Researchers vs. ad agencies • A moderator's view of videoconferencing • Focus groups with physicians

June/July 1996

Quirk's MARKETING RESEARCH Review

Practical applications in marketing research

Consumers approve Best Western's ambitious ad campaign

Directory of Syndicated/Omnibus Studies

Quirk's MARKETING RESEARCH Review

C O N T E N T S

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F E A T U R E S

D E P A R T M E N T S

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Health benefits loom large for workers

As Congress works to make health insurance portable — breaking the link that exists for many Americans between health care coverage and employment — a national study by St. Louis-based Aragon Consulting Group shows that nearly 83 percent of Americans take their employer-provided health benefits into account when considering a job change.

The study showed that on a scale of one to seven, with seven being complete agreement, 47.8 percent of those surveyed agree completely that lawmakers should mandate insurance companies to sell policies to all individuals regardless of pre-existing health conditions. Only 8.7 percent disagree completely. "We found that the number of people who favor such legislation declines, however, as they realize it will increase their insurance premiums," says Gary Miller, president of Aragon Consulting Group.

"For instance, when told their premium might increase 3 percent [as the American Academy of Actuaries has suggested] the percent of respondents who agree completely that insurers should have to sell individual policies without discrimination drops to 38.2 percent. This added information had virtually no impact on those who disagree completely.

"Only 17.6 percent agree completely with the mandate if costs increase 10 percent — the minimum projected by the Health Insurance Association of America — while the number of individuals who disagree completely climbed to 29.4 percent," says Miller.

More than 66 percent of the insureds who participated in the study obtain their coverage through their employer, and of those enrolled in employer-provided plans, 46.6 percent report that their employer offers more than one policy from which they can choose their coverage.

In fact, 63 percent of individuals enrolled in an HMO have more than one employer-sponsored plan from which to select their coverage. That is higher than those using a PPO — 43 percent — or a conventional health plan — 42 percent.

More than 37 percent of the respondents indicate that they do not currently

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Public uncertain about fat substitutes in food

While the Food and Drug Administration approved Procter & Gamble's Olestra for use in snack foods January 30, the U.S. public has a "wait and see" attitude about buying foods and snacks containing fat substitutes, according to the findings of IssueTrack/USA, an ongoing study by Audits & Surveys Worldwide, New York. After interviewing a nationally representative sample of adults in February, ASW noted that a majority of Americans were aware of the issue of alleged health risks associated with fat substitutes, despite the fact that no products containing synthetic fats had yet reached store shelves. Even more Americans are aware of the risks associated with conventional fat and cholesterol in food and more are concerned about them.

"Based on media coverage and word of mouth alone, 54 percent of U.S. adults were aware of the alleged health risks associated with fat substitutes in food, even before products containing them had hit the market," says Barry M. Feinberg, senior vice president and director of ASW's Public Policy Division. "Our data show that the public still needs more information about the issue to address their concerns. Right now, by a ratio of three to one, more Americans would be unlikely to buy food with fat substitutes than would be likely to buy them. While 30 percent say they are unlikely to buy products containing fat substitutes, resistance may diminish if the products pass the taste test and potential side effects are minor."

The public is more aware of the possible health risks of cholesterol and fat (75 percent) in food than of fat substitutes (54 percent) and more concerned about the risks of cholesterol and fatty foods (41 percent) than about fat substitutes (22 percent). Women are significantly more concerned about the risks associated with cholesterol and fat and fat substitutes than men. Thirty-two percent of males said they were concerned about the risks associated with cholesterol and fat, compared to 49 percent of women. Seventeen percent of men were concerned about fat substitutes; 28 percent of women expressed concern. Overall, consumers are as unlikely to buy foods containing fat substitutes as those high in cholesterol and fats. But among those aware of the fat substitute health issue, three times as many would not buy as would buy fat substitute products. For more information call Barry Feinberg at 212-627-9700.

Product & Service Update

MDI releases psychographic study of Latin American consumers

Market Development, Inc., San Diego, has released MDI Compass, a psychographic segmentation study of Latin American consumers. Based on 2,000 in-depth, person-to-person interviews with adults in four major markets of Latin America — Sao Paulo, Mexico City, Buenos Aires and Santiago, the study identifies attitude dimensions that influence not only what products these consumers buy but why they buy them. Using psychographic segmentation and multivariate statistical methods, MDI found that Latin Americans are divided into five psychographic segments based on shared attitudes toward life. They are: Relaxed Realists (17.4 percent), Careful Copers (28.9 percent), Cosmopolitan Climbers (24.1 percent), Hurried Handlers (6.6 percent) and Hopeful Homebodies (23.1 percent). For more information call Loretta Adams or Ben Levy at 619-232-5628.

Equifax debuts database of Mexican market and new versions of ON-CD

Equifax National Decision Systems has released its first demographic database for consumer market research in Mexico, which provides 1996 estimates as well as projections to the year 2000 for key Mexican demographics. The database was jointly developed with economic forecasters CIEMEX-WEFA. The Pop-Facts Mexico database includes information on more than 70 variables from the 1990 Mexican Census conducted by the National Institute of Statistical and Geographic Information (INEGI), 1996 estimates and 2000 forecasts and key variables. Reports and datasets including 1990 population, age, gender, income, education, housing and employment variables are available for the 32 Mexican states down to the AGEB (Area Geo-Estadistica Basica or Basic Geo-Statistical Area) level. An AGEB is equivalent to the block groups used by the U.S. Census Bureau. Estimates for 1996 and projections for 2000 are available for more than 85 metro areas down to the AGEB level. For more information call Karen Thomas at 619-677-9568.

Equifax National Decision Systems has also introduced new versions of ON-CD, its stand-alone CD-ROM-based market analysis data and software line. Pop-Facts ON-CD provides 1990 U.S. Census data, with estimates for 1996 and projections for 2001 of key demographic variables such as population, households, age, occupation and income. Business-Facts ON-CD includes business counts for SIC codes, sales volume and employment size ranges and daytime population counts. The ON-CD products can be used alone or downloaded for use in other software packages such as spreadsheets, database managers or GIS mapping programs. Data sets can be exported into ASCII, dBASE,

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Without reservations

Respondents in interactive groups approve Best Western's ambitious ad campaign

By Joseph Rydholm
QMRR editor

When I was a kid, I took a lot of summer car trips with my parents. Since we had relatives in Montana, and since I was a big fan of the region's natural splendors — Old Faithful, the Grand Canyon, Bryce National Park — our trips usually took us west.

When it was time to turn in for the night, my folks often chose a Best Western hotel. With its ubiquitous yellow sign and dependably modest facilities (which to my young eyes always seemed to be run by the same friendly husband and wife) the chain was our home away from home.

I haven't stayed in a Best Western since those halcyon days, so my impression of the company is still firmly rooted in the '70s. Apparently, as Best Western's research has found, I'm not alone. "Some consumers perceive Best Western as kind of a tired, older hotel chain from the '70s, when in reality we have gone through a massive system-

Interactive group research

wide change," says Elaine Hendricks, formerly Best Western's director of strategic planning, now an independent consultant.

Several years ago the Phoenix-based hotel chain, the world's largest at nearly 3,500 locations (2,100 in North America alone), began a program to upgrade the appearance and quality of its properties. But somehow that message just wasn't reaching consumers. So in 1993 the company turned to advertising, calling on the Rogge Effler & Partners agency to create a TV campaign that would show current and future Best Western customers that the chain had changed. "The goal of the ad campaign was to reposition Best Western as a modern, contemporary chain, the best choice in the mid-priced category, that could meet the traveling needs of the public whether they be on leisure or business travel," Hendricks says.

Given consumer perceptions of its properties, Best Western wanted to make sure that the commercials, which show a sparkling array of Best Western locations all over the world, were believable. "There was an internal concern that the commercials looked more upscale than the product could deliver in the consumer's actual experience. It's not that we didn't believe that our product could meet expectations. We've renovated all of the properties and added many other high quality locations. But we were afraid the person who remembers Best Western as a small Mom and Pop operation along the roadside in the '70s might reject the commercials," Hendricks says.

To test the commercials, Best Western conducted interactive large-group interviews in 1995 using the Rapid Analysis Measurement System (RAMS), from Aragon Consulting Group, St. Louis. With RAMS, respondents use hand-held remote control devices with dials on them to answer questions and express their opinions about the stimulus — in this case, TV commercials — they are shown.

"After meeting with Aragon Consulting and getting a sense of what their technology could accomplish, I decided, in conjunction with the director of advertising, that we would use it to get a better sense of the strengths and weaknesses of the individual commercials as well as the overall campaign so that we could better strategically position the evolution of the campaign," Hendricks says.

In the beginning of a research session using RAMS, respondents familiarize themselves with the dial units by answering simple categorical questions (Are you male or female? Dial 1 for male, 2 for female.) before moving on to questions requiring them to use a Likert scale, paired comparison and other measures.

With the RAMS system, backroom observers can watch real-time responses to the commercials on TV monitors, represented by a line on a graph superimposed over the commercial that moves as audience reactions change. "The computer transceiver sweeps the audience every half-second then it locks out so that a person can't change their response. Then it calculates the adjusted mean score based on the weighting variables we have entered. It gives

"There was an internal concern that the commercials looked more upscale than the product could deliver in the consumer's actual experience. It's not that we didn't believe that our product could meet expectations. We've renovated all of the properties and added many other high quality locations. But we were afraid the person who remembers Best Western as a small Mom and Pop operation along the roadside in the '70s might reject the commercials."

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Omnibus research in Asia has unique demands

By Jerry Stafford, Mark Stapylton-Smith and Geoff Hutton

Editor's note: Jerry Stafford is chairman of SRG International - Europe; Mark Stapylton-Smith is managing director of SRG International, Pleasantville, N.Y.; and Geoff Hutton is managing director of SRG International - Europe.

Traditionally, syndicated or multi-client research services are often simply annual or biannual surveys of awareness, image and usage that are funded by the research agency and the resulting data sold to several participating clients. These services are now as well developed in east and southeast Asia as in western Europe, with buyers being able to purchase off-the-shelf reports covering a plethora of products and services. Our firm, Survey Research Group (SRG), for example, offers multi-client services in such industries as automotive, fast food restaurants, automobiles, hair and skin care products, consumer electronics, domestic appliances and many others. Since each participating client shares in the cost of the research, one of the key benefits of a syndicated service is that generally nationally representative data can be obtained at a fraction of the price of an ad-hoc survey.

This undoubtedly has led to the emergence of these standardized services over the past 20 years as companies operating in Asia tend to be restricted by relatively small research budgets and clearly looking to stretch them further. Obviously, there are disadvantages of this type of survey: All participating clients, including your competitors, will have access to the same information and there is far less scope to dictate the content of the questionnaire to suit one's own particular needs.

One particular type of syndicated service, the omnibus survey, is regularly carried out in 15 countries in Asia by SRG and some of its competitors. The omnibus service offers similar advantages as mentioned above but it does not suffer from the inherent disadvantages. Each client has exclusive access to their own information and total control of the questions asked. On the surface it would appear that the omnibus service could be made very standardized in Asia, even more so than in Europe, where one must deal with a different language in almost every country. One might conclude that a questionnaire in Chinese could be used with little if any modification in a number of countries, such as China, Hong Kong, Taiwan and Malaysia, thus avoiding the problems of timing, cost and inaccuracies generally associated with translations. However, due to vast differences across the region in terms of language, culture and geography, the "standard" omnibus survey becomes far less standard than would first meet the eye.

Great care

Whilst the omnibus is a very cost effective and efficient

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Omnibus study looks at

senior lifestyles

By Dr. Leslie M. Harris and Terrence J. Pranses

Editor's note: Dr. Leslie M. Harris is a principal of Mature Marketing and Research, Boston. Terrence J. Pranses is president of Pranses Research Services, Hoboken, N.J.

Long ignored by many mainstream marketers, consumers over 50 years of age are moving into the economic spotlight. In part that's driven by the baby boomers — their oldest members have just hit the "big five-o." But it also reflects the increasingly active lifestyles of those over 60.

To find out more about the attitudes and priorities of these consumers, we conducted a study, "Tracking the 50+ Market: An Omnibus Study." Respondents were questioned about: computer use, financial planning, leisure time interests, retirement living, telecommunications and travel.

The respondents were broken into two cells — those aged 50-59 and those aged 60+. Some participants were interviewed in depth in a 20-minute session. Others participated in a 10-minute survey that included frequency of use and measurements of brand preference.

Key findings

Computer use

Here's an area where acceptance of technology shows big inroads. Many of our quantitative respondents use computers at home — and that includes a majority of the males in their 50s. The biggest applications are working from home and budgeting. Some of the computer users are very enthusiastic:

"They're nice — I can send E-mail to Malta!"

"(Computers) are very important. The best thing is that they help things move around the world faster."

Others indicate an interest, but feel that the expense means they must wait:

"I'd love to have one. As soon as I'm financially able,

I'll have one."

Still, the opportunities to sell computers seem limited among consumers in their 60s. Only a small number of our respondents in that age group use computers at home. Here some of the reactions indicate an unwillingness to try:

"If I were younger — but, at this stage you keep doing what you're doing."

"(Computers) intimidate me . . . like most mechanical things."

And among some non-users there's a deep hostility:

"They're terrible . . . they took a lot of jobs away."

Telecommunications

In this arena the level of utilization is even greater — perhaps due to the lower out-of-pocket costs, but it also seems that these innovations have been easier to use. Although there are still misgivings about the breakup of AT&T, telephone service today is seen as faster, offering "many, many services," and "cheaper, but confusing."

The top phone related technologies used by our sample: answering machine or answering service; call waiting; automatic redial; Caller ID. Most of these capabilities are more heavily used by those in their 50s.

Answering machines and call waiting have been embraced by many as ways to catch important calls. And many see call return or *69 as the best way to catch a call "when you walk in (for) that last ring."

One area of sharp contrast between our segments is with regards to calling cards. While a good majority of those in their 50s carry such cards, only a minority of those 60+ do so. A significant number of our respondents in their 50s use calling cards three or more times weekly. And while all respondents in their 50s are familiar with the pre-paid phone cards, only a small number have actually used them.

Financial planning

Here we find a chasm between those with limited assets and those who have extensive savings and investments beyond pension and Social Security income. Those with more diverse portfolios seem more confident in their investment strategy and more comfortable. And a majority of those in their 50s is taking some risk — they own stocks, bonds and mutual funds.

As one respondent said, when it comes time to pick a mutual fund:

"I like to see their portfolio and (get) trend information . . . plus what industries they're in."

Or they look for multi-faceted cash management-style accounts that combine stocks, money market and checking:

"It gives free checking, interest better than the bank and a wonderful statement each month."

