #203
Fillmore, CA 93015
Ph. 805-524-6845
Fax 805-524-1531
Michael Blatt



BMDP Statistical Software, Inc.
12121 Wilshire Blvd., Ste. 300
Los Angeles, CA 90025
Ph. 800-238-2637
Fax 310-207-8844
Leon DiIpare, Sales Manager

For over 30 years, BMDP has provided technical professional data analysis software solutions. The BMDP product line features software for DOS, Windows, UNIX, and mainframes.

(See advertisement on p. 11)

Bolding Tab Service, Inc.
22 Sachem St.
Norwalk, CT 06850
Ph. 203-847-1108
Fax 203-849-9300
Lee Bolding, President

Bradenton Data, Inc.
1303 10th St. E.
Palmetto, FL 34221
Ph. 813-729-5694
Fax 813-729-2739
Scott Stewart, V.P. Bus. Dev.

Brunetti & Associates
201 Rock Rd., Ste. 217
Glen Rock, NJ 07452
Ph. 201-652-6448
Fax 201-652-6318
Wally Brunetti

Business Forecast Systems, Inc.
68 Leonard St.
Belmont, MA 02178
Ph. 617-484-5050
Fax 617-484-9219
K. Hemming, Marketing Director

Buzz Saw Computing
P.O. Box 7423
Nashua, NH 03062
Ph. 603-888-7210
Adam Rehbein, Marketing Specialist

CACI Marketing Systems
1100 N. Glebe Rd.
Arlington, VA 22201
Ph. 800-292-CACI(2224)
Fax 703-243-6272
Paul Davies

Cardiff Software
531 Stevens Ave., Bldg. B
Solana Beach, CA 92075
Ph. 619-259-6430
Fax 619-259-6450
Rochelle Pinnell

Cascio Research Services
32-34 Main St.
Norwalk, CT 06851
Ph. 203-854-6587
Fax 203-866-5257
John Cascio

Claritas, Inc.
1525 Wilson Blvd., #1000
Arlington, VA 22209
Ph. 703-812-2700



Computers for Marketing Corporation
Headquarters/Western Region/Svce. Bureau
547 Howard St.
San Francisco, CA 94105
Ph. 415-777-0470
Fax 415-777-3128
Leif Gjestland, Pres. or Richard Rands, Mgr.
Branch offices:

Eastern Region
126 Fifth Ave., Ste. 1501
New York, NY 10011
Ph. 212-627-7730
Fax 212-633-2451
Joyce Rachelson, Manager

Mountain Region/Svce. Bureau
1888 Sherman St., Ste. 425
Denver, CO 80203
Ph. 303-860-1811
Fax 303-860-0501
Kay Leaf, Manager

European Rep. & Support Office
STATIRO
4, rue Louis Lejeune
Montrouge 92120 France
Ph. 1-40-84-84-85
Fax 1-40-84-89-03
Jean Sousselier

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(See advertisement on p. 5)

Comstat Research Corporation
17 John Alexander Dr.
Cortlandt Manor, NY 10566-6303
Ph. 914-739-1671
Fax 914-739-1671

Consumer Pulse, Inc.
725 S. Adams
Birmingham, MI 48009
Ph. 800-336-0159 or 810-540-5330
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Rich Anderson



DJC

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Fax 914-591-4659
Doris J. Cooper, President

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Data Systems

CRC Data Systems

435 Hudson St.
New York, NY 10014
Ph. 212-620-5678
Fax 212-924-9111
Scott Waller, Vice President
Branch office:

70 E. Lake St.
Chicago, IL 60601
Ph. 312-443-1120
Fax 312-443-1349
Anthony Pacenti, Vice President

CRC is a 20-year-old provider of execution services to support research professionals. Our CATI center, coding, data entry, tabulation and software is designed to satisfy the needs of those doing design and analysis. (See advertisement on p. 53)

Creative Research Systems
140 Vista View, Ste. 100
Petaluma, CA 94952-4728
Ph. 707-765-1001
Fax 707-76-1068
Bill Eaton or Lisa Bacon



C T S C
COMPUTER TRAINING & SUPPORT CORPORATION

CTSC (Computer Training & Support Corp.)

14115 Farmington Rd.
Livonia, MI 48154
Ph. 800-884-CTSC (2872)
Fax 313-525-1401
Steve Foster, Nat'l. Sales Mgr.

CTSC provides software that offers a paperless method to create, distribute and

take surveys and/or tests. With an automatic question/response layout, tests or surveys can be made in minutes. Surveys or tests may be taken over a network or a stand-alone PC. Contains its own database for analyzing results using complex formulas and statistical functions. Presentation quality display of results.

(See advertisement on p. 2)

Data Lab Corp.
7333 North Oak Park Ave.
Niles, IL 60714
Ph. 708-647-6678
Maurice Girardi

Data Probe, Inc./Datatab, Inc.
80 Fifth Ave.
New York, NY 10011
Ph. 212-255-3355
Fax 212-255-9699
Jim Sheridan, Exec. V.P.

DATA RECOGNITION



CORPORATION

Data Recognition Corporation

5900 Baker Rd.
Minnetonka, MN 55345
Ph. 612-935-5900
Fax 612-935-1435
Deanna Hudella, Mgr. Sales & Mktg.

Data Recognition Corporation provides custom survey processing services, including project management, questionnaire layout, printing, variable intelligent printing, material distribution/ mailing, collection, optical/IMAGE scanning, key entry, programming, reporting, statistical analysis, and verbatim comment typing/coding to commercial, medical, government, and education markets. (See advertisement on p. 45)

DATAN, Inc.
301 N. Harrison, Ste. 482
Princeton, NJ 08540
Ph. 609-921-6098
Fax 609-921-6731
Michael Stentz

Datanetics
114 N. Beatty St.
Pittsburgh, PA 15206-3002
Ph. 412-363-3282
Jerry Lisovich, Director

DataSource
3939 Priority Way S. Dr.
P.O. Box 80432
Indianapolis, IN 46280-0432
Ph. 800-800-8370
Fax 317-843-8638
Teresa Young

DataStar, Inc.
400 Main St., Ste. 2
Waltham, MA 02154
Ph. 617-647-7900
Fax 617-647-7739
Elaine Smerlas, President

Data Tabulating Service, Inc.
3323 Chamblee-Dunwoody Rd.
Chamblee, GA 30341
Ph. 404-455-0114
Fax 404-458-8926
Bill Tyner

Data Vision Research, Inc.
29 Emmons, Bldg. G1
Princeton, NJ 08540
Ph. 609-987-0565
Ron Vangi

Delphus, Inc.
103 Washington St., Ste. 348
Morristown, NJ 07960
Ph. 201-267-9269
Fax 201-285-1228
Hans Levenbach, President

ENVISION_™

EnVision Knowledge Products

1 Veterans Square
Media, PA 19063
Ph. 610-566-4210
Fax 610-566-4252
Mike Fassino, Principal
Branch office:
203 E. Baltimore Pike
Media, PA 19063
Ph. 610-565-1832
Fax 610-565-7293
Rose Marie McElwee, Dir. Sales & Mktg.

