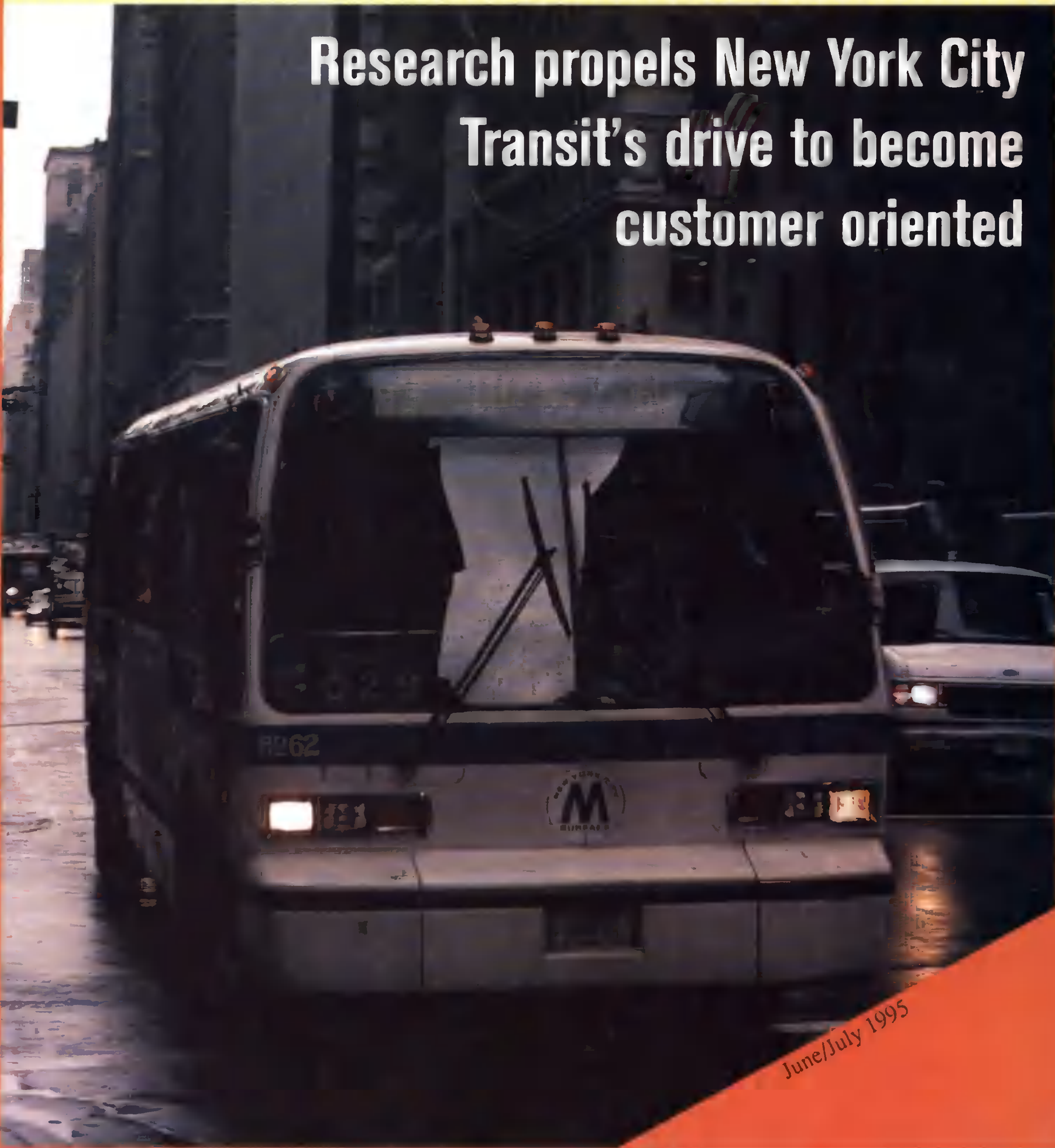
Quirk's MARKETING RESEARCH Review

Research propels New York City Transit's drive to become customer oriented



June/July 1995

Quirk's
MARKETING RESEARCH
Review

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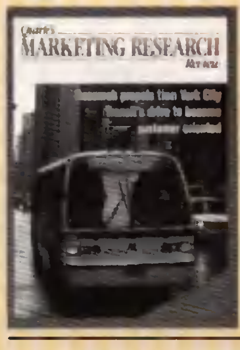

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Cover
New York City Transit (NYCT) turned to its passengers for help in delivering better service. Photo courtesy of NYCT.

FEATURES

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Take the R train

Research propels New York City Transit's drive to become customer oriented

By Joseph Rydholm/QMRR editor

Riding the subway this spring during my annual visit to New York City, something seemed wrong. First of all, I could actually understand what the conductors were saying as they rattled off the upcoming stops. And as passengers filed out of the cars, the conductors said things like, "Have a nice day," and "Watch your step as you exit."

I also noticed that the subway cars and stations seemed a bit cleaner. There were fewer panhandlers on the trains. This was not the kind of New York subway experience I've become used to.

Ken Stuart would be happy to hear that. In his five years as director of marketing research and analysis at New York City Transit (NYCT), Stuart has used a host of marketing research efforts to make riding the city's subways and buses a more pleasant experience.

Research has been an inte-

The NYCT marketing research department staff, from left, Ken Stuart, Susan Connolly, Marc Mednick, Wing Leung, Bruce Shaller, Wally Wentworth (seated), and Bram Weiser.

gral part in NYCT's drive to become more customer focused. Behind that drive is the belief that subway and bus riders have a choice in how they get from point A to point B. "We don't assume that our customers have to use us," Stuart says. "Some people don't have a choice but there are a lot of people who do. Even those who don't have a choice, we want to treat as though they do."

Succeed and flourish

Each day, the subway system moves over 3 million passengers; the bus system another 1.5 million. Annually, the system chalks up one billion subway rides and a half-billion bus rides.

If NYCT, with nearly 45,000 employees and 27 major departments and divisions, can integrate marketing research into its corporate culture and use it as an agent for change, it seems like almost any organization can do it. What it takes, Stuart says, is a total commitment to customer service and management that values the role of research.

Both of these things exist at NYCT, Stuart says, thanks in large part to Alan Kiepper, president of NYCT, who has championed the need for customer focus since he arrived five years ago, and Jack Lusk, senior vice president for customer services. "They have created an environment to promote the customer orientation that has allowed marketing research to succeed and flourish within NYCT," Stuart says. Under Lusk's organization, Stuart reports to Mary

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Study explores role of market research in HMOs

By Bahl Gardner

Editor's note: Dahl Gardner is vice president of quality operations, Paria Group, an Orem, Utah research firm.

The growing popularity of managed care coverage and increasing competition and governmental pressures are forcing health maintenance organizations (HMOs) to become more sensitive to customer satisfaction. To find out how to improve service and satisfaction, many HMOs are turning to market research.

With research potentially playing a larger role in HMO decision making, Paria Group, an Orem, Utah research firm, conducted a study to determine the current status of market research in HMOs.

The data was collected from May 16, 1994 through September 15, 1994 at Paria Group's facility using computer-assisted telephone interviewing software. Respondents were identified as the person most knowledgeable about market research in the organization. Respondents who participated in the survey were sent a copy of the executive summary. The study was conducted with representatives of 225 HMOs which were randomly selected from all of the HMOs within the United States (546).

The main objectives of the study were to determine:

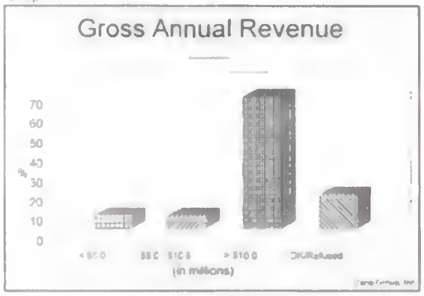
- the structure and role of market research within the HMO;
- which research methodologies were used and their level of usage; and
- how the HMO's annual research budget or annual gross revenue affect the research function.

Of the 225 HMOs surveyed, the study found that 99 percent (223) conduct market research on a regular basis. Nearly half (49 percent) have a central market research department. Over one-third (35 percent) have established written policies or guidelines regarding market research.

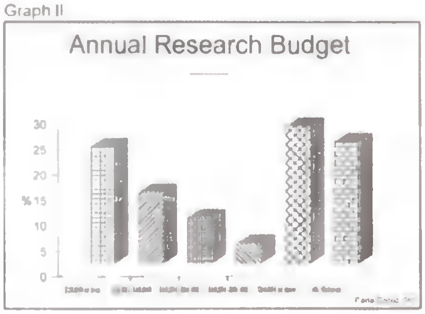
Gross annual revenue, annual research budget, and plan size (number of covered lives) were found to be important factors affecting market research. The distributions from our sample are shown in Graphs I, II, and III.

As you can see in Graph I, the gross annual revenue is highly concentrated in the over-$10 million range (68 percent). Graph II shows that the annual research budget is concentrated at the under-$20,000 range (23 percent) and the over-$80,000 range (27 percent). The mean of plan sizes is about 40,000 covered lives, with most plans at 50,000 or less, as shown in Graph III.

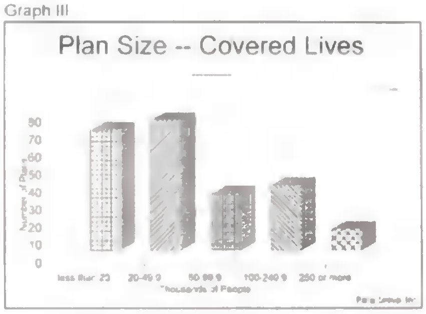
Graph I



Graph II



Graph III



When researchers at HMOs were asked how important market research was for various purposes, most (84 percent) indicated that market research was important for "determining customer satisfaction, which contributes to continuing quality improvement." Other responses are summarized in Table I.

Table I

USES OF MARKET RESEARCH	PERCENT OF HMO'S
Determining customer satisfaction which contributes to continuing quality improvement	84%
Conducting business and consumer image assessment	58%
Test marketing before new products or services are introduced	46%
Determining advertising effectiveness	45%
Conducting tracking studies	41%

Research organization

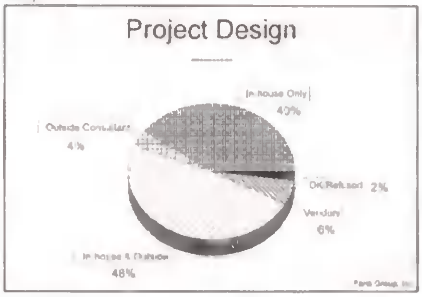
There are a variety of approaches for initiating, organizing and conducting research. They include: a central market research department; a marketing or service department; joint research conducted by several departments; separate research conducted by each division or department; individuals who have the responsibility for research; an outside supplier; and/or combinations of several approaches.

The central market research department is the dominant approach and is used by approximately 49 percent of respondents. Many other HMOs indicated that they plan to establish central market research departments in the future.

Another related trend in research is for HMOs to use contract services in conjunction with in-house personnel rather than using solely in-house personnel. For example, 48 percent of HMOs use a combination of contract services and in-house personnel for project design, compared to 40 percent who use in-house personnel only. Graph IV clearly illustrates this. Similar trends for data collection and data analysis are shown in Graphs V and VI.

ARE MARKET RESEARCH PROJECTS DESIGNED BY IN-HOUSE PERSONNEL ONLY/ OUTSIDE SOURCES ONLY/MIXED SOURCES?

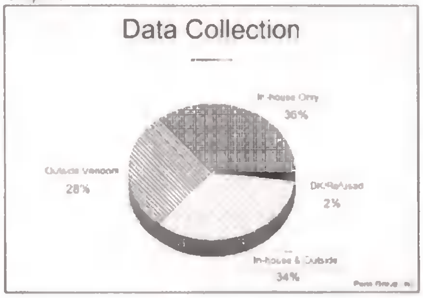
Graph IV



Graph V shows the distribution of HMOs in data collection: 36 percent use in-house personnel only, 34 percent use mixed sources, 28 percent use outside vendors.

DOES YOUR COMPANY USE IN-HOUSE PERSONNEL/OUTSIDE SOURCES/MIXED SOURCES FOR DATA COLLECTION?

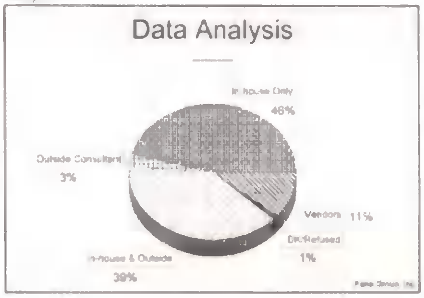
Graph V



Graph VI shows the distribution of HMOs in data analysis: 46 percent use in-house personnel only, 39 percent use mixed sources, 11 percent use vendors and 3 percent use outside consultants.

DOES YOUR COMPANY USE IN-HOUSE PERSONNEL/OUTSIDE SOURCES/MIXED SOURCES FOR DATA ANALYSIS?

Graph VI



Several trends become apparent when the responses are broken down by annual market research budget. For instance, at HMOs with annual research budgets of $20,000 or less, there is a greater tendency for the marketing department or the vice president of sales/marketing to initiate research projects. They were more likely to use in-house sources for design/planning, data collection and data analysis. They had the highest usage of mail surveys and the lowest usage of CATI surveys. They were more likely to rate market research as being less important in conducting test marketing before new products and services are introduced. They were also less likely to have made changes in the market research they conducted during the past year.

HMOs with research budgets under $40,000 also rated the following tasks as not very important for market research: test marketing new products or services, tracking studies, and business and consumer image assessments.

On the other hand, HMOs with budgets between $40,000 and $60,000 were more likely to turn to a market research department to initiate market research. They were also more likely to indicate plans to increase or intensify their use of market research in the future.

HMOs with budgets from $60,000 to $80,000 tend to be more likely to use outside sources for data collection. However, they were also more likely to use mixed sources (in-house and contract services) for data analysis.

HMOs with research budgets greater than $80,000 were more likely to have written market research policies or guidelines. They tended to use contract services and in-house sources equally for data collection while they tended to

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Vendor selection criteria for a health needs assessment

By Anthony Stanowski and Ann Banish

Editor's note: Anthony Stanowski is the director of planning and market research for Main Line Health, a four-hospital chain located in suburban Philadelphia. Ann Danish is the director of social work at Lankenau Hospital, a Main Line Health member.

Main Line Health is a 1,197 bed, four-hospital chain located in the western suburbs of Philadelphia (known as the Main Line). The three acute care hospitals and one rehabilitation hospital of Main Line Health serve an extremely diverse patient population, ranging from impoverished urban neighborhoods to one of the wealthiest areas in the nation.

As the first phase of a community benefits initiative within its strategic plan, Main Line Health was to address community health needs within its primary service area. Considering its service area's population size (over 1 million people), socioeconomic diversity, and geographical length (25 miles) and breadth (15 miles), the first question was "Where do we start?"

Lower Merion township's 62,859 population has an overall household income of $74,151. The township has its own health department. Also, Lower Merion is served by two Main Line Health hospitals. The Lankenau Hospital is a 475-bed center for medical care, education, research and community health education. Founded in 1860, Lankenau moved to its current site in 1953. The Bryn Mawr Hospital is a 393-bed teaching hospital with a 100-year tradition of serving the community. Both hospitals provide a full complement of medical, psychiatric and surgical services.

Coincidentally, three independent health and social service entities within the township were grappling with similar concerns over the population's health. The Board of Health of Lower Merion Township wished to evaluate public health needs of township residents. The Long Term Care Consortium of the Main Line had initiated a survey of the adequacy of long term care services, but wanted a more valid, objective assessment. Community Health Affiliates, a non-profit home health organization, wanted to develop outreach programs to poor elderly in need of home care. Through a community organizing strategy by Main Line Health, these three organizations were brought together and encouraged to sponsor an assessment in partnership with Main Line Health.

Main Line Health wanted to understand the health status and needs of all of the communities it serves, but needed a place to start. With a ready group of partners and a service area that was small enough to be manageable but large enough to offer a diversity of people, Main Line Health felt that Lower Merion would be a good place to start, using its experience there as a prototype for other communities that it served.

A steering committee organized and crafted a request for proposal (RFP). This article details the components of the RFP, necessary proposal elements, and suggested guidelines in vendor selection.

Vendor contacts

We asked two vendors to speak with us informally. Both have experience with health needs assessments in the region. One of the two also provides direct health and social services in the community and designs and implements disease prevention and promotion programs. These two vendors provided the necessary background and information to help us in drafting the RFP.

Possible vendors were identified by polling members of the committee to learn if they knew qualified and interested people or firms to handle the project. The list was a compendium of names, ranging from unaffiliated Ph.D.'s in the community to established consulting firms. We sent out eight RFPs and received three replies.

RFP structure

The objectives defined in our RFP were to (1) identify current and emerg-

continued on p. 26

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

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Data Use

The significance of significance

Editor's note: The subject of this month's "Data Use" is a response from Albert Madansky, professor of Business Administration, director, Center for International Business Education and Research at the University of Chicago, to two articles on significance that appeared in QMRR, "The Use, Misuse and Abuse of Significance," by Patrick M. Baldasare and Vikas Mittel (November 1994) and "What is Significance?" by Hank Zucker (March 1994). Following Madansky's comments are those of Baldasare and Mittel and Zucker.

The recurrence of articles on the meaning of "significance levels" is clear evidence that the concept is murkily understood. The root cause of this may even hark back to poor (or, worse yet, incorrect) exposition of this concept in statistics textbooks. Indeed, Professor Gerd Gigerenzer of the University of Chicago Psychology Department has collected and published a number of misstatements about this concept in the plethora of "statistics for psychologists" books on the market.

That QMRR has published two articles on the meaning of "significance levels" within a year indicates that this concept is murkily understood by the marketing research profession as well. Unfortunately, both of these articles contain ambiguities which help to further muddy one's understanding of this concept. The purpose of this article is to set the record straight, hopefully in a clear enough fashion to dispel any erroneous notions readers may have about this concept.

To provide a context for my comments, consider the following quotes from "The Use, Misuse and Abuse of Significance," by Baldasare and Mittel (QMRR, November 1994) and "What Is Significance?" by Zucker (QMRR, March 1994).

"A significance level of, say 95 percent merely implies that there is a 5 percent chance of accepting something as being true based on the sample when, in fact, in the population it may be false." (Baldasare & Mittel)

"Given our particular sample size, there is a 5 percent chance that in the population represented by this sample the proportions for Group A and Group B are not different." (Baldasare & Mittel)

"It (statistical significance) only tells us the probability with which a difference found in the sample would not be found in the population." (Baldasare & Mittel)

"Significance levels show you how probably true a result is." (Zucker)

What's troublesome about these statements? First of all, the words "something," "it," and "result" (as underlined by me above), as referents of the adjective "true," are somewhat imprecise, which can lead the reader to erroneous conclusions about what "truth" is being assessed by significance testing. Secondly, when Baldasare and Mittel talk about probability of finding a characteristic in the population and Zucker talks about probability of the truth of a conclusion they are expressing a common misunderstanding of what the probability statement associated with a significance test is all about.