Although some have a variety of stocks, many follow a more conservative approach, with utilities as a way to

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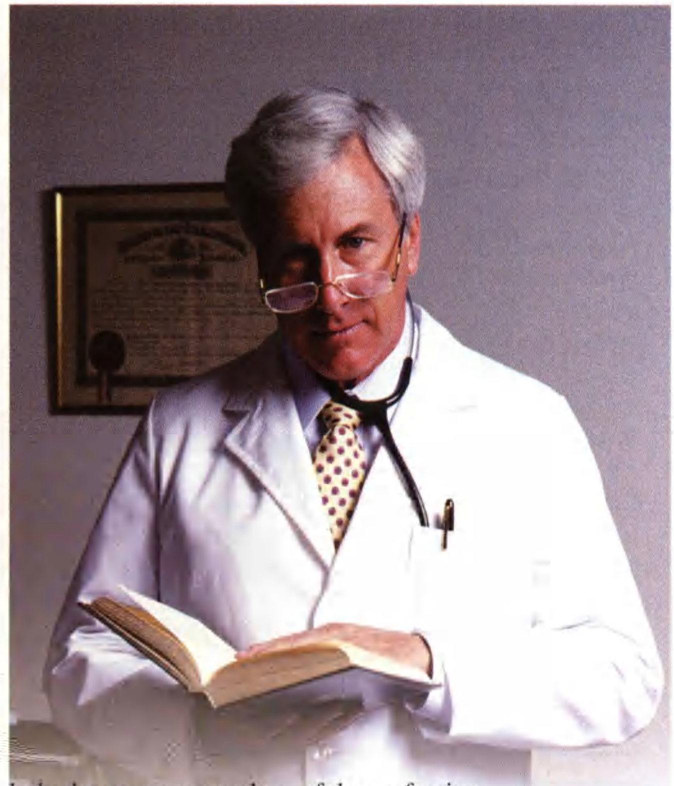
Physician focus groups revisited



By Murray Simon

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

About 10 years ago I wrote an article that was published under the title of "Physician Focus Groups Require Special Techniques." In a recent reading of that piece, I was amazed at how much had changed in the wonderful world of marketing research with health care professionals and decided it might be beneficial to compare yesterday's thinking and experiences with today's.

The original article led off with the statement that doing marketing research with doctors is far more difficult than with children . . . and not nearly as entertaining. This was a reference, in part, to the ego factor that is sometimes a problem in focus groups with doctors. I am pleased to report that although the ego is still alive and well in these focus groups, it does not seem to prevail or get in the way with the same frequency and intensity that it once did. Health care professionals are more relaxed and less competitive with each other in the market research setting and, in general, groups and individuals seem to settle down to the task more quickly and with far less posturing and preening than was once the case.

This is probably due, in part, to the fact that managed care has had a major impact on medicine during the past 10 years and physicians are more oriented towards group dynamics. They aren't the stand-alone individualists they once were. Many may not like the situation, but they are far more accepting of it as a reality than they were previously, particularly the younger members of the profession.

There is another possible influence on this tendency towards greater cooperation in the focus group setting and it can be used as a potential advantage in recruiting professional respondents. Managed care has imposed strict guidelines on how medicine is practiced, what fees are charged and the specific drugs and medical devices used, particularly in the hospital setting. Physicians have seen their influence on the choice of specific drugs, instruments and devices erode significantly: Manufacturers concentrate a sizable amount of their detailing/sales efforts on purchasing agents and hospital formulary members and doctors are bothered about being left out of the loop in these matters. Focus group recruitment can be enhanced if the initial call emphasizes that the study involves obtaining physician feedback on a new technology or service or relates to modifications being contemplated for an existing product or service. Changes in medicine have been rapid and profound and professionals continue to demonstrate a strong desire to stay on top of things.

One particular recommendation in the earlier article certainly holds true today — the entire project can be won or lost at the crucial point of recruitment and, therefore, a recruitment service that specializes in health care professionals should be used. Doctors' calls are filtered by very protective front office staff people, but experienced recruiters know the nuances that can get them through more frequently, which, in turn, can have a positive influence on the quality of the groups.

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War stories
True life tales in marketing research

By Art Shulman

Editor's note: Art Shulman is president of Shulman Research, Van Nuys, Calif.

An acquaintance of mine, relatively new to working in the market research profession, was curious about why so many surveys screen out people active in the profession. So she asked her boss, a man who'd been in the business for over 20 years, "Why are market researchers excluded from opinion surveys? Is it for reasons of security or confidentiality, or because researchers are familiar with the types of questions that might be asked and are therefore atypical?"

"Neither," he replied. "The reason is, as experienced market researchers, we know that the opinions of other market researchers aren't worth a damn."

This is a true story. The experienced researcher declined to be identified for this column, explaining, "Listen, I have clients."

Joan Rogers of Mid-America Research tells of an interviewer working for her company who was doing door-to-door interviews, placing motor oil with households for an in-car test. She'd just given two cases of oil to a man when she realized that he was blind. "Sir, do you realize you're blind?" she asked.

"Certainly," he replied.

When she began to stammer about whether he was really eligible to participate in the survey, he went on to inform her that he could tell when his oil needed changing by how it felt.

The interviewer, almost expecting him to ask if she'd like to go for a spin, instead left the oil with him. It turned out that the gentleman later completed the survey after using the oil. (Of course, someone else was the driver. At least that's what the respondent told the research company during the callback interview.)

The same interviewer, working on a different study, reported placing a set of sharp European-made knives with a blind man. Turned out he was a blind butcher. Talk about the cutting edge of research!

Ben Pine of Pine Company recalls running into his old friend Herb, a CPA, at a tailgate party. Herb, appearing to be angry, asked Pine, "What makes you think my time is worth only $12 an hour?"

Turns out that, by chance, Herb had been randomly selected to receive a questionnaire mailed out by Pine's company, with a dollar bill enclosed for "five minutes of your time just for filling out this questionnaire and mailing it in." The astute CPA had then mentally computed that there are 12 five-minute periods in an hour, which, when multiplied by $1, came out to $12 per hour.

Pine's company sent a different questionnaire, together with a quarter, to an executive of The Franchise Tax Board, the tax collection agency for the State of California. Within a few days the quarter was returned along with a form letter which began, "We have received your payment but cannot accept if for the reason checked."

Unchecked were items such as, "The numerical and written amounts differ or the amount was not entered," and "Wrong payee. Make your check or money order payable to Franchise Tax Board." Instead, an "X" was typed in the "Other" space, and to the right was the note, "The State of California does not accept gratuities."

The State of California sure knows how to fill out forms. ❑

This is the final installment of "War Stories." We are discontinuing the series due to reader complaints. We apologize to those who were offended by the content of past columns.

Names of Note

Matt Michel has joined *Decision Analyst, Inc.*, Arlington, Tex., as vice president of client services. In addition, the firm has promoted **Garry Upton** to senior vice president of business development.


Michel


Upton

Beth Wilson has joined *Eagle Research* - Atlanta as president.

Strategic Marketing Corp., Bala Cynwyd, Pa., has expanded the staff and capabilities of its Strategic Marketing Asia, Ltd., operating unit, adding **Grace Chin**, formerly of Asian Perspective, Inc., **David Lubega** and **Mitzi Swanson**, both formerly of Asian Strategies, Ltd., and **J. Micah Zimmerman**, formerly of the Wilkerson Group.

TeleSession Corporation, a New York City research firm, has named **Kelly Wosahla** program coordinator. In addition, **Lata Sannoo** has joined the firm as executive administrative assistant, **Annette McLoughlin** has been named assistant program coordinator, and **Kathy Rogers** has been promoted to senior program coordinator.

Beth Fischer, president and co-owner of *Twin City Interviewing Service, Inc.*, will receive the WCCO Good Neighbor Award, which is given by Minneapolis radio station WCCO to recognize outstanding community service.

Mary Barnidge has been promoted to account manager for the Minneapolis office of *Maritz Marketing Research Inc.'s Performance Measurement Group*. Also at the Minneapolis Performance Measurement Group office, **Sharon Alberg** has promoted to senior research manager. At the Chicago Performance Measurement Group office, **Mona Makhijani** has been named manager, analytic services, and **Linda Stump** has been named research manager for the Ameritech account. **Robert Daly** has joined the Somerset, N.J., Performance Measurement Group office, as senior research manager. **Lori Najera** has been promoted to research manager at the Los Angeles Performance Measurement Group office. At Maritz's St. Louis headquarters, **Phil Wiseman** has been promoted to vice president of marketing and **Grace Kruger** has been promoted to Financial Division vice president.


Barnidge


Makhijani


Wiseman


Kruger

Timothy Billies has joined *Q2*

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Research Industry News

BRX/Global Inc., Rochester, N.Y., announced that it had permanently shut down its operations due to the death of Joel Axelrod, its president and founder.

SPSS Inc., Chicago, has signed a licensing agreement with SmallWaters Corp. to distribute Amos, a structural equation modeling program. Amos gives researchers a comprehensive method for building statistical models that explain causal relationships among variables.

Advanced Neurotechnologies, Inc., Colorado Springs, Colo., has licensed its MindTrack system to Bourget Marketing, Inc. of Montreal. MindTrack is a suite of market intelligence indices derived from a brainwave-to-computer interface.

Saporito & Associates, a New York research firm specializing in the insurance industry, has reached an agreement to represent WIRE (World-Wide Intellectual Resources Exchange), a provider of customized Internet access for the insurance industry.

In August, a new research firm, **Stone Marketing Research** will open. The firm, located at 6416 N. Sherman Dr., Indianapolis, Ind., 46220, will offer telephone interviewing and a full range of qualitative services. For more information call Toby Stone at 317-255-3324.

A new research firm, **Information Specialists Group, Inc.**, has opened at 9905 Hamilton Rd., Eden Prairie, Minn., 55344. Phone 612-941-1600; fax 612-942-0747. For more information call Bob McGarry, Jr.

White Horse, a research firm headquartered in Guangzhou, China, has joined IriS (International Research InstituteS), a Brussels-based network of global research firms.

House of Marketing, Pasadena, Calif., has opened its second focus group facility in the Pasadena area.

Marketecture, a qualitative and quantitative research firm, has opened at 12460 Crabapple Rd., Ste. 202, Alpharetta, Ga., 30201. Phone 770-740-0807; fax 770-664-6128. For more information call Greg Rathjen.

Sprint Integrated Marketing Services, Kansas City, Kan., has changed its name to **Sprint Marketing Research Services** to re-focus the company's resources and return to the strategic business direction under which the company was originally founded.

VideoProbeIndex, Inc., has moved to 1374 Sudden Valley, Bellingham, Wa., 98226-4837. Phone 360-676-2700; fax 360-676-2727.

John Fox, a former brand manager with Procter & Gamble and most recently with Matrixx Marketing, has opened **John Fox Marketing Consulting** at 260 Northland Blvd., Suite 308B, Cincinnati, Ohio, 45246. Phone 513-771-3699 (FOXX); fax 513-772-5369 (JFOX).

Ethridge & Associates L.L.C. has moved to 751 Walnut Knoll Lane, Cordova, Tenn., 38018. Phone 901-754-9437; fax 901-755-8075.

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~~Moderating~~ Facilitating focus groups

By Richard A. Feder and Bryan W. Mattimore

Editor's note: Richard A. Feder is president of The Marketing Group, Inc., Stamford, Conn. Bryan W. Mattimore is president of The Mattimore Group, Stamford, Conn.

It used to be so simple. All it took to run a consumer focus group was some straightforward questions and a course in how to talk to people. The respondents had fun, viewers learned all they wanted, and you looked like a genius.

Then the world tilted.

Women went to work, sessions moved to evenings, and respondents arrived tired. Before long, these tired consumers became marketing-savvy critics of advertising. They started using words like "concept" and "demeaning" and took umbrage at the idea they were affected by emotional appeals. As if that weren't enough, along came political correctness, which made these tired advertising critics reluctant to disagree with each other publicly. That's when conducting consumer focus groups got to be a lot like work, and those behind the mirror started amusing themselves looking for the blue M&Ms.

Today a classically-moderated consumer focus group including a search for deeply felt beliefs, relevant emotions and brand imagery can be a long, weary and potentially misleading experience on both sides of the mirror. Viewers end up learning more and more about less and less — hearing all about how a cold makes people feel congested, without finding out that it makes them feel angry, slow-witted, and socially ostracized (and scouring for the remaining blue M&Ms).

Fortunately, there is an alternative: don't moderate, facilitate.

Facilitation utilizes a body of techniques developed and perfected by people like James Osborne, Sid Parnes, Andy VanGundy, Irv Merson, Charles Clark, Michael Michalko, James Higgins, Synectics, Inc., and ourselves. These direct and projective techniques rely on verbal, visual and sensate stimuli and have long been used successfully to generate new product ideas and to solve human relations problems. Facilitation techniques like excursions, brainstorming, metaphors, collaging, idea hooks, role playing, and mind mapping are ideally suited to consumer focus groups to get at responses where social pressure or personal inhibitions have to be overcome. They also make it possible to extend groups when necessary to two-and-a-half to three hours without the energy level or the value of the output diminishing.

Warming up with your eyes closed

Facilitating groups is easy for any experienced moderator to learn and has value on both sides of the mirror. The difference between moderating and facilitating starts with the first question. The difference is not in what is asked but how it is asked. After the respondent introductions, traditional focus groups most often begin with the moderator posing an introductory question which respondents answer one at a time, usually addressing the moderator, thus setting a pattern for the group as a series of one-on-one interviews. In a facilitated group, the leader poses the same question, encourages everyone to contribute an

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A moderator's view of focus group videoconferencing

By Thomas Greenbaum

Editor's note: Thomas Greenbaum is president of Groups Plus, a Wilton, Conn., research firm.

The focus group industry has gone through some major changes over the past 30 years but none can match the impact of videoconferencing focus group sessions. While videoconferencing is still a big unknown to many clients, facilities and moderators, one only has to look at what has happened in the past 12-18 months to identify it as a significant trend. Videoconferencing of focus groups is here to stay, and it should grow dramatically over the next few years. Whereas the best available evidence suggests that less than 3 percent of all focus groups are videoconferenced today, by the year 2000 it would not be surprising to see this number well in excess of 30 percent and perhaps as high as half of all groups.

Videoconferencing of focus groups is simply the broadcasting of the sessions to a remote facility (often the client offices) where people observe the proceedings live over a television monitor in their offices or other local receiving sites, without having to travel to the groups to watch from behind the one-way mirror. With current technology, the clients observing from afar can move the camera for an isolated view of individual members of the group or the moderator, or they can view the entire group together. They can also communicate with the moderator during the groups via telephone hookup to the local receiving facility or by fax.

While there is a range of costs based on varied scenarios, on average, the costs to execute a videoconferenced focus group range from $1,200 to $1,400 per session.

At present, there are two major players in the industry, FocusVision and GroupNet. Others are trying to establish a foothold. Videoconferencing of focus groups began as an experiment in 1991 with three facilities and a handful of clients testing this new technology. By 1993 there were 17 facilities with video capabilities and approximately 700 groups were conducted using this approach. At the present time, some 50 facilities have videoconferencing capabilities and more are opening each month. Further, in 1995, there were approximately 3,000 groups conducted by videoconferencing, and the estimates for 1996 suggest this will grow significantly.

The advantages of videoconferencing

Videoconferencing of focus groups offers several very significant advantages which will drive the technology's aggressive growth in the coming years. There are also some important disadvantages to address if the technology is to achieve its potential.

The most important advantages of this technique are:

• Client organizations save money using videoconferencing, as travel costs are significantly reduced (or eliminated) since it is possible to observe the sessions from the client office or other viewing facility. Currently, it appears that at least half the groups are conducted with no client representation on site and the balance generally have only one or two people. This is in contrast to the four to six people who often travel from city to city to observe the groups from behind the one-way mirror.

• More people are involved in the focus group process while it is happening. While videotaping of groups has been common practice for several years, experience indicates that few people will take the time to watch the tapes after the groups have happened. However, with videoconferencing, several people from the client and/or ad agency can observe the proceedings live and even have a chance to communicate with the moderator to ensure that the right information is explored during the sessions.

• Better representation of the target audience. Many organizations focus group markets that are very close to the home office because they reduce travel time and expense. With videoconferencing, a large variety of markets, distant and near, can be accessed without spending time and money traveling.