EnVision Knowledge Products' staff of professional statisticians and programmers have been providing state-of-the-art statistical analysis and report writing for over 15 years. We are ready to help you with all your analysis and reporting needs, from the most simple to the sublime.

(See advertisement on p. 55)

FMR Associates, Inc.
6045 E. Grant Rd.
Tucson, AZ 85712
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Fax 602-886-0245
Jess De Vaney

Geographic Decision Support Systems
2345 Queen St., 2nd fl.
Toronto, ON M4E 1H2
Ph. 416-693-9054
Fax 416-693-7893
Dr. David Brusegard

Hancock Information Group
2180 West S.R. 434, Ste. 3170
Longwood, FL 32779
Ph. 407-682-1556
Fax 407-682-0025
John Bonsall

HBRS, Inc.
455 Science Dr.
Madison, WI 53711
Ph. 608-232-2800
Fax 608-232-2858
Kent D. Van Liere, Principal/President
Branch office:
20 Park Plaza, Ste. 1220
Boston, MA 02116
Ph. 617-695-9421
Fax 617-695-1427
Glen Weisbrod, Principal

Idea Works, Inc.
100 W. Briarwood
Columbia, MO 65203
Ph. 314-875-5827 or 800-537-4866
Fax 314-875-5814
Ed Brent, President

Imagisys, Inc.
60 Rome St.
Farmingdale, NY 11735
Ph. 516-420-4770
Herb Rubinsky

Immediate Quality Data
6075 E. Molloy Rd.
Rodax Park, Bldg. #1
Syracuse, NY 13211
Ph. 315-431-0660
John McCarthy

Intelligent Marketing Systems, Inc.
Ste. 2801, 10303 Jasper Ave.
Edmonton, AB T5J 3N6
Ph. 403-944-9212
Fax 403-426-7622
Michael Williams, President

International Data Corp.
1884 Lackland Hill Pkwy., #3
St. Louis, MO 63146
Ph. 314-432-7866
Fax 314-432-5960
Gayle Myers

IRA
701 N. Plano Rd.
Richardson, TX 75081
Ph. 214-690-4493
Andy Keedy

R. Isaacs Computing Ascts., Inc.
734 Walt Whitman Rd.
Melville, NY 11747
Ph. 516-427-1444
Fax 516-427-1455
Richard Isaacs, President

JRP Marketing Research Services, Inc.
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Minnetonka, MN 55345
(612) 935-5900 or (800) 826-2368

KG Tabs
80 Park Ave. S., Ste. 818
New York, NY 10003
Ph. 212-674-2323
Sally Krusch

Lincoln Systems Corporation
P.O. Box 391
West Ford, MA 01886
Ph. 508-692-3910

M. Lynch Company
80 Fifth Ave.
New York, NY 10011
Ph. 212-243-9022
Fax 212-989-2234
Marguerite Lynch

Management Science Associates, Inc.
6565 Penn Ave.
Pittsburgh, PA 15206-4490
Ph. 412-362-2000
Fax 412-363-8878
James Stangl

Manugistics, Inc.
2115 E. Jefferson St.
Rockville, MD 20852
Ph. 301-984-5000
Fax 301-984-5094
Jhana Shimizu, Mktg. Mgr.

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Fax 314-827-3224
Ron Lipovsky, President
Branch offices:

Performance Measurement Group

1297 N. Highway Dr.
Fenton, MO 63099
Ph. 314-827-2417
Fax 314-827-4651
Michael D. Phillips, Exec. V.P.

Performance Measurement Group

1415 W. 22nd St., Ste. 800
Oakbrook, IL 60521
Ph. 708-368-3800
Fax 708-368-3801
Michael Brereton, V.P., Div. Mgr.

Performance Measurement Group

100 Park Ave., 34th fl.
New York, NY 10017
Ph. 212-983-7575
Fax 212-983-7574
Steve Wolf, Acct. Mgr.

Performance Measurement Group

Southpoint Tower
1650 W. 82nd St., Ste. 1400
Bloomington, MN 55431
Ph. 612-885-3885
Fax 612-885-3886
Lynn Newman, V.P., Div. Mgr.

Performance Measurement Group

142 Central Ave.
Clark, NJ 07066
Ph. 908-388-4800
Fax 908-388-4999
Sandy Hoffman, Sr. Acct. Mgr.

Performance Measurement Group

17100 Pioneer Blvd., Ste. 400
Artesia, CA 90701
Ph. 310-809-0500
Fax 310-809-0422
Julie Williams, V.P., Div. Mgr.

Agricultural/Industrial Division

1297 N. Highway Dr.
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Ph. 314-827-2305
Fax 314-827-5433
Janet Hanson, Sr. Acct. Mgr.

Automotive Research Group

3035 Moffat Dr.
P.O. Box 352768
Toledo, OH 43615
Ph. 419-841-2831
Fax 419-841-8349
Tim Rogers, Group V.P.

Automotive Research Group

1515 W. 190th St., Ste. 300
Gardena, CA 90248
Ph. 310-217-4600
Fax 310-323-2459
Larry Sherman, Acct. Mgr.

Automotive Research Group

1000 Town Center, Ste. 1100
Southfield, MI 48075
Ph. 313-948-4500
Fax 313-948-4647
Pam Donoghue, Sr. Acct. Mgr.

Full service marketing research firm. Internal data processing and data entry staff. Custom data tabulation, CATI interviewing. Statistical analysis experience with most multivariate methods (ANOVA regression, factor conjoint, cluster, etc.) plus proprietary. (See advertisements on pp. 15, 46)

Market Probe International
19 W. 44th St., Ste. 1004
New York, NY 10036-6001
Ph. 212-869-6262
Fax 212-869-6593
Alan Appelbaum, President

Marketeam Associates
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Fax 617-261-5390
Meryl Kahn, Dir. Sales & Mktg.