Let me illustrate with a simple example. Someone hands me a coin, and I'd like to determine whether the coin is fair. The coin either is or isn't a fair coin. At the moment, only God knows for sure (and perhaps so does the person who handed me the coin). But what does the expression "the probability that the coin is fair" mean? Objectively, that probability is either 1 (if the coin is in truth fair) and 0 (otherwise). Subjectively, one can interpret the expression as "What odds would I give that the coin is fair?" But my odds may not be the same as your odds, which is why I dubbed this interpretation "subjective." And I don't think this is what Baldasare, Mittel, and Zucker are talking about when they use the word "probability."

Let's continue with the example. Suppose I toss the coin 100 times and find that I come up with 60 heads. I can ask myself what is the probability of obtaining 60 or more heads in 100 tosses of a fair coin. In the parlance of significance testing, I postulated a null hypothesis (that the coin is fair) and asked what is the probability of my data (or data more inconsistent with the null hypothesis) arising when the null hypothesis is true. That probability is called a "p-value," and is the only probability calculated in the standard significance testing packages. (In my example, the p-value is .0284.)

What's a significance level? To understand this concept, let me continue my story. Before I tossed my coin 100 times, I sat back and planned my analysis. As a professional statistician, I am asked to make a recommendation about whether or not to accept a posited null hypothesis. Only God knows whether the null hypothesis is true or false. Suppose God were to keep a scorecard on my recommendations, but only on those recommendations made when the null hypothesis is true. (God could also keep a separate scorecard of my recommendations when the null hypothesis is false, but we won't look at that scorecard now.) If I want my lifetime percentage of correct calls, given that the null hypothesis is true, to be 95 percent, I will adopt the following procedure:

1. calculate the p-value as defined above

2. if that p-value is at most .05, I will recommend rejecting the null hypothesis; if that p-value is greater than .05, I will recommend accepting the null hypothesis. (In my example, since the p-value was less than .05, I would recommend rejecting the null hypothesis. Indeed, I would have recommended rejecting the null hypothesis if I had observed 59 or 58 heads, but not 57 or fewer, out of 100 using this procedure.)

On any one recommendation, I don't know whether I'm right or wrong. I can only tell you that the way I operate I'm right 95 percent of the time when the null hypothesis is true. The level of significance is just the p-value that I use as a cutoff in making my recommendations. The only correct statement about significance levels is the following restatement of one of those by Baldasare and Mittel, namely:

"A significance level of, say, 5 percent merely implies that, given my procedure for making inferences, there is a 5 percent chance of my rejecting a null hypothesis based on the sample when, in fact, in the population it (the null hypothesis) is true."

The concept associated with the Baldasare and Mittel quote, "the chance of accepting a hypothesis as being true based on the sample when, in fact, in the population it is false," is called the operating characteristic of a statistical test. More regularly referred to in the statistics literature is the power of the test, which is defined as 1 minus the operating characteristic, or "the chance of rejecting a hypothesis based on the sample when, in fact, in the population it is false." It is this that is being recorded on God's other scorecard, the one he keeps on the accuracy of my calls when the null hypothesis is false. This latter concept is also important in market research, in that it is the power of the test (and not the level of significance) that determines the required sample size. But this is off the main point of this article, and should itself be the subject of a future article in this publication.

—Albert Madansky

PATRICK BALDASARE AND VIKAS MITTEL'S REPLY:

We would like to thank Al Madansky for taking the time to carefully read the articles related to statistically discernible differences (a.k.a. statistical significance). While the points made by Madansky warrant consideration, we should point out that the differences between his work and ours are essentially due to a difference in orientation.

We are at issue with Madansky's conclusion that publication of two articles in QMRR about significance testing indicates that "this concept is murkily understood by the marketing research profession." While some people within the marketing research field do not fully understand the concept, it is stereotypic thinking to draw judgments about the profession as a whole. Publications such as QMRR serve as vehicles for continuing education among professionals who may not have the time to take formal classes to refresh their skills. By publishing articles on topics that are of practical importance, QMRR and other such publications (1) provide a forum for professionals to brush up their skills and knowledge and (2) remind readers of the importance of basic concepts. Publishing more than one article on a given topic does not suggest ignorance or ambiguity on the profession's part. Rather, it shows the field's penchant to revisit and revive basic concepts that are useful.

Second, the words something, it, and result refer to the alternative hypothesis. While phrasing sentences in technical terms such as "the null hypothesis" and/or "alternative hypothesis" may make the exposition seem more precise, they do not necessarily render it more understandable or readable. In fact, carrying Madansky's recommendation to the extreme, we could express the entire problem in terms of mathematical symbols. While this would make our exposition more technically appealing, it would not necessarily make it more practical or useful. Ironically, it is the same sort of difference that we pointed out between statistical significance and practical significance.

Third, the restatement of our point by Madansky says nothing new. On careful examination we find that his restatement is the same statement as ours, except that he phrases it in terms of the null hypothesis compared to our phrasing in terms of the alternative hypothesis. Practitioners are more used to thinking in terms of the alternative hypothesis rather than the null hypothesis. For instance, a manager is more likely to understand the statement that we are looking for differences, rather than the statement that we are trying to gather evidence against the assertion that there are no differences in the population. Therefore, to enhance the readability of the article we phrased our sentences accordingly. Is the glass half empty or is it half full? We believe such a debate only muddies the issues.

Nevertheless, Madansky's note is useful in itself because it describes the philosophy of undertaking a test of significance using a common example. Additionally, he highlights the dilemma practitioners wrestle with on a daily basis: what is the dividing line between technical clarity from a purist's perspective and practical clarity from an end user's viewpoint? This question does not have a right a wrong answer. We leave the readers to draw their own conclusions.

—Patrick Baldasare and Vikas Mittel

HANK ZUCKER'S REPLY:

Prof. Madansky seems to have misunderstood the aims of my article "What is significance?" A primary aim was to avoid statistics jargon.

One of the reasons that the meaning of "significance levels" is so "murkily understood" (in Madansky's terms) is the unfortunate choice of words statistics professionals use to discuss the underlying concepts. Many statistical terms mean nothing to the non-expert. Worse, others have clear meanings in normal English that have nothing to do with their meanings in statistics. Significance is a prime example. A non-expert hearing or seeing the term significance level would likely think it refers to importance rather than to the chance of erroneously rejecting a null hypothesis. A key aim of my article was to correct this all-to-understandable mistake.

My article was originally written for a newsletter sent to users of our interviewing and tabulation software The Survey System. Our clients include many academics and long-time research professionals, but also many people new to survey research. The article was written primarily for the latter group. I attempted to give the non-expert a clear, generally correct understanding of the term significance, to explain how to read the probability notations provided by statistical packages and to caution the reader that significance tests do not measure all types of errors. Phrases like "something" or "a result" being true may be less precise than "rejecting a null hypothesis," but they are more easily understood by non-experts. As Baldasare and Mittel mention in their response to Madansky, some sacrifice in precision is often worthwhile for the sake of clarity.

Some readers may find Madansky's approach useful. Others may prefer a less jargonistic approach, especially since it allowed a similar length article to include important information about issues related to statistical significance, not just a definition of the term.

—Hank Zucker

Circle No. 104 on Reader Card

War stories:

True life tales in marketing research

By Art Shulman

Editor's note: "War stories" is a regular feature in which 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.

Are you like me? Do you think you were born to be in market research? I remember when I was a kid of about nine or 10, watching the evening news on television. It would be a sweltering summer day and the newscaster would say something like, "And 2 million people jammed our city beaches today!"

Now, hearing that, most kids would imagine themselves swimming or frolicking in the surf or building sand castles. But when I heard that report, I'd say to myself, "How do they know it's 2 million? Who counted them? When did they count them? If they counted them at 2 p.m., what about all the people who came at 2:30 p.m.?"

Or, if there was a parade, the broadcaster would say, "And 1.2 million people lined the streets to celebrate." And while most kids would imagine themselves marching in the parade or cheering on the sidelines, I'd ask my mother, "How do they know it's 1.2 million?"

My mother would answer, "Arthur, what's the difference if it's 1.2 million, more than 1.2 million, or less than 1.2 million? Can't you just appreciate a parade?"

Then she would add, "And after dinner, I want you to march into the bathroom and shave off your mustache."

Basically market researchers are good people. However, sometimes despite our best intentions, we go astray. Jeff Totten cites a mail study where his firm sent out a small amount of money as an incentive. An elderly minister returned the money, along with his questionnaire, writing how sinful it was to "guilt" people into responding.

Becky Fangman of Fangman Research reports a mall study her company conducted where it was hard to determine if one specific child was male or female. When the interviewer asked, "What is your sex" the child answered, "Oh, I'm too young to have sex."

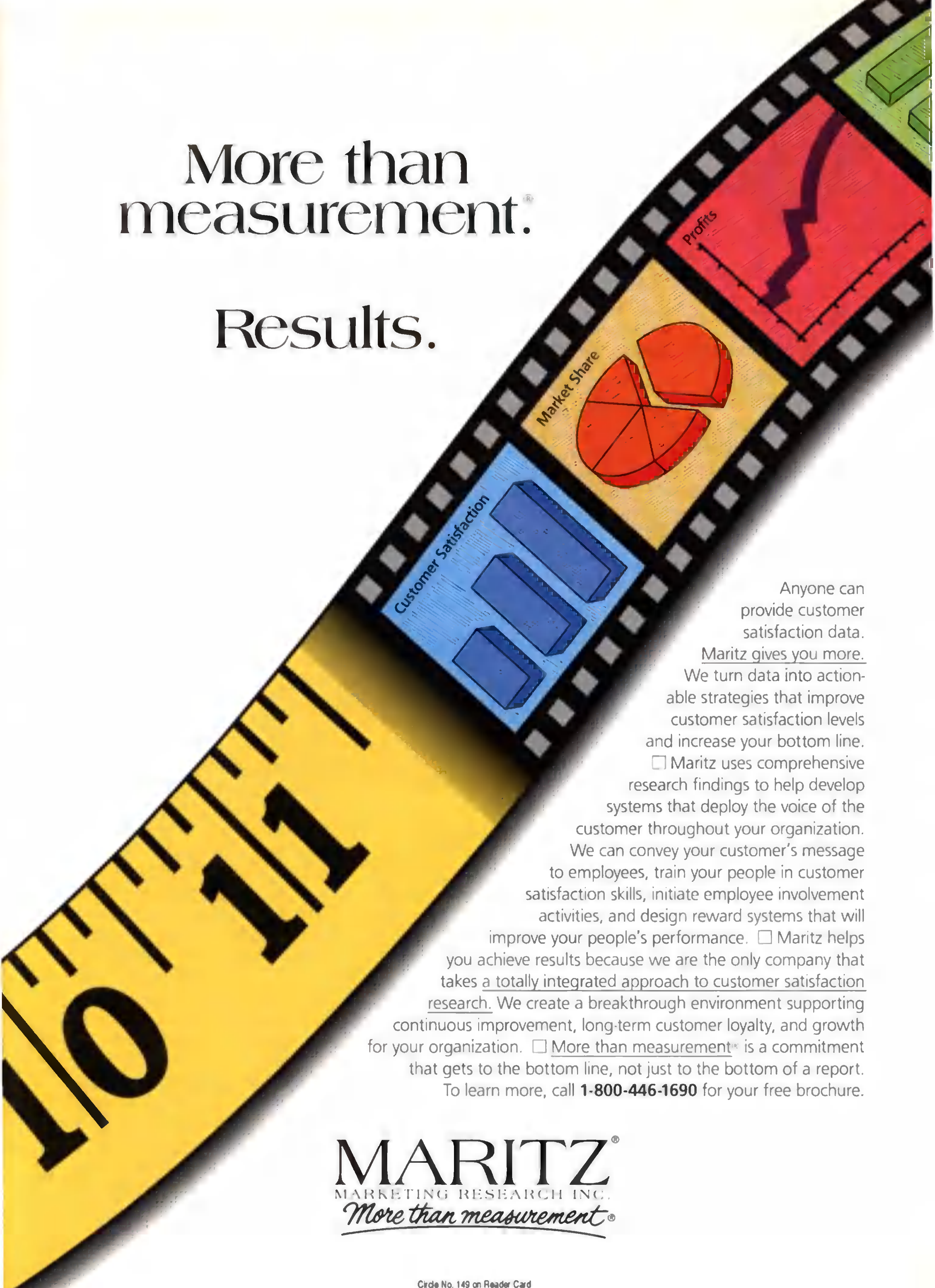
Shelley Donow of Donow & Associates, a qualitative recruiting firm, reports an incident which has undoubtedly occurred many times. Two women arrived at the facility at the same time, both in business suits and carrying attaché cases. One of the women announced to the receptionists that she was from the company sponsoring the groups and the receptionist escorted them both to the client viewing room.

Other clients arrived and all began eating dinner in the viewing room. Finally the moderator arrived and introduced herself around, asking one of the women who'd been escorted in earlier if she was from the agency or the client. Of course, it turned out that the woman was supposed to be a respondent in the group, and having never been in a group before, didn't realize she was in the wrong room.

Research consultant Thomas T. Semon reports editing questionnaires years ago on a study for Serutan ("Natures spelled backward"). In answer to the question, "Where did you first learn about Serutan?" one respondent replied, "I saw it being demonstrated at the RKO theater."

Semon could never figure out what kind of demonstration the respondent had seen.

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 please call me (818-782-4252) or, better yet, write it up and fax it to me (818-782-3014).❑


Profits
Market Share
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11

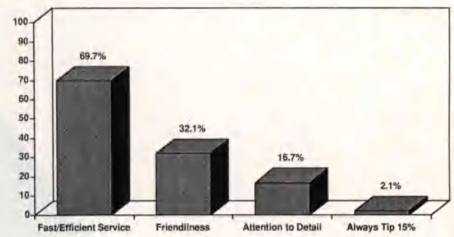
Survey Monitor

Dining out has become a new pastime

Going out to eat has become as American as baseball, apple pie and mom. On average, Americans eat at sit-down restaurants five times per month, according to a new survey by Maritz Marketing Research Inc. (For this survey, Maritz defines a sit-down restaurant as any eating establishment excluding fast-food restaurants.) While the majority of people (67 percent) eat out between one and five times each month, 21 percent dine out six or more times in a month. Only 12 percent of Americans say they never eat at a sit-down restaurant.

More than half (55 percent) of those who eat at sit-down restaurants spend less than $10 per meal. On the other hand, a surprising 12 percent typically spend over $25 per meal when they go out to eat.

What Factors Most Influence The Amount You Tip A Waiter or Waitress?*



* Respondents could choose more than one factor.

Maritz AmeriPoll®
April 1995

What makes the restaurant experience so attractive for consumers? Twenty-eight percent of America's restaurant patrons say the primary reason they go out is that they don't want to cook, and 28 percent go out when they need a break from their daily routine. Only 4 percent cite relaxation, business or pleasure as primary reasons for dining out at sit-down restaurants. (Respondents could choose more than one item.)

Several factors influence choice of restaurant. Thirty-seven percent of restaurant-goers say that an eating establishment's "variety of food" affects their choice, while 23 percent choose "price," and 21 percent say "quality of food." Factors such as "healthy menu items," "cleanliness," and "smoking policy" seem less important. (Respondents could choose more than one item.)

Americans put significant consideration into tipping a waiter or wait-

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ress. Seventy percent say that a server's ability to provide fast, efficient service guides the size of the tip they leave. Thirty-two percent note that a server's friendliness influences the size of the tip, and 17 percent say that attention to detail, such as frequent drink refills, and correctly delivering special orders makes them more likely to give larger tips. Only 3 percent of Americans who go to sit-down restaurants always tip a server the traditional 15 percent or 20 percent without considering service quality. For more information, call Kristi Pearce at 800-446-1690.

It's prom time, do you know what your kids are doing?

It's spring, the time when teens think about parties and proms. But for many of their parents, spring is a time to worry about their children's risky behaviors. And in the 1990s a discussion about the birds and the bees is no joking matter.

When asked about risky behaviors, over half of parents (58 percent) say they are very concerned about their child riding in a car with a drunk driver and 50 percent say they are very concerned about the threat of AIDS. Many parents are also very concerned that their teenager will drink and drive (49 percent), use drugs (48 percent) or become sexually active (45 percent). Comparatively fewer parents are very concerned that their child will smoke cigarettes (37 percent).

When asked which single issue they are most concerned about when thinking about their teenagers, 28 percent of parents are most likely to say the threat of AIDS is of most concern. A similar proportion (22 percent) say they are most concerned that their teen will ride in the car with a drunk driver. Comparatively smaller proportions mention becoming sexually active (14 percent), drinking and driving (13 percent), or drug use (11 percent) as their biggest concern for their teenaged child.

Fortunately, most parents talk to their teens about sex (89 percent), drinking (94 percent), using drugs (96 percent), drinking and driving (92 percent), smoking (94 percent) and the threat of AIDS (87 percent). These results were part of a new survey released today by *Prevention* magazine and Cable News Network (CNN).

Furthermore, few parents wait until a crisis to talk with their teens. Almost eight in ten parents spoke to their children about drinking and driving (82 percent), drugs (81 percent), drinking (80 percent), sex (79 percent), and AIDS (77 percent) when they thought the time was right, rather than because of a problem needed to be addressed immediately.

And this time comes when the children are at a fairly young age. On the average, parents talked with their teenager about each issue before that child

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Names of Note

Janet Jenness has been named director of marketing research at *SunTrust Banks, Inc.*, Atlanta.

George Wilkerson has been promoted to vice president and division manager for *Maritz Marketing Research's Performance Measurement Division* in Chicago. **Gloria Sloan-Reel** has joined Maritz Marketing Research Inc. as division manager of the firm's Agricultural Division. In addition, **Gil Hoffman** has been promoted to the company's group vice president of information systems.

John Golanty has been promoted to executive vice president of *Conway/Milliken & Associates*, Chicago.

Raymond Boggs has joined *Response Analysis Corp.* as a vice president in its Telecommunications and Information Technology Group.

Marilyn Rausch has joined *Rockwood Research*, St. Paul, as qualitative research director.

Brian Hawley has been named lead supervisor of the night phone room at *Barnes Research, Inc.*, Grand Rapids, Mich.

Market Facts, Inc., Arlington Heights, Ill., has promoted **Don Morrison** to senior vice president. He heads the company's Cincinnati office.

Morrison Hurry

The M/A/R/C Group, an Irving, Texas, research firm, has named **Jack Wolf** to the company's board of directors. Wolf is the current president of Targetbase Marketing, a division of The M/A/R/C Group. In addition, **Susan Hurry** has been promoted to vice president of M/A/R/C Research, a division of The M/A/R/C Group.

The board of directors of *Information Resources, Inc.*, Chicago, has appointed **Thomas W. Wilson, Jr.**, as chairman. The firm also announced three managerial appointments relative to its European information busi-

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Research Company News

SuperDatos de Mexico has opened a new focus group facility in Mexico City. The complex features a large conference room, an observation room with a wrap-around mirror, PZM microphones and Nakamichi recording equipment, and closed-circuit video viewing. For more information, call Rich Anderson at 800-800-5055.