• More groups may mean more learning. Since the total cost per videoconferenced group can be less than standard groups, companies can conduct additional sessions to more fully explore topics that could not be addressed in the traditional number of groups.

Disadvantages of videoconferencing

There are several important disadvantages of videoconferencing focus groups, which, if not addressed, can seriously affect the value of the research which is conducted. These include:

• The technique makes communication between the moderator and the client more difficult and less effective. This is because the "client" is often hundreds of miles away, watching the group on a TV monitor, rather than in the backroom. Therefore, it is necessary for clients to fax or telephone messages to the moderator. The exception is the situation where clients send one or two people to travel with the moderator to serve as a communications link between the facility and those viewing in the home office. In either case, the moderator does not have the same ability to go face-to-face with the key decision makers in the client organization to address issues raised during the group.

• Watching a focus group on a television screen is not the same as observing from behind a one-way mirror. The backroom at a focus group facility has a different feel than a videoconferencing viewing room. And watching the proceedings from behind a large one-way mirror isn't the same as viewing it on a 27" to 32" television screen. The net result is often a very different attention span and concentration level of the viewers, one that can make it more difficult to pick up nuances from the discussions, observe key non-verbal behavior and feel the atmosphere in the room.

• Videoconferencing of groups makes it difficult for a client and moderator to develop the rapport so they can function effectively as a research team. Most moderators will agree that some of the most important work that happens in a focus group research program happens before or after the sessions occur as a result of discussions between client and moderator. With the clients many miles away and communications very structured in pre- and post-group videoconference sessions, the ability to develop these important relationships is minimized. As a result, some of the intangible benefits of the traditional focus group process are not realized.

Maximizing effectiveness

While it is impossible to overcome all the disadvantages associated with videoconferencing of focus groups, client organizations can take steps to neutralize the problems and therefore produce more effective research:

• First, include the "home" market as one of the cities (ideally the first) where groups are held whenever possible. This enables interested parties in the headquarters operation to attend some groups in person without having to travel. And it should help the client personnel get more out of groups they observe via videoconferencing, as they will have some sense of the atmosphere in the room based on their initial exposure from the groups they attended.

• Second, the environment in the home viewing area should be set up in such a way that it duplicates as closely as possible

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Can't we all just get along?

Bringing researchers and ad agency folks together

By Denise Lee Yohn

Editor's note: Denise Lee Yohn is director, marketing research, at Jack In the Box restaurants, San Diego.

"Ad agency folks—you can't live with 'em and you can't live with out 'em."

Have you found yourself muttering this phrase under your breath on more than one occasion? We, as market researchers, find it difficult to work with advertising agency people — we're analytical, they're creative; we're concerned with reality, they deal in perception; we think we have the right answers, so do they.

While it may seem that researchers and ad people are oriented as far apart as 1 and 10 on a 10-point scale, we are called to work together on a regular basis and so we must find a way to peacefully coexist. In fact, coexisting is not enough — mutually productive relationships are the only way our two groups can maximize our contribution to our clients. I'd like to tell you about how the marketing research department at Jack In the Box and our agency's planners are doing just that.

Consider the change we've undergone. Last year at this time, our company had just signed on one of the hottest ad agencies in the business, top management was enamored with the agency's new perspective, and sales were starting to climb only a few weeks into the new ad campaign. There was only one glitch — the marketing research department was in a non-stop battle with the account planners from the agency. It had gotten so bad that meetings were held to hash out the issues. Finger-pointing was on everyone's meeting agenda.

Fast-forward to the present. The two groups are working hand-in-hand on many projects, making joint recommendations, bouncing ideas off each other, and most importantly, truly enjoying the opportunity to work together. What has changed? Actually, a lot — but I think the most important changes are the many attitude adjustments that we marketing researchers made. Here are just three of them:

We had to recognize the agency reps as business partners, not adversaries. That meant involving them in all aspects of our work — research design, priority planning, budget management. I even included one agency planner on the screening team for a research position that I had to fill. Viewing them as partners not only set the stage for open communication, it conveyed a level of trust that they were eager to reciprocate.

We had to remember that both parties have the best interests of the company in mind. Our department exists for the sole purpose of benefiting the company. So do they. Once we bought into this basic principle, it was easier for us to deal with the times when it seemed like they were just out to make the marketing research department look bad. We stopped expecting them to agree with us, and started expecting them to do what they felt would benefit the company.

We had to admit that there was a lot we could learn from them. They could stretch our thinking to a more conceptual level, they could show us how to make more compelling presentations, they could teach us how to manage corporate politics. All we had to do was be open to learning from them. Our candor in asking for help was met with respect and responsiveness. It also opened the door to us teaching them a thing or two.

Productive relationship

Changing our attitudes was the most important step we took in establishing a productive, enjoyable working relationship with our agency. Even as I write this article, I am working with an agency planner on a joint recommendation for a strategic research project. We have formulated the research objectives, searched for a supplier and spent many hours developing the plan for selling this idea to top management — and we've done all of this together. Not because we were forced to, but because we wanted to.

Don't get me wrong. We still disagree on a lot of issues. But at least now, we can agree to disagree. And now and then, we even make jokes about each other's discipline . . . how many agency execs *does* it take to change a light bulb? ❑

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ArcView and MapInfo. For more information call 800-866-6510 or visit the company's Web site at http://www.ends.com.

Business intelligence courses from Tyson

Kirk Tyson International's Business Intelligence Institute now offers a management development program in business intelligence. Courses are offered year-round at the company's Chicago headquarters. Course categories range from beginner to advanced — foundation skills and knowledge, practitioner applications, management strategies, and specialized tools and techniques — arranged into "knowledge modules" of one-half day or two days in length. Participants are eligible to become certified business intelligence professionals upon completion of the certification curriculum. For more information call Terry Murtaugh at 708-969-0100.

Access ABI Web site for free information services

Internet users who visit the Web site of American Business Information, Inc. (ABI), Omaha, can now locate addresses, phone numbers and credit ratings for businesses free of charge. The new Web site includes three free information services:

• American Directory Assistance, which allows searching for business by name, within ABI's database of 10 million U.S. businesses. Information provided includes full address and telephone number. Soon, users will be able to find people by name as well from a residential database of 88 million households.

• American Yellow Pages lets users find businesses by Yellow Page heading, within any city in the country.

• American Business Credit provides credit rating scores for more businesses, based on demographic factors such as number of employees, years in business, industry stability and barriers to entry, and government data. The scores are practical indicators of probable creditworthiness.

To access LookupUSA, go to http://www.abii.com/.

New recruiting management software from DBM

DBM Associates, Whitehouse Station, N.J., has introduced a recruiting management software package suitable for any research application that requires qualified consumer or in-house employee test subjects. The Automated Recruiting Control System (ARCS) is Windows-based software that automates the process of identifying, selecting and recruiting qualified consumer respondents based on the researcher's search criteria. The database manages extensive product and brand usage history for each test subject and tracks user-defined features/restrictions, previous testing history, demographics and psychographics. Users can create multiple relational searches of the database to identify the best consumers or in-house employee test subjects. The voice/response recruiting module uses data generated by the database. In the database, ARCS users select a group of consumers who meet qualifying criteria and then the recruiting module creates a call list, autodials and qualifies these potential test subjects for one or more projects. The system screens potential testers through a series of user-defined qualifying questions which the user can record on a PC using his or her own voice. The voice/response module can also be used to collect data for home use tests and forward the information to almost any statistical package. Once qualified, the consumer schedules his or her test time over the phone using the touch-tone buttons. Users and test participants can call into ARCS 24 hours a day, seven days a week to check test schedules, reschedule tests, find out if sessions are full and obtain other information. For more information call Glenn Fishback at 415-329-0737.

SPSS offers Chinese and Catalan versions; how-to book on surveys

SPSS Inc., Chicago, has introduced local language versions of SPSS for Windows in Traditional Chinese and Catalan for users in Taiwan and the Catalonian region of Spain, respectively. Local language products include localized graphical user-interfaces for the menus, dialog boxes, glossary of statistical terms, help and on-line documentation. The packages also include manuals in the local language. For more information call 800-543-2185. The company is also offering a book, "Surveys with Confidence: A Practical Guide to Survey Research Using SPSS," which shows how to create, analyze and administer many types of surveys. The book is available directly from SPSS for $29.95 by calling 800-253-2565.

REZIDE available through LEXIS-NEXIS

Marketers can now access U.S. ZIP code demographic data on-line with the LEXIS-NEXIS services. The demographic database from Claritas, Inc., called REZIDE, is a national ZIP code encyclopedia searchable by congressional district, area code plus exchange, county, state, MSA and DMA. REZIDE provides a detailed demographic portrait for every residential ZIP code in the U.S., including age, income, race, ethnicity, household composition, employment and more. Claritas updates the database annually using data drawn from the U.S. Census Bureau and from more than 1,600 local, public and private sources of demographic data. For more information call 800-227-4908 or send an E-mail message to newsales@lexis-nexis.com.

Ag study will measure grower perceptions of new products

Doane Marketing Research, Inc., St. Louis will conduct a shared-cost "Bt Corn and Roundup Ready Study." The primary purpose is to assess corn and soybean growers' experience with and perceptions of these new products. The study will be fielded post-harvest and measure both users and non-users of enhanced seeds. Use intentions for 1997 will also be determined. For more information call Marypat Corbett at 314-878-7707.

New Ci3 from Sawtooth

Sawtooth Software, Sequim, Wash., has released Ci3 v2.0 for Windows 95. The new version offers all the features of version 1 plus advanced features available in Windows applications. Windows 95 interviews can now include graphics, sound, font control and a true Windows look and feel. Ci3 v2.0 creates interviews for both DOS and Windows 95. For more information call 360-681-2300.

3D revamps CATI system

TelePrompt, a Windows CATI system from 3D Software Services, Foster City, Calif., has been re-engineered as an executable program that can fit on one diskette but can also run hundreds of workstations at one time. The Client/ Server version is compatible with Oracle, Sybase and SQL Server. Local files can be read by Word and Excel. TelePrompt features multiple projects, questionnaire setup, branching, validation and unlimited open-end responses. A free demo is available on the Internet at http://www.teleprompt.com or by mail. For more information call David Griffis at 415-574-0178.

New hand-held edition of Opinionmeter

Opinionmeter, Inc., Berkeley, Calif., has introduced Opinionmeter Jr., a hand-held version of the stand-alone

Opinionmeter V polling machine. Offering the same capabilities as the full-size unit, OP-Jr. can fit into smaller places. It can be hand held for intercept surveying, fit on check-out counters and attach next to product displays. The unit's flip-up questionnaire piece folds down for transport into a 7" x 4" x 2" overall size, weighing 1.5 lb., and its alphanumeric keyboard permits entry of respondents' phone numbers, ZIP codes, etc. It operates on rechargeable batteries and offers access for infrared hard-copy printing and for serial cable data transfer to PC. For more information call 510-482-4317.

Syndicated survey to monitor magazine readers

Audits & Surveys Worldwide, New York, has launched the ASW Primary Audience Database to monitor household demographics, product usage and lifestyles of subscribers and newsstand buyers of U.S. magazines. The syndicated survey will use complete subscription lists and newsstand counts to generate the same sample size for all titles surveyed. Data will be obtained from a 12-page questionnaire. Product usage responses will be supplemented by existing databases, whenever advisable, to reduce the burden on respondents and maximize completion rates. The complete survey will be in the field from September through November and reports will be made available to subscribers by the end of January. For more information call Paul Donato at 212-627-9700.

MSA intros marketing data analysis system

BusinessWEB 2.0, a decision support system for accessing and interpreting sales and marketing data, is now available from Management Science Associates, Inc., Pittsburgh. The system enables users to employ customizable applets, or macros, to manipulate raw business information such as pricing, market share and promotions data into reports, creating multidimensional graphics, charting and table information almost instantaneously. BusinessWEB 2.0 also offers ad hoc charting support, slide show support and enhanced printing options. For more information call 412-362-2000.

In defense of the mail survey

By Howard Waddell

Editor's note: Howard Waddell is president of Decision Resource, a Miami research firm.

With the exception of consumer mail panels, little marketing research in this country is done by mail. Read the sales literature of most full-service research companies and you will learn about the number of phone stations, CATI capability, focus group facilities and so on, but few firms say anything about mail surveys. The fact is, most researchers do not take mail surveys seriously. Until a few years ago, I was one of those people.

Almost any textbook on marketing research will tell you that telephone surveys are generally superior to mail surveys. Lower non-response error is usually the reason given why. It is a common perception that because such a high percentage of people do not return mail surveys, one cannot extrapolate survey results to the entire population being surveyed. It is also perceived that the non-response error of telephone surveys is much lower than that of mail surveys. Perhaps it's time to revisit these issues.

If the non-response error associated with telephone surveys is truly less than that with mail surveys, then the number of different people called by telephone to complete a single interview should be consistently lower than the number of questionnaires mailed to receive a completed response.

There are two factors that determine telephone survey response rates or, inversely, the number of calls necessary to complete a given number of interviews. The first is the proportion of people called who can be reached. The second is the proportion of people reached who agree to be surveyed (and do, in fact, complete the interview).

With more working couples and pervasive use of telephone answering machines, it is becoming increasingly difficult to reach people on the telephone. That only 40 percent to 45 percent of consumers can be reached by phone on a first try should surprise no one. (Reaching the right person within the household is yet another problem, but we'll ignore that here.)

With the increasingly high volume of telemarketing calls, including those that start off with a few "survey" questions, the percentage of people who are even willing to participate in phone surveys is no higher than about 50 percent.

The arithmetic is simple. If calls are made to 1,000 households with good phone numbers, 450 might be reached on the first call. With a survey participation rate of 50 percent, one would expect 225 completed interviews. As additional calls are made to the people who could not be reached, more interviews will be completed. But there is a point of diminishing returns because the refusal rate isn't going to change.

If each household were called three times, and it is assumed that the likelihood of getting through remains at 45 percent, one would establish contact with 834 households and complete 417 interviews. The response rate, therefore, would be 41.7 percent. (The upper limit of the response rate, achieved when all households are contacted, is equal to the 100 percent minus the refusal rate, or 50 percent.)

A critical question must be asked. Can response rates better than 41.7 percent can be routinely achieved with mail surveys? The answer is that they can. With mail panels, response rates of

70-80 percent are not uncommon. Even without mail panels, response rates for consumer mail surveys of 50 percent can be routinely achieved if the surveys are done properly.

The single most important aspect of doing mail surveys properly is focusing on the cost per response received, not the cost per questionnaire mailed. Taking that approach can mean the difference between a 10 percent response rate and a 50 percent, 60 percent or even 70 percent response rate. It should also be pointed out that doing the things that are necessary to minimize the cost per response will, more than likely, maximize the total response rate as well.

Buyers of telephone surveys know that it is not uncommon for their research suppliers to ask for four, five or even six times as many telephone numbers as completed interviews required. If research buyers believe that the non-response error for telephone surveys is lower than for mail surveys, they should limit their supplier to only two times as many telephone numbers as required interviews.

Additional benefits

In addition to a lower non-response error, mail surveys have additional benefits relative to telephone surveys.

• In telephone surveys, interviewers can unintentionally influence how people answer questions. It is not difficult to imagine a variety of scenarios in which a male respondent might answer questions one way if they were asked by a woman, and another way if they were asked by a man. (The same could be true when the sexes are reversed.) Telephone research buyers should ask to see their data cross-tabbed by sex of the interviewer.