Marketing Probe
1233 N. Mayfair Rd., Ste. 100
Milwaukee, WI 53226
Ph. 414-778-6000
T.R. Rao, President

MarketPlace Research, Inc.
7800 Cooper Rd., Ste. 202
Cincinnati, OH 45242
Ph. 513-891-8891
Fax 513-891-8897
Gregory R. Widmeyer, Dir. Mktg. Rsch.



MATRIXX Marketing - Research Division
4600 Montgomery Rd., Ste. 400
Cincinnati, OH 45212
Ph. 800-323-8369 or 513-841-1199
Fax 513-841-0666
Brian Goret, Acct. Exec.

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(See advertisement on p. 32)

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Microtab, Inc.
380 Market Place
Roswell, GA 30075
Ph. 404-552-7856
Fax 404-552-7719
Larry Hills

Based in Atlanta, Microtab offers full service data processing. Full service is provided, from data entry to presentation quality tables. Data entry and coding services available. We can read data generated by Ci2, Ci3, CfMC, Oscar, etc. We can test already compiled data (tables) for statistical significance, keying areas where differences are found and annotating the results on the table. We can also provide overhead transparencies, slides or paper in black and white or in color.

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(See advertisements on pp. 47, 73)

Mid-America Research, Inc.
999 N. Elmhurst Rd.
Mt. Prospect, IL 60056
Ph. 708-392-0800
Fax 708-870-6236
Marshall Ottenfeld, President

Gary Mullet Associates, Inc.
466 Connemara Crossing
Lawrenceville, GA 30244-4854
Ph. 404-931-1060
Gary Mullet, President

Multivariate Software, Inc.
4924 Balboa Blvd., #368
Encino, CA 91316
Ph. 818-906-0740
Fax 818-906-8205
Brian Lorber, Marketing Manager

Next Generation Research, Inc.
30301 Wedgewood Dr.
Cleveland, OH 44139-1508
Ph. 216-498-1185
Fax 216-498-0983
Jonathan E. Brill, Ph.D., Principal

Optimum Solutions Corp.
265 Sunrise Hwy.
Rockville Centre, NY 11570
Ph. 516-763-6510
Fax 516-763-6769
Ira Sadowsky

Perfect Data
2015 W. Cactus Rd., #215
Phoenix, AZ 85029-2792
Ph. 602-861-2303
Fax 602-870-0221
Mark Yannone, Owner

Pericles Software
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Perrysburg, OH 43551
Ph. 419-872-0966 or 419-872-0441 (Tech.)
Fax 419-872-0441
Nora Logan

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Data Processing for Marketing Research

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Ph. 310-453-0633
Fax 310-453-3969
Ben Pine, President

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(See advertisement on p. 27)

Pizzano & Company, Inc.
301 Edgewater Place
Wakefield, MA 01880
Ph. 617-245-9545
Fax 617-245-9540
Christal Changelian

Processing Consultants In Mktg.
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Palisades Park, NJ 07650
Ph. 201-944-5585

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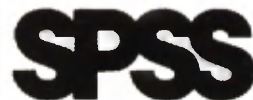
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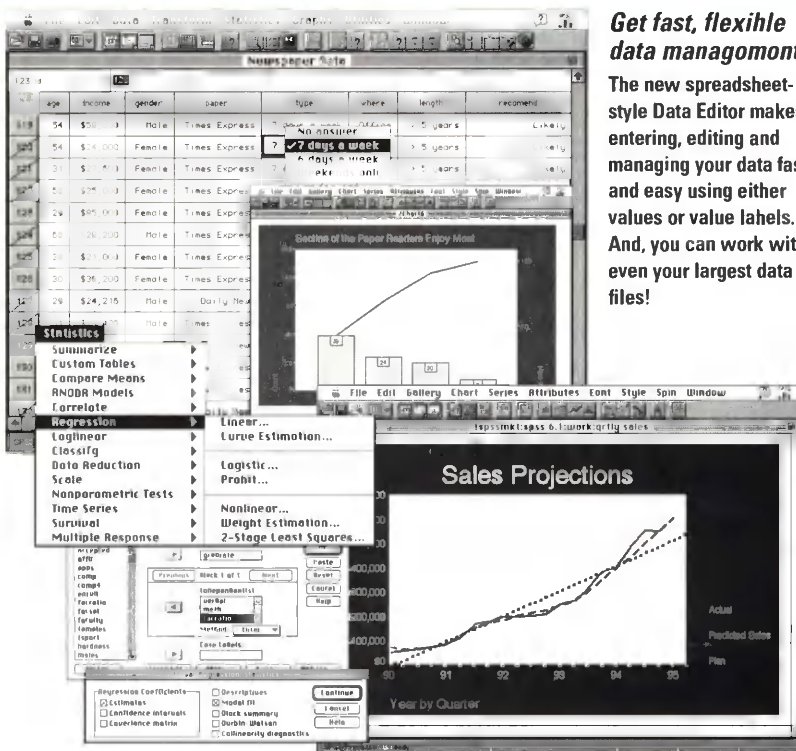
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Bloomfield Hills, MI 48302
Ph. 810-332-1217
Fax 810-332-6869
Kevin Cook, Technical Mktg. Mgr.