Irwin Research Services, Inc. has moved its telephone operations center from Jacksonville, Fla. to 4112 N.W. 22nd Drive, Gainesville, Fla., 32605. Phone 904-371-7800; fax 904-371-0087. In addition, the company has opened a central location testing facility at 9965 San Jose Blvd., Ste. 32, Jacksonville, Fla., 32257. Phone 904-731-1811; fax 904-731-1225.

Dr. Greg Rennier has formed **Rennier Associates**, a marketing research and consulting firm that will specialize in agriculture with an emphasis on multiclient and custom research in the poultry industry. The firm's address is P.O. Box 787, Olathe, Kan., 66051-0787. Phone 913-768-6464. Fax 913-782-9391.

Dave Disher and Sharon Buhr have opened a full-service research firm in Cincinnati. **Disher - Buhr Research, Inc.**, is located at 8190 Beechmont Ave., Ste. 303, Cincinnati, Ohio, 45255. Phone 513-232-1603.

Business Dynamics, a business research and consulting firm based in Eagan, Minn., has opened a Milwaukee-area office. The new office is located in Waukesha, Wis. For more information, call John Raiche at 414-521-1063.

Interviewing Service of America, Van Nuys, Calif., has received The Asian American Advertising and Public Relations Alliance's 1995 Horizon Award in the category of Government and Public Affairs. The award is presented each year to individuals and companies for professional excellence in advertising, public relations and marketing communication programs targeted to the Asian-American market. ISA won the award for its work on a survey conducted for the Los Angeles Times Poll concerning issues and attitudes among Vietnamese Americans in

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Product & Service Update

StreetRite corrects address data before geocoding

Group 1 Software, Lanham, Md., has released StreetRite for PCs. StreetRite allows users of mapping software to correct address data before appending geocodes. By correcting address information prior to geocoding, users can achieve higher geocode match rates and improve analysis reliability. StreetRite compares addresses against the USPS National Database, deciphers inaccurate or incomplete addresses and corrects misspelled street names and adds missing ZIP Codes, cities and states. It corrects or appends the ZIP+4, locating the correct ZIP+4 for specific companies. The software is updated quarterly to coincide with the quarterly updates to the USPS database. It supports ASCII delimited, ASCII fixed field, dBase III and IV, Alpha Four, FoxPro, Clipper dBXL/Quicksilver, FoxBASE, FoxPro, OMNIS and Group 1 ArcList data file formats. A single quarter-year release StreetRite is $295. For more information, call 800-368-5806.

Study profiles Hispanics' experience with U.S. health care

A comprehensive study of Hispanics' experiences and expectations of the nation's heath care system is now available from Market Development, Inc., San Diego. The study, which was completed in December 1994, involved telephone interviews with 1157 Hispanics and 1002 non-Hispanics across the United States. "Patient Care: Bridging the Gap with Hispanic Consumers," a 255-page report including detailed findings cross-tabbed by geographical region and Hispanic subgroup, is now available by subscription. For more information, call Dave Taber, 619-424-4583.

Software analyzes broadcast research data

SuperRatings Research Corp., Covina, Calif., now offers a process of analyzing broadcast market research data that enables the agency rep or station sales manager to customize each report on a PC. The report dissects any given market by offering seven columns of data with up to 15 different categories of numeric values to be assigned by the user. For example, the top five TV or radio stations in a market can be compared and reported according to seven

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- **Conference Room** includes washable writing surfaces, movable easel, oak rails, 20" monitor & 1/2" video players. Conference table seats 13. Wired to provide audio & video feeds to Focus Group.
- **Viewing Room** 2 tiered, seating 15 people comfortably. Writing surface, muted lighting & state-of-the-art sound system. Snack & beverage bar also in room. Catering service provides Denver's best cuisine.
- **Central Location Facility** 500 sq. ft provides multiple configurations of seating, holding 40-50 respondents. Can be used for multipurposes, including client work area, de-briefing facility, for mock jury tests, store simulations, or taste tests.
- **Secured Storage Room** Adjacent to central location facility for product materials.

In defense of on-line focus groups

By Amy J. Yoffie and Marj Anzalone

Editor's note: Amy J. Yoffie is president of Research Connections, Inc., Westfield, N.J. Marj Anzalone is president of Marj Anzalone Research, Florham Park, N.J.

"Why not acknowledge that technology inevitably giveth and taketh away and therefore try from the outset to magnify the benefits and minimize the costs?" This quotation from a recent article in the *New York Times Magazine* by Max Frankel illustrates our perspective on the current debate among marketing researchers: What is the value of online research and, in particular, online focus groups? While Tom Greenbaum stated in his article "Focus groups on the Internet: an interesting idea but not a good one" (QMRR, May 1995) that focus groups on the Internet — and by implication any on-line groups — are "not likely to result in effective focus group research," we believe that there is a place for on-line qualitative research and that researchers can successfully add it to their menu of available methodologies.

Less expensive

As with most marketing research projects, the starting point for our position is a cost-benefit analysis: on-line focus groups are less expensive than traditional groups. One obvious reason is that moderators and clients don't have to travel anywhere to participate. Given the high cost of air travel, rental cars and hotels, the savings can be substantial. Incentive payments to respondents, which also have increased in recent years, can be reduced as it costs the respondent little or nothing to dial in and they do not have to travel to attend. These savings can be put aside for other research projects or, better yet, used to increase the number of groups held and to allow for more geographically dispersed respondents, thereby obtaining more information than would be collected from in-person groups.

As to where the groups are conducted, there is a valid concern about holding them in a location where others might "wander in." While it may be difficult prevent such occurrence on the Internet, it possible to designate a private discussion area on the commercial on-line services. Furthermore, it is not as if people can join the group without being "seen." Their screen name appears and a trained moderator will be aware that this has occurred and ask the intruder to leave before proceeding. Another option for maintaining privacy is to use a private bulletin board where only authorized respondents and clients can participate.

Moderating on-line groups is a very different process than moderating traditional groups. While we acknowledge that the face-to-face interaction of an in-person group is lost, a skilled on-line moderator can ensure that the group is successful by establishing rules of participation which control the flow of the group. Key issues would be probed and discussed, and passive respondents would be encouraged to participate, just as in an in-person group.

Dial in from her desk

On-line focus groups also have an internal value to companies. When was the last time your CEO attended a focus group? When did your budget last allow for more than one or two staff members to be present? When the focus groups are on-line, all the CEO has to do to attend is dial in from her desk. She then can see first-hand what is being said and what the hot issues are, and a phone link to the moderator enables her and other staff people to request that certain points be explored in more depth. Allowing multiple staff members to observe generates excitement about the research they have requested. This internal PR raises awareness at all levels about the importance and value of research to marketing plans and results in a greater commitment to all types of marketing research.

Some people object to focus groups because respondents cannot yet see a video or other visual stimuli on-line. The solution is to send such materials to them either for prior viewing or for viewing during the group. Having a "piece of the research" in their hands underlines to respondents the seriousness of their task, even as it generates enthusiasm and commitment to dial in and participate.

Enthusiasm and commitment to focus groups are especially difficult to achieve with survey-weary and hard-to-reach respondents. Physicians, MIS personnel, senior business executives, and teens — to name a few — have numerous demands on their time and often are not willing to drive to and participate in a two-hour group. When they learn that all they have to do to participate is dial in — and that they can do so from home or from the office — participation rates increase dramatically. The result is refreshed, attentive respondents.

Statistical validity?

Some have questioned the statistical validity of on-line groups. This seems specious to us, since no focus group is designed to yield quantitative results. Rather, they are used to add more information to the creative process and to learn the language of the population being surveyed. As to the issue of whether participants represent their population, it should be noted that the types of hard-to-survey respondents mentioned earlier generally have ready access to computer and modems.

Finally, as marketing researchers we have a responsibility to constantly explore new ways of gathering data and not be bound by traditional research methods. The on-line focus group should be viewed as one more very useful and cost-effective research tool, particularly when we want to talk to lots of people, to hard-to-reach respondents, and to those who are geographically dispersed. It is a powerful qualitative data collection technique which can help us to understand what our customers are thinking and why they are thinking it, which, after all, is our mission. Our charge, then, is to become proficient at using this tool and to use it when appropriate, or as Max Frankel states, "magnify the benefits and minimize the costs." ❑

Vendor criteria
continued from p. 10

ing health problems of Lower Merion Township, (2) provide direction for program or resource development to address identified needs, (3) adopt or develop measures to understand the impact on health status of new programs and services, and (4) to foster cooperation among providers, civic organizations and government.

We were careful to ensure that the RFP would not be a request for a strategic plan for our facilities. It was designed to be as pure a needs assessment as possible, a true study of the needs of the community regardless of our own strengths and weaknesses.

The RFP defined a suggested methodology. It required the selected organization to use both primary and secondary research methods, leveraging the value of established sources when possible. The general approach is as follows:

• Assess health status and use of services by township residents. This may be accomplished by using household surveys, focus groups and existing data sources.

• Determine existing and future health needs.

• Develop solutions/recommendations, including programs and services, facilities and funding approaches.

• Ongoing health status measurement and monitoring. The report will detail the necessary steps and costs to accom-

Key data elements

The RFP included a list of selected data elements to be included in the analysis. These were:

Demographic: Age, sex, race, ethnicity, etc.

Socioeconomic: Education, occupation, income, living arrangements, insurance coverage, medical assistance (Medicaid) recipients, homeless, homebound, living alone, housing needs, transportation.

Psychographic: Patterns of health care utilization by lifestyle.

Health status: Mortality, morbidity, communicable diseases, disabilities, vision and hearing impairment, chronic diseases, accidents, alcohol related accidents, emergency room utilization, injuries, immunization rates, cholesterol/blood pressure levels, other diseases of concern in the community such as rabies, lyme disease, HIV incidence, STD (sexually transmitted disease) incidence.

Mental health: Mental health/mental retardation measures, suicide.

Natality: Maternal and child health indicators, teen pregnancy, premature births, congenital anomalies, SIDS, perinatal indices, fetal alcohol syndrome, in utero drug exposure.

Health risk: Behaviors that increase the risk of health problems, such as smoking, obesity, alcohol/IV drug/substance abuse, sexual behaviors. Environmental dangers, such as pollution levels, radon gas, congestion. Occupational exposure. Physical inactivity. Nutrition. Failure to thrive. Domestic violence. Blood lead levels.

Long-term care: Pediatric, adult and aging long term care.

Provision of health: The degree of access and utilization of health related resources, including: inpatient providers, outpatient facilities, emergency services, clinics, physicians, screening and early detection services, preventive health services, mental health services, crises centers, family planning centers, community-based services, weight management, health clubs, athletic facilities, senior services, school health, homemaker services, visiting nurses, medical transportation, ambulance services and para-transit services.

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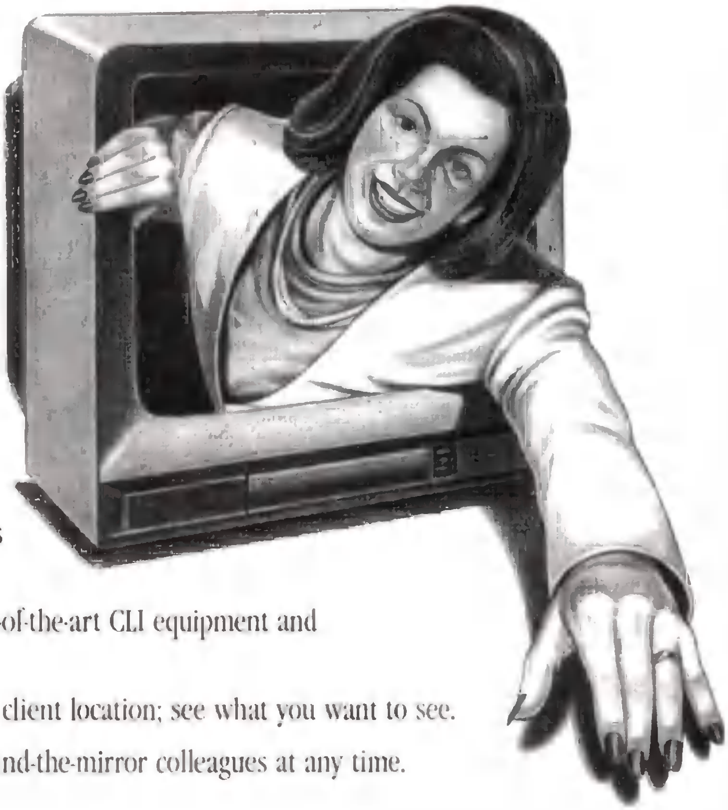

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plish monitoring recommendations.

Although the above represented a broad list of data analysis, we required thoughtful analysis with recommendations, not a "data dump." The selected organization was instructed to display exemplary capabilities for data analysis and synthesis.

The RFP also alluded to keeping costs low, and expected the vendor to use the data resources of the participating organizations. These resources included Nashville-based Inforum's Mediedge product for demographic and health utilization, the capabilities inherent in a regional inpatient database, and the information service departments of the hospitals for other patient data.

We requested the vendor to meet a four-month turnaround. This period was felt to be appropriate, and the vendor selected met the specifications in both the proposal and in the ultimate report.

Proposal responses

One proposal was a joint effort by two health care consulting companies. They produced a 200-page proposal defining background, detailed methodology, survey tools, and resumes of key project staff.

The second proposal was from a Ph.D. on the faculty of a local university. The proposal was about as thick as the total pages dedicated to the résumés of a competitive proposal, yet was comprehensive enough to address all of our requirements.

The third proposal was received from a health care consulting firm which had experience with a local county's board of health in defining community health needs. Their proposal also produced the detailed information necessary to conduct the assessment.

Analysis of proposals

We judged the proposals against 11 key areas:

1. Clarity. The extent to which the proposal made its case indubitably. We used the writing of the proposal as a predictor for how the writing of the report will look. Did the author state his/her methodology clearly? Did the author succinctly address each item of our suggested approach? Did the author define the resources he/she will use? Did the author organize the action steps with proposed costs as stated in the directions?

2. Oversight/participation. The proposals were examined to determine if the author provided for the right amount of work for the committee to do. The committee was willing and able to participate in the study to keep costs low, but did not want to do the study itself. One vendor's approach seemed to want us to define too much; another seemed as if they were saying they did this often — we should leave it all to them.

3. Provider interviews. Both the quantity of interviews the vendor would provide, and the methodology used in interviewing the providers was examined.

4. User interviews. One consultant felt that we should conduct user interviews. We felt this was important enough to examine separately.

5. Survey methodology. We expected the consultant to have a survey instrument tool. We did not want to create an instrument, but we did want to have the instrument modified to meet our needs.

6. Survey sample. The quantity of surveys proposed.

7. Survey cost. The total cost, and the extent to which the vendor enabled us to decrease this cost by using established vendor relationships.

8. Focus groups. The cost for conducting focus groups.

9. Vendor experience. Did the vendor have experience in conducting an assessment?

10. Vendor resources. What resources was the vendor able to bring to get the project completed in the time allotted?

11. Overall cost. Was the study able to meet our budgetary constraints and still meet our goals?

Conclusion

We defined the criteria for vendor selection within our RFP. The final selection of a vendor was a tough choice, with two vendors displaying full capabilities. Ultimately, the selection of a vendor was unanimous within the committee. The vendor best met the criteria we established and kept within our cost and time frames.

The project was completed in the time frame specified, with results that led to the establishment of a local group, the Lower Merion Health Consortium. This consortium is developing programmatic responses to the community's needs by soliciting participation not just from the initial study team, but from community leaders and other health providers. ❑

Supplementing omnibus data paints clearer picture of Polish market

By Tracy Dziedzic and Michael Fodor

Editor's note: Tracy Dziedzic is country manager, Poland, and Michael Fodor is regional director, Eastern European Operations, with Macro International, an international research firm based in Calverton, Md.

The problems of conducting syndicated/omnibus studies in a developing market like Eastern Europe are baked in the cake. As telephone penetration is extremely low and the phones that do exist do not always work, large-scale interviewing is conducted door-to-door. These door-to-door sampling designs cover tens of thousands of square miles, using interviewers who need to be trained to implement what can be fairly complex protocols. But these and other problems are well-known and documented. The frosting on the cake lies in trying to interpret static data in such an evolving environment.

In most Eastern European markets, large multinational producers of fast-moving consumer goods manage numerous brands across multiple categories. These categories are dynamic, crowded and competitive. Observers of share data note a shuffling of positions rather than a bottoming out of the market. Consumer data reveals that product perceptions and expectations are changing rapidly as new combinations of attributes, benefits and claims are introduced to the market. The bundle of attributes which defines the ideal is changing faster than producers and advertisers can adjust. Previously strong claims lose impact. Simply put, the Eastern European consumer can be difficult to track.

That is, a situation exists where standard cross-sectional survey approaches are not effective for tracking rapid changes associated with a volatile economy and accelerated cultural change. The traditional "point in time" omnibus survey provides a snapshot in time within a fast moving frame that limits the predictive value of such instruments. Qualitative tracking tools address these issues by supplementing omnibus data, allowing the study of social and economic dynamics of key demographic groups — teens, women, men — in order to build to complete picture of these key segments.

Recently, Macro International has launched semi-annual qualitative tracking studies of the key segments mentioned. Collected via depth interviews in capital cities, the data are combined with the traditional cross-sectional omnibus results to provide consumption data with attitudinal trends that best predict future behavior.

To illustrate how this combination of qualitative and quantitative techniques works to add value to the investigative process, some of the results of a recent comprehensive study of Polish women are discussed below. Specifically, the research program revealed a unique set of operating dynamics which would most likely have remained invisible using traditional omnibus survey techniques.

Unique dynamics

As mentioned, a combined approach of qualitative (motivational, depth interviews in Warsaw) and quantitative (a nationally representative survey of 1,000 women) means were used to identify, quantify and qualify the following market dynamics:

• Economic forces and consumer confidence. Rising taxes, inflation, and low per-capita income coupled with significant price differences between domestic and imported products influence consumer behavior at the most basic level. These macroeconomic factors drive not only purchase power but consumer confidence that is at the very center of buying behavior. The state of the economy clearly remains at the forefront of consumers' concerns:

— In Poland, for example, almost half of the women surveyed believe that there is a possibility they will lose their job in the coming year.

— Considering the progress of reforms in Poland, over one-third of Polish women do not expect any change over the next two years; forty-four percent believe that change will develop; eighteen percent foresee a change for the worse; thirty-six percent don't think things will change at all.

Skepticism aside, Polish women most often point to "new products" or "improved selection" as the best changes over recent years. Given the financial limitations of the typical Polish household, the woman's role becomes that of economist, weighing and justifying purchase of the most basic goods:

"My job is to make decisions to provide what is best for my family."

"Each purchase I make is important; my family budget is limited."