Interviewers can also influence responses in a more direct, but still unintentional way. Consider an actual incident that happened a few years ago. A manufacturer of windows was conducting a telephone survey of homeowners to measure, among other things, aided awareness of their brand. I received one of the calls. The interviewer read me a list of company names and asked me to tell her which ones I had heard of. The list was rather lengthy and, after about 10 names, she and I were both growing a bit impatient because I knew none of the companies. Then we came to Storm-Tite (a fictitious name). "Surely, you have heard of them!" she said with considerable irritation in her voice. Although I had heard of Storm-Tite and said so, would I have admitted my ignorance to this interviewer if I had not? While this was, presumably, an isolated incident, it could not happen in a mail survey.

• Knowing they have no anonymity, respondents to telephone surveys are more likely to color their answers or not answer some questions at all. Consider the following example. If, in a survey, people are asked how much money they make, some might exaggerate the figure if they feel they should be making more. Others might not answer the question if they suspect their answer will not be treated confidentially.

Logic, alone, would suggest that these response problems would be worse if the respondent believes the interviewer knows who he or she is. When a question is asked over the telephone, the link between the answers given and the person giving them is obviously there. In a mail survey, the link may or may not be there, depending on the construction of the questionnaire. However, when it is not there, one can expect more candid answers.

• With mail surveys, respondents have time to think about their answers. During a telephone interview, the respondent has no opportunity to review any subjective answers to determine if they accurately reflect his or her opinions. Asked to indicate the importance of a variety of factors influencing purchase behavior, the mail survey respondent can review all the answers and make changes, if necessary. Anyone who has reviewed mail survey questionnaires knows that changes to answers are not uncommon. Reflection by the respondent during a telephone survey is generally not possible.

• With mail surveys, it is possible to include illustrations or detailed descriptions of products or services. With phone surveys, it's not.

• Mail surveys are usually less expensive than telephone surveys. With a 50 percent mail survey response rate, the direct cost to acquire a completed four-page questionnaire as part of a nationwide consumer survey would usually be between $4 and $6. The cost to complete an interview in a comparable telephone survey would certainly be no less, and probably more.

There are, of course, situations where mail surveys are inappropriate. First, mail surveys are not suitable for unaided or top-of-mind awareness measurement. Also, because mail surveys generally take more time than telephone surveys, they do not make sense when results are needed quickly. A telephone sway can be done overnight. Mail surveys cannot.

Undeserved reputation

To conclude, it is fair to say that mail surveys have an undeserved bad reputation that is perpetuated in marketing classrooms, even today. Also, few sellers of research have any experience or expertise in the subject. That's not surprising since there is little demand for mail surveys and the margin dollars for the suppliers are less for a mail survey. If mail surveys cost more than telephone surveys, there might be more marketing emphasis on the virtues of the mail survey. ❑

Survey Monitor

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pay a monthly health insurance premium. However, for those who do, the average monthly premium for individual policies ($412.78) is more than double that of group policies ($149.24).

Contrary to a recent Blue Cross study that showed 45 percent of employees would switch to a medical savings account (MSA) plan if given the chance, the Aragon survey found that only 14.6 percent of the general population is extremely interested in such an opinion, while 29 percent is not interested at all.

Likewise, nearly 30 percent strongly oppose any legislation that will eliminate employer-provided insurance and build in a transition enabling individuals to shop around and buy policies, as has been proposed by some health experts.

Only 16.3 percent of those who participated in the Aragon study recall any situation in which they or a member of their family experienced any difficulty in obtaining health insurance or been refused coverage.

"Although more than half of those surveyed are enrolled in employer-sponsored health plans, the study found that most people are at least moderately satisfied with their coverage," says Miller. "However, only 40.4 percent say that their insurance meets all of their needs; 50.5 percent say it meets some of their needs; and less than 1 percent say the insurance meets none of their needs."

On a scale of one to seven, with seven being completely satisfied and one being completely dissatisfied, 32.4 percent respond that they are completely satisfied with their health plan and 75.7 percent are at least moderately satisfied, while less than one percent say they are completely dissatisfied. Those aged 55 and older who are enrolled in a conventional insurance plan are the most satisfied.

Only 17.8 percent of people between the ages of 18 and 34 indicate that they are completely satisfied with their health plan, as do 26.4 percent of people aged 35 to 54 and 50.3 percent of those 55 and older. Almost a fourth of those in an HMO and 26 percent of PPO members are completely satisfied, compared with 42.5 percent of conventional health policyholders.

In general, the study found that Americans are highly satisfied (74 percent) with the selection of doctors available to them. However, the insureds are who are most likely to be completely satisfied are those with a conventional plan (76.5 percent). That is significantly higher than the ratings of those enrolled in an HMO (31.8 percent) or a PPO (44.2 percent). "These numbers may be attributable to the fact that nearly 60 percent of those surveyed think continuity of treatment from a care provider is important — a relationship that might be severed if they lose their job, change jobs or their employer changes insurance plans, forcing them into a managed care plan," says Miller. For more information call Barbara Hohbach at 314-726-0746.

Researchers caught in the Net

Nine out of 10 market researchers in America now have a computer sitting on their desks. And they're not just sitting there. The average researcher spends about 20 hours each week using the computer. These estimates were obtained by a mail survey of 228 researchers conducted by Survey Sampling, Inc., Fairfield, Conn., in November and December 1995.

Who is using the Internet?

	Cases	% With PC on Desk	% Using Internet	% Using Web at Work	% Using Web at Home
All respondents	228	90	46	26	22
Staff size					
1 to 4	80	89	45	29	23
5 to 19	60	92	42	30	20
Over 20	65	92	49	22	26
Sex					
Men	119	91	53	33	32
Women	107	100	39	19	11
Job Title					
President	63	86	44	24	21
Vice President	19	89	42	26	26
Professor	12	100	83	58	33
Account Executive	40	93	35	15	13
Research Director	8	75	50	13	38
Marketing Director	24	100	46	42	33
Analyst	11	91	55	36	36
Project Director	17	100	71	29	18
Age					
<30	35	94	49	20	26
30-39	59	93	46	32	25
40-49	69	94	52	32	28
50-59	46	85	43	20	11
60 plus	13	77	31	15	15
Org. Type					
Producers	188	90	48	26	24

The ubiquitous Internet has already enmeshed almost half of the respondents. Some 46 percent now have access to the Net at work and these busy folks spend about three hours each week on the Net, primarily for E-mail. Nearly one in four researchers visit the Web at work, while one in four log onto the Web at home.

Some 48 percent of research producers access the Net, slightly ahead of research sponsors (40 percent), though both groups use the Web about equally (26 percent and 28 percent respectively).

While almost every woman has a computer on her desk (versus 91 percent of men), males are more likely to use the Net (53 percent versus 39 percent female), surf the Net at work (33 percent male versus 19 percent female) and surf the Net at home (32 percent male versus 11 percent female).

Computer usage varies with age as well. Some 94 percent of researchers under 50 have computers. This percentage drops to 85 percent for those aged 50-59 and to 77 percent for those aged 60 or older.

Job function makes a difference, too. Net use is most popular among professors (83 percent) and project directors (71 percent), while account executives (35 percent) trail the pack. Professors (58 percent) and marketing directors (42 percent) are the leading Web users at work.

The strongest demographic correlate is educational background. Net usage by educational level shows an almost linear trend: Ph.D. (71 percent), Master's (51 percent), Bachelor's (37 percent), some college (33 percent) and high school (17 percent). For more information call 203-255-4200.

Report explores African-American market

African-American spending power is growing at an impressive rate. In 1990, according to the census taken that year, U.S. blacks had a gross national income of $280 billion. By the end of 1995 the University of Georgia's Selig Center for Economic Growth predicts that figure will have grown to $399 billion. African-Americans represent an untapped consumer market for a wide range of products and services, according to The African-American Market, a study by Packaged Facts, Inc., a New York research firm.

"The Million Man March served as a wake-up call in more ways than one," says Mary Ardagna, project manager, Packaged Facts. "The march sent a strong message to elected officials and the nation about civil rights and the continuing struggle for justice. It also broadcast a no less important message to marketers — through the sheer visual impact of seeing hundreds of thousands of working, middle-class black men — that not all African-Americans are poor."

There is no question that a disproportionate percentage of American blacks live in poverty. Non-blacks — including marketers — mistakenly assume that most blacks are poor. Although the average African-American family income after taxes falls well below that of whites, this discrepancy is not reflected in the spending of these two groups.

A black family making $30,000 or more a year is likely to spend the same amount of money as a white family in the $50,000+ bracket. As a group, African-Americans spend more on rent, clothing and on skin and hair care products. In fact, blacks make one-third of hair care product purchases and black women, while only 6 percent of the total U.S. population, account for 15 percent of cosmetics sales.

Blacks represent 12.7 percent of the U.S. population by 21 percent of girls between the ages of 4 and 9 are African-American. The U.S. black population is increasing at twice the rate of the white population. These girls will be the primary consumers for their own households in 20 years. Opportunities for sales are strong, but potential marketers need to look beyond statistics if they plan to approach African-American consumers as a group.

"Marketers make the mistake of approaching black consumers as whites with black faces," says Ardagna. "Using an occasional black model or superstar to endorse products isn't enough to get black consumers to open their wallets."

In addition to the cultural nuances marketers must be sensitive to, marketers must be ready to pay back into the African-American community with jobs, grants, entrepreneurial opportunities and other contributions. "Community may be the key to this market," says Ardagna. "Black consumers don't want to see their dollars being taken outside of the black community. They want to see blacks not just behind the cash register at their local stores, but in the manager's office as well. African-American shoppers are enthusiastic in supporting companies that put something back in their community." For more information call 212-807-2604.

Seniors rate their favorite take-out foods

Take-out food sales may thrive on the hearty appetites and compressed schedules of young people, but the 50+ market also bears watching. Eighty percent of people age 50 and over buy take-out food each month, according to The Senior Panel, a survey conducted by Research 100, Princeton, N.J.

Purchase Frequency for Take-Out Food for the 50+ Consumer

	Total	Women	Men
Base	882	484	381
Purchase Take Out Food in an Average Month	81%	81%	81%
1-2 Times a Month	38	42	33
3-4 Times a Month	22	22	23
5+ Times a Month	21	17	25
None	19	19	19

The 50+ Consumer: Favorite Take-Out Foods

	Total	Women	Men	North east	Mid west	South	West
Base	882	484	381	269	299	181	113
Chicken	20%	20%	20%	15%	21%	21%	23%
Pizza	17	19	16	17	26	14	16
Chinese	13	14	12	32	9	8	7
Hamburgers	13	13	13	3	11	18	16
Deli	5	5	4	7	3	4	5
Fish	5	4	5	4	6	5	2
Salad Bar	5	6	3	3	-	10	-
Mexican	2	1	3	-	1	-	7
Italian	1	1	1	3	1	1	1
No Favorite	26	24	26	25	27	24	26

Men are more frequent purchasers of take-out food than women. Nationwide, chicken is the favorite take out food of the mature market. Pizza is number two and Chinese food and burgers tie for the third spot. While chicken is the first choice of the mature market nationwide, there are distinct regional favorites. The Northeast favors Chinese food while pizza comes up strongest in the Midwest. The salad bar is important in the South and Mexican food is mentioned only in the West.

"It makes perfect sense that the mature market would choose chicken over burgers," says Candace Corlett, president of the Research 100 division that conducts the Senior Panel. "When people hit their 50s they think about what they can do to stay healthy. Nutrition becomes more important and one of the first things to go is the double hamburger and fries. That doesn't, however, mean that older diners are lining up at the salad bar!"

Corlett suggests that the arrival of 50-year-old baby boomers will quickly impact eat-in restaurant and take-out menus. "The boomers' concern with good nutrition will only increase as they age. People in their 50s and 60s are important to the restaurant industry, and we see industry leaders already investigating how the aging of our society will impact their menus." For more information call 718-657-5100.

Information access draws users to Internet

In a survey of Internet users by Jaffe & Soeder, a Glendale, Calif., marketing communications firm, 70.4 percent said "easy access to information/being able to get the latest information" was the greatest personal and professional benefit of using the Internet. "Fast/easy communication" was second at 33.8 percent, and exposure/promotion for their company came in at 31 percent. For more information call 800-664-3766.

Hispanic men looking forward to Olympic games

Four out of five Hispanic men (81 percent) surveyed by Market Development, Inc., a San Diego research firm, plan on watching the 1996 Olympics on television. As reported in MDI's *Hispanic Perspective* newsletter, MDI surveyed 500 Hispanic men in five major Hispanic markets regarding their intention to watch the Olympics on TV. Of those who plan to watch and have a language preference, 56 percent said they will follow it in Spanish. Only 15 percent haven't yet decided which language would give them better coverage of their preferred sports.

Hispanic men chose soccer as the most popular Summer Olympic sport to watch. Boxing placed second, followed by basketball, track and field, swimming, baseball and gymnastics.

Men's most popular sport differed substantially by market. Soccer was the top choice in Los Angeles and Miami. Basketball was the number one preference in New York. Boxing was the favorite in San Antonio and track and field was selected first in Houston.

Preferences for certain sports also varied among U.S.-born and foreign-born Hispanics. Foreign-born Hispanics prefer to watch soccer three times as much as those born in the U.S. Conversely, more than three times as many U.S.-born Hispanics expressed a preference for following track and field competitions. For more information call 619-232-5628.

Memberships in fitness facilities bulk up

Memberships and visits to fitness centers continued to increase during the first half of 1995 following a year of growth in 1994, according to a new survey of 210 exercise facilities around the country.

About half (56 percent) of the participating facilities reported an average increase of 10 percent in memberships or user visits during the six months ended June 30, 1995, the survey found. Another 34 percent says membership was stable and 10 percent reported declines. All types of facilities surveyed recorded membership or usage increases for the full year 1994.

"The centers surveyed, on the whole, seem confident about future growth," says Gregg Hartley, executive director of the Fitness Products Council (FPC), which sponsored the study. "The prevailing impression from the survey is that the involvement of Americans in exercise is continuing to grow."

The FPC is composed of approximately 140 companies that make and distribute fitness equipment for institutional and home use.

The study, conducted by the research firm of Morgan-Horan, Inc., involved telephone interviews with a national panel of managers of YMCAs/YWCAs, health clubs, corporate fitness centers, cardiovascular/rehabilitation centers, hotel centers and facilities at spas and resorts.

At the end of 1994, the average "Y" had 5,011 members, the average health club 1,050 and the average corporate center 450.

Among other highlights from the study:

- Equipment items that club patrons are becoming increasingly interested in are programmable treadmills (mentioned by 75 percent of panelists), computerized recumbent bicycles (62 percent), free weights (60 percent) and resistance machines (60 percent).
- Special programs for seniors were cited most often as attracting increasing interest from club users, mentioned by 73 percent of the panelists. Next in drawing increasing interest were personalized training programs (reported by 68 percent of panelists) and swimming programs (66 percent).
- In terms of programs and services currently offered, personalized training led the list, being provided by 78 percent of panelists. Next came baths: sauna, steam, whirlpool (74 percent); then step classes (66 percent). Special senior programs ranked seventh, offered by 45 percent of panelists, followed by swimming programs (43 percent).
- Looking ahead two years, health clubs, corporate centers, hotel centers and resorts believe women aged 25-40 will be the most important group to their business. YMCAs/YWCAs and cardiovascular centers, however, are targeting older consumers. They believe men and women aged 55 and older will be most important. For more information call Gregg Hartley at 407-840-1161.

Physicians

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Ten years ago you had to take special care to convince potential professional respondents that they were being asked to participate in a true research project and not some form of sales or product detailing in the guise of market research. There were two common reasons for their suspicion: Market research was not as prevalent among health care practitioners as it is now. Marketers were frequently selling and/or detailing under the guise of market research.