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Fax: 312-337-2551
Jerry Madansky, President
Branch office:
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Scottsdale, AZ 85258
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Fax 602-483-9388
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(See advertisement on p. 42)

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Bruce Bell & Ascts.
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Canyon City, CO 81212
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(See advertisement on p. 13)



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Fax 310-207-8844
Leon DiIpare, Sales Manager

BMDP offers several software programs for DOS and Windows, including data analysis, data visualization, structural equation modeling, and specialized statistical programs. (See advertisement on p. 11)

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89 Headquarters Plz., 14th fl.
Morristown, NJ 07960
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Fax 201-993-1757
Steve Herman

Brunetti & Associates
201 Rock Rd., Ste. 217
Glen Rock, NJ 07452
Ph. 201-652-6448
Fax 201-652-6318
Wally Brunetti

Business Forecast Systems, Inc.
68 Leonard St.
Belmont, MA 02178
Ph. 617-484-5050
Fax 617-484-9219
K. Hemming, Marketing Director

Buzz Saw Computing
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Nashua, NH 03062
Ph. 603-888-7210
Adam Rehbein, Marketing Specialist

CACI Marketing Systems
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Arlington, VA 22201
Ph. 800-292-CACI(2224)
Fax 703-243-6272
Paul Davies

Caliper Corporation
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Newton, MA 02161
Ph. 617-527-4700
Howard Slavin

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Ceresco, NE 68017
Ph. 800-642-4638
Fax 402-785-2073
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Fax 415-777-3128
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Branch offices:
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New York, NY 10011
Ph. 212-627-7730
Fax 212-633-2451
Joyce Rachelson, Manager

Mountain Region/Svce. Bureau
1888 Sherman St., Ste. 425
Denver, CO 80203
Ph. 303-860-1811
Fax 303-860-0501
Kay Leaf, Manager

European Rep. & Support Office
STATIRO
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Montrouge 92120 France
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Fax 011-1-40-84-89-03
Jean Sousselier

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Comstat Research Corporation
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Cortlandt Manor, NY 10566-6303
Ph. 914-739-1671
Fax 914-739-1671



Data Systems

CRC Data Systems
435 Hudson St.
New York, NY 10014
Ph. 212-620-5678
Fax 212-924-9111
Scott Waller, Vice President
Branch office:
70 E. Lake St.
Chicago, IL 60601
Ph. 312-443-1120
Fax 312-443-1349
Anthony Pacenti, Vice President

CRC Software offers solutions for CATI interviewing with TELATHENA™, tabulation needs with TABULOUSTM and ADtab™, and data reporting with POST™. (See advertisement on p. 53)

Creative Research Systems
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Petaluma, CA 94952-4728
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Fax 707-76-1068
Bill Eaton or Lisa Bacon



If you're ready to start converting market research information into marketing knowledge, call Susan Pine at 1-800-854-0019 or by fax at 610-566-4252 and get a demo disk of EnVision Knowledge Products' **SmartReport**.

SmartReport an extremely easy to use computer program for creating and distributing **interactive multimedia** market research reports. The **SmartReport** allows market researchers to:

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- Completely integrate qualitative and quantitative research.
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- Automatically update text and graphics in tracking studies.
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- Provides integration of complex statistical models such as conjoint simulators so they are activated from within a report.
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FAX 610-566-4252

Circle No. 131 on Reader Card



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Livonia, MI 48154
Ph. 800-884-CTSC (2872)
Fax 313-525-1401
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CTSC provides software that offers a paperless method to create, distribute and take surveys and/or tests. With an automatic question/response layout, tests or surveys can be made in minutes. Surveys or tests may be taken over a network or a stand-alone PC. Contains its own database for analyzing results using complex formulas and statistical functions. Presentation quality display of results.

(See advertisement on p. 2)

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Kent Francis

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80 Fifth Ave.
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Ph. 212-255-3355
Fax 212-255-9699
Jim Sheridan, Exec. V.P.

Datacap, Inc.
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Tarrytown, NY 10591
Ph. 914-332-7515
Fax 914-332-7516
Stephen Miller

DATAN, Inc.
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Princeton, NJ 08540
Ph. 609-921-6098
Fax 609-921-6731
Michael Stentz

Datanetics
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Pittsburgh, PA 15206-3002
Ph. 412-363-3282
Jerry Lisovich, Director

DataSource
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Indianapolis, IN 46280-0432
Ph. 800-800-8370
Fax 317-843-8638
Teresa Young

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Morristown, NJ 07960
Ph. 201-267-9269
Fax 201-285-1228
Hans Levenbach, President

Detail Technologies, Inc.
29 Emmons Dr.
Princeton, NJ 08540
Ph. 609-452-8228
Fax 609-987-9120

Digisoft Computers, Inc.
310 Madison Ave., Ste. 509
New York, NY 10017
Ph. 212-490-7980
Fax 212-370-9118
Peggy MacLean, Dir. Sales & Mktg.



EnVision Knowledge Products

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Media, PA 19063
Ph. 610-566-4210
Fax 610-566-4252
Mike Fassino, Principal
Branch office:
203 E. Baltimore Pike
Media, PA 19063
Ph. 610-565-1832
Fax 610-565-7293
Rose Marie McElwee, Dir. Sales & Mktg.

EnVision Knowledge Products' SmartReport™ is a computer program that puts your clients' data at their fingertips, along with all the tools they need to explore, interpret and generate decisions. By simply moving the mouse, your client can move through an interactive market research report containing text, graphics, build their own cross tabs and perform extensive statistical analysis.

(See advertisement on p. 55)

Equipax Nat'l. Decision Systems
5375 Mira Sorrento Pl., #400
San Diego, CA 92121
Ph. 619-622-0800

Expert Choice, Inc.
4922 Ellsworth Ave.
Pittsburgh, PA 15213
Ph. 412-682-3844
Rozann Whitaker

Ferox Microsystems, Inc.
901 N. Washington St., Ste. 707
Alexandria, VA 22314
Ph. 703-684-1660
Fax 703-684-1666
Rusty Luhning, President



GENESYS Sampling Systems

565 Virginia Dr.
Ft. Washington, PA 19034
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Fax 215-653-7114
Amy Starer, Vice President

Complete random digit dialing (RDD) sampling system for IBM compatibles and Apple Macs. Geographic capabilities down to the

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GENESYS-ID: Hardware/software/database system for identifying and purging non-working and non-household numbers from RDD samples.
(See advertisement on p. 57)

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Fax 607-729-5909
Mike Nichols, Dir. of Mktg.