• New brand entry. The entry of a brand affects consumer judgement and choices. This "attraction effect" causes consumers to evaluate not only the new entrant, but the entire category, repositioning the brands according to revised comparative judgments. The rate of new brand entry in Poland over the past two years contributed to rapid change in brand positions, and thus, a changing definition of the competitive set. It is noteworthy that economic conditions have not diminished women's interest and involvement in adopting new brands:

— A distinct majority (85 percent) of Polish women say they "like to try new things."

— Among the new things tried lately, Polish women are not only justifying purchases for the family, but now mention products "just for her." Indicative of this trend, cosmetics are tried more often than any other category. In Warsaw, women spend over $30 per month on themselves, a trend that contrasts sharply to even a year ago.

— Importantly, women are increasing their role in traditionally male purchases, such as household appliances and cameras. Dovetailing with this trend is a modern, more liberated Polish woman.

• Ad-evoked effect. In developing markets like Poland, brand attitudes are largely shaped by advertising. In the absence of more mature brands, advertising is a powerful form of persuasion. Brand interest can be generated successfully by advertising messages, encouraging cross-brand trail and switching. Research on a variety of consumer goods suggests that, while advertising is stimulating trial, adoption is slower to crystalize in developing markets. This observation is especially relevant as the Polish consumer develops her ability to decode imagery and messages.

Awareness and recall data tell only part of the story. Advertisers who have succeeded in this market have taken time to understand this consumer and build copy strategy around a locally relevant and accepted proposition:

Research on a variety of consumer goods suggests that, while advertising is stimulating trial, adoption is slower to crystalize in developing markets. This observation is especially relevant as the Polish consumer develops her ability to decode imagery and messages.

— A large consumer products company purchased a local detergent and built advertising and positioning strategy around Polish historical figures who quickly became symbols of the brand. For three years, the product has been named as the favorite commercial by women across all age groups.

— Although 84 percent of Polish women agree that "advertising is necessary," they react strongly to advertising that they deem wrong by avoiding and even rejecting brands. Polish "requirements" include:

- a claim that is supported by a relevant and plausible reason to believe rather than superlatives and hyperbole;
- relevant settings and characters with aspirations that are within reach;
- clear information about benefits and attributes that relate to or create consumer expectations, without the need for competitive attack.

Consumer reaction to advertising should not be understated in a market where all forms of media are attracting attention and curiosity. Macro International's research reveals that among women in Warsaw, over 20 percent watch over 25 hours of television per week. Radio has generated high listenership as well, with the average adult woman listening to 20 hours of radio per week.

• Habits and practices. The influx of product alternatives has changed usage occasions and practices for many categories. The consumer is evolving to seek a new set of offerings from the products she buys. For example:

- Convenient packaging and fragrance have become important attributes for cleaning products which were once chosen primarily to kill germs.
- Almost three quarters of Polish women express strong interest in non-toxic cleaning, paper, and petrol products.
- Prepared foods, once considered taboo among Polish housewives, are being adopted as their lifestyle changes and producers meet the requirements of their shopping basket and dining table.

Previously it was safe to classify Polish women as typical housewives, though many provided supplementary income to the household. Today, the life of the Polish woman must be viewed from many angles. The survey data concludes that marketing plans aimed at Polish women should address the one or more factors of their consumer personality as wage earner, decision-maker and independent woman.

The combination of qualitative and quantitative tools has provided valuable insight into the changing roles of women and the effects of these changes in the markets of Eastern Europe. The aforementioned example illustrates that the Polish woman is multi-dimensional and cannot be understood by a review of crosstabs and frequencies from an omnibus study. That is, omnibus data, while critical, does not paint a complete picture in a developing market. ❑

HMOs

continued from p. 9

use mixed sources for data analysis. They were more likely to use CATI surveys and less likely to use mail surveys for data collection. They were also more likely to contract market research through an advertising agency. They tended to place a high degree of importance on market research in determining member satisfaction. Finally, they were more likely to consider market research important in conducting test marketing of new products or services.

HMOs with annual revenues of $10 million or more tended to have annual market research budgets of $80,000 or more. They were more likely to have department heads making decisions regarding market research.

The research found significant positive correlations between the gross annual revenue and the importance the HMO attaches to using market research to determine member satisfaction. This correlation was also found between gross annual revenue and test-marketing new products and services and evaluating advertising effectiveness. Of little surprise was the correlation between the gross annual revenue and the size of the annual research budget and how well the research function is defined. A negative correlation was found between the gross annual revenue and the use of mail surveys.

HMOs with higher gross revenues were more likely to have established research policies or guidelines (see Graph VII). However, 65 percent of HMOs do not have written research policies or guidelines.

DOES YOUR COMPANY HAVE ANY POLICIES/ GUIDELINES? IF NOT, DO YOU HAVE INDIVIDUALS RESPONSIBLE FOR RESEARCH?

Graph VII

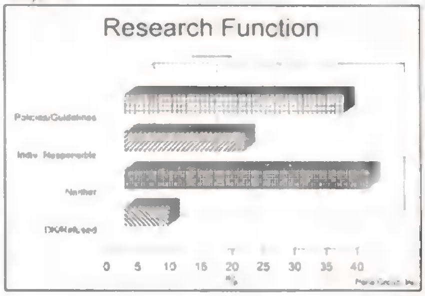

Table II shows the results of a Chi-square test using 95 percent significance level indicating that:

• HMOs without policies/guidelines

or individuals responsible for research are more likely to use outside sources for research design (61 percent).

• HMOs with individuals responsible for research are more likely to use outside sources for data collection (28 percent).

It appears that the market research function needs more attention by top management to ensure that the function is properly organized, objectives are well defined and that the HMO's research is appropriate given those objectives.

• HMOs with neither individuals responsible for research nor policies and guidelines are more likely to use mixed sources for data collection.

• HMOs with policies/guidelines on market research are more likely to use in-house personnel for data analysis; other HMOs are more likely to use outside sources for data analysis.

Table II

	Research Design			Data Collection			Analysis		
	In-House	Out-Side	Mixed	In-House	Out-Side	Mixed	In-House	Out-Side	Mixed
Policies/ Guidelines	39%	26%	32%	15%	34%	33%	37%	26%	34%
Individual Responsible	17%	13%	23%	18%	28%	14%	18%	23%	20%
Neither	34%	61%	40%	18%	38%	45%	34%	51%	41%

Pena Group, Inc.

Some of the columns do not add up to 100 percent because the don't know responses are not included in the table.

Table III shows the results following a Chi-square test, which found that:

Table III

	Research Design			Data Collection			Analysis		
	In-House	Out-Side	Mixed	In-House	Out-Side	Mixed	In-House	Out-Side	Mixed
Central Department	30%	35%	50%	39%	61%	48%	45%	48%	52%
Joint Departments	11%	9%	10%	11%	11%	10%	13%	3%	12%
Each Department	16%	17%	17%	20%	9%	19%	18%	16%	16%
Individual Responsible	11%	13%	11%	20%	5%	8%	16%	13%	7%

Pena Group, Inc.

Some of the columns do not add up to 100 percent because the don't know responses are not included in the table

• HMOs with a central market research department are more likely to use outside sources (61 percent) and less likely to use in-house personnel (39 percent) for data collection;

• Research done by each department is less likely to use outside sources for data collection (9 percent).

• If individuals are responsible for research, they are more likely to use in-house sources for data collection (20 percent).

Table IV

What percent of your research does each of the following methods represent?	Mail Surveys	CATI Interview	Focus Groups	Panel Studies
20% or less	32%	59%	61%	74%
21% - 40%	15%	6%	17%	7%
41% - 60%	18%	14%	7%	1%
61% - 80%	17%	7%	5%	1%
81% or more	13%	7%	1%	1%
DK/Refused	5%	7%	9%	16%

Pena Group, Inc.

Mail most popular

Mail surveys are the most frequently used method of data collection: nearly half (48 percent) of all HMOs said they used mail surveys for 41 percent or more of their research. The second-most frequently used method of data collection is computer-assisted telephone interviewing: 28 percent of HMOs said they used CATI surveys for 41 percent or more of their research. Thirteen percent of HMOs use focus groups for 41 percent or more of their research. Panel studies are used by three percent of the HMOs for 41 percent or more of their research (see Table IV).

Research budget

As discussed previously, there is a

strong positive correlation between gross annual revenue and annual research budget. Table V provides a summary.

Table V

RESEARCH BUDGET	GROSS ANNUAL REVENUE		
	[illegible]	[illegible]	[illegible]
$20,000 or less	50%	47%	21%
$20,001-$40,000	7%	27%	15%
$40,001-$60,000	29%	0%	7%
$60,001-$80,000	0%	20%	3%
$80,001 or more	7%	6%	34%
DK/Refused	7%	0%	20%

Cells highlighted are statistically significant.

Table VI shows the correlation between the annual research budget and how well the research function is defined.

Table VI

RESEARCH FUNCTION	ANNUAL RESEARCH BUDGET			
	[illegible]	[illegible]	$40,001-$80,000	$80,001 or more
Policies/Guidelines	22%	24%	32%	45%
Indiv. Responsible	20%	30%	26%	15%
Neither	50%	45%	42%	33%
DK/Refused	8%	3%	0%	6%

*Cells highlighted are statistically significant.

Table VII breaks down the budget effects on research design, data collection and analysis. Strong correlations are revealed: a lower budget draws each phase inward (the HMOs tend to use more in-house personnel) while a higher budget pushes research outward (they turn to outside sources or mixed sources).

Table VII

	Research Design			Data Collection			Analysis		
Budget	In-House	Out-Side	Mixed	In-House	Out-Side	Mixed	In-House	Out-Side	Mixed
$20,000 or less	[illegible]	17%	14%	[illegible]	8%	14%	[illegible]	10%	9%
$20,001 - $40,000	8%	17%	18%	16%	14%	11%	10%	23%	15%
$40,001 - $60,000	7%	4%	11%	9%	8%	10%	[illegible]	13%	10%
$60,001 - $80,000	2%	[illegible]	4%	[illegible]	8%	4%	1%	3%	7%
$80,001 or more	28%	[illegible]	28%	10%	41%	37%	22%	[illegible]	[illegible]
DK/Refused	30%	26%	25%	23%	22%	25%	24%	29%	22%

Cells highlighted are statistically significant

More attention needed

It appears that the market research function needs more attention by top management to ensure that the function is properly organized, objectives are well defined and that the HMO's research is appropriate given those objectives. Second, to ensure quality and improvement of research, a corporate policy should be developed and implemented for those HMOs (65 percent) who do not have one yet. Creating a central market research department appears to aid development and implementation of research policies and helps management cope with an increasing number of research projects. Finally, it would be extremely beneficial to establish some models and/or quantitative indexes to measure research efficiency, effectiveness and progress. ❑

Mail surveys are the most frequently used method of data collection: nearly half (48 percent) of all HMOs said they used mail surveys for 41 percent or more of their research. The second-most frequently used method of data collection is computer-assisted telephone interviewing: 28 percent of HMOs said they used CATI surveys for 41 percent or more of their research.

Survey Monitor

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reached the age of twelve. And among parents with more than one teenager, 23 percent say their youngest was younger when they spoke to that child than their older teenagers were when they spoke to them.

Parents appear somewhat hopeful that their teenager will follow their advice. Fewer than one-half of parents think their teenagers definitely will follow their advice about AIDS (48 percent), smoking (46 percent) or drugs (45 percent). Comparatively smaller proportions think their teenagers definitely will follow their advice about sex (28 percent), alcohol use (37 percent) or drinking and driving (39 percent).

"Parents are clearly concerned about talking with their children about these important safety issues," says Thomas Dybdahl, marketing research director for *Prevention* magazine. "And that's a good beginning to the process of prevention and reducing risk. The question is whether teens are listening to their parents as well as they think."

"The poll shows that parents are doing more than crossing their fingers," says Dan Rutz, executive producer of CNN Health and Medical News. "Most are talking to their kids about some of the dangers of growing up. Now, if they just keep it up! A natural and ongoing dialogue is the best bet for a smooth and safe transition to adulthood."

The vast majority of parents (90 percent) concede that it is harder for their kids to be teenager today than it was for them. However, 59 percent say they would not be too worried (26 percent) or not at all worried (32 percent) if their teenaged sons or daughters behaved like they did when growing up.

Almost half of parents (45 percent) also tend to think their teenagers are better behaved than they were when they were growing up, and an additional 41 percent say they are acting about the same. But, the parents who think their teens are better behaved than they were are more likely than others to say they would be very worried if their teenager behaved like they did when they were growing up (38 percent vs. 4 percent).

With today's threat of AIDS, parents who say they aren't worried if their kids behave like they did may be deluding themselves. Forty-eight percent of parents confided that they were sexually active as teenagers, and roughly the same proportion (54 percent) think their teenagers will be sexually active before getting married.

Among the other *Prevention*/CNN survey highlights:

Although parents of teenaged girls and teenaged boys are equally concerned about AIDS, parents of girls are more likely than parents of boys to say that they are most concerned about their teenager becoming sexually active (22 percent vs. 7 percent).

Ninety percent of parents say they know their teenagers' closest friends, and among these parents, 79 percent say they know the parents of their teens' closest friends. Only 61 percent of these parents say they have talked about issues like smoking, drinking and drug use with parents of their teenagers' closest friends.

The *Prevention* /CNN poll on risky behaviors was conducted April 17 through 20, 1995. The telephone survey of 400 randomly selected parents of teenaged children was administered by Parkwood Research Associates, and has a margin of error of plus or minus 5 percentage points. For more information, call Sarah Smedley Spiers at 610-967-8783.

Long distance ads annoy, confuse most consumers

In a recent national survey of more than 1,000 Americans, 78 percent reported being sick of the advertising and hype about long distance services. Nearly six out of 10 (59 percent) said they were confused about available calling plans. The survey was conducted by CDB Research & Consulting Inc., the research subsidiary of Creamer Dickson Basford, an international public relations firm.

A total of 59 percent agreed they were confused by the many different calling plans to choose from. Another third (34 percent) disagreed with the statement, while 8 percent did not know. A higher proportion of those in the 18-24 age range (68 percent) agreed they were confused.

Overall, 78 percent of Americans acknowledged that they were tired of all the advertising and hype about long distance telephone services; 15 percent disagreed and 7 percent did not know. Those with annual incomes of $50,000 or higher were even more likely to agree (89 percent), as were those in the 18-34 age range (83 percent), a key finding since both groups are important markets for long distance services.

The majority of Americans (60 percent) feel all the major long distance providers charge the same. In spite of feeling this way, they appear to consider cost savings within reach of a careful consumer: Sixty-two percent agreed that by choosing the right provider and calling plan, you can save a lot of money on long distance calls.

"Though consumers want to choose a long distance provider that will save them money, they are clearly confused about the various options available," says Larry Chiagouris, managing director of CDB Research & Consulting Inc. "They appear to be cynical about the claims for cost savings made by providers," he adds.

In a separate survey, additional data regarding consumers' motivations in choosing a long distance provider were collected from long distance users in CDB Research & Consulting's National Consumer Panel. The data indicates cost savings is not the only factor in the choice of a provider; only 50 percent believe their current providers are saving them money over other providers. In addition, when asked why they use their current provider, loyalty to the provider was mentioned as a reason as often as cost savings.

"Long distance companies may be missing opportunities to cultivate customer loyalty by leveraging their heritage, image and brand equity, which appear to play an equally important role as cost savings in getting customers to stay with that provider," says Chiagouris.

Study finds strong brand loyalty for feminine protection products

Menstrual periods may not be a topic for polite conversation but they are a fact of life . . . at least for women and, increasingly, the men who love them, according to a poll in the current issue of *EDK Forecast*, an executive newsletter that tracks women consumers' attitudes, values and lifestyles. The poll found that women are no longer embarrassed to mention the previously unmentionable — in fact, two thirds (62 percent) of the 500 women aged 18-50 polled have sent their husbands of boyfriends out to buy tampons or sanitary pads for them. And 90 percent report that the men asked to run the errand went willingly — or at least they went.

"While euphemisms still abound, most women and men recognize that menstruation is just a fact of life and not cause for embarrassment," says Ethel Klein, publisher of *EDK Forecast* and president of EDK Associates. "And the commercials that appear on television touting absorbency or wings don't make women or men cringe. Eighty percent of women say these ads are perfectly fine, and only a third say that all these ads offend is their intelligence."

TV advertisements for tampons and pads don't offend the sensibilities — women don't want them taken off the air — but they aren't particularly persuasive either. When it comes to feminine protection, women tend to stick with the brands they know and trust. Three quarters (75 percent) of women always buy the same brand of tampon or pad. The few women who are willing to try something new may be susceptible to the power of persuasion. Forty-three percent of women who switched said they did it because they read about something new, another quarter (26 percent) had a coupon for another brand.

Today more information than ever is available about women's health, but some myths still persist. A quarter (24 percent) of women still hear that menstrual cramps are all in their head. And the more a woman suffers from menstrual pain, the more likely she is to hear that refrain (40 percent of women with very painful periods, compared with 14 percent of women who have no pain).

But for the pain that is associated with menstrual cramps, painkillers are available to women and women buy them. Two thirds (61 percent) of women who experience some discomfort during their periods turn to over-the counter pain relief. One in ten (11 percent) uses prescription drugs, and only five percent rely on chamomile tea or other home remedies. A quarter (23 percent) of women in pain, however, do nothing at all.

"The market for feminine hygiene products and related painkillers is in no danger of disappearing," says Klein. "While women tend to stick with the products they know and trust, clever television ads that don't offend women's intelligence, reinforced by a print campaign that lays out product benefits, can create a niche in the market."

The EDK Forecast poll of 500 women nationwide was conducted January 6 - 8, 1995. It has a margin of error of four percent. *EDK Forecast* is published ten times a year. For more information, call 800-335-7655.

Study shows effects of promotions on shoppers' choices

A promotion effectiveness study conducted by Clayton/Curtis/Cottrell, a Boulder, Colo., market research firm, details the impact of advertising and promotions on brand choices in 223 product categories. The study is broken into two distinct parts - "The Role Of Promotions On How Shoppers Plan And Execute Their Shopping Decisions" and "The Role Of

Promotions On Consumer's Brand Loyalty, Brand Trial And Brand Conversion."

For each of the product categories, shoppers were given a list of brands and asked to assume that all of the brands are the same price and size. Included within the list of brands were generic and private label store brands if applicable to the category. Shoppers were first asked to select the brand they would select first, then the brand they would select second and third in the event their first or favored brand is not available. The brands selected by shoppers first, second and third are very important because the selection process is free of all other influences, especially the influences of price and positioning in the store. The brand that a shopper will select first is attitudinal. A shopper's attitude toward a particular brand is the result of a number of influences that have been accumulated over time.

In some categories, shoppers may have an attitudinal preference toward a favorite brand and will repeatedly purchase that brand when they make their selection in the store. In other categories, shoppers may have an attitudinal preference toward a favorite brand but will select another brand when making the selection. When shoppers do not select their favored brand, the reason is almost always related to a combination of price and their perception of risk if the brand does not prove to be satisfactory. A shopper is more likely to be influenced to purchase a lower-priced brand if the brand has a frequent purchase cycle and low-use risk.