Doctors today, whether they be physicians, dentists, or veterinarians, are much more attuned to the presence of market research within their respective fields but we still use a sales/detailing disclaimer up front in every recruiting script.

While professionals are more familiar with market research, it is still important to persuade them that their participation will result in one or more of the following happening:

1. Their input will have an impact on anticipated changes in an existing product or service or in the development of a new product or service.

2. They will learn something about a new product or service currently in development.

3. They will have an opportunity to learn more about what their colleagues are doing. This is a particularly useful approach when recruiting focus groups held in conjunction with conventions, where the group makeup is more geographically diverse.

A gift of some personal or professional value — a sports watch, a quality pen, an American Express gift certificate, etc., usually is better than money. That was my thinking with regard to incentives 10 years ago: Be careful to avoid the appearance that you are trying to buy their attention and input. But experience today indicates that when it comes to putting together a focus group of professionals money speaks loudest. They have always put a high value on their time but now managed care is forcing them to look more closely at professional cost/benefit ratios and the true cost of their time. This should not be misinterpreted to mean that incentives have to be astronomical; today's physicians' net incomes are down and they seem more willing to spend a few hours after work discussing their attitudes and experiences when a meal and a respectable cash incentive are involved.

Ten years ago recruitment screeners seemed to be a lot shorter. Typical screener questions used to focus on area of specialization, years in practice, group vs. solo and previous participation in focus groups. Today's screeners are more complex and must be carefully thought out and developed to ensure that the groups or individual interviews will properly meet the client's needs. The nuances of sub-specialization, percentage of patients that are managed care, incidence of HMO participation and demographics of the patient population are just some of the considerations that must be carefully weighed and evaluated in constructing a good screener.

Not too long ago we did focus groups with urologists on the subject of prostate cancer, a disease found in older males, and I was rather embarrassed to discover that there are a small number of these practitioners who specialize in pediatric urology. I found this out the hard way. I wound up with two of them in one group. Fortunately that group worked out well and my client was understanding and willing to share the responsibility for not having picked up on this fact.

Some factors in market research with health care professionals have not changed in the intervening decade and are worth repeating:

• Facilities — Convenience to hospitals and professional office parks, as opposed to convenience to the airport and hotels, should be a primary prerequisite in facility choice. Physicians often run late and are subject to emergencies and as the day runs on, the prospect of a long drive in traffic can lead to last-minute cancellations or no-shows.

• Food — In the overall scheme of things, the cost of serving a meal to a group of respondents is minimal and it is not worth the potential of upsetting or disappointing some of your respondents by only having cookies and soda or a fruit/cheese platter. Any professional groups that start between the hours of 5:00 to 8:30 p.m. should include food service. It doesn't have to be elaborate or fancy. We often use sandwiches or deli platters and many doctors who come into the facility after a day on the run seem very happy to have it available. A word of caution: all sandwiches and deli platters are not created equal. After the second or third time of arriving at a facility to find a platter of "mystery meat" awaiting my respondents, I learned that if we are not familiar with the facility it is important to inquire about the quality of their deli resource. When in doubt, choose a simple chicken dish and a salad.

• Group dynamics — One of the major differences between a consumer focus group and one made up of doctors is the likelihood that some of the doctors will know each other. It is not uncommon to have a group of professionals shown into the conference room with two or three engaged in an intense discussion, and they will generally sit next to each other at the table. Usually this does not prove to be a problem or concern. If all of the standard control statements fail (Ladies and gentlemen . . . please. The cross conversations are overwhelming our sound system. I'm sorry but I can't hear what this person is saying), manipulation of the seating arrangement can be an effective ally. One of my favorite methods is to rearrange the group for an evaluation of print materials or products into specified mini-teams by having certain respondents change seats with others. After these evaluations they are asked to stay where they are.

• The moderator — This is a rather subjective topic about which there is room for debate. My personal opinion is that health care providers consider themselves to be authorities. They do not like to feel that their time is being wasted and they respond best to an authoritative approach from the moderator. It is important to establish in the opening remarks that the moderator is experienced and comfortable in the field of health care market research. Beyond personal appearance (I always wear a tie) one of the best ways to convey authority and control is to make sure that you have a reasonable grasp of the technology being discussed, that questions are appropriately phrased and technical terms are correctly pronounced. The Helen/Harry Helpless approach — Please people, you've got to help me understand this — should not be used as a substitute for thorough advanced preparation. Which is not to say that the phrase "I'm not sure what you mean" doesn't play a valid role in moderating physician groups, but you have to be able to demonstrate that you have grasped their meaning ("Before we move on I would like to summarize what has been said to make sure I understand it correctly.").

One constant has remained over the past 10 years: while market research with professionals has its own particular demands and levels of difficulty, well planned and executed qualitative studies can provide valuable input for the clients who commission them. Whether it relates to advertising concept testing, troubleshooting a product already in the market, prototype evaluations or just getting a read on a market's future potential, there is no substitute for going out into the field to talk with the highly educated people who are in the trenches using these products and services every day. As health care continues to change in its complexity, the need for good health care market research will undoubtedly continue to grow and it is the research industry's mandate to develop the level of skill and expertise necessary to properly meet the demand. Researchers who prepare themselves for the complexities of this type of research will be rewarded by their efforts. ❑

Names of Note

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Marketing Research, Cincinnati, as a research analyst.

Larry Munson has been named vice president and senior consultant at *Aragon Consulting Group*, a St. Louis consulting and research firm. The firm has also appointed **Gregory Rutledge** vice president and senior consultant.

Polly Kleissas has been promoted to vice president account services at ISA East, the Grasonville, Md., office of *Interviewing Service of America*, Van Nuys, Calif. At the company's headquarters, **Rodger Low** has been named project manager and **Oliver Karp** has been named data processing manager. In addition, **Sarah White** has been named assistant telephone center manager and **Kevin Kneale** has been named assistant data processing manager.

Jack Pollack has been promoted to president of *Analytical Computer Service, Inc.*, at the firm's Scottsdale, Ariz., office. Also in the Scottsdale office, **Clare Stewart** has been named vice president. At the firm's Chicago office, **Dawn Speakman** has been named vice president and **Jerry Madansky** has been named CEO.

Lisa Carter has joined *Marketing and Planning Systems*, Waltham, Mass., as vice president.

James Fouss, chief executive officer of *Response Analysis Corp.*, Princeton, N.J., has been elected president of The International Research Institutes (IriS), a Brussels-based global network of marketing research firms. In addition, **Damien Schnyder** of DemoScope in Switzerland was named treasurer. Elected as council members were: **Soulla Kellas**, AMER World Research, Cyprus; **Xenia Kourtoglou**, FOCUS Athenian Marketing Research Centre, Greece; **Chantal Le Bras**, Institut Francais de Demoscopie, France; **Per Nellerad**, IMU - Testologen, Sweden; **Nick Winkfield**, MORI, Great Britain.

Tracy Snicker has been promoted to data collection associate manager at *C.J. Olson Market Research, Inc.*, Minneapolis.

Elrick and Lavidge, an Atlanta research firm, has added **Rohan Ullal** to its staff as manager, analytical services.

Conway/Milliken & Associates, a Chicago research firm, has promoted **Karin Litwin** to account group vice president.

House of Marketing, Pasadena, Calif., has hired **Lisa Kosiba** as director of recruiting and field operations. She will oversee the staffing of the firm's new 24-station phone room, which is scheduled to be built later this year.

Kara Oishi has joined *Macro Consulting, Inc.*, Mountain View, Calif., as a project director.

Osvaldo Maeso has rejoined *Strategy Research Corp.*, Miami, as vice president in charge of Caribbean operations.

Sally Schatz has joined the research division of *FGI*, Chapel Hill, as vice president of research operations. **Gail DeJean** has joined the firm as administrative manager of the research division.

Jenne Ahlgrim has joined *Doane Marketing Research, Inc.*, St. Louis, as research associate.

Thomas Payne has been named president and CEO of *Market Facts, Inc.*, Arlington Heights, Ill.

Tamera Currey has been named director of marketing and account services for *Ryan•McGinn•Samples Research, Inc.*, Charleston, W.Va. In addition, **Diana St. Charles** and **Kristin Alderfer** have been named market research analyst.

Payne **Currey**

St. Charles **Alderfer**

Research Industry News

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Rockbridge Associates has moved to 421-E Church St., N.E., Vienna, Va., 22180-4708. Phone 703-281-9541; fax 703-281-5763. The company also announced that it has been awarded the contract to conduct research and development for the customer satisfaction index for the United States Postal Service. Rockbridge is operating as a sub-contractor to Market Facts, Inc., Chicago. The total contract is valued at approximately $4.7 million in 1996.

Decision Analyst, Inc., Arlington, Texas, won a David Ogilvy Award for its marketing research work on behalf of Tropical Freezes, a frozen drink introduced nationally in 1995. The company conducted marketing research to help refine the initial product concept, performed test market tracking and evaluation, did research to help guide creative development, and conducted communications research to assist in final advertising evaluation. The award is presented by the Advertising Research Foundation, New York.

Time N Talent and **Strictly Medical Market Research**, Phoenix, have moved to a new address. The firms have also expanded their focus group facilities. The new address is 2400 E. Arizona Biltmore Circle, Ste. 1100, Phoenix, Ariz., 85016-2108. Time N Talent's new phone number is 602-956-1001. Strictly Medical's is 602-224-7979.

Attitude Measurement Corp., Southampton, Pa., has granted a license to NOP Research Group, London, whereby NOP will market Attitude Measurement's ResponseCall throughout Europe. ResponseCall is a proprietary system that uses prepaid telephone calling cards, placed in or on product packages, as an incentive for purchasers of those products to call a toll-free number to complete an interview with a live interviewer.

Response Analysis Corp. has moved to 1060 State Road, P.O. Box 158, Princeton, N.J., 08542. Phone 609-921-3333; fax 609-921-2611.

Roper Starch Worldwide has opened offices in London and Hong Kong and has formed global strategic alliances with two European and two Asian research consulting firms. The new offices are named Roper Starch Europe and Roper Starch Asia, respectively. The new strategic partners are: SIFO Management Group AB, a Swedish firm; Paris-based International Research Institute on Social Change (RISC); Acorn Marketing and Research Consultants, with offices in Singapore, Malaysia, Hong Kong, China, Indonesia, Thailand, Vietnam and Taiwan; and Cosmo Research Center of South Korea.

The Eagle Group's **Arena Research**, Atlanta, office has changed its name to **Eagle Research - Atlanta**. Beth Wilson has joined Eagle Research - Atlanta as president.

MRCFocus has opened a new focus group facility at 101 Convention Center Dr., Ste. 1005, Las Vegas, Nev., 89109. Phone 702-734-7511; fax 702-734-7598. The new facility features two interviewing rooms that can be arranged to meet client needs, from traditional conference style arrangement to a classroom set-up. For more information call Jim Medick at 702-734-7511.

Information Resources, Inc. (IRI), Chicago, has received confirmation from the European Commission that a Statement of Objections had been issued to the A.C. Nielsen Co. and Nielsen International, S.A. The Statement of Objections follows a complaint made by IRI against Nielsen and its parent, The Dun & Bradstreet Corp., alleging that those companies had acted abusively within the meaning of Article 86 of the EC Treaty. Article 86 prohibits the abuse by an organization holding a dominant position within the common market where it affects trade between the Member States of the European Union.

Latin American research firm **IBOPE** and **Audits & Surveys Worldwide,** New York, have opened an office in New York to sell and service the firms' Latin American television ratings service to U.S.-based clients.

Qualitative Marketing Software, Inc., a maker of geocoding and address standardization software, has reached an agreement with Equifax National Decision Systems, San Diego, to resell Equifax's current year estimates and five-year projections for block group level demographics.

Facilitating

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answer, then walks to an easel and turns his or her back on the group. The facilitator stays this way, recording answers, without saying anything, until two things happen:

• All respondents have said something; (You can tell who's talking by looking in the mirror.)

• Respondents have given up on getting a response from you and have started to talk to each other.

Five minutes after the group has started, you have the answer to your question and a group of energetic respondents reacting to each other.

Projective role playing and the usage occasion

Learning about a product or service category often starts with a discussion of the usage occasion. To get beyond the mechanics to the feelings characterizing what is it like to use a credit card or have a cold, get the group to write a script for a popular television show about it. You could do a "Cheers" episode called "Sam Gets a Cold." Tell them the opening scene is Sam walking into the bar to open up. He's talking to Carla about how he feels. Ask them, "What does he say?" "Sam is vain; what does he say about how he looks?" "How does he sound?" Just as Rebecca comes in, he has to sneeze and takes out his handkerchief. "What does she say?" And so on, through Norm, Cliff, Frasier, and Woody talking about Sam and his cold and colds in general.

Then ask the group how the situation is different for them when they get a cold or when others they work or live with have a cold. You'll find yourself tapping into another, deeper level of self-realization and candor.

Mind mapping category segments

Need to get a good reading on category segmentation? Have respondents construct mind maps of the category. Put all the category brands (or representations thereof) on the table. Give each respondent a piece of posterboard and some Magic Markers. Tell them to individually create groups of the brand names, putting the brands that are most like each other together and putting each group as close to, or far from, other groups as they perceive it to be. Have them label each group, indicating what the brands in each set have in common. Then tell the group you are interested in seeing if there are any patterns and invite them to compare their boards and talk about them.

Brainstorming brand attributes

Learning about the perceived differences among brands also lends itself to facilitation. Start as you would when moderating by having the respondents rate each major brand in the category in writing on a scale of one to 10. Collect the ratings. Discuss the differences between the top brand and a 10, and the top brand and each of the other brands. Then return to the easel.

With your back turned, get the group to brainstorm all the characteristics of the ideal brand. Write them on the left side of the chart. Keep pushing for more. Once you've gotten as many as you can, push for the benefits of each attribute and write them on the right. Once you're done getting divergent thinking, converge on the elements that are most important to the group. Have them identify those attributes and benefits they get adequately from the current products (the category mandatories). Then have them pick the two or three attributes they don't have, or don't have enough of, that they would most like (the product improvement or new product opportunities).

Defining brand personality with 20 questions

To get at the personalities of each brand, play 20 questions. Start by picking a brand and telling the group you want them to help you build a composite person with the same personality as that brand. Then ask your questions. "Is it a man or a woman?" "How old?" "Thin or fat?" "How is he/she dressed?" "What does he/she do in spare time?" "What do his/her friends like most about the person?" "Least?" "If you were casting a movie, who would play the part?" "How would you describe this actor to someone who doesn't know him or her?"

You can usually repeat this for two or three brands without any erosion of participant imagination or enthusiasm.

Collaging brand imagery

To get into other aspects of brand imagery, have the group do collaging. The visual stimuli bring forth a whole different kind of response. Break the group into three or four small teams. Give each team some old magazines, scissors, a glue stick and a posterboard, and assign them one of the brands. Have them cut out pictures and words from the magazines which illustrate dimensions of the brand imagery and have them make a collage. Watch the BMW illustrations gravitate towards one brand, while the Volkswagen bug pops up elsewhere. Then have each team explain their collage to the group. (And they thought they were immune to advertising imagery.)

Concept evaluation via team selling

To expand and accelerate concept evaluation, start the usual way by showing the group the concept and having them write down a purchase intent on a scale of one to 10 without saying anything. Then do a team selling exercise, where those who rated it eight or higher try to sell the idea to the rest of the group, and vice versa. Let both the teams prepare their pitches before they make them. The unique attributes, the benefits and the reservations just spew forth. (At this point the group behind the mirror will be writing so fast, they'll forget about the blue M&Ms.)