Geographic Data Technology, Inc.
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Lebanon, NH 03766
Ph. 603-643-0330
Section III

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Fax 416-693-7893
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Ph. 608-232-2800
Fax 608-232-2858
Kent D. Van Liere, Principal/President
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Boston, MA 02116
Ph. 617-695-9421
Fax 617-695-1427
Glen Weisbrod, Principal

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Fax 916-621-2004
Margaret Hansen

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Columbia, MO 65203
Ph. 314-875-5827 or 800-537-4866
Fax 314-875-5814
Ed Brent, President

I M A - Information Mgmt. Ascts., Inc.
One Corporate Dr., Ste. 414
Shelton, CT 06484
Ph. 203-925-6800 or 800-776-0462
Fax 203-1170
Kathleen Corry, Mktg. Comm. Specialist
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Lisle, IL 60532
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Fax 708-241-4781
Jon Gassett, Reg. Mgr.

1891 Professional Bldg.



Just because it has ten digits doesn't mean it's a phone number.

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

No Black Boxes

Sample development should not be a black box process. GENESYS is for researchers who want to know exactly where the ten digits come from. We are the company to call if you need to know your sampling options and the impact each will have. You can count on us to provide a detailed methodological definition for every sample we create. GENESYS has no black boxes, just explicit sampling processes.

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One simple phone call gives you complete access to a wealth of experience and a collection of sampling resources that can handle any sampling problem. We have a full array of RDD sample methodologies (including the industry's *only* single stage epcem telephone probability sample) as well as listed household and business samples. Demographic targeting, with exchange-level demographic estimates, is available for all RDD and listed samples. GENESYS does it all, from sample design through generation.



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GENESYS Sampling Systems has the experience and technology to help you hold down the high cost of data collection. Our GENESYS Plus and GENESYS ID systems economically purge business and non-working numbers from your RDD sample so you don't have to pay interviewers to find them. We also offer significant, automatic, volume discounts on both a job and an annual basis.

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Quality research begins with a quality sample and you can count on GENESYS to be the most statistically accurate available. Whether you need a fully customized sample for a specific project, or you want to set up an in-house, stand-alone system using your own computers, GENESYS gives you the best of both worlds. The best way to find out what GENESYS Sampling Systems can do for you is to see us in action. Call today for a personal demonstration at your location .

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Ph. 703-391-6011
Fax 703-476-2217
Mike Faul, Mktg. Rep.

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Roswell, GA 30075
Ph. 404-552-7770
Fax 404-552-7403
Paul McGhee, Mktg. Rep.

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Fountain Valley, CA 92708
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Fax 714-641-0689
Mac McGary, Reg. Mgr.

Harbour Exchange Square
Ste. 4.04 Exchange Tower
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Chris Brooks, Reg. Mgr.

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Farmingdale, NY 11735
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Herb Rubinsky

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San Rafael, CA 94901-5568
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Fax 415-454-8901

InnoVision
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Ph. 707-795-3031
Fax 707-795-3031
Bill Eaton

Intelligent Marketing Systems, Inc.
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Edmonton, AB T5J 3N6
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Fax 403-426-7622
Michael Williams, President

IRI Software
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Waltham, MA 02154
Ph. 617-890-1100

R. Isaacs Computing Ascts., Inc.
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Fax 516-427-1455
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Landis Group
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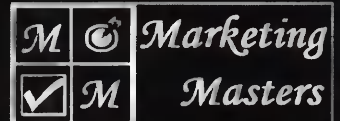
Leibowitz Market Research Ascts.
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Ph. 704-357-1961
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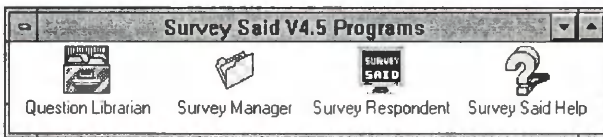
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Fax 910-759-0636
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Branch offices:

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Fenton, MO 63099
Ph. 314-827-2417
Fax 314-827-4651
Michael D. Phillips, Exec. V.P.

Performance Measurement Group
1415 W. 22nd St., Ste. 800
Oakbrook, IL 60521
Ph. 708-368-3800
Fax 708-368-3801
Michael Brereton, V.P., Div. Mgr.

Performance Measurement Group
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Fax 212-983-7574
Steve Wolf, Acct. Mgr.

Performance Measurement Group
Southpoint Tower
1650 W. 82nd St., Ste. 1400
Bloomington, MN 55431
Ph. 612-885-3885
Fax 612-885-3886
Lynn Newman, V.P., Div. Mgr.

Performance Measurement Group
142 Central Ave.
Clark, NJ 07066
Ph. 908-388-4800
Fax 908-388-4999
Sandy Hoffman, Sr. Acct. Mgr.

Performance Measurement Group
17100 Pioneer Blvd., Ste. 400
Artesia, CA 90701
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Fax 310-809-0422
Julie Williams, V.P., Div. Mgr.

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Fax 419-841-8349
Tim Rogers, Group V.P.

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Gardena, CA 90248
Ph. 310-217-4600
Fax 310-323-2459
Larry Sherman, Acct. Mgr.

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Ph. 212-869-6262
Fax 212-869-6593
Alan Appelbaum, President

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Fax 708-491-0682
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1. Was this your first visit to the centre or had you visited before that?

First visit Visited within the year Visited before that

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42	125	136
8%	25%	28%
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36	70	51
10%	28%	20%

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Fax 201-599-0791
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Fax 617-261-5390
Meryl Kahn, Dir. Sales & Mktg.

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Milwaukee, WI 53226
Ph. 414-778-6000
T.R. Rao, President



MATRIXX Marketing - Research Division
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(See advertisement on p. 32)

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SNAP Professional™: An integrated survey design and analysis software, available in Windows or DOS, for creating and analyzing surveys. Facilities include questionnaire printing and 3 methods of data entry. Analysis incorporates cross tabulations, frequency and grid tables, 2D & 3D bar, pie and line charts, descriptive statistics, data import and export. SNAP™ Data Entry and SNAP™ Analysis editions are also available.
(See advertisement on p. 59)

MICROTAB

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Fax 404-552-7719
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(See advertisements on pp. 47, 73)

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Fax 708-870-6236
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Michael Carr, Director

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Fax 801-546-3907
Jerry Hintze

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Fax 419-872-0441
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Fax 610-430-3316
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Yorba Linda, CA 92686
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Dara Kubiak

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Dallas, TX 75243
Ph. 214-824-4939
Fax 214-824-5670
Vicki Bernstein, Owner

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Fax 301-951-3362
Peter Van Brunt, President

P-STAT, Inc.
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Hopewell, NJ 08525
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Fax 609-466-1688
Sebbie Buhler, Mktg. Mgr.