For example, a six-pack of carbonated soft drinks purchased twice weekly at a discounted price of $1.39 and consumed very quickly is a low risk. A package of chewing gum purchased frequently at a discounted price of $0.25 is a low risk if the product proves to be unsatisfactory. However, a tube of toothpaste, even if discounted to $1.79, or jar of mayonnaise, discounted to $1.69, purchased every six weeks and consumed incrementally over the six week period is a much higher-risk if the product is unsatisfactory. The risk of a pain reliever discounted to $2.79 and used over a period of three months that does not meet performance expectations is too much for many shoppers to trade-off a discount versus their favorite brand.

According to Robert Cottrell, president of Clayton/Curtis/Cottrell, "In many categories, the brand that shoppers indicate they would select first is different from the scanner data history of what shoppers actually purchase the most. The comparison of the attitudinal data provided in this study compared to scanner data for each category provides a measure of the role and effectiveness of advertising and promotion in both the short and long term."

For example, the brand of beer that shoppers indicate they would select first, all things equal, is Coors Light. Yet, scanner data indicates that Coors Light is not the most often purchased brand of beer. The fact that shoppers indicate they would select Coors Light first is a measure of the effectiveness of Coors' long-term marketing and promotion activities. Even though shoppers have this attitude and perception of Coors Light, they are often influenced to purchase another brand when making the selection decision. The shopper's deviation from established attitudes is also a demonstration of the influence and effectiveness of another brand's short-term promotion activity.

Another example of shopper attitudes versus historical scanner data is with salad or cooking oil. Crisco is the brand that shoppers indicate they will select first, all things equal, yet Crisco is not the most often purchased brand according to past scanner data. The value of creating a long-term brand image and reputation is a major goal of manufacturers. Yet, it is not clear that manufacturers know, exclusive of scanner data, the measure of shoppers' attitudes toward their brands.

A free 56-page brochure describing the full study is available upon request. The brochure includes information on how companies can purchase the study. Write to: Clayton/Curtis/Cottrell at 2020 Pearl Street, Boulder, Colo., 80302 or call Bob Cottrell at 303-444-2381.

International companies restructuring marketing to spark global sales

Marketing decisions in international companies are being increasingly coordinated on a global basis to meet the needs of worldwide customers and new product introductions, according to a study by The Conference Board, the New York City-based global research and business membership organization.

The study is based on interviews, case studies, and a survey of more than 50 senior marketing officers in the U.S. and Europe. It finds that the marketing function is being dramatically restructured in some international companies into separate account groups to foster faster global sales growth. In other global companies, the marketing function is likely to become multi-disciplinary — including executives from marketing, sales and manufacturing.

"For many companies, foreign sales are becoming critical in the wake of weakening national trade barriers, and head office marketing managers are responding by developing new approaches," says Stephen Gates, a Paris-based senior research associate in The Conference Board's Human Resources/Organizational Effectiveness department and author of the report. "As global marketing advances, however, these marketing directors may need to provide added encouragement to foreign subsidiary managers whose control over marketing decisions is declining."

Just over half of this study's survey participants indicate that country managers' control over the marketing budget is being reduced, while a third state that the marketing function is being eliminated from the foreign subsidiaries.

To avoid demotivating the country managers who implement global marketing plans, several practices can be followed:

- let country managers retain local brands and marketing budgets;
- solicit country managers' contributions for new product development;
- give country managers Eurobrand team leadership roles;
- provide international transfers to country managers.

"Although global coordination of marketing decisions and practices is increasing, local or national conditions and pressures still exist," concludes Gates. "When overlooked, the result is often failed global product launches and demotivated country managers. More than many other business activities, the marketing function runs the risk of disastrous results by overstandardization on a global basis. The global marketing function can avoid narrow, head office vision by seeking input from its network of marketing managers."

Companies are realizing that global coordination depends on the strategic nature of the marketing activity, the essential qualities of the product or service, and national differences in marketing practices. Strategic marketing activities, such as product positioning, affect many of the other aspects of the marketing effort, and consistent worldwide marketing policies are generally more appropriate. Conversely, marketing activities such as sales promotion do not respond well to global coordination.

The study also shows that whether the essential value of the product or service is derived from its physical or emotional attributes also helps determine the marketing to be used. If the product's strongest attributes are physical, global coordination of product design and packaging may best protect its value. If the product or service's appeal is based on emotional attributes, global coordination of brand name and advertising activities may be the best approach.

Brand positioning, package design, and advertising are the marketing activities that are increasingly coordinated on a worldwide basis. But imposing uniform marketing practices worldwide without careful study of local market conditions can result in costly mistakes, The Conference Board study shows. For more information, call 212-759-0900.

Names of Note

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nesses. **Pierre Latour** has been appointed president of European Retailers Services. **Claude Charbit** is the new president of IRI-Secodip. **Christopher Sellers** has been named managing director of IRI InfoScan Ltd.

Josh Bernoff has joined the People & Technology Strategies services group of *Forrester Research, Inc.*, Cambridge, Mass., as senior analyst.

Walter Jacobson has been named vice president, marketing, of *Plasman Compass International*, a St. Paul research firm.

C.J. Olson Market Research, Inc., Minneapolis, has promoted **Robert Hill** to senior supervisor and **Barbara Manke** to supervisor in the data collection department.

Barbara Dawson has left Research International to join *Dennis and Company, Inc.*, a Stamford, Conn., research firm, as vice president.

Robert V. Miller has been named president of the new Customer Satisfaction Measurement Division of *MarketVision Research Inc.*, Cincinnati.

Miller **Bauld**

Sean Bauld has joined the TEC Group of *Chilton Research Services*, Radnor, Pa., as research consultant. He is currently based in Austin, Texas.

Sherry A. Schulte has joined *Medical Data Management*, a Stony Brook, N.Y., pharmaceutical research and marketing services company specializing in Central and Eastern Europe, as director, business development, and country manager for Poland.

Cheryl S. Hawkins has joined *TrendQuest Custom Medical Marketing Research* in San Diego as project manager.

J. David Craig will assume the newly created position of president and chief operating officer for all operations of *AmeriComm Direct Marketing*, Norfolk, Va. **Jaynai Fort** has joined the firm as account services manager.

Suzanne George has been promoted to vice president of marketing for *Hanes Hosiery*, New York City.

New York Transit
continued from p. 7

McCartney, the chief marketing officer.

In five years, the marketing research staff has grown from one employee (Stuart) to seven. During his first few years on the job, Stuart spent a lot of time meeting with the various departments within NYCT, assessing their information needs and explaining how marketing research could help them. Now, many departments come to him and his staff. Stuart gives strong credit to his co-workers in the marketing research department (see photo). The department functions so effectively because the staff members have a great deal of responsibility and authority in working with internal clients and external vendors, Stuart says.

Precious dollars

While the NYCT system took in revenues of $3.1 billion in 1994, it also spent $3.1 billion. Money is tight and fare increases are a last-ditch option. So NYCT must keep its current riders happy with the service while determining where to allocate the dollars that do exist. "Research helps us establish service levels and then it helps us determine, once we start meeting these thresholds, where we should be spending our precious dollars. And if we have sound research on which to base our decisions, we're much more likely to get funding for the projects we need," Stuart says.

"Research helps us establish service levels and then it helps us determine, once we start meeting these thresholds, where we should be spending our precious dollars."

With so many issues facing it — rising costs, fewer government dollars, aging equipment — NYCT's information needs are many (there are 30 projects currently in the works) and varied. Thus the marketing research department uses the full range of qualitative and quantitative techniques, from focus groups and telephone interviews to a transportation panel. It's even developing research applications for a virtual reality system.

Much of the research focuses on identifying what Stuart calls the key levers that influence use of the system. Research has shown that the most important factor influencing subway use is concern about personal security. "A number of years ago we determined that it was the single greatest barrier to increased ridership," Stuart says. "We also determined that off-peak usage was an area with tremendous potential to increase ridership, but people aren't traveling with us [during off peak hours] because they're concerned about safety. Even though the crime rate has dropped by nearly 50 percent in the last five years, the perception of personal security has generally remained flat."

Analysis of several studies has shown that crime isn't the only contributor to feelings of personal security. It's influenced by other factors, such as the cleanliness of stations and subway cars, the presence of panhandlers and the layout of the station.

"There was no one study that told us what security is all about; it was a combination of them. We learn as much from the synergy of analysis across studies as we do from any one study. At the beginning we focused on the transit police and the crime rate. We're finding now as we build on past results that personal security is more than just the crime rate; it's the quality of life issues that detract from a sense of control and order. Any improvements in that area help make people feel more secure."

New Technology trains

One of the largest expenditures facing NYCT in the coming decades is the replacement of its fleet of subway cars. Here too, NYCT has turned to its customers for help. Research with passengers has influenced the design of the interior of the New Technology trains, which will be purchased beginning in 1997 and are expected to cost $2 million per car.

"Whereas in the past, the engineers and designers would look at the new cars in terms of maintenance and how many miles they can go without breaking down, now we have this opportunity to redesign the trains, to get the customer involved and design the interior," Stuart says. "We have nearly 6,000 subway cars, so it's a multi-billion dollar purchase over 20 years. We feel we'll save a lot of money if we do it right up front instead of having to modify the trains later," Stuart says.

NYCT has prototypes of the new subway cars in the system that it has used for focus groups and walk-throughs, to get opinions on both aesthetic and functional issues, from the number of hand-holds, to flooring, lighting, and the positioning, number and style of seats. For one set of groups, prototype cars were brought to the station at 34th street and Herald Square for a weekend at a part of the platform that wasn't being used. Respondents were recruited from subway stations and taken through each of the trains before participating in a focus group on board the prototype cars.

"There was no one study that told us what security is all about; it was a combination of them. We learn as much from the synergy of analysis across studies as we do from any one study."

Research has also helped in the development of the MetroCard, an automated fare collection (AFC) system that replaces tokens with a card bearing a magnetic strip. During testing, 2,000 people have used the cards. Installation at the first 69 stations was completed in 1994. AFC installation in the remaining 400 stations and on buses will be phased in through 1997, replacing tokens as the main fare payment method.

Transportation panel

One of NYCT's major research efforts is an ongoing transportation panel in which a cross section of 3,000 New York City adults keep a two-day diary of all of their trips and the kinds of transportation they use. Respondents receive incentives to complete the diary twice a year and if they complete all the waves they're entered into a drawing to win $1,000. Shortly after submitting their diary each quarter they're contacted by telephone for a more in-depth review of their transportation choices and options.

"The panel will give us the most accurate data we've ever had on who uses our system, how they use it, and what our share of the market is. We'll be able to break down our market share geographically, by time of day, etc.," Stuart says. The panel will also serve as a flexible vehicle for measuring the short- and long-term effects of an accident on the NYCT system or other transportation issues or events.

The NYCT marketing research department is also developing a virtual reality system that would let it create, for example, a virtual subway station and have respondents "walk around" in it. Using the virtual reality approach, researchers could quickly alter the look of the station, changing the decor or who is in the station, for example, and then measure the effect the changes have on the respondents' perceptions of their personal safety.

The applications are almost endless, Stuart says, but before NYCT can run with the virtual reality approach, it has to learn to walk. "In the initial foray, people will look at a video monitor, but I'd like to get to the point where it's totally interactive, where the person controls where they go, what they look at."

Research doesn't sit on a shelf

In his research career, Stuart has worked at ad agencies, research firms and in the research departments of large corporations. "I think research is used as well here as I've ever seen it used. In terms of the percent of projects which actually get to the clients and where the information is used, it can't be beat because we just don't do research that sits on a shelf."

A sign that research has become ingrained in NYCT operations is that in the past few years Stuart says he has been asked by heads of departments to be actively involved in the decision making process — before the decisions are made. "More and more they want to know: Is this the right decision, based on customer research?" he says.

What advice would Stuart give to organizations that want to better integrate marketing research? First, he says, research must be shared with a wide audience within the organization, often beyond the people with the most obvious interest in the results. "That way, other departments and a range of individuals see what has been done and what can be done. Heads of other parts of the organization will see that and say, what can research do for our department?

"In addition, you'll find that there are people in different parts of the organization, especially a very large one, who actually have a need to know that you often don't realize until you start sharing the results on a wider basis. The more you share the more you find out what people and thinking and what they need."

When reporting research findings, Stuart says, timeliness is key: get a summary out to people right away and let them digest it, then release the final version of the results later. "There's always the tradeoff between the perfect report and the timeliness of the information. A great-looking report that nails down every detail that comes out six months to a year later isn't going to meet needs. What we find very successful is a succinct summary up front, a quick release of pertinent information that gets out to senior management and others. And then the longer report follows for those who are interested. But we get the initial results out quickly. That's important because it keeps everybody informed."

In addition, getting people within the organization involved early in the research process gives them a sense of ownership of the project and also results in better research because their input insures that the right questions are asked.

In-house users are clients

It's clear that Stuart takes the idea of research as a service quite seriously. He refers to the in-house users of his department's research as clients and customers. "We have to realize that the various parts of the organization are our internal partners, our customers. There are a whole host of organizations out there where research is kind of isolated in its own world or not in tune with needs of each division. We strive to avoid that. While all of us in the marketing research department are heavily steeped in research methodology, we know the importance of being client oriented. We have to be able to work with others and translate data into knowledge." ❑

Research Company News
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Southern California.

Market Facts, Inc., Arlington Heights, Ill., had a record first quarter of 1995. Revenue for the quarter was 38 percent greater than last year and an all-time record. Company earnings were 273 percent of the net income reported for the first quarter last year. The increase in revenue in 1995 is due to expanded client demand for the company's proprietary research products and service, as well as the impact of the acquisition of Market Facts of Canada, Ltd.

Rickie Kruh Research, Reston, Va., has opened a branch office at 2301 Marina Isle Way, Suite 203, Jupiter, Fla., 33477. Phone 800-544-6778. The new location will provide mystery shopping, retail pricing studies and marketing services.

Sorensen Associates, a Troutdale, Ore., firm specializing in the food industry, has opened a new phone center at its headquarters, expanding its capacity to 31 calling stations. For more information, call Bill Hruby at 800-542-4321.

MarketVision/Gateway, a division of MarketVision Research, Inc., has opened a consumer research center at Paramount's King's Island amusement park in Cincinnati. The facility is located near the Adventure Village theme area of the park, giving MarketVision's researchers access to thousands of visitors. For more information, call 513-791-3100.

Cardiff Software, Inc. has moved to 6351 Yarrow Dr., Suite E, Carlsbad, Calif., 92009. Phone 619-931-4500. Fax 619-931-4550.

Joan Treistman, president of **Treistman & Stark Marketing, Inc.**, a Hackensack, N.J., research firm, has formed a joint venture with Keith Sherman, president of Micromeasurements, a Farmington, Conn., research firm, to produce ENVISION, a computerized approach to package, print and outdoor design research. ENVISION is an interactive research process that allows consumers to react to package designs, ads and billboards using computer graphics (with the option of eye tracking and T-scope). For more information, call 201-996-0101.

Walter Meneses has formed **Meneses Research & Associates (MR&A)**. The firm specializes in national and international data collection with a focus on Hispanic consumers. The firm is located at 11629 Iberia Place, Suite D, San Diego, Calif., 92128. Phone 619-451-3772. Fax 619-451-3774. The firm also has a phone facility at 15000 Ventura Blvd., Suite 200, Sherman Oaks, Calif., 91403.

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 612-861-8051/ fax 612-861-1836.

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

Asian Marketing Communication Research/Div. of H&AMCR, Inc.
1301 Shoreway Rd., Ste. 100
Bolmont, CA 94002
Ph. 415-595-5028
Contact: Dr. Sandra M.J. Wong
Qual./Quant. Rsch. in Cantonese, Mandarin, Japanese, Korean, Tagalog, etc. U.S. & Intl.

Asian Perspective, Inc.
386 Broadway, 5th fl.
New York, NY 10013
Ph. 212-431-9366
Contact: Grace Chin
Mod. & Recruit In Cantonese, Mandarin, Vietnamese, Korean & Japanese.

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

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580 White Plains Rd.
Tarrytown, NY 10591
Ph. 914-332-5300
Contact: Kate Permut
Innovative & Standard Approaches To Qual. Research.

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635 S. Kenilworth Ave.
Oak Park, IL 60304
Ph. 708-383-5570
Contact: George Balch
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Brand Consulting Group
17117 W. Nine Mile Rd., Ste. 1020
Southfield, MI 48075
Ph. 313-559-2100
Contact: Jonathan Brand
Consumer, Advertising Strategy, New Product Strategy Research.

CB&A Market Research
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Winston-Salem, NC 27103
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Contact: Amy Anderson
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Cambridge Associates, Ltd.
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Ph. 800-934-8125
Contact: Walt Kendall
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Cambridge Research, Inc.
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St. Louis Park, MN 55416
Ph. 612-525-2011
Contact: Dale Longfellow
High Tech, Executives, Bus.-To-Bus., Ag., Specifying Engineers.

Campos Market Research
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Pittsburgh, PA 15222
Ph. 412-471-8484
Contact: R. Yvonne Campes
Experience With Consumers and Business-to-Business Groups.

Carlson Marketing Consultants
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Ft. Lauderdale, FL 33324
Ph. 305-475-7161
Contact: Susan Carlson
Fortune 500 Clients/Consumer/Business-To-Business.

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204 Dupont St.
Philadelphia, PA 19127
Ph. 215-487-2061
Contact: M. Carraher
Discovering What Is & How To Create Desired Change.

The Clowes Partnership
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Ridgefield, CT 06877
Ph. 203-438-2647
Contact: Rusty Clowes
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Chicago, IL 60601
Ph. 312-263-7551
Contact: Lisa J. Hougsted
Consumer, Executive, Technical & Children Grps.

Consumer/Industrial Research Service (C/IR)
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Chadds Ford, PA 19317
Ph. 610-565-6222
Contact: Gene Rullo
Agriculture, Business-To-Business, Health Care.

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

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Contact: Dr. Andrew Erlich
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New York, NY 10025
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APPAREL/FOOTWEAR
Brand Consulting Group
The Customer Center, Inc.

ASIAN
Asian Marketing
Asian Perspective, Inc.
Communication Research
Data & Management Counsel, Inc.
Erlich Transcultural Consultants

AUTOMOTIVE
Auto Pacific Group, Inc.
Creative & Response Rsch. Svcs.
Erlich Transcultural Consultants
Matrixx Marketing-Research Div.

BIO-TECH
Focus On Hudson
Intersearch Corporation
Irvine Consulting, Inc.
Market Navigation, Inc.
MedProbo Medical Mktg. Rsch.
Medical Marketing Research, Inc.

BUS.-TO-BUS.
Access Research, Inc.
BAI
Cambridge Associates, Ltd
Cambridge Research, Inc.
Michael Carraher Discovery Rsch.
Consumer/Industrial Research (C/IR)
Consumer Opinion Services
Creative & Response Rsch. Svcs.
Data & Management Counsel, Inc.
The Deutsch Consultancy
Direct Feedback
Fader & Associates
First Market Research (J. Heiman)
Pat Henry Market Research, Inc.
Intersearch Corporation
Gene Kroupa & Associates
James A. Lumpp
Monitor Research Corp.
James Spanier Associates
Spier Research Group
Sweeney International, Ltd.
Wolf/Altschul/Callahan, Inc.
Yarnell Inc.