Great thinking about product improvements

If you're showing or tasting a product, after going for the usual responses, get the help of some great thinkers to learn about potential product improvements. Present the group with a list of people, such as Walt Disney, Bill Gates, Steven Spielberg, Julia Childs — eight or 10 thinkers with different perspectives. Let each respondent pick one and give them a card with some information about the background and achievements of the great thinker they selected. Ask the respondents to imagine they are the person they have selected and to write down what advice that great thinker would give on how to improve the product. Then start the discussion.

Summary

Relative to just five years ago, consumer respondents in focus groups are more guarded about their opinions, more knowledgeable about research, more marketing savvy, and more tired. Moderators are working harder and observers are enjoying it less. Getting information from these respondents on emotions and feelings requires tools that are not part of traditional moderating. Fortunately, suitable tools are available as part of facilitating. Whereas moderating relies primarily on direct, verbal stimuli, facilitating uses both direct and indirect verbal, musical, visual and sensate stimuli. Facilitating techniques let you go deeper into consumer motivation and behavior. They also increase the enjoyment and energy level on the other side of the mirror (long after all the blue M&Ms are gone.)

Try it, you'll like it. ❑

Videoconferencing

continued from p. 25

the experience behind the one-way mirror at the local focus group facility. Specifically, this involves:

—Establishing "rules" for remote viewing that strongly discourage observers from casual watching of the sessions including going in and out of the observation room during the groups to handle other matters.

— Serving refreshments to the observers, as would be done in a normal backroom environment.

— Having large (30"+) monitors for people to watch the groups, so they can get as close to the situation as possible.

Darkening the room, as would be the case in a backroom situation, to encourage the observers to focus on the group proceedings.

• Send one or two key client representatives to the groups in each location to serve as a liaison with the moderator and to function as the "voice of the client" on premises. It is important that these be people who are decision-makers relative to the project, rather than simply low-level employees who function as messengers between the remote location and the moderator.

As with traditional focus groups, establish firm guidelines and controls to limit the amount of backroom intervention during the groups. If the moderator is qualified and has been well briefed, inputs from the backroom during the groups should be very limited, and contained to only the most essential topics, rather than "nice to know" subjects which are a curiosity of an observer.

The on-site client personnel should be the link between the remote location and the facility, with arrangements made with the moderator for communications with the backroom during the groups (via notes or face-to-face meetings, depending on the desires of the moderator).

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Continued growth

I believe that videoconferencing of focus groups will continue to grow at a very fast pace over the next several years. To take advantage of this new technology while retaining the quality of the work, researchers must plan appropriately to help neutralize the problems associated with this technique. If this is accomplished, then clients should be able to reap many important benefits from the new technology. ❑

Best Western

continued from p. 11

you the score as it moves in real time," says Gary Miller, president of Aragon Consulting Group, Inc.

The RAMS methodology also allows clients and/or the moderator to insert questions as needed. If, for example, an issue arises, respondents can be queried about it in seconds. "In the Best Western research, if the respondents didn't like something, we could ask a new series of questions because we were smarter after we asked the question than before. So then we could insert new questions to find out why they responded the way they did," Miller says.

Testing advertising with a methodology like RAMS was a first for Best Western. "Historically we had never used this kind of technology for our advertising testing, usually because we were limited by a lack of funds. It does tend to be more expensive than the traditional means but we decided that we would give it a shot, and we're very glad that we did. I think we reaped much more back in terms of value than the expenditure," Hendricks says.

Tough audience

The groups were conducted in two phases in Atlanta and Beverly Hills with 100 respondents. In the first phase, Best Western customers and non-customers watched the Best Western commercials and those of competitors. In the second phase, customers and non-customers were separated into concurrent diagnostic groups to probe their reactions to the commercials in more detail.

"We went to Beverly Hills because respondents there tend to be the most critical of the of kind of commercials Best Western was doing," says Miller. "We really tried to subject the commercials to the toughest audience we could find, knowing that if they passed muster there they would pass muster in other markets."

The groups were split, Hendricks says, to get a keener understanding of the attitudinal differences between potential and current customers and also to determine how to make the advertising more appealing to potential customers. "This methodology allowed us to understand the elements that were compelling and why they were compelling. For a research team and an ad team, that's critically important because as the campaign evolves (the research findings) give us a keen understanding of what's driving consumer perceptions. That's something that we really haven't been able to get out of other kinds of research. We've gotten at in broad strokes but we've never isolated it down to a particular image and been able to ask consumers what it was about an image that was either compelling or caused them to reject it," Hendricks says.

"We went to Beverly Hills because respondents there tend to be the most critical of the of kind of commercials Best Western was doing," says Miller. "We really tried to subject the commercials to the toughest audience we could find, knowing that if they passed muster there they would pass muster in other markets."

Because the research measured consumer reaction to the commercials second by second, Best Western could identify the portions of the commercial during which interest dipped and then go back to the respondents in the second group and probe for more information. "It was really great to be able to see the real-time responses to the commercials. In addition to the Best Western management team we had the creative staff from the ad agency as well as a few hotel owners, so it was a fun process for everybody involved," Hendricks says.

Accomplished the impossible

Much to the delight of all concerned, the research showed that the Best Western ads accomplished the impossible: they were persuasive without straining credibility.

Originally the plan was to change the campaign over time, using the research findings to determine which elements worked and which didn't. There was also a feeling within the company that the campaign was no longer fresh, Hendricks says. "It turns out that the public still found the campaign fresh and it was only internally that we were burnt out on its theme. So the results guided us to retain and enhance the campaign rather than make some substantive changes."

With a strong campaign on its hands, Best Western took the money it had earmarked for production of additional commercials and used it to buy more airtime this summer. "The summer campaign carries the traditional tactical message of appealing to vacation travelers but reinforces the findings from the research for those particular elements that were compelling in getting across our updated image," Hendricks says.

"Based on the previous exposure, the wear index was extremely low," Miller adds. "That drove the decision to keep the campaign running during a year when media costs were climbing due to the upcoming presidential election and the Olympics."

While advertising agencies usually are loath to have their work analyzed by consumers, Miller says that in this case, the people from Rogge Effler & Partners were extremely cooperative. "It was a wonderful opportunity to work side by side, where you had strategic planning, marketing and advertising working along with market research in a very productive and synergistic manner."

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"We were able to give the creative team guidance on how to refine and maximize the entire commercial, adjusting in the spots that had weaknesses," Hendricks says. "And in this case it wasn't just a matter of knowing that audience reaction went down in a certain spot and having to guess what they didn't like. We knew exactly what they were reacting negatively to. There's no stronger guidance that could be given to the creative team and I think that gave us a huge benefit." ❑

Asian omnibus

continued from p. 12

way of conducting research in Asia, great care must be taken in order to make best use of this service, particularly by companies thinking of entering these markets for the first time. It is an extremely complex region, not just in terms of language and dialects, and one which is difficult to comprehend without firsthand experience.

Countries such as Japan, Korea and Thailand, where there is a single culture and a single language throughout the country, are unique in the region. In

Whenever possible it is also best to match ethnicity of the interviewer and the respondent. This issue goes beyond language; it has an impact on rapport between the interviewer and the respondent due to culture and behavioral issues. In both Singapore and Malaysia, it is common for research agencies to have both Chinese and non-Chinese interviewing staffs.

both Singapore and Malaysia, for example, omnibus questionnaires are always printed in three languages: English, Mandarin and Malay. In Malaysia, in addition to Mandarin, which is spoken by all Chinese-literate consumers, there are three other commonly spoken dialects which have to be dealt with at the respondent level: Cantonese, Hokkien and Hakka, whereas in Singapore the commonly spoken dialects are Cantonese, Hokkien and Teochew.

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China is somewhat unique in the region in that Mandarin, or Puntonghua, meaning "common language," is the official language of the entire country.

However, it is usually necessary to interview respondents in Guangzhou in Cantonese, respondents in Shanghai in Shanghainese, and in a number of other local dialects in cities in other areas. Also, due to the rapid development of the key urban cities in China, a lot of "foreign" Chinese (i.e., people who have moved to the cities from other areas) will not speak the local dialect, and not necessarily Mandarin. Whereas, questionnaires in Chinese are printed using the same Chinese characters, the various dialects are not identical in that slightly different words may be used for the same Chinese character and the sequence of words may vary.

At the extreme is India, where there are 19 major languages and over 200 dialects. India is divided into linguistic states. The country can be described as a mini-Europe, with each state like a separate country within Europe with its own language and cultural peculiarities. A national survey in India is similar to a pan-European survey in terms of cultural and language differences the researcher must be aware of and able to deal with. For an omnibus survey conducted in only the five major metros of Delhi, Bombay, Madras, Calcutta and Bangalore, questionnaires will usually be printed in six different languages; English (for the professional classes), Hindi, Marathi, Bengali, Kannada and Tamil. A survey that even approaches national representation in scope will generally be printed in at least 12 languages. Imagine the difficulties of timely preparation of visual stimuli for the more complex questionnaires that we all know too well.

Inconsistencies

Geography, economic development and infrastructure are all factors that often cause inconsistencies in samples and interview methods across countries in Asia. Samples, omnibus and otherwise, are almost always nationally representative and include all SES classes in Hong Kong and Singapore. Omnibus surveys by telephone are also well developed in both countries.

Based on geography alone, however, national samples in China and Indonesia are almost unthinkable. China is predominantly rural and Indonesia consists of several thousand islands, the majority of inhabitants of which cannot be considered consumers by Western definition. In Thailand, only 21 percent of the population live in urban areas, and two-thirds of the total urban population live in a single city, Bangkok. Many surveys are carried out in Bangkok only, or at most Bangkok and a few Upcountry cities. In these three countries, telephone interviewing is, for the most part, not a consideration.

In Thailand, only 21 percent of the population live in urban areas, and two-thirds of the total urban population live in a single city, Bangkok. Many surveys are carried out in Bangkok only, or at most Bangkok and a few Upcountry cities. In these three countries, telephone interviewing is, for the most part, not a consideration.

When conducting omnibus or any other type of research in Asia the following guidelines will serve the international researcher well.

• Be sensitive to cultural differences, not only between countries but within countries as well.

• Learn to rely on local researchers, who usually know their countries best, and encourage their input. But ask questions.

• Focus on the objectives not the methods. Asia is a very diverse region often requiring different methods and approaches to a particular research problem.

• Allow sufficient time for planning and preparation of surveys, translations, checking and rechecking of translations, printing of questionnaires, preparation of visual stimuli, etc. ❑

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Michigan
KidFacts Research
Nordhaus Research, Inc.

Minnesota
Cambridge Research, Inc.
GraffWorks Marketing Research
MedProbe, Inc.
Outsmart Marketing

Missouri
I^2

New Jersey
MCC Qualitative Consulting
Treistman & Stark Marketing, Inc.
Yarnell Inc.

New York
BAI
Fader & Associates
Focus On Hudson
Focus Plus, Inc.
Horowitz Associates, Inc.
JRH Marketing Services, Inc.
Leichliter Associates
Market Navigation, Inc.
Shelli Reichwald
Rhoda Schild Focus Grp. Recruiting/Mktg.
Paul Schneller - Qualitative
Gerald Schoenfeld, Inc.
Jack M. Shapiro Healthcare Rsch. & Mgmt. Cnsltg.
James Spanier Associates
Spier Research Group

North Carolina
CB&A Market Research
The Customer Center, Inc.
D/R/S HealthCare Consultants
FacFind, Inc.
Medical Marketing Research, Inc.

Ohio
The Answer Group
CJI Research Corporation
Pat Henry Market Research, Inc.
MarketVision Research, Inc.
Rodgers Marketing Research
Dwight Spencer & Associates, Inc.

Pennsylvania
Michael Carraher Discovery Rsch.
CJ Robbins
Data & Management Counsel, Inc.
Decker Research Associates, Inc.
Direct Feedback

Tennessee
Directions Data Research

Texas
Cunningham Research Associates
Decision Analyst, Inc.
First Market Rsch. (J. Heiman)

Utah
Focused Solutions

Virginia
Bannon Moderating Services
Fuller Research Services, Inc.

Washington
Consumer Opinion Services

SPECIALTY CROSS INDEX OF MODERATORS

Refer to Preceding Pages For Address, Phone Number and Contact Name

ADVERTISING
Bannon Moderating Services
Cambridge Associates, Ltd.
Cambridge Research, Inc.
CJ Robbins
Creative & Response Rsch. Svcs.
The Customer Center, Inc.
Dolobowsky Qual. Svcs., Inc.
Erlich Transcultural Consultants
Fader & Associates
First Market Research (J. Reynolds)
Outsmart Marketing
Paul Schneller - Qualitative
SIL: Worldwide Marketing Services
Spier Research Group
Strategy Research Corporation
Treistman & Stark Marketing, Inc.
Widener-Burrows & Associates, Inc.
Dan Wiese Marketing Research

AFRICAN-AMERICAN
Erlich Transcultural Consultants
JRH Marketing Services, Inc.

AGRICULTURE
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Dan Wiese Marketing Research

ALCOHOLIC BEV.
Creative & Response Rsch. Svcs.
Gerald Schoenfeld, Inc.
Strategy Research Corporation

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

ASSOCIATIONS
Nancy Low & Associates, Inc.

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

BIO-TECH
Focus On Hudson
Irvine Consulting, Inc.
Nancy Low & Associates, Inc.
Market Navigation, Inc.
MedProbe, Inc.
Medical Marketing Research, Inc.
Jack M. Shapiro Healthcare Rsch. & Mgmt. Cnsltg.

BUS.-TO-BUS.
Access Research, Inc.
BAI
Brittain Associates
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Michael Carraher Discovery Rsch.

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.
MCC Qualitative Consulting
Paul Schneller - Qualitative
Gerald Schoenfeld, Inc.
SIL: Worldwide Marketing Services
James Spanier Associates
Sunbelt Research Associates, Inc.
Yarnell Inc.

CABLE
Creative & Response Svces., Inc.

CHILDREN
Creative & Response Rsch. Svcs.
Doyle Research Associates
Fader & Associates
Greenleaf Associates, Inc.
KidFacts Research
Matrixx Marketing-Research Div.
Outsmart Marketing
Shelli Reichwald
Pamela Rogers Research
Paul Schneller - Qualitative
Gerald Schoenfeld, Inc.
Spier Research Group

CHURCH & RELIGIOUS ORG.
Heffernan Marketing Rsch. Svcs.

COMMUNICATIONS RESEARCH
Access Research, Inc.
Cambridge Associates, Ltd.

COMPETITIVE POSITIONING
GraffWorks Marketing Research

COMPUTERS/MIS
Cambridge Associates, Ltd.
Michael Carraher Discovery Rsch.
Creative & Response Rsch. Svcs.
Daniel Associates
Fader & Associates
First Market Research (J. Heiman)
Leichliter Associates
Marketing Advantage Research
SIL: Worldwide Marketing Services
James Spanier Associates
Yarnell Inc.

CONSUMERS
The Answer Group
Consumer Opinion Services
Creative & Response Rsch. Svcs.
Greenleaf Associates, Inc.
Pat Henry Market Research, Inc.
Marketing Advantage Research
Research Data Services, Inc.
Rodgers Marketing Research
Paul Schneller - Qualitative
Gerald Schoenfeld, Inc.
Dan Wiese Marketing Research

CUSTOMER SATISFACTION
The Answer Group
BAI
Michael Carraher Discovery Rsch.
CJ Robbins
Elrick and Lavidge
Fader & Associates
Nancy Low & Associates, Inc.
Research Data Services, Inc.
Sunbelt Research Associates, Inc.