Pulse Analytics, Inc.
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Ridgewood, NJ 07450
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N. Palm Beach, FL 33408
Ph. 407-842-4000
Fax 407-842-7280
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Chicago, IL 60646
Ph. 312-794-8900

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(See advertisement on p. 77)

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New York, NY 10014
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Fax 212-627-4363
MacGregor Suzuki

Quality Information Center
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Staten Island, NY 10304
Ph. 718-987-0893
Fax 718-667-8005
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New York, NY 10010
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Fax 212-447-9097
Joseph P. Marinelli, President
Branch offices:
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Fax 513-563-8807
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Quanvert/Quanvert for Windows: Interactive data analysis for researchers. Tabulates any question (variable) in the database by any other. Some of Quanvert's features include filtering tables on any answer or combination of answers from existing questions and creating new variables by combining/splitting parts of existing questions. Quanvert can also handle multiple projects simultaneously. Tables may be weighted, unweighted or volumetric. Interfaces with Quantum. Available on Multi-User UNIX machines, 640K MS-DOS PCs and Windows.

Quanquest: Interactive design system. Uses color windows and menus. Stores questions, groups of questions and entire questionnaires for use with new questionnaires. User enters text of questions and responses. Handles skip patterns and grid questions. Automatically assigns column and punches, generates printed questionnaires, CATI script, editing and tabulation specs. Interfaces with Quantum and Quancept. Available on 640K MS-DOS PCs. New more powerful and easier to use Windows version available mid-1995.

Quancept/CATI: CRT Interviewing System. Handles very large and complex questionnaires. Significant features are telephone number management, quota control, computer assisted coding, interviewer monitoring, and interactive topline tabs. Generates printed questionnaire and tabulation specs from script. Predictive-dialer interface available. Interfaces with Quanquest and Quantum. Available on multi-user UNIX machines.

Quancept/CAPI: CRT interviewing system. Handles very large and complex questionnaires. Significant features are quota control, computer assisted coding and interactive topline tabs. Displays color graphics. Generated printed questionnaires and tabulation specs from script. Interfaces with Quanquest and Quantum. Available on 640K MS-DOS PCs. New Windows version available mid-1995.

(See advertisement on p. 3)

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Berkeley, CA 94704
Ph. 510-540-7200
Fax 510-540-7268
Robert Uhlener



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(See advertisement on p. 60)

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Winston Lee, President

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London, U.K. SW1P 1RL
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Richard Hoptruff, President
Branch office:

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Newbury, MA 01951
Ph. 800-803-0933
Fax 508-462-9198
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(See advertisement on the back cover)

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Fax 708-475-7830
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Ph. 603-623-5877
Len Harrington

Samamish Data Systems, Inc.
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Fax 919-677-8123
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Fax 818-952-8117
Robert Saxe

Scientific Computing Associates
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(See advertisements on pp. 23, 63)

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Charles N. Smart, President

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Ph. 312-275-5273
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Peter Douglas, Sales Manager

Statistical Innovations Inc.
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Belmont, MA 02178
Ph. 617-489-4490
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Fax 514-483-6660
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(See advertisements on pp. 18, 30)

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Great Neck, NY 11021
Ph. 516-829-1800
Fax 516-829-1823
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Wilson Baker, President

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Fax 413-499-5047
Jan Werner, Principal

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3D Software Services
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Pulse Train Technology
P-STAT, Inc.
Quantime Corporation
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Cortlandt Manor, NY 10566-6303
Ph. 914-739-1671
Fax 914-739-1671



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New York, NY 10014
Ph. 212-620-5678
Fax 212-924-9111
Scott Waller, Vice President

Branch office:
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Fax 312-443-1349
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Fax 212-255-9699
Jim Sheridan, Exec. V.P.

Devcom Mid-America Inc.
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Oak Brook, IL 60521
Ph. 708-574-3600
Fax 708-572-0508
Ronald Diener

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Fax 610-566-4252
Mike Fassino, Principal

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Equifax Nat'l. Decision Systems
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San Diego, CA 92121
Ph. 619-622-0800



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Fax 608-232-2858
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Ph. 617-695-9421
Fax 617-695-1427
Glen Weisbrod, Principal

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Ph. 617-890-1100

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Melville, NY 11747
Ph. 516-427-1444
Fax 516-427-1455
Richard Isaacs, President

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Fax 212-869-6593
Alan Appelbaum, President

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Fax 708-491-0682
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Fax 818-906-8205
Brian Lorber, Marketing Manager

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Fax 212-447-9097
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Fax 513-563-8807
Rudy Bublitz, Acct. Mgr.

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Quancept/CATI: CRT Interviewing System. Handles very large and complex questionnaires. Significant features are telephone number management, quota control, computer assisted coding, interviewer monitoring, and interactive topline tabs. Generates printed questionnaire and tabulation specs from script. Predictive-dialer interface available. Interfaces with Quanquest and Quantum. Available on multi-user UNIX machines.

Quancept/CAPI: CRT interviewing system. Handles very large and complex questionnaires. Significant features are quota control, computer assisted coding and interactive topline tabs. Displays color graphics. Generated printed questionnaires and tabulation specs from script. Interfaces with Quanquest and Quantum. Available on 640K MS-DOS PCs. New Windows version available mid-1995. (See advertisement on p. 3)

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(See advertisements on pp. 23, 63)

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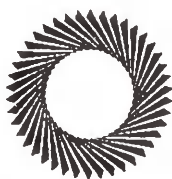
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Frank Derrick



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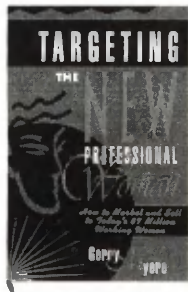
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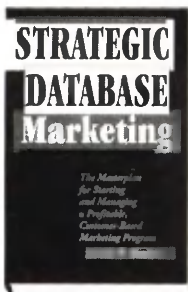
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Listing Additions

Please note the corrections to the following listings from the 1995 Directory of Focus Group Facilities (corrected text shown in bold):