CABLE
Creative & Response Svces., Inc.

CHILDREN
Carlson Marketing Consultants
Creative & Response Rsch. Svcs.
Doyle Research Associates
Fader & Associates
KidFacts Research
Matrixx Marketing-Research Div.
Outsmart Marketing

COMMUNICATIONS RESEARCH
Access Research, Inc.
Cambridge Associates, Ltd.
The Customer Center, Inc.

COMPUTERS/MIS
Cambridge Associates, Ltd.
Michael Carraher Discovery Rsch.
Creative & Response Rsch. Svcs.
Fader & Associates
Find/SVP
First Market Research (J. Heiman)
Leichliter Associates
Market Navigation, Inc.
Marketing Advantage Research
Monitor Research Corp.
James Spanier Associates
Strategic Research, Inc.
Sweeney International, Ltd.
Yarnell Inc.

CONSUMERS
The Clowes Partnership
Consumer Opinion Services
Creative & Response Rsch. Svcs.
Doyle Research Associates
Pat Henry Market Research, Inc.
Intersearch Corporation
Gene Kroupa & Associates
James A. Lumpp
Marketing Advantage Research
Rodgers Marketing Research
Thorne Creative Research
Dan Wiese Marketing Research
Wolf/Altschul/Callahan, Inc.

CUSTOMER SATISFACTION
BAI
Michael Carraher Discovery Rsch.
Elrick and Lavidge
Fader & Associates
James A. Lumpp
Rockwood Research
Strategic Research, Inc.

DIRECT MARKETING
BAI
Spier Research Group

DISTRIBUTION
Graff Works Marketing Research

EDUCATION
Cambridge Associates, Ltd.
Marketing Advantage Research

ENTERTAINMENT
Sweeney International, Ltd.

EXECUTIVES
BAI
Creative & Response Rsch. Svcs.
Dolobowsky Qual. Svcs., Inc.
Fader & Associates
First Market Research (J. Heiman)
Intersearch Corporation
Marketing Advantage Research
James Spanier Associates
Strategy Research Corporation
Sweeney International, Ltd.

FINANCIAL SERVICES
Access Research, Inc.
BAI
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Michael Carraher Discovery Rsch.
Creative & Response Rsch. Svcs.
The Deutsch Consultancy
Dolobowsky Oual. Svcs., Inc.
Elrick and Lavidge
Fader & Associates
Intersearch Corporation
Marketing Matrix, Inc.
Matrixx Marketing-Research Div.
Monitor Research Corp.
Nordhaus Research, Inc.
The Research Center
James Spanier Associates
Sweeney Int'l. Ltd.

FOODS/NUTRITION
Leichliter Associates

FOOD PRODUCTS
BAI
Creative & Response Rsch. Svcs.
Doyle Research Associates
KidFacts Research
Outsmart Marketing
POV
James Spanier Associates
Thorne Creative Research

HEALTH & BEAUTY PRODUCTS
BAI
Thorne Creative Research

HEALTH CARE
Access Research, Inc.
George I. Balch
Consumer/Industrial Research (C/IR)
Dolobowsky Qual. Svces., Inc.
D/R/S HealthCare Consultants
Elrick and Lavidge
Erlich Transcultural Consultants
Find/SVP
First Market Research (L. Lynch)
Infotech Research Studies
Intersearch Corporation
Irvine Consulting, Inc.
Market Navigation, Inc.
Matrixx Marketing-Research Div.
MedProbe Medical Mktg. Rsch.
Medical Marketing Research, Inc.
Nordhaus Research, Inc.
Rockwood Research
James Spanier Associates
Strategy Research Corporation

HISPANIC
Data & Management Counsel, Inc.
Ebony Marketing Research, Inc.
Erlich Transcultural Consultants
Hispanic Market Connections, Inc.
Hispanic Marketing
Communication Research
Market Development, Inc.
Phoenix Consultants
Strategy Research Corporation
Target Market Research Group, Inc.

IDEA GENERATION
Analysis Research Ltd.
BAI
George I. Balch
Brand Consulting Group
Cambridge Associates, Ltd.
Creative & Response Rsch. Svcs.
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Leichliter Associates
Matrixx Marketing-Research Div.
Monitor Research Corp.
Outsmart Marketing
POV
Rockwood Research
Sweeney International, Ltd.
Thorne Creative Research

IMAGE STUDIES
Cambridge Associates, Ltd.

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

INSURANCE
Marketing Advantage Research

INTERACTIVE PROD./ SERVICES/RETAILING
Leichliter Associates

INVESTMENTS
The Deutsch Consultancy

LATIN AMERICA
Market Development, Inc.

MANAGEMENT
James A. Lumpp

MEDICAL PROFESSION
Cambridge Associates, Ltd.
D/R/S HealthCare Consultants
Focus On Hudson
Pat Henry Market Research, Inc.
Intersearch Corporation
Nancy Low & Associates, Inc.
Matrixx Marketing-Research Div.
MedProbe Medical Mktg. Rsch.
Medical Marketing Research, Inc.
Nordhaus Research, Inc.
Rhoda Schild Focus Group Recruiting/Mktg.

MODERATOR TRAINING
Cambridge Associates, Ltd.
Cunninghis Associates

MULTIMEDIA
Marketing Advantage Research

NATURAL HEALTH CARE/REMEDIES
Focused Solutions

NEW PRODUCT DEV.
BAI
Brand Consulting Group
Cambridge Associates, Ltd.
Carlson Marketing Consultants
Creative & Response Rsch. Svcs.
Data & Management Counsel, Inc.
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Fader & Associates
First Market Research (J. Heiman)
First Market Research (L. Lynch)
Graff Works Marketing Research
Intersearch Corporation
KidFacts Research
Leichliter Associates
Marketing Advantage Research
Outsmart Marketing
POV
Rockwood Research
James Spanier Associates

NON-PROFIT
Doyle Research Associates

PACKAGED GOODS
BAI
Creative & Response Rsch. Svcs.
Doyle Research Associates
Thorne Creative Research

PARENTS
Doyle Research Associates
Fader & Associates
Marketing Advantage Research

PET PRODUCTS
Cambridge Research, Inc.
The Customer Center, Inc.
Marketing Advantage Research
Thorne Creative Research

PHARMACEUTICALS
BAI
Cambridge Associates, Ltd.
Creative & Response Rsch. Svcs.
D/R/S HealthCare Consultants
Focus On Hudson
Infotech Research Studies
Intersearch Corporation
Irvine Consulting, Inc.
Market Navigation, Inc.
MedProbe Medical Mktg. Rsch.
Medical Marketing Research, Inc.
POV

POLITICAL RESEARCH
Cambridge Associates, Ltd.

PUBLIC POLICY RSCH.
George I. Balch
Cambridge Associates, Ltd.

PUBLISHING
Cambridge Associates, Ltd.
First Market Research (J. Heiman)
Marketing Advantage Research
Spier Research Group
Thorne Creative Research
Dan Wiese Marketing Research

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

SENIORS
Erlich Transcultural Consultants
Fader & Associates
Marketing Advantage Research

SERVICES
Spier Research Group

SMALL BUSINESS/ ENTREPRENEURS
Leichliter Associates
Strategy Research Corporation
Yarnell Inc.

SOFT DRINKS, BEER, WINE
Cambridge Associates, Ltd.
Carlson Marketing Consultants
Creative & Response Rsch. Svcs.
Grieco Research Group, Inc.
POV
Strategy Research Corporation
Thorne Creative Research

TEACHERS
Marketing Advantage Research

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

TELECOMMUNICATIONS
BAI
Cunninghis Associates
Elrick and Lavidge
Find/SVP
First Market Research (J. Heiman)
Horowitz Associates Inc.
Intersearch Corporation
Marketing Advantage Research
POV
Rockwood Research
Strategy Research Corporation

TELECONFERENCING
Cambridge Research, Inc.

TELEPHONE FOCUS GROUPS
Cambridge Associates, Ltd.
Consumer/Industrial Research (C/IR)
Creative & Response Rsch. Svcs.
The Customer Center, Inc.
Intersearch Corporation
Market Navigation, Inc.
Medical Marketing Research, Inc.
MedProbe Medical Mktg. Rsch.

TOYS/GAMES
Carlson Marketing Consultants
Fader, William & Associates
KidFacts Research

TRANSPORTATION SERVICES
Sweeney International, Ltd.

TRAVEL
Cambridge Associates, Ltd.
Michael Carraher Discovery Rsch.
James A. Lumpp
James Spanier Associates
Sweeney International, Ltd.

UTILITIES
Cambridge Associates, Ltd.
Fader & Associates
Nordhaus Research, Inc.
Rockwood Research

WEALTHY
The Deutsch Consultancy
Strategy Research Corporation

YOUTH
Fader & Associates
Outsmart Marketing
POV

Product & Service Update

continued from p. 22

of the 15 criteria offered for any given daypart. Then the process can be repeated using another seven variables, and so on. The program and survey data for specified markets are available on a single diskette for IBM-compatible 386 or higher PCs, on Windows, DOS 3.3 or better, with CGA or better color monitors. For free sample market surveys on diskette, call 818-966-4000.

New version of Teleform boasts improved hand print recognition

Teleform for Windows Version 4 is now available from Cardiff Software, Carlsbad, Calif. Teleform automated forms processing software now includes Tri-CR, which uses three recognition technologies to increase accuracy of reading hand printed information. For more information, call 800-659-8755.

New GIS system for Windows

Caliper Corporation, Newton, Mass., is now shipping Maptitude, a new desktop mapping and GIS system for Windows. The complete package of software and data is $395. It includes maps of all the streets in the U.S. as well as ZIP codes, counties, metro areas, demographic statistics and more. It also includes translators for geographic data including the Census Bureau's TIGER files, DXF files, and geographic files from other popular desktop mapping systems. Maptitude supports object linking and embedding (OLE 2.0), which allows maps to be dragged and dropped into documents, spreadsheets and presentations. Using open database connectivity, Maptitude can create virtual data tables that comprise data items from multiple heterogeneous sources. System requirements include a 486 or Pentium chip, Windows 3.1, 8MB RAM, a CD-ROM drive, and at least 16MB. For more information, call 617-527-4700. The e-mail address is info@caliper.com

Online dialog with mutual fund investors

The Center for Strategy Research, a Boston-based market services and research firm, and GALT Technologies, Inc., the creators of NETworth: the Internet Resource for Individual Investors, have launched a joint research effort to open a continuing dialog with mutual fund investors.

Through NETworth, GALT provides information on mutual funds from 56 different fund companies and over 5,000 funds. CSR Boston will provide a forum where NETworth users have the opportunity to share their best thinking about mutual fund investing. Users are invited to discuss their investing goals, how they make decisions, who helps them decide, how they select mutual fund companies, etc. CSR's interviewing method allows volunteers to respond freely to fast-paced open-ended questions. More than 40,000 registered NETworth users and several hundred thousand monthly NETworth visitors will have the opportunity to participate in the dialog. NETworth users who complete the dialog and leave e-mail address will receive highlights of the research. A select number of respondents will be invited to join panels to continue the dialog and receive feedback over the next six months. For more information, call 617-345-9500.

Just how many people are on the Internet anyway?

The Emerging Technologies Group of FIND/SVP, a New York City research firm, is heading a new study designed to assess the current size and characteristics of the Internet user universe, including World Wide Web users. The large multiclient study will combine an online survey, a telephone survey, and in-depth focus groups to develop statistics and insights into who is using the Internet and why. For more information, call Dana Simmons at 800-965-4636 or e-mail dsimmons@ findsvp.com

London firm offers country data on-line

MarketLine, an international research firm based in London, now offers CountryLine, an on-line information service that furnishes the vital statistics of 120 countries, from Afghanistan to Zimbabwe. All current data refers to 1994-1995 and is updated every quarter. Available information includes inflation and unemployment figures, population by age and sex, political developments, data on retailing and advertising, and more. CountryLine information is being launched across the on-line information market and will be available to on-line users of FT Profile, Datastar, Dialog, MAID, Lexis/Nexis and Markintel. For more information, call Richard James at 0171-624-2200. Fax 0171-372-0130.

MapMarker matches addresses

MapInfo Corp., Troy, N.Y., has introduced MapMarker, an intelligent address-matching product that combines full-featured address matching capabilities with an application programming interface that enables users to embed the product within any application. With MapMarker, available for both Windows and UNIX, users can now add location to corporate data at any instance, regardless of the data source, for use across enterprise-wide applications. The company also announced easier access to corporate data through its newly enhanced client/server data connectivity product, SQL DataLink for Windows. MapMarker consists of geocoding software, an address dictionary of geocoding data and built-in StreetWorks street maps for display. The address dictionary, updated semiannually, and matching software permit place name matches (e.g., Sears Tower), P.O. box and rural route matches. For more information, call Lisa Jacobson at 518-285-7205.

1995

Directory of

Syndicated/ Omnibus Studies

1995 SYNDICATED/OMNIBUS DIRECTORY

Section One
Alphabetical Listing

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

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

American Sports Data, Inc.
234 N. Central Ave.
Hartsdale, NY 10530
Ph. 914-328-8877
Fax 914-328-1823
Harvey Lauer, President
American Sports Analysis (S)
Athlete Footwear Monitor (S)
Health Club Trend Report (S)

Audits & Surveys
650 Avenue of the Americas
New York, NY 10011
Ph. 212-627-9700
Fax 212-627-2034
Barry Feinborg, Ph.D., Sr. V.P.
IssueTrack/USA (S)

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

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

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

Irwin Broh & Associates, Inc.
1011 E. Touhy Ave.
Des Plaines, IL 60018
Ph. 708-297-7515
Fax 708-297-7847
Dave Waitz, Exec. V.P.
Marcom (O)
Leisure Time Tracking Study (S)
Many Consumer Hard Good Studies (S)

BRUSKIN GOLDRING RESEARCH

Bruskin/Goldring Research
100 Metroplex Dr.
Edison, NJ 08817
Ph. 908-572-7300
Fax 908-572-7980 or 7981
Irwin Korman, Executive V.P.
OmniTel - Weekly national consumer study. For times when you need answers to a few marketing questions. It furnishes the same data quality as well-run dedicated surveys. (O)
Integrated Survey Information System-ISIS - Weekly national consumer study. For custom surveys up to 15 minutes in length. It also furnishes the same data quality as well-run dedicated surveys. (O)
(See advertisement on the Inside Front Cover)

California Retail Survey
5303 Nyoda Way
Carmichael, CA 95608-3082
Ph. 916-486-9403
James Vaughn, President
California Retail Survey, 1995 Edition (S)

Cambridge Reports, Inc.
955 Massachusetts Ave.
Cambridge, MA 02139
Ph. 617-861-0110
Fax 617-661-3575
Gene Pokorny
Cambridge Reports Omnibus Surveys (O)
Cambridge Report Program (S)
Quarterly Opinion Review Program (S)
Ouarterly Opinion Briefing Program (S)

Canadian Facts
1075 Bay St.
Toronto, ON M5S 2X5
Ph. 416-924-5751
Fax 416-923-7085
Michael Lopresti, President
Monitor (O)
Multifacts (O)
Financial Services (S)

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

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

CHILTON RESEARCH SERVICES

Chilton Research Services
One Chilton Way
Radnor, PA 19089
Ph. 610-964-4602 or 800-EXP-POLL
Fax 610-964-2942
Kirsten Zapiec, Express Rsch. Mgr.
Chilton's EXPRESS Omnibus - Is a national weekly omnibus survey offering the highest quality research at the lowest price available. Designed to get the answers you need fast, EXPRESS allows you to submit questions as late as noon, Wednesday and to get full tabulations three business days later, on Monday. 1,000 adults interviewed. Nationwide RDD sample. Random respondent selection. Standard demographic banner. First question one time - $725. Each additional question - $700. (O)
Teen.com - Is a linked research product focusing on teen attitudes toward media, technology and communications, as well their more general values. The product links a quarterly national survey (of 1,000 teens living at home) and an ongoing computer bulletin board, which will collect comments on-line from a representative sample of teens. (S)
ESPN Chilton Sports Poll - Is a national syndicated weekly survey of the U.S. population (12+) which tracks sports interests and fan activities. Covers major professional and college sports; interest level, favorite teams and players, games attended/seen/heard on TV/radio, licensed product ownership and more. Monthly/quarterly/annual results reported. Variable subscription options, custom studies, analysis and consulting available. (S)
CyberOffice Surveyor - Is a quarterly syndicated survey designod to track usage of products and services including information on brand preferences and purchase plans within the small business/home business (SOHO) market. Emphasis is on high technology products/services. Custom options available. A total of 750 interviews are conducted quarterly among a nationwide random sample. Quarterly reporting and semi-annual presentation of results. (S)
(See advertisement on p. 54)

S=SYNDICATED STUDY
O=OMNIBUS STUDY

1995 SYNDICATED/OMNIBUS DIRECTORY

Com-Sci Systems, Inc.
900 Skokie Blvd., #107
Northfield, IL 60062
Ph. 708-714-0714
Fax 708-714-9900
Richard Schlesinger
BPI Brand Performance Index (S)
On-Premise Beer, Wine & Spirits Studies (S)
Office Services Study (S)

The Consumer Network, Inc.
3624 Market St.
Philadelphia, PA 19104
Ph. 215-561-2921
Fax 215-557-7692
Mona Doyle, President
Advertising Fact Book (S)
Changing Perceptions of Health Care (S)
Changing Perceptions of Juice (S)
The Shopper Report (S)
The Swing Shopper & The Future of Store Brands (S)
What's Happening to Dinner (S)

Creative Research International, Inc.
4950 Yonge St., #1002
N. York, ON M2N 6K1
Ph. 416-250-8500
Fax 416-250-8515
Liz Jaye
Yankelovich Monitor™ In Canada (S)

Custom Research, Inc.
10301 Wayzata Blvd.
Minneapolis, MN 55426-0695
Ph. 612-542-0824
Fax 612-542-0864
Lisa Gudding/Joan Palmquist
Criterion Omnibus™ Concept Screening Sys. (O)
Warehouse Club Store Syndicated Study (S)

Danis Research International
383 Rte. 46 W.
Fairfield, NJ 07004-2402
Ph. 201-575-3509
Fax 201-575-5366
Tom Cristiani
Fresh Track™ (S)

Data Insight, Inc.
1551 Forum Place, Ste. 500-D
W. Palm Beach, FL 33401
Ph. 407-689-3222
Fax 407-640-1898
Jonathan Flah, Director
D-Monitor, Dissatisfaction Monitor (S)
Idea Book (S)

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

Doane Marketing Research, Inc.
1807 Park 270 Dr., Ste. 300
St. Louis, MO 63146
Ph. 314-878-7707
Fax 314-878-7616
David Tugend, V.P. Client Svcs.
Pesticide Profile Study (S)
Companion Animal Vet Clinic Study (S)
U.S. Animal Health Market Study (S)
U.S. Farm Corn Seed Study (S)