DIRECT MARKETING
BAI
Greenleaf Associates, Inc.
Spier Research Group

DISTRIBUTION
GraffWorks Marketing Research

EDUCATION
Cambridge Associates, Ltd.
Greenleaf Associates, Inc.
Marketing Advantage Research
Spier Research Group

ENTERTAINMENT
Bannon Moderating Services
Sweeney International, Ltd.

EXECUTIVES
BAI
Brittain Associates
Creative & Response Rsch. Svcs.
Dolobowsky Qual. Svcs., Inc.
Fader & Associates
First Market Research (J. Heiman)
Marketing Advantage Research
Paul Schneller - Qualitative
SIL: Worldwide Marketing Services
James Spanier Associates
Strategy Research Corporation

FINANCIAL SERVICES
Access Research, Inc.
BAI
Brittain Associates
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Michael Carraher Discovery Rsch.
Creative & Response Rsch. Svcs.
The Deutsch Consultancy
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Fader & Associates
Nancy Low & Associates, Inc.
Marketing Matrix, Inc.
Matrixx Marketing-Research Div.
MCC Qualitative Consulting
Nordhaus Research, Inc.
The Research Center
Gerald Schoenfeld, Inc.
SIL: Worldwide Marketing Services
James Spanier Associates
Widener-Burrows & Associates, Inc.

FOODS/NUTRITION
Leichliter Associates

FOOD PRODUCTS
The Answer Group
BAI
Creative & Response Rsch. Svcs.
Greenleaf Associates, Inc.
KidFacts Research
Outsmart Marketing
Paul Schneller - Qualitative
Gerald Schoenfeld, Inc.
James Spanier Associates

HEALTH & BEAUTY PRODUCTS
The Answer Group
BAI
Paul Schneller - Qualitative
Gerald Schoenfeld, Inc.
Jack M. Shapiro Healthcare Rsch. & Mgmt. Cnsltg.

HEALTH CARE
Access Research, Inc.
The Answer Group
Decker Research Associates, Inc.
Directions Data Research
Dolobowsky Qual. Svces., Inc.
D/R/S HealthCare Consultants
Elrick and Lavidge
Erlich Transcultural Consultants
First Market Research (J. Reynolds)
Irvine Consulting, Inc.
Nancy Low & Associates, Inc.
Market Access Partners
Market Navigation, Inc.
Matrixx Marketing-Research Div.
MedProbe, Inc.
Medical Marketing Research, Inc.
Nordhaus Research, Inc.
Paul Schneller - Qualitative
Jack M. Shapiro Healthcare Rsch. & Mgmt. Cnsltg.
James Spanier Associates
Spiller & Reeves Research
Strategy Research Corporation
Sunbelt Research Associates, Inc.
Widener-Burrows & Associates, Inc.

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

HI-TECH
Market Navigation, Inc.

HOUSEHOLD PRODUCTS/CHORES
Paul Schneller - Qualitative

IDEA GENERATION
Analysis Research Ltd.
The Answer Group
BAI
Cambridge Associates, Ltd.
Creative & Response Rsch. Svcs.
Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
Elrick and Lavidge
Leichliter Associates
Matrixx Marketing-Research Div.
Paul Schneller - Qualitative
Gerald Schoenfeld, Inc.
SIL: Worldwide Marketing Services

IMAGE STUDIES
Cambridge Associates, Ltd.
Paul Schneller - Qualitative

INDUSTRIAL
First Market Research (J. Heiman)
Market Navigation, Inc.
SIL: Worldwide Marketing Services
Dan Wiese Marketing Research

INSURANCE
Brittain Associates
Erlich Transcultural Consultants
Nancy Low & Associates, Inc.
Marketing Advantage Research

INTERACTIVE PROD./ SERVICES/RETAILING
Leichliter Associates

INTERNET
GraffWorks Marketing Research

INVESTMENTS
The Deutsch Consultancy

KEY OPINION LEADERS
GraffWorks Marketing Research

LATIN AMERICA
Market Development, Inc.

MEDICAL PROFESSION
The Answer Group
Cambridge Associates, Ltd.
Decker Research Associates, Inc.
D/R/S HealthCare Consultants
Focus On Hudson
Pat Henry Market Research, Inc.
Matrixx Marketing-Research Div.
MedProbe, Inc.
Medical Marketing Research, Inc.
Nordhaus Research, Inc.
Rhoda Schild Focus Group Rec./ Mktg.
Paul Schneller - Qualitative
Jack M. Shapiro Healthcare Rsch. & Mgmt. Cnsltg.

MODERATOR TRAINING
Cambridge Associates, Ltd.
Cunninghis Associates
Fuller Research Services, Inc.

MULTIMEDIA
Marketing Advantage Research

NATIONAL ACCOUNTS
GraffWorks Marketing Research

NATURAL HEALTH CARE/REMEDIES
Focused Solutions

NEW PRODUCT DEV.
The Answer Group
BAI
Bannon Moderating Services
Brittain Associates
Cambridge Associates, Ltd.
CJ Robbins
Creative & Response Rsch. Svcs.
Daniel Associates
Data & Management Counsel, Inc.
Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
Elrick and Lavidge
Fader & Associates
First Market Research (J. Heiman)
First Market Research (J. Reynolds)
Greenleaf Associates, Inc.
KidFacts Research
Leichliter Associates
Market Access Partners
Marketing Advantage Research
Outsmart Marketing
Paul Schneller - Qualitative
Gerald Schoenfeld, Inc.
James Spanier Associates
Spiller & Reeves Research

NON-PROFIT
Doyle Research Associates

OBSERVATIONAL
Doyle Research Associates

PACKAGE DESIGN RESEARCH
Treistman & Stark Marketing, Inc.

PACKAGED GOODS
The Answer Group
BAI
Bannon Moderating Services
CJ Robbins
Creative & Response Rsch. Svcs.
Doyle Research Associates
Paul Schneller - Qualitative
Gerald Schoenfeld, Inc.

PARENTS
Fader & Associates
Greenleaf Associates, Inc.
Marketing Advantage Research
Paul Schneller - Qualitative

PET PRODUCTS
Cambridge Research, Inc.
Marketing Advantage Research

PHARMACEUTICALS
The Answer Group
BAI
Cambridge Associates, Ltd.
Creative & Response Rsch. Svcs.
Decker Research Associates, Inc.
D/R/S HealthCare Consultants
Focus On Hudson
Irvine Consulting, Inc.
Market Navigation, Inc.
MCC Qualitative Consulting
MedProbe, Inc.
Medical Marketing Research, Inc.
Paul Schneller - Qualitative
Jack M. Shapiro Healthcare Rsch. & Mgmt. Cnsltg.
Spiller & Reeves Research

POLITICAL RESEARCH
Cambridge Associates, Ltd.

PUBLIC POLICY RSCH.
Cambridge Associates, Ltd.
CJI Research Corporation

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

RETAIL
First Market Research (J. Reynolds)
Pat Henry Market Research, Inc.
MCC Qualitative Consulting
Paul Schneller - Qualitative

SENIORS
Fader & Associates
Marketing Advantage Research
Paul Schneller - Qualitative
Sunbelt Research Associates, Inc.

SERVICES
Spier Research Group

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

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

TEACHERS
Greenleaf Associates, Inc.
Marketing Advantage Research

TEENAGERS
Creative & Response Rsch. Svcs.
Doyle Research Associates
Fader & Associates
KidFacts Research
Matrixx Marketing-Research Div.
MCC Qualitative Consulting

TELECOMMUNICATIONS
BAI
Cunninghis Associates
Daniel Associates
Delta[3] Research
Elrick and Lavidge
Erlich Transcultural Consultants
First Market Research (J. Heiman)
Horowitz Associates Inc.
Marketing Advantage Research
MCC Qualitative Consulting
Pamela Rogers Research
Gerald Schoenfeld, Inc.
Strategy Research Corporation

TELECONFERENCING
Cambridge Research, Inc.
Decker Research Associates, Inc.

TELEPHONE FOCUS GROUPS
Cambridge Associates, Ltd.
Creative & Response Rsch. Svcs.
The Customer Center, Inc.
Doyle Research Associates
Market Navigation, Inc.
Medical Marketing Research, Inc.
MedProbe, Inc.

TOURISM/HOSPITALITY
Research Data Services, Inc.

TOYS/GAMES
Fader & Associates
Greenleaf Associates, Inc.
KidFacts Research

TRANSPORTATION SERVICES
CJI Research Corporation
SIL: Worldwide Marketing Services
Strategic Focus, Inc.

TRAVEL
Cambridge Associates, Ltd.
Michael Carraher Discovery Rsch.
Greenleaf Associates, Inc.
Research Data Services, Inc.
Paul Schneller - Qualitative
SIL: Worldwide Marketing Services
James Spanier Associates

UTILITIES
Cambridge Associates, Ltd.
CJI Research Corporation
Fader & Associates
Nancy Low & Associates, Inc.
Nordhaus Research, Inc.

VIDEO TELECONFERENCING
The Answer Group

WEALTHY
Brittain Associates
The Deutsch Consultancy
Strategy Research Corporation

YOUTH
Fader & Associates
Outsmart Marketing

Senior omnibus

continued from p. 15

hedge their bets. And the most conservative are likely to keep most of their assets in savings accounts:

"When you're my age you're a little afraid to undertake a new investment."

"The bank is easy to use . . . a two-minute walk from home."

Retirement living

Regardless of financial situation, about one-half of our sample plans to stay put, rather than moving to a planned community. The reasons to stay where they are include a real satisfaction with their homes, their communities and nearby friends and family.

For the remainder, the benefits of planned communities include ease of living and access to their favorite activities:

"I like the setting — the planned look, the golf course, the clubhouse, and also (their) maintenance."

While Florida had some mentions, most of those considering planned communities are looking to sites close to home.

Travel

The lure of travel is strong among nearly all of the 50+ consumers we interviewed. A sizable majority forecast a trip in the continental U.S. within the next year. Of those, Florida is the most-mentioned destination, with the weather and beaches seen as the major attractions. Some in their 50s go regularly to the Caribbean.

Yet most think further afield when defining the ideal vacation. Among the places mentioned as ideal are Alaska, Australia, China, Hawaii and Scandinavia. Some focus on their roots in Europe.

Many have very vivid mental pictures of these places they want to see:

Scandinavia: *"More scenic [than most of Europe]."*
Alaska: *"It's the wildlife . . . I've read about it."*
Australia: *"Kangaroos in the wild."*
Hawaii: *"Kind of a playground." "Island paradise."*

Other activities

The top leisure-time activities cited by our 50+ consumers include: fitness/exercising, gourmet cooking, gardening, and health foods. Plus others cite pet care (*"I walk my dog four or five times a day."*) and a passion for shopping (*"I go all over . . . all the malls."*).

Regardless of financial situation, about one-half of our sample plans to stay put, rather than moving to a planned community. The reasons to stay where they are include a real satisfaction with their homes, their communities and nearby friends and family.

But even in avocations, we see some big differences. Golf and photography are exciting to many in their 50s, while gardening is more popular among those 60+.

Distinct markets

The 50+ consumer is not one market but several distinct markets. Our study reveals significant segment breaks based on financial status and age.

Those in their 50s often enjoy full incomes and excellent health. They're adventurous in vacation planning, often willing to take financial risks, and include many technology-friendly folks who've adopted computers, both at work and at home.

Those above 60 appear to be less willing to learn computer technologies or take risks with their savings. Those in this group who take a more aggressive approach to financial planning seem to have more resources now, but they're not readily adopting new investments. Within the 60+ group many are selectively adventurous — planning vacations to faraway locations or utilizing new, user-friendly telecommunications services and features.

With their increasing leisure time, these consumers have a wide range of interests and expenditures. Rather than consumers to ignore, the 50+ marketplace offers increasing opportunities for a wide variety of products and services. ❑

Quirk's
MARKETING RESEARCH
Review

1996

Directory of Syndicated/ Omnibus Studies

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. Section one contains an alphabetical listing of study providers. Section two, which begins on p. 68, lists studies by subject matter.

Codes
S=SYNDICATED STUDY
O=OMNIBUS STUDY

Section One Alphabetical Listings

Advertising Research Corp. (ARC)
77 Brant Ave.
Clark, NJ 07066
Ph. 908-388-5955
Fax 908-388-5645
Studies:
ARC Yellow Pages Ad Size Study (S)
ARC Measurement Study of Yellow Pages (S)
ARC/TAG Voice Information Svce. Study (S)
COMPPARE (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
Studies:
American Sports Analysis (S)
Athlete Footwear Monitor (S)
Health Club Trend Report (S)
Sports Brand Intelligence Report (S)
Sports Media Index (S)

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

BAI (Behavioral Analysis Inc.)
580 White Plains Rd.
Tarrytown, NY 10591
Ph. 914-332-5300
Fax 914-631-8300
E-mail: litzkowitz@BehavioralAnalysis.com
Lisa Itzkowitz, Marketing Director
Studies:
Inside TrackSM (S)
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
Studies:
Business Track (O/S)
Consumer Track (O)
Hispanic Track (O/S)
Southern AZ - Sonora Business Study (O/S)
Metrotrack (O)

Beta Research Corporation
6400 Jericho Turnpike
Syosset, NY 11791
Ph. 516-935-3800
Fax 516-935-4092
Richard Welch, President
Studies:
Beta Omnibus Exchange - Consumers (S)
Beta Omnibus Exchange - Business Executives (S)
Beta Omnibus Exchange - Healthcare/Physicians (S)

Irwin Broh & Associates, Inc.
1011 E. Touhy Ave.
Des Plaines, IL 60018
Ph. 847-297-7515
Fax 847-297-7847
Dave Waitz, Exec. V.P.
Studies:
Brand Image (S)
Consumer Market Studies
Marcom (O)

Bruskin/Goldring Research
100 Metroplex Dr.
Edison, NJ 08817
Ph. 908-572-7300
Fax 908-572-7980 or 7981
Irwin Korman, Executive V.P.
Studies:
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 p. 5)

California Retail Survey
5303 Nyoda Way
Carmichael, CA 95608-3082
Ph. 916-486-9403
James B. Vaughn, President
Studies:
California Retail Survey, 1996 Edition (O)

Cambridge Reports/Research International
955 Massachusetts Ave.
Cambridge, MA 02139
Ph. 617-661-0110
Fax 617-661-3575
E-mail: creports@world.std.com
Jim Caffrey
Studies:
CR/RI Omnibus Surveys (O)
American Focus (S)

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

Children's Market Research, Inc.
1385 York Ave.
New York, NY 10021
Ph. 212-794-0983
Dr. Selina S. Guber, President
Studies:
Children's Market Reports (S)
Kid Trends Newsletter (S)

Chilton Research Services
One Chilton Way
Radnor, PA 19089
Ph. 610-964-4602 or 800-EXP-POLL
Fax 610-964-2942
Kirsten Zapiec, Express Bus. Mgr.
Studies:
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)
ESPN Chilton Sports Poll - Is a national syndicated monthly 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)
(See advertisement on p. 61)

The Consumer Network, Inc.
3624 Market St.
Philadelphia, PA 19104
Ph. 215-561-2921
Fax 215-557-7692
Mona Doyle, President
Studies:
Various

Creative Research International, Inc.
4950 Yonge St., Ste. 1002
Toronto, ON M2N 6K1
Ph. 416-250-8500
Fax 416-250-8515
E-mail: info@crii.com
Marilyn E. Sandler, President
Studies:
New Market (S)
Yankelovich Monitor™ In Canada (S)