Pathfinder Research Group
179 Great Road
Acton, MA 01720-5740
Ph. 508-263-0400
Fax 508-264-4065
Contact: James F. Shur
1,3,4,6,7B

The listing for Survey Central, Inc., Northfield, N. J., on page 112 should have been placed under the **Atlantic City** heading. The company also has a new address:

Survey Central, Inc.
503 Mill Rd.
Northfield, NJ 08225
Ph. 609-383-1700
Fax 609-383-1783
Contact: Jody Davis
1,3,6,7B
Rm. 1) 15x20 Obs. Rm. Seats 10

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Atlanta Focus
Druid Chase Office Park
2801 Buford Hwy., Ste. 250
Atlanta, GA 30329
Ph. 404-636-9054
Fax 404-636-8927
Contact: Marianne H. Polk
1,3,6,7B,8,9
Rm. 1) 15x20 Obs. Rm. Seats 18
Rm. 2) 15x20 Obs. Rm. Seats 18
Rm. 3) 15x20 Obs. Rm. Seats 18

The Consumer Center of Mid-Florida
101 Philippe Pkwy., Ste. A
Safety Harbor (Tampa), FL 34695
Ph. 813-726-0844
Fax 813-724-3944
Contact: Ann Hudson
1,2,3,4,6,7C,8
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†Rm. 2) 29x18 Obs. Rm. Seats 25
†Rm. 3) 26x12

Issues and Answers Network, Inc.
301 N.W. 63rd St., Ste. 140
Oklahoma City, OK 73116
Ph. 405-840-4767
Fax 405-840-5660
Contact: Carla Lindemann
1,3,6,7B,8,9
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Issues and Answers Network, Inc.
5151 Bonney Rd.
Virginia Beach, VA 23462
Ph. 804-456-1100
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Contact: Carla Lindemann
1,3,6,7C,8,9
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Strategic Marketing & Research, Inc.
9200 Keystone Crossing, Ste. 400
Indianapolis, IN 46240
Ph. 317-574-7700
Fax 317-574-7777
Contact: Fred Bingle
1,3,6,7B

Williams Research
641 Ohio St.
Terre Haute, IN 47808
Ph. 812-232-0360
Fax 812-232-1298
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Trade Talk

continued from p. 86

they expect to happen in terms of interest rates and inflation. Their expectations are moderate and realistic.

"Most of those investing have that long-term horizon, they're not speculators. They're not in because they think they're smarter than the market they're there because they have their savings tucked away in an IRA."

Zehren says he was impressed by the widespread nature of investing. "It's something that surely reaches into the middle class and isn't the domain of those in the highest income groups."

Some of the major findings:

- Two out of five (41 percent) Americans now invest in stocks, bonds, mutual funds or commodities;

- Two-thirds of those with incomes of \$50,000 or more have some type of investment; half of them use a full service broker; one-quarter use a discount broker;

- Twenty-one percent of investors have all of their investments in a retirement account of some kind — an IRA, 401(k) or Keogh account.

Age is, not surprisingly, the biggest influence on people's investing practices and outlook. For investing, the prime age range is 45-54. Up to age 45, investors are much more likely to say they expect to buy stocks than to sell them. After they hit 54, stock purchases drop sharply and selling is more common as investors turn towards concerns about stability and go to cash.

Those in the 55-64 age group were the least optimistic about the stock market. Only 19 percent expected stock prices to go up, compared to 31 percent of other age groups.

Regional differences

The research also uncovered some interesting regional differences in mutual fund investors. Those in the west are very concerned with a fund's financial objectives. Westerners and southerners said full disclosure of management fees, loads and other charges was very important. Midwesterners are more concerned about avoiding risk: they are the least likely to decrease their cash holdings (17 percent as compared to 27 percent to 29 percent in other regions). Midwesterners who are looking for mutual funds are more likely to place the highest importance on the fund's past performance.

Investors have higher average incomes than non-investors — \$37,300 vs. \$24,500 respectively. Investors are better-educated and are more likely to be white, married and work full-time.

As you might expect, investors were more bullish than non-investors. When the surveys were conducted, most investors felt the market would go up (either a little or a lot) or stay the same. While nearly half of investors expect to hold their current portfolios, 33 percent expected only to buy in the next six months, 16 percent expected to buy and sell. Only 4 percent expected only to sell.

Most investors and non-investors were realistic about another interest rate increase.

There were also some differences between the sexes. "Men's portfolios are less conservative, and they are more aggressive players than women overall. This pattern does not stem from differences in expectations about interest rates or inflation, but rather seems to reflect different concerns and priorities," Zehren says.

Three in ten men but only one in four women own stocks. Men take more risks and are for the most part more

Percentage of Americans Who	
Own one of more types of investments	41%
Stocks	27%
Mutual Funds	23%
Bonds	22%
Commodities	4%
Do not invest in any of these	59%

Source: Chilton's EXPRESS Omnibus Investors Survey

active in the market. Of mutual fund investors, 54 percent of the men and 41 percent of the women own shares in stock funds. 24 percent of the men and 15 percent of the women are in corporate bond funds; 29 percent and 20 percent are in funds that invest in both.

Women are more likely to invest in (ostensibly) more conservative vehicles like municipal, government or treasury bonds. Men more often invest in riskier, low-grade corporate bonds.

Zehren says that despite these findings, marketers should be careful about rushing into marketing programs that play to one sex or the other. "The differences are at the margin. Both may be predominately of the same attitude, it's just that one is a stronger majority than the other, that's why I'd be cautious if I were them. One can find uninformed men and women, so I would use a mix of male and female portrayals [in advertising]."

Clear and up front

One opportunity the results present is for mutual funds to be clear and up front about their management fees and other expenses. Not only are investors interested in these numbers but they seem to seek out funds that make this information easy to find and understand.

For marketers of financial services, Zehren says the most important finding is that despite the market's gyrations, investors haven't been scared away.

"The research shows a receptive marketplace that wants to play ball and is quite realistic about the criteria they use to select their investments. They seemed to be reasonably informed and disciplined in the way that they operate."