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

ELRICK&LAVIDGE
MARKETING RESEARCH
EQUIFAX

Elrick & Lavidge
One Mack Centre Dr.
Paramus, NJ 07652
Ph. 800-253-0221
Fax 201-599-9896
Mark Perline, Account Manager
Multi-Mall℠ - Make the move to Multi-Mall℠ when one or two front-burner issues demand immediate attention, speed is of the essence, budgets are tight or there can be no compromise in quality. All female waves available. (O)
(See advertisement on p. 53)

Environmental Research Associates
707 State Rd., Ste. 102
Princeton, NJ 08540
Ph. 609-683-0187
Fax 609-683-8398
Lois Kaufman
Environmental Report (S)
Environmental Report: The Power of Children (S)

Erdos & Morgan
116 E. 27th St.
New York, NY 10016
Ph. 212-685-9393
Fax 212-685-9629
Irene Ochs-Lilien, V.P. Sales
Opinion Leaders (S)
Purchase Influence In American Business (S)
Professional Investment Community (S)

Find/SVP
A Worldwide Consulting and Research Firm

Find/SVP
625 Avenue of the Americas
New York, NY 10011
Ph. 800-965-4636
Fax 805-565-9761
Mr. Dana Simmons, Managing Director
The American Information User Study - Launched in 1994, benchmarks computer, modem, CD-ROM and other new media adoption by U.S. households. The 2,000 household survey cross-tabs interest in interactive services with demographics, PC adoption, traditional media usage and other factors. A boosted online user sample (n=400) is also available. (S)
The American Learning Household Survey - Developed with Grunwald Associates and C+C Data, Inc., explores U.S. household demand for educational programming, software and technology. Focus groups examine parents' and students' perceptions about educational media used at home. A 1,200 household survey benchmarks educational use of PCs, modems, online services, the Internet, plus TV, videos and other media, and interest in using new media. June 1995. (S)
The American Home Energy Management Survey - Developed with Texas Systems, Inc., and C+C Data, Inc., is keyed to the recent deregulation of U.S. energy services. Focus groups explore home energy activities, needs and interests. A 1,200 household survey benchmarks use of energy products and services and the potential for bundling energy management features with the other interactive home services. Fieldwork complete in August 1995. (S)
The American Internet User Survey - Developed with HSF Consulting and C+C Data, Inc., is a large study of U.S. Internet users that combines an online survey, telephone survey and focus groups. Covers business and personal users of WWW, e-mail and other Internet services, including comparisons of conventional media usage. Proprietary sample boosting is available. Charter sponsors can influence study design. September 1995. Ask for complete prospectus. (S)
The New American Small Business Survey - Developed with Joanne H. Pratt Associates and C+C Data, Inc., studies the impact of computers and advanced telecom on U.S. small businesses (SBs). Examines SBs in each technology adoption stage: "novice," "dependent" and "integrated." Covers product/service usage, online and Internet use, purchase decision processes, new opportunities including financial services. Fieldwork targeted for 4th quarter 1995. (S)
(See advertisement on p. 36)

Find/SVP
A Worldwide Consulting and Research Firm

Find/SVP Published Products, Inc.
625 Avenue of the Americas
New York, NY 10011-2002
Ph. 212-645-4500
Fax 212-645-7681
Barbara Elstein, Associate Director
American Food & Beverage Monitor - Produced by Find/SVP, Inc., is designed to provide insights regarding the attitudes behind consumer food choices; track baseline measures over time; and, as a result of our unique method of overlaying retail sales data with the results of a 1,000 household survey, delineate what consumers say they do and what they actually do in terms of shopping and eating. In addition, the study will provide invaluable data regarding the relationship between away-from-home and at-home eating behavior. Charter participants will receive statistically projectable, nationally representative results that will be published in two volumes. The product categories included in the American Food & Beverage Monitor will be based on final participants with possibilities ranging from dairy products, coffee and tea, new age beverages, health and natural foods, snacks, to baked goods. To receive a study prospectus call Barbara Elstein at 212-645-4500. (S)
(See advertisement on p. 36)

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

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

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

S=SYNDICATED STUDY
O=OMNIBUS STUDY

1995 SYNDICATED/OMNIBUS DIRECTORY

HealthFocus, Inc.
4108 Oak Forest Dr.
Des Moines, IA 50312
Ph. 515-274-1307
Fax 515-274-3117
Linda Gilbert
HealthFocus On U.S. Consumers Healthy Food Trends (S)

Hospital Research Associates
Hollywood Ave. & Rte. 46 W.
Fairfield, NJ 07004-2402
Ph. 201-575-3650, ext. 296
Fax 201-575-5366
William Soriano, Vice President
Medical Trends in Antibiotics (S)
Medical Trends in Hospital Formulary Committee (S)
Medical Trends in Managed Care Formulary Committee (S)

ICR Survey Research Group

ICR Survey Research Group
605 W. State St.
Media, PA 19063
Ph. 610-565-9280
Fax 610-565-2369
Steven McFadden, Exec. V.P.
EXCEL - National telephone omnibus survey of 1,000 consumers conducted twice each week. Interviewing through final tabulations in seven days. RDD sampling; CATI interviewing; totally conducted in-house; custom options; extremely cost effective. (O)
TeenEXCEL - National telephone omnibus survey of 500 teens aged 12 to 17. Conducted monthly. Interviewing through final tabulations within seven days. Same precedures and quality controls as EXCEL. Combine TeenEXCEL and EXCEL for 12 years+ population. (O)
(See advertisements on pp. 55, 57,59)

IMR Research
140 Burlington Ave.
Clarendon Hills, IL 60514
Ph. 708-654-1077
Fax 708-654-0147
George Griffin, Exec. V.P.
Continuing Canadian Consumer Survey (S)
Continuing Consumer Survey (S)
Continuing Automotive Maintenance Survey (S)

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

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

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

Interviewing Service of America, Inc.
16005 Sherman Way, Ste. 209
Van Nuys, CA 91406-4024
Ph. 818-989-1044
Fax 818-782-1309
Michael Halberstam, President
Solutions (O)

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

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

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

Macro•AHF Mktg. Rsch. & Consultancy
100 Avenue of the Americas
New York, NY 10013
Ph. 212-941-5555
Fax 212-941-7031
Art Zarin, Senior V.P.
Scholastic-AHF Online Poll of American Youth (O)

Macro International
805 Third Ave., 8th fl.
New York, NY 10022
Ph. 212-888-4141
Fax 212-888-0140
Sheila Paterson, Vice President
Eastern EurOpinion Omnibus (O)
Eastern EurOpinion Woman Watch (O)
Eastern EurOpinion Teen Track (O)
Eastern EurOpinion Men's Monitor (O)

MARITZ
MARKETING RESEARCH INC
More than measurement

Maritz Marketing Research, Inc.
1297 N. Highway Dr.
Fenton, MO 63099
Ph. 314-827-2305
Fax 314-827-5433
Gloria Sloan, V.P., Div. Mgr.
Row Crop Pesticide Use Study - Annual syndicated study among 30,000 growers which provides brand share and tracking of farm pesticide usage in the U.S. (S)
Row Crop Pesticide Satisfaction Study - Annual syndicated study with growers providing information on growers' satisfaction with pesticide products. (S)
Golf Course Pesticide Use Study - Study with 1,500 golf course superintendents determines pesticide use practices and brand share in the U.S. (S)
Specialty Crop Pesticide Use Study - Study provides brand and dollar expenditures for pesticides on 19 vegetable and 18 fruit, nut and vine crops. (S)
(See advertisements on pp. 17, 50)

MARITZ
MARKETING RESEARCH INC
More than measurement

Maritz Marketing Research, Inc.
3035 Moffat Dr.
Toledo, OH 43615
Ph. 419-841-2831
Fax 419-841-8349
Tim Rogers, Vice President
Second Quarter New Car Lessee Study - Primary research study of 6,500 new car lessees and 4,900 truck lessees regarding product satisfaction, purchase consideration, shopping patterns, leasing issues, trading dynamics and demographics. Report released in September. (S)
Early Model New Car and Truck Buyer Study - Primary research study of 24,000 new car buyers and 6,000 new truck buyers regarding product satisfaction, purchase considerations, shopping patterns, dealer satisfaction, trading dynamics and demographics. Report released in March. (S)
Second Quarter New Car and Truck Buyer Study - Primary research study of 36,000 new car buyers and 9,000 new truck buyers regarding product satisfaction, purchase considerations, shopping patterns, alternative fuels, trading dynamics and household demographics. Report released in August. (S)
Canadian New Car and Truck Buyer Satisfaction - Primary research study of 36,000 new car buyers and 9,000 new truck buyers regarding product satisfaction, purchase considerations, dealer satisfaction, trading dynamics and household demographics. Report released in September. (S)
Used Car Buyer Study - Primary research study of 16,000 used car buyers regarding product satisfaction, purchase considerations, shopping patterns, trading dynamics and household demographics. Report released in September. (S)
(See advertisements on pp. 17, 50)

Market Development, Inc. (MDI)
1643 Sixth Ave.
San Diego, CA 92101-2706
Ph. 619-232-5628
Fax 619-232-0373
Roger Sennott, V.P. General Manager
Compass Latin American Syndicated Study - The first in-depth, syndicated psychographic survey of the four major Latin American markets: Mexico, Chile, Argentina and Brazil. A global marketer's guide to the attitudes and values that drive 450 million Latin American consumers. The study includes five hundred interviews conducted in each country. (S)
Patient Care: Bridging the Gap with Hispanic Consumers - A specialized report comparing Hispanics' and non-Hispanics' attitudes and perceptions toward hospital care, medical facilities and medical practitioners. The study was designed to equip healthcare marketers, administrators and insurance providers with useful information to better understand the needs of Hispanic patients and their families. (S)
(See advertisements on pp. 39, 49)

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

S=SYNDICATED STUDY
O=OMNIBUS STUDY

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

Market Facts of Canada
77 Bloor St. W., Ste. 1200
Toronto, ON M4X 1E2
Ph. 416-964-6262
Fax 416-964-5882
Peter Greensmith, Senior V.P.
Beverage Consumption Study (S)
Canadian Eating Habits Study (S)
Canadian Footwear Market Index (S)
CustomerService Index (S)
Household Equipment Survey (S)
Household Flow of Funds Survey (S)
Industrial Pumps (S)
National Flexibus (O)
Personal Accessories + Cosmetics Survey (S)
Process Control Instrumentation (S)
Self Service Banking Study (S)
SportsVision (S)
TeleNation-Canada (O)

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

Market Response International
6442 City W. Pkwy., #305
Minneapolis, MN 55344
Ph. 612-943-2230
Fax 612-943-2320
Thomas Andersen, Int'l. Project Dir.
Benelux Scopo-Holland & Belgium (O)
Telescope Belgium (O)
Telescope Germany (O)
Telescope Holland (O)

Market Segment Research, Inc.
1320 S. Dixie Hwy., #120
Coral Gables, FL 33146-2911
Ph. 305-669-3900
Fax 305-669-3901
Gary Berman, President
MSR Ethnic Market Report (S)

Market Trends
3633 136th Place S.E., Ste. 110
Bellevue, WA 98006
Ph. 206-562-4900
Fax 206-562-0633
Jackie Weise, Exec. V.P.
Opinion Monitor (O)

Mature Marketing
65 E. Indian Row, Ste. 29F
Boston, MA 02110
Ph. 617-720-4158
Fax 617-723-1254
Dr. Leslie Harris
Senior Pulse (O)

MDI
interviewing services

MDI Interviewing Services
1101 Bay Blvd., Ste. D
Chula Vista, CA 91911
Ph. 619-424-4535
Fax 619-424-4501
Roxanne Ewalt, Mgr. Client Services
MDI Hispanic Omnibus - The MDI Hispanic Omnibus has been conducted every quarter since 1991. It consists of 1,000 telephone interviews among Hispanic adults between the ages of 18 and 64. Interviews are conducted in Spanish or English depending on each respondent's preference. Markets: Los Angeles, New York, Miami, San Antonio and Houston. (O)
(See advertisement on p. 25)

Mediamark Research, Inc.
708 Third Ave.
New York, NY 10017
Ph. 212-599-0444
Fax 212-682-6284
Ken Wollenberg, V.P. Sales & Mktg.
The Study of the American Consumers (S)

Medical Data Management
25 E. Loop Rd., Ste. 217
Stony Brook, NY 11790-3350
Ph. 516-444-8844
Fax 516-444-8847
Elizabeth Montgomery, Marketing Manager
OTC-Bus (O)
Profil (S)
Promo-Test (S)

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

MRCA Information Services
20 Sumner St.
Stamford, CT 06902
Ph. 203-324-9600
Fax 203-348-4087
Ken Murphy
National Consumer Purchase Panel (S)
Menu Census (S)
Casual Apparel Usage (S)
Health-Trak (S)
Communication Awareness (S)
Video-Trak (S)
Vision-Trak (S)
Baby-Trak (S)
Mail-Trak (S)
Direct-Trak (S)

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

Nielsen North America
150 Martin Gale Rd.
Schaumburg, IL 60173
Ph. 708-605-5000
Scantrack (S)
Scantrack Household Panel Services (S)

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

The NPD Group
9399 W. Higgins Rd., #300
Rosemont, IL 60068
Ph. 708-692-6700
Fax 708-692-6049
Crest (S)

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

NuStats, Inc.
4404 S. Lamar, Bldg. 200
Austin, TX 78745
Ph. 512-469-6400
Hispanic InfoSource (S)

OPINION
RESEARCH
CORPORATION

Opinion Research Corporation
P.O. Box 183
Princeton, NJ 08542-0183
Ph. 800-999-0213
Fax 800-759-5786
Judi Lescher, Vice President
Caravan® - National telephone omnibus survey of 1,000 adults conducted weekly, Thursday through Sunday. Preliminary results available on Monday. Full tabulations delivered on Tuesday. CATI interviewing utilizing state-of-the-art RDD sample. In-house professional interviewers and data processing staff. Low cost. (O)
Teen Caravan - National telephone omnibus survey of 250 teens ages 12-17. (O)
Pre-teen Caravan - National telephone omnibus survey of 250 pre-teens ages 6-11. (O)
Executive Caravan - Conducted monthly in the U.S. (O)
Small Business Caravan - Conducted quarterly among small business service and product related companies. (O)
Investor Caravan, Credit Card Caravan - Conducted quarterly. Consumer-oriented market based information for the financial services arena. (O)
(See advertisement on p. 56)

1995 SYNDICATED/OMNIBUS DIRECTORY

J.D. Power and Associates
30401 Agoura Rd.
Agoura Hills, CA 91301
Ph. 818-889-6330
Fax 818-889-3719
Patricia Patano, Director, Marketing
Initial Quality Study (S)
Customer Satisfaction Index Study (S)
Sales Satisfaction Index Study (S)

Angus Reid Group, Inc.
363 Broadway, 5th fl.
Winnipeg, MB R3C 3N9
Ph. 204-949-3100
Fax 204-942-5669
Maggie Burns
Canadia Household in the Information Age (S)
North American Gaming & Gambling (S)
Canadia Business Traveler (S)
National Angus Reid Poll (O)

Restaurant Research Associates
6 Hutton Centre Dr., Ste. 1240
Santa Ana, CA 92707
Ph. 714-241-7930
Fax 714-241-7933
Lynn Stalone, Partner
Hot Topics (S)

Rockwood Research Corp.
1751 W. County Rd. B
St. Paul, MN 55113
Ph. 612-631-1977
Fax 612-631-8198
Robert Hill, President
Ag Tel™ (O)
Mail Monitor™ (S)

Roper Starch Worldwide
205 E. 42nd St.
New York, NY 10017
Ph. 212-599-0700
Fax 212-867-7008
Peter Stisser, Vice President
Limobus (O)
Roper Age Segment Portfolio (S)
Roper Green Gauge (S)
Roper Reports (S)
Starch "Plus" Database (S)

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

Simmons Market Research Bureau, Inc.
420 Lexington Ave.
New York, NY 10170
Ph. 212-916-8900
Fax 212-916-8918
Jerry Ohlsten, Marketing Director
Study of Media and Markets (S)
The Hispanic Study (S)
CompPro-Study of Computer Professionals (S)

Lee Slurzberg Research, Inc.
379 Windsor Rd.
Englewood, NJ 07631
Ph. 201-567-2265
Fax 201-567-5661
Lee Slurzberg, President
LSR New York Hispanic Omnibus (O)

Southeastern Institute of Research, Inc.
2325 W. Broad St.
Richmond, VA 23220
Ph. 800-807-8981
Fax 804-358-9761
G. William Greer, Dir. Client Svcs.
Baltimore, MD Insight (O)
Hampton/Norfolk/Virginia Beach, VA Insight (O)
Richmond, VA Insight (O)
Washington, DC Insight (O)

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

Strategy Research Corporation
100 N.W. 37th Ave.
Miami, FL 33125
Ph. 305-649-5400
Fax 305-649-6312
Mel Olans
STAR - Spanish Television Audience Ratings (S)
SRC Hispanic Omnibus (O)

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

Teenage Research Unlimited
707 Skokie Blvd., Ste. 450
Northbrook, IL 60062
Ph. 708-564-3440
Fax 708-564-0825
Peter Zollo, President
Teenage Marketing & Lifestyle Study (S)

Thompson Lightstone & Co.
1027 Yonge St., Ste. 100
Toronto, ON M4W 2K9
Ph. 416-922-1140
Fax 416-922-8014
Peggy Richardson-McKee, Vice President
Omnitel (O)

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

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

S=SYNDICATED STUDY
O=OMNIBUS STUDY

TVQ
14 Vanderventer Ave.
Port Washington, NY 11050
Ph. 516-944-6833
Fax 516-944-3271
Steven Levitt
Cartoon Q (S)
Performer Q (S)
Sports Q (S)

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

U.S. Travel Data Center
1100 New York Ave. N.W., Ste. 450
Washington DC 20005-3934
Ph. 202-408-1832
Suzanne Clark
National Travel Survey (O)
Quick Travel Fax (O)
Cooperative Travel Survey (S)

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

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

WestGroup Mktg. Rsch., Inc.
1110 E. Missouri Ave., Ste. 780
Phoenix, AZ 85014
Ph. 602-264-4915
Fax 602-631-6844
Ted Apostol, President
WestTrack-Phoenix (O)
WestTrack-Arizona (O)

Youth Research
36 Tamarack Ave.
Danbury, CT 06811
Ph. 203-797-0666
Fax 203-748-1735
Karen Forcade, President
Kids Research (O)

Section Two Specialty Cross Index

Advertising

Advertising Research Corp. (ARC) (S)
Beta Research Corp. (S)
Bruskin/Goldring Research, Inc. (O)
Chilton Research Services (O/S)
The Consumer Network, Inc. (S)
Erdos & Morgan (S)
Gallup & Robinson (S)
Gallup Canada, Inc. (O)
Healthcare Communications (S)
Hospital Research Associates (S)
ICR Survey Research Group (O)
International Demographics (S)
Macro•AHF Mktg. Rsch. & Consultancy (O)
Macro International (O)
Market Opinion Research (O)
Market Trends (O)
Medical Data Management (O/S)
NFO Research (S)
Opinion Research Corporation (O)
J.D. Power and Associates (S)
Rockwood Research Corp. (S)
Roper Starch Worldwide (S)
Simmons Market Research Bureau (S)
Strategic Vision (S)
TVQ (S)
U.S. Travel Data Center (O)
Video Storyboard Tests (S)