Custom Research, Inc.
P.O. Box 26695
10301 Wayzata Blvd.
Minneapolis, MN 55426
Ph. 612-542-0800
Fax 612-542-0864
Internet: http://www.cresearch.com
Lisa Gudding, Project Manager
Studies:
Criterion® Omnibus Concept Testing Sys. (O)

Danis Research International
383 Rte. 46 W.
Fairfield, NJ 07004-2402
Ph. 201-575-3509
Fax 201-575-5366
Studies:
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
Studies:
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
Studies:
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 M. Tugend, Vice President
Studies:
Animal Health Market Study (S)
U.S. Farm Corn Seed Study (S)
U.S. Pesticide PROFILE™ (S)

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

Elrick & Lavidge
One Mack Centre Dr.
Paramus, NJ 07652
Ph. 201-599-0755
Fax 201-599-9896
E-mail: elavidge@atl.mindspring.com
Internet: http://www.elavidge.com
Mark Perline, Account Manager
Studies:
Multi-Mall℠ - Need to do mall research but don't have the time or budget for a full-scale study? Buy research by the question with Elrick and Lavidge's Multi-Mall℠. You'll get the answers you need quickly, affordably, and reliably from geographic locations throughout the United States. Elrick and Lavidge is a full-service marketing research firm dedicated to providing solutions that make a powerful positive impact on your bottom line. (O)
(See advertisement on p. 63)

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

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

Codes
S=SYNDICATED STUDY
O=OMNIBUS STUDY

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
Studies:

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. (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. (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. 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. (S)

(See advertisement on p. 63)

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
Studies:

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. 63)

Codes
S=SYNDICATED STUDY
O=OMNIBUS STUDY

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

HealthFocus, Inc.
P.O. Box 7174
Des Moines, IA 50309-7174
Ph. 515-274-1307
Fax 515-274-3117
Linda Gilbert
Studies:
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
Studies:
Medical Trends in Antibiotics (S)
Medical Trends in Hospital Formulary Committee (S)
Medical Trends in Managed Care Formulary Committee (S)
Pre-Launch Product Awareness (S)
Anesthesia Audit (S)
Hospital DRG Cost and Charge Report (S)

ICR Survey Research Group

ICR Survey Research Group
605 W. State St.
Media, PA 19063-2620
Ph. 610-565-9280
Fax 610-565-2369
Steven C. McFadden, Exec. V.P.
Studies:
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 procedures and quality controls as EXCEL. Combine TeenEXCEL and EXCEL for 12 years+ population. (O)
(See advertisements on pp. 67, 69, 71)

IMR Research
140 Burlington Ave.
Clarendon Hills, IL 60514
Ph. 708-654-1077
George Griffin, President
Studies:
Continuing Canadian Consumer Survey (S)
Continuing Consumer Survey (S)
Power Tool - Home Improvement (S)

Innovative Marketing, Inc.
40 Eglinton Ave. E., Ste. 203
Toronto, ON M4P 3A2
Ph. 416-440-0310
Fax 416-440-1768
E-mail: longhorn@inforamp.net
Don Mayo, Vice President
Studies:
Public Reach - Canada (O)
Urban - Reach - Canada (O)
Promo-Trak Canada (O)
Loyalty-Trak (O)

IntelliQuest, Inc.
1250 Capitol of Texas Hwy.
Bldg. 2, Plaza One
Austin, TX 78746
Ph. 512-329-0808
Fax 512-329-0888
E-mail: info@intelliquest.com
Internet: http://www.intelliquest.com
Bob Bisciglia, Managing Director
Studies:
Computer Industry Media Study (CIMS) (S)
IntelliTrack IQ U.S. Desktop Computer Module (S)
IntelliTrack IQ U.S. Portable Computer Module (S)
IntelliTrack IQ U.S. Home Computer Module (S)
IntelliTrack IQ European Adapter Card Module (S)
IntelliTrack IQ European Hub Module (S)
IntelliTrack IQ European Router Module (S)
IntelliTrack IQ European Home Computer Module (S)
IntelliTrack IQ European Business Desktop Module (S)
IntelliTrack IQ European Business Portable Module (S)
IntelliTrack IQ Japanese Business Portable Module (S)
IntelliTrack IQ Japanese Home Computer Module (S)
IntelliTrack IQ Japanese Business Desktop Module (S)
IntelliTrack IQ U.S. Network Operating System Module (S)
IntelliTrack IQ U.S. Router Module (S)
IntelliTrack IQ U.S. Server Module (S)
IntelliTrack IQ U.S. Monitor Module (S)
IntelliTrack IQ U.S. Adapter Card Module (S)
IntelliTrack IQ U.S. Hub Module (S)
IntelliTrack IQ U.S. Home Printer Module (S)
IntelliTrack IQ U.S. Printer Module (S)
IntelliTrack IQ U.S. Scanner Module (S)
IntelliTrack IQ European Server Module (S)
Worldwide Internet/On-line Tracking Svc. (S)
Worldwide Internet/On-line Tracking Svc.-Corp. Influences (S)
Worldwide Internet/On-line Tracking Svc.-Webmasters (S)

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

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

I.S.I.S. - Integrated Strategic Info. Svcs., Inc.
2516 Hastings Dr.
Belmont, CA 94002
Ph. 415-802-8555
Fax 415-802-9555
E-mail: isisglobal.com
Marc Limacher, Managing Director
Studies:
Telecom 2000 (S)
Wireless 2000 (S)
Program Demand 2000 (S)
Courier, Express & Parcel Svcs. Mkt. in E. & W. Europe (S)
World Report I (20 OECD countries) (S)
World Report II (38 emerging economies) (S)
East-West Goods Transport & Logistics (S)

Leemis Marketing, Inc.
1420 Kensington Rd.
Oak Brook, IL 60521-2164
Ph. 708-571-1200
Fax 708-571-1427
Rich Palesh, Dir. of Mktg.
Studies:
Price-Trak (S)
Coupon-Trak (S)
Ad Activity (S)

Philip Levenstein & Associates
7019 Summer Tree Dr., Ste. 201
Boynton Beach, FL 33437
Ph. 407-731-4694
Fax 407-731-4694
Philip Levenstein, President
Studies:
Vision Study Among Eyecare Practitioners (O)
Eyewear/Eyecare Study Among Consumers (O)

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

Macro International, Inc.
100 Avenue of the Americas, 2nd fl.
New York, NY 10013
Ph. 212-334-4300
Fax 212-334-4223
Sheila Paterson, Pres., Int'l. Mkt. Rsch.
Studies:
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.
Studies:
Row Crop Pesticide Use Study - Annual syndicated study which provides brand share and pesticide tracking information for 15 crops among 30,000 growers in the U.S. (S)

Golf Course Pesticide Use Study - Annual study with 1,500 golf course superintendents determines pesticide use practices and brand share in the U.S. (S)
Specialty Crop Pesticide Use Study - Annual study provides brand and dollar expenditures on 20 vegetable and 18 fruit, nut and vine crops. (S)
Ornamental Pesticide Use Study - Annual study provides brand share and dollar expenditures for pesticides used by the nursery and ornamental industry. (S)
Non-Label/Experimental Compound Study - Annual study providing overview of experimental compounds being tested at university extension research centers. Inclusive of herbicide, insecticide and fungicide compounds. (S)
(See advertisements on pp. 9, 65)

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
Studies:
Second Quarter New Car and Truck Lessee Study - Primary research study of 24,000 new car lessees and 7,000 truck lessees regarding product satisfaction, purchase considerations, 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 and Truck Buyer Study - Primary research study of 17,500 used car buyers and 6,000 used truck buyers regarding product satisfaction, purchase considerations, shopping patterns, trading dynamics, and demographics. Report released in September. (S)
(See advertisements on pp. 9, 65)

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
Studies:
Compass Latin American Syndicated Study (S)
Patient Care: Bridging the Gap with Hispanic Consumers (S)

Market Facts, Inc.
3040 W. Salt Creek Ln.
Arlington Heights, IL 60005
Ph. 708-590-7000
Fax 708-590-7010
Tom Payne, President
Studies:
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.
Studies:
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)
National Flexibus (O)
National Showcase (O)
Personal Accessories + Cosmetics Survey (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 810-737-5326
Jeffrey Leiman, Project Director
Studies:
Market Opinion Reports (O)

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

Codes
S=SYNDICATED STUDY
O=OMNIBUS STUDY

Market Trends
3633 136th Place S.E., Ste. 110
Bellevue, WA 98006
Ph. 206-562-4900
Fax 206-562-4843
E-mail: Jackie@markettrends.com
Jackie Weise, Exec. V.P.
Studies:
Opinion Monitor (O)

MarketResponse International
6442 City West Pkwy., #305
Minneapolis, MN 55344
Ph. 612-943-2230
Fax 612-943-2320
Thomas Andersen, Int'l. Project Dir.
Studies:
Benelux Scope-Holland & Belgium (O)
Telescope Belgium (O)
Telescope Germany (O)
Telescope Holland (O)

Mature Marketing & Research Int'l.
85 E. India Row
Boston, MA 02110
Ph. 617-720-4158
Fax 617-723-1254
Dr. Leslie M. Harris, Principal
Studies:
Fifty Plus (O)

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
Studies:
MDI Hispanic Omnibus (O)

Mediamark Research, Inc.
708 Third Ave., 8th fl.
New York, NY 10017
Ph. 800-310-3305
Fax 212-682-6284
E-mail: info@mediamark.com
Internet: http://www.mediamark.com
Jeffrey T. Cullen, V.P., Acct. Mgmt.
Studies:
Survey of American Consumers (S)
American Teenager Study (S)
Twelve Plus (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
Studies:
OTC-Bus (O)
Profil (S)
Promo-Test (S)
Sales Force Survey (S)

Mendelsohn Media Research
841 Broadway
New York, NY 10003-4704
Ph. 212-677-8100
Fax 212-677-8833
E-mail: 102154.1117@compuserve.com
Mitch Lurn, President
Studies:
Mendelsohn Affluent Survey (S)
Mendelsohn Affluent Travel Survey (S)
Affluent Recontact Survey (S)

MRCA Information Services
20 Sumner St.
Stamford, CT 06901
Ph. 203-324-9600
Fax 203-348-4087
Kenneth Murphy, Sr. Vice President
Studies:
National Consumer Panel (S)
Menu Census (S)
Health-Trak (S)
Video-Trak (S)
Baby-Trak (S)

National Healthcare Research
170 Washington Ave.
Dumont, NJ 07628
Ph. 201-385-3773
Fax 201-385-6842
Arthur Oken, Exec. V.P.
Studies:
Physician Omnibus (O)
Physician Preference Studies (S)

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

A.C. Nielsen
150 Martin Gale Rd.
Schaumburg, IL 60173
Ph. 847-605-5000
Studies:
Various

Northwest Research Group, Inc.
400 108th Ave. N.E., Ste. 200
Bellevue, WA 98004
Ph. 206-635-7481
Fax 206-635-7482
E-mail: ecolvin@nwrg.com
Internet: http://www.nwrg.com
Ellen Colvin, Asct. Project Mgr.
Studies:
Sound Stats (O)

NuStats International
4544 S. Lamar, Bldg. 200
Austin, TX 78745
Ph. 512-892-0002
Fax 512-892-3806
Studies:
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
Studies:
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)
Please visit our web site at http://www.opinionresearch.com
(See advertisement on p. 66)

J.D. Power and Associates
30401 Agoura Rd.
Agoura Hills, CA 91301
Ph. 818-889-6330
Fax 818-889-3719
Studies:
Credit Card Satisfaction Study (S)
Airline Frequent Traveler Satisfaction (S)
Rental Car Customer Satisfaction (S)
Cellular Satisfaction Study (S)
Residential Cable/Satellite TV Satisfaction (S)
Residential Long Distance Satisfaction (S)
Residential Local Telephone Satisfaction (S)
Desktop Computer Satisfaction Study (S)
Notebook Computer Satisfaction (S)
Automotive Studies
- APEAL (S)
- Customer Satisfaction Study (S)
- Dealer Attitude Study (S)
- Dealer Finance Study (S)
- Initial Quality Study (S)
- Medium Duty Truck Satisfaction Study (S)
- Sales Satisfaction Study (S)
- U.K. Customer Satisfaction Study (S)
- Used Vehicle Retail Study (S)
- Vehicle Dependability Study (S)

Angus Reid Group, Inc.
2929 Norwest Center
90 S. Seventh St.
Minneapolis, MN 55402-1618
Ph. 612-904-6970
Fax 612-904-6980
E-mail: ewolfo@angusreid.com
Internet: http://www.angusreid.com
Eileen Wolford, Sr. V.P.
Angus Reid USA Poll (O)
Studies:
Canadian 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
Studies:
Hot Topics (S)

Rockwood Research Corp.
1751 W. County Rd. B
Roseville, MN 55113
Ph. 612-631-1977
Fax 612-631-8198
E-mail: rockwdplus@aol.com
Robert Hill, President
Studies:
Mail Monitor (S)

Roper Starch Worldwide
205 E. 42nd St.
New York, NY 10017
Ph. 914-698-0988
Fax 914-867-7008
Bradford Fay, Vice President
Studies:
Limobus (O)
Roper Youth Report (S)
Roper Green Gauge (S)
Roper Reports (S)
Starch "Plus" Database (S)

Simmons Market Research Bureau, Inc.
309 W. 49th St.
New York, NY 10019
Ph. 212-916-8900
Fax 212-916-8918
Lisa Hidalgo, Marketing Director
Studies:
The Study of Media and Markets (S)
The Hispanic Study (S)
STARS-Teenage Research Study (S)
The Food Service Study (S)
CompPro-Study of Computer Professionals (S)
Top Management Insights (S)

Lee Slurzberg Research, Inc.
379 Windsor Rd.
Englewood, NJ 07631-1424
Ph. 201-567-2265
Fax 201-567-5661
Lee Slurzberg, President
Studies:
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
E-mail: sirearch@aol.com
G. William Greer, Dir. Client Svcs.
Studies:
Baltimore Insight (O)
Hampton/Norfolk/Virginia Beach Insight (O)
Richmond Insight (O)
Washington Insight (O)

Strategic Vision, Inc.
P.O. Box 420429
San Diego, CA 92142
Ph. 619-576-7141
Fax 619-576-9235
E-mail: gorrell@vision-inc.com
Internet: http://www.vision-inc.com
Daniel Gorrell, Vice President
Studies:
Values In America™ (S)
Vehicle Experience™ Study (S)

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

Talmey-Drake Research & Strategy, Inc.
100 Arapahoe, Suite 1
Boulder, CO 80302
Ph. 303-443-5300
Fax 303-447-9386
Paul Talmey, President
Studies:
Colorado Omnipoll (O)

Codes
S=SYNDICATED STUDY
O=OMNIBUS STUDY

Teenage Research Unlimited
707 Skokie Blvd., Ste. 450
Northbrook, IL 60062
Ph. 847-564-3440
Fax 847-564-0834
E-mail: TRUTEEN@aol.com
Marla Grossberg, Dir. Syndicated Rsch.
Studies:
TRU's Teenage Marketing & Lifestyle Study (S)

Thompson Lightstone & Co., Ltd.
350 Bloor St. E., 6th fl.
Toronto, ON M4W 1H4
Ph. 416-922-1140
Fax 416-922-8014
Trina M. Lee, Research Associate
Studies:
Omnitel (O)

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

Travel Industry Assoc. of America
(formerly U.S. Travel Data Center)
1100 New York Ave. N.W., Ste. 450
Washington, DC 20005-3934
Ph. 202