Trade Talk

By Joseph Rydholm/QMRR editor

Confessions of a mutual fund junkie

I confess: I'm a mutual fund junkie. My house is littered with fund prospectuses (prospecti?). I fill my waking hours poring over *The Wall Street Journal*, *Smart Money*, *Money* and *Kiplinger's* and watching CNBC or "Wall Street Week."

Even if I don't have any cash to invest, I still think about mutual funds. Should I switch funds? Should I pick a different international fund? Are this fund's 12b-1 fees too high?

At least I don't have photos of my favorite fund managers

up on my walls — yet.

The worst thing is, I think I've drawn some of my friends and co-workers into my sickness. Pals who three years ago looked at me quizzically when I started blabbing about mutual funds now come up to me, with that telltale look in their eyes, and ask if I've heard anything about "that hot new sector fund."

At least we're not alone. There are millions of others with the investment bug. During the past few years, the assets of mutual funds have swelled to record levels as Jane and John Q. Public cashed in their CDs and savings accounts and jumped into the stock and bond market, hoping for double digit returns. Others have entered the market after realizing that social security and company pensions won't be enough to provide for retirement.

Things went smoothly in the market for a while before it tanked last year. Since then it's been a roller coaster. It seems like each week brings a new bugaboo: the Orange County mess, the earthquake in Kobe, the collapse of the peso, the specter of inflation and the fed's attendant interest rate shenanigans.

When will it end? Probably never. But I'm still in the market and I plan to be for the long term. According to surveys done by Chilton Research Services, Radnor, Pa., most other investors feel the same way.

Two separate phone surveys were conducted last fall of a nationwide random sample of adults 18 and older to determine the level of U.S. consumers' investment activity, to understand the demographics of investors, and to take the pulse of investors and non-investors regarding the current economic climate.

Optimism and resilience

The research found considerable optimism and resilience in investors' attitudes, says Bart Zehren, research consultant with the CRS Financial Services Group of Chilton Research Services. "They have a willingness to stay with the market for the long haul. People were realistic and ready to absorb what

continued on p. 85



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Market Administrator, GTE Directories
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Manager, ICI Pharmaceuticals
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Product Researcher, Midmark Corporation
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Business Research Analyst, Dow Chemical
- Fantastic! Even though I have an M.S. in stats I have never had such a clear picture of how to apply stat techniques before. Wonderful examples to explain the theories, ideas, philosophies-superb (speaker)! Helped to motivate me to expand my use of different techniques and explore more possibilities.
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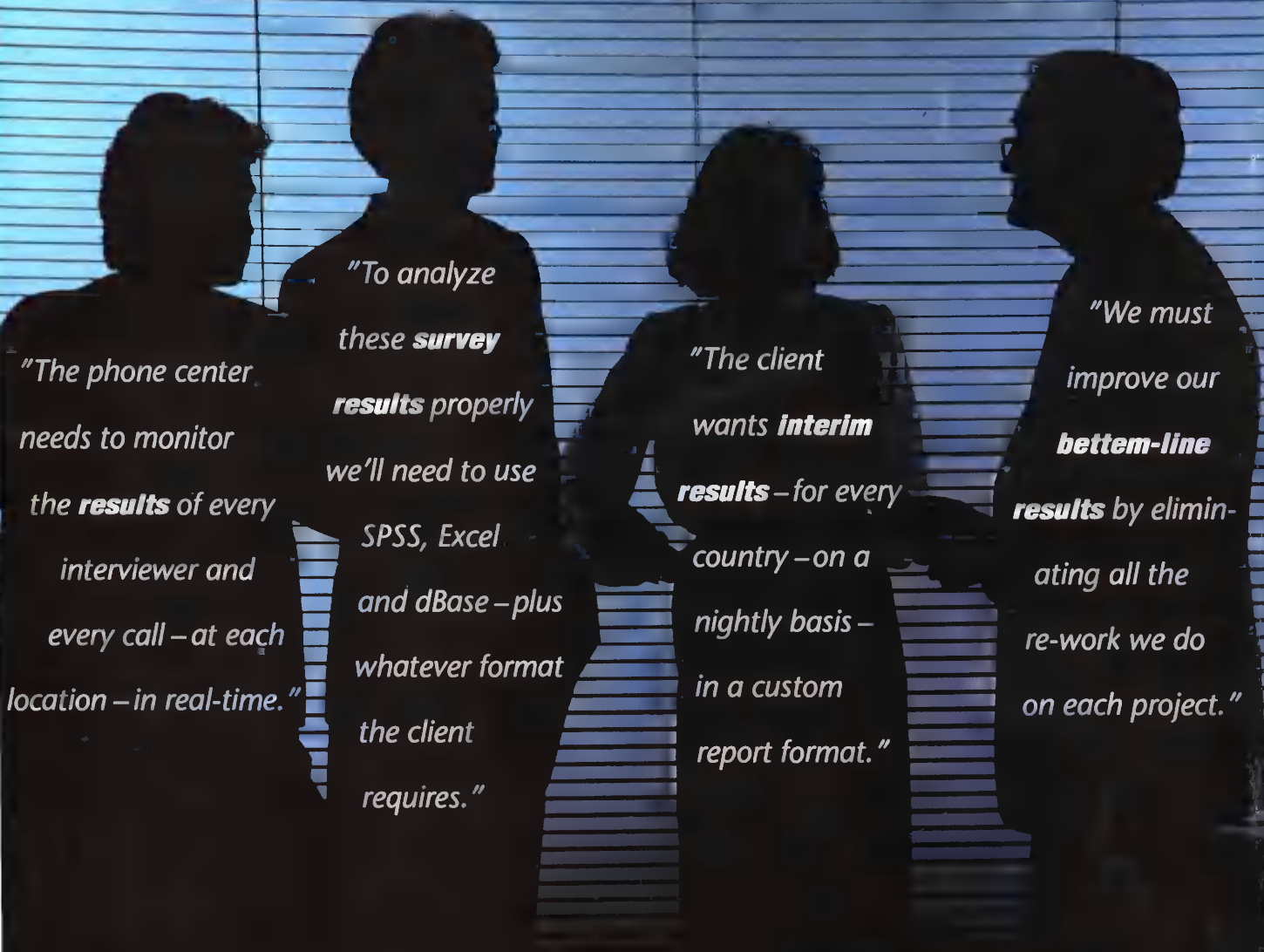
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