African-Americans

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

Agricultural

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

Airlines

J.D. Power and Associates (S)

Asian-Americans

Data Insight, Inc. (S)
Market Segment Research, Inc. (S)

Automotive

Bruskin/Goldring Research, Inc. (O)
Chilton Research Services (O/S)
Gallup Canada, Inc. (S)
IMR Research (S)
Interviewing Service of America (O)
Macro International (O)
Maritz Marketing Research (S)
Market Opinion Research (O)
Opinion Research Corporation (O)
J.D. Power and Associates (S)
Strategic Vision (S)

Business-To-Business

Behavior Research Center (O/S)
Beta Research Corporation (O)
Erdos & Morgan (S)
Find/SVP (S)
Find/SVP Published Products, Inc. (S)
Macro International (O)
Market Facts of Canada (S)
Mediamark Research, Inc. (S)
Opinion Research Corporation (O)
Simmons Market Research Bureau (S)

Cable

Angus Reid Group, Inc. (S)

Carpeting

Bruskin/Goldring Research, Inc. (O)

Chemical Industry

Chemark Consulting (S)
Market Facts of Canada (S)

Children

Bruskin/Goldring Research, Inc. (O)
Children's Market Research (S)
Data Insight, Inc. (S)
Environmental Research Associates (S)
ICR Survey Research Group (O)
Interviewing Service of America (O)
Macro•AHF Mktg. Rsch. & Consultancy (O)
Macro International (O)
Market Facts, Inc. (O)
MRCA Information Services (S)
Opinion Research Corporation (O)
Roper Starch Worldwide (S)
TVQ (S)
Youth Research (O)

College Students

Data Insight, Inc. (S)
Macro International (O)
Roper Starch Worldwide (S)
The Wagner Group (O)

Computers

Chilton Research Services (S)
Find/SVP (S)
IntelliQuest, Inc. (S)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (S)

1995 SYNDICATED/OMNIBUS DIRECTORY

Consumer-Canada

Canadian Facts (O)
Creative Research International, Inc. (S)
Gallup Canada, Inc. (O/S)
IMR Research (S)
Maritz Marketing Research (S)
Market Facts of Canada (O/S)
Market Opinion Research (O)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (O)
Roper Starch Worldwide (S)
Thompson Lightstone & Co. (O)

Consumer-Europe

Macro International (O)
Market Response International (O)
Medical Data Management (O/S)
J.D. Power and Associates (S)
Roper Starch Worldwide (S)

Consumer-Local

Behavior Research Center-AZ (S)
Dittman Research-AK (O)
Gene Kroupa & Associates-WI (O)
Market Trends-OR (O)
Northwest Research Group-WA (O)
Lee Slurzberg Research, Inc. (O)
Southeastern Institute of Rsch.-DC (O)
Southeastern Institute of Rsch.-VA (O)
Talmey-Drake Research-CO (O)
WestGroup Marketing Rsch.-AZ (O)

Consumer-U.S.

Audits & Surveys (S)
Beta Research Corporation (O)
Irwin Broh & Ascts. (S)
Bruskin/Goldring Research, Inc. (O)
Cambridge Reports/Research International (O/S)
Chilton Research Services (O/S)
Custom Research Inc. (O/S)
Data Insight, Inc. (S)
Elrick & Lavidge (O)
Find/SVP (S)
Find/SVP Published Products, Inc. (S)
ICR Survey Research Group (O)
IMR Research (S)
Interviewing Service of America (O)
Issues & Answers Network (O)
Macro•AHF Mktg. Rsch. & Consultancy (O)
Maritz Marketing Research (S)
Market Facts, Inc. (O)
Market Opinion Research (O)
Market Segment Research (S)
Mediamark Research Inc. (S)
Monroe Mendelsohn Research (O/S)
MRCA Information Services (S)
NFO Research (O)
Nielsen North America (S)
The NPD Group (S)
Opinion Research Corporation (O)
J. D. Power and Associates (S)
Roper Starch Worldwide (O/S)
Simmons Market Research Bureau (S)
Strategic Vision (S)
Total Research Corp. (S)
TrenData Inc. (S)
U.S. Travel Data Center (O)

Direct Mail

MRCA Information Services (S)

Entertainment

Audits & Surveys (S)
Irwin Broh & Ascts. (S)
Bruskin/Goldring Research, Inc. (O)
Chilton Research Services (O/S)
Interviewing Service of America (O)
Macro•AHF Mktg. Rsch. & Consultancy (O)
Market Opinion Research (O)
MRCA Information Services (S)
Opinion Research Corporation (O)
TVQ (S)

Environmental

Audits & Surveys (S)
Bruskin/Goldring Research, Inc. (O)
Environmental Research Associates (S)
Erdos & Morgan (S)
Interviewing Service of America (O)
Macro•AHF Mktg. Rsch. & Consultancy (O)
Market Directions (S)
Market Opinion Research (O)
Opinion Research Corporation (O)
Roper Starch Worldwide (S)

Executives

Chilton Research Services (S)
Data Insight, Inc. (S)
Erdos & Morgan (S)
Hospital Research Associates (S)
Opinion Research Corporation (O)
Simmons Market Research Bureau (S)

Financial

BAI (S)
Bruskin/Goldring Research, Inc. (O)
Canadian Facts (S)
Chilton Research Services (O/S)
Erdos & Morgan (S)
Gallup Canada, Inc. (S)
Interviewing Service of America (O)
Macro International (O)
Market Facts of Canada (S)
Opinion Research Corporation (O)
J.D. Power and Associates (S)
Strategic Vision (S)
Unidex Research (S)
WestGroup Mktg. Rsch., Inc. (O)

Food/Beverage

Audits & Surveys (S)
Bruskin/Goldring Research, Inc. (O)
Children's Market Research (S)
Chilton Research Services (O/S)
Com-Sci Systems (S)
The Consumer Network, Inc. (S)
Custom Research Inc. (O/S)
Danis Research (S)
Data Insight, Inc. (S)
Ehrhart-Babic Ascts. (S)
Find/SVP Published Products, Inc. (S)
HealthFocus, Inc. (O)
Information Resources, Inc. (S)
Interviewing Service of America (O)
Macro•AHF Mktg. Rsch. & Consultancy (O)
Macro International (O)
Market Facts of Canada (S)
Market Opinion Research (O)
MRCA Information Services (S)
The NPD Group (S)
Opinion Research Corporation (O)
Restaurant Research Associates (S)
Strategic Vision (S)

Gaming

Angus Reid Group, Inc. (S)

Health Care/Medical

American Sports Data, Inc. (S)
Audits & Surveys (S)
Beta Research Corporation (O/S)
Irwin Broh & Ascts. (S)
Chilton Research Services (O)
The Consumer Network, Inc. (S)
Custom Research Inc. (O/S)
Data Insight, Inc. (S)
Healthcare Communications (S)
HealthFocus, Inc. (O)
Hospital Research Associates (S)
Interviewing Service of America (O)
Macro International (O)
Market Development, Inc. (MDI) (S)
Market Opinion Research (O)
Medical Data Management (O/S)
MRCA Information Services (S)
Opinion Research Corporation (O)

Hispanic

Behavior Research Center (O/S)
Market Development, Inc. (MDI) (S)
Market Segment Research (S)
MDI Interviewing Services (O)
NuStats, Inc. (S)
Simmons Market Research Bureau (S)
Lee Slurzberg Research, Inc. (O)
Strategy Research Corporation (O/S)

Insurance

Bruskin/Goldring Research, Inc. (O)
Chilton Research Services (S)
Erdos & Morgan (S)

S=SYNDICATED STUDY
O=OMNIBUS STUDY

1995 SYNDICATED/OMNIBUS DIRECTORY

Gallup Canada, Inc. (S)
Interviewing Service of America (O)
Market Facts of Canada (S)
Market Opinion Research (O)
Opinion Research Corporation (O)
Strategic Vision (S)

International

Behavior Research Center (O/S)
Macro International (O)
Market Development, Inc. (MDI) (S)
Medical Data Management (O/S)
Roper Starch Worldwide (S)

Latin America

Market Development, Inc. (MDI) (S)

Lodging Industry

Bruskin/Goldring Research, Inc. (O)
Interviewing Service of America (O)
Opinion Research Corporation (O)
U.S. Travel Data Center (O)

Management

Hospital Research Associates (S)
Opinion Research Corporation (O)
Simmons Market Research Bureau (S)

Media

Advertising Research Corp. (S)
Audits & Surveys (S)
Beta Research Corporation (S)
Bruskin/Goldring Research, Inc. (O)
Chilton Research Services (S)
Find/SVP (S)
Erdos & Morgan (S)
Hospital Research Associates (S)
International Demographics (S)
Interviewing Service of America (O)
Macro International (O)
Market Opinion Research (O)
Mediamark Research, Inc. (S)
Opinion Research Corporation (O)
J.D. Power and Associates (S)
Roper Starch Worldwide (S)
Scarborough Research Corp. (S)
Simmons Market Research Bureau (S)
Strategic Vision (S)
Strategy Research Corporation (S)

Mothers

Bruskin/Goldring Research, Inc. (O)
Children's Market Research
Interviewing Service of America (O)
Macro International (O)
Market Facts, Inc. (O)
Market Facts of Canada (O)
Youth Research (O)

Office Products

Chilton Research Services (S)
J.D. Power and Associates (S)

Pet Foods

Custom Research Inc. (O)

Pharmaceutical

Medical Data Management (O/S)

Political Affairs

Market Opinion Research (O)

Promotions

TVQ (S)

Public Policy Issues

Market Opinion Research (O)

Restaurants/Fast Foods

California Retail Survey (S)
Chilton Research Services (O/S)
The Consumer Network, Inc. (S)
Data Insight, Inc. (S)
Find/SVP Published Products, Inc. (S)
Interviewing Service of America (O)
Macro International (O)
The NPD Group (S)
Opinion Research Corporation (O)
Restaurant Research Associates (S)
Strategic Vision (S)

Retail

Bruskin/Goldring Research, Inc. (O)
California Retail Survey (S)
Chilton Research Services (S)
The Consumer Network, Inc. (S)
Custom Research Inc. (S)
Ehrhart-Babic Ascts. (S)
Information Resources (S)
Interviewing Service of America (O)
Macro•AHF Mktg. Rsch. & Consultancy (O)
Macro International (O)
Market Opinion Research (O)
MRCA Information Services (S)
Nielsen North America (S)
Opinion Research Corporation (O)
Strategic Vision (S)

Seniors/Mature/Elderly

Mature Marketing (O)

Small/Home Businesses

Chilton Research Services (S)

Sports

American Sports Data, Inc.
Irwin Broh & Ascts. (S)
Bruskin/Goldring Research, Inc. (O)
Children's Market Research (S)
Chilton Research Services (S)
Interviewing Service of America (O)
Macro•AHF Mktg. Rsch. & Consultancy (O)
Market Facts of Canada (O/S)
Opinion Research Corporation (O)
TVQ (S)

Technology

Angus Reid Group, Inc. (S)

Teens

Bruskin/Goldring Research, Inc. (O)
Chilton Research Services (S)
ICR Survey Research Group (O)
Interviewing Service of America (O)
Macro•AHF Mktg. Rsch. & Consultancy (O)
Macro International (O)
Market Facts, Inc. (O)
Opinion Research Corporation (O)
Roper Starch Worldwide (S)
Teenage Research Unlimited (S)
Youth Research (O)

Telecommunications

Chilton Research Services (S)
Find/SVP (S)

Textiles

Bruskin/Goldring Research, Inc. (O)
MRCA Information Services (S)
Opinion Research Corporation (O)

Transportation

Audits & Surveys (S)
Market Opinion Research (O)

Travel

Bruskin/Goldring Research, Inc. (O)
Interviewing Service of America (O)
Market Opinion Research (O)
Opinion Research Corporation (O)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (S)
Strategic Vision (S)
U.S. Travel Data Center (O)

Trucking

MacKay & Company (S)
Maritz Marketing Research (S)
J.D. Power and Associates (S)

Veterinary Medicine

Doane Marketing Research, Inc. (S)

S=SYNDICATED STUDY
O=OMNIBUS STUDY

Listing Additions

Please add the following firm to the 1995 Directory of Focus Group Facilities:

New York City area

Morristown Market Research
80 Washington St.
Morristown, NJ 07960
Ph. 201-326-9461
Fax 201-326-9767
Contact: Melody Whitelaw
1,2,3,4,5,6,7C,8,9
Rm. 1) 22x14 Obs. Rm. Seats 8
Rm. 2) 22x14 Obs. Rm. Seats 8

Please add the following firms to the 1995 Directory of Telephone Interviewing Facilities:

Direct Feedback
5414 Oberlin Dr., Suite 251
San Diego, CA 92121
Ph. 619-457-8180
Fax 619-457-4314
Christopher Reinhard
20-20-20-20

Direct Feedback
4 Station Square, Suite 545
Pittsburgh, PA 15219
Ph. 412-394-3650
Fax 412-394-3660
Tara Hill Conroy
20-15-20-20

ICR Survey Research Group
1450 E. American Lane, Suite 1400
Schaumburg, IL 60173
Ph. 708-330-4465
Fax 708-330-4463
Sharon Roberts
0-0-0-0

Telesphere
5125 North 16th St., Suite A-201
Phoenix, AZ 85016
Ph. 602-277-9195
Fax 602-277-9919
Ray Petrulsky
16-16-16-16

Please note the changes to the following listings from the 1995 Directory of Telephone Interviewing Facilities (corrected text is shown in bold):

Field Research Corpporation
550 Kearney St., Ste. 900
San Francisco, CA 94108
Ph. 415-392-5763
Fax 415-434-2541
Deborah Jay, Ph.D.
85-85-85-85

Interviewing Service of America
16005 Sherman Way, #209
Van Nuys, CA 91406-4024
Ph. 818-989-1044
Fax 818-782-1309
Michael Halberstam
200-175-175-175

Sales Offices

Headquarters: Evan Tweed, *Quirk's Marketing Research Review*, 8030 Cedar Ave.So., Ste. 229, Bloomington, MN 55425, Phone: 612-854-5101, Fax: 612-854-8191

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

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U.S HISPANIC MARKETING RESEARCH
Target Market Research Group, Inc.
FOR BROCHURE: (305) 262-1606 • (305) 262-0372 (FAX)

FACILITIES FOR SALE

Florida - Assume existing lease at newly constructed NE Florida regional mall facility. For more information write to: Quirk's Classified, Dept. "MK", P.O. Box 23536, Minneapolis, MN 55423

Trade Talk

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respondents, but the response was so overwhelming that it was expanded to over 8,600. "We wanted to address the problems of low, unweighted respondent counts that currently are inherent within MRI. So we made sure that the panel has a large enough base of consumers."

BH&G SIPs looked to the panel to help it define who the readers were, how they used the magazines and how involved they were with home enhancement. "We wanted to gain a clearer understanding of the importance of home enthusiasts as brand specifiers," Levinson says. "We also wanted information on what home enthusiasts plan to do and purchase, which is not available in the syndicated studies.

"It's been very satisfying to share information with manufacturers about their customers and potential customers. Prior to this research, no one had been able to clearly define the core of the home enthusiast marketplace, those people that are most actively involved in the process. We've done that and we also have data on what they are planning to do tomorrow, within what time frame and how much they plan to spend."

Here's a quick sketch of the panelists:

- 86 percent are female, 14 percent male;
- the average age is 40;
- the median household income is $58,600;
- 85 percent own their own home and they've lived there for an average of 6.3 years;
- the average home is 21.5 years old and its average market value is $136,600;
- 59 percent of respondents used the publications for brand recommendations, 68 percent for project planning information and 45 percent as a guide to product purchasing.

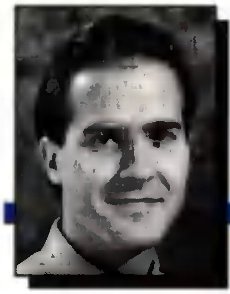
Actively involved

The home enthusiasts are passionate about their "hobby." Nearly two-thirds have done three or more projects in the past 12 months, and 22 percent did six or more projects in the last 12 months, spending an average of $15,000. Nearly 75 percent plan to start a new project within three months. Thirty-six percent plan to start a project within 30 days of reading a BH&G SIP.

They are take-charge people: 77 percent say that they or their spouse make brand decisions — only one in five consults a builder or designer on brands; 60 percent did not hire a contractor to do the work on their last project.

They are also influencers: three-quarters said they are frequently asked by friends for advice about home enhancement projects. Eighty-eight percent of the respondents viewed themselves as skilled at decorating, and 57 percent viewed themselves as skilled at remodeling. No doubt their skill comes from all that practice! ❑

Index of Advertisers



Trade Talk

by Josepb Rydholm
QMRR editor

Panel builds bond with remodelers

Everyone knows a chronic remodeler. You may be one yourself. Or perhaps you're married to one. They're the folks whose homes are in a constant state of, shall we say, evolution. Once a project is done the next one is in the works. Whether it's the downstairs bathroom or the guest bedroom, they're always re-ing something, redoing, redecorating, refinishing.

Many do-it-yourselfers educate themselves by reading home magazines, which provide project tips, ideas and guidance on product choices. Two years ago, one company that publishes many such magazines decided it was time for readers to educate it.

After a survey of ad agency people and marketers in the building and remodeling industry uncovered a dearth of knowledge about the readers of its publications, Better Homes and Gardens Special Interest Publications (BH&G SIPs) established the Home Enthusiast Panel, an ongoing research effort that tracks the opinions and habits of over 8,600 readers of its quarterly publications like *Building Ideas, Do-It-Yourself* and *Kitchen & Bath Ideas*.

The main goal was to show the industry why BH&G SIPs should be part of the media buy, but the panel also fills an information void, says Stephen Levinson, publisher, BH&G SIPs.

"There seemed to be a lack of any kind of consumer research within the category beyond subscriber studies. Plus, because our magazines are not measured in syndicated studies, and all the publications are newsstand-driven, the panel made a lot of sense to us," Levinson says.

"With the uncertainty of syndicated research as it is now, publishers should be looking at viable alternatives that help solidify their magazine's position. I think panels do that. Another thing panels can do is provide you with a moving picture of consumer habits over time, which is something that we can't get out of syndicated services like MRI and Simmons."

Overwhelming response

The panel was recruited through a one-page questionnaire inserted in the spring and fall 1994 issues of *Building Ideas, Decorating, Do-It-Yourself, Kitchen & Bath Ideas*, and *Remodeling Ideas*. Respondents were sent a four-page follow-up questionnaire on their recent home project activity.

Levinson says the panel's original target size was 5,000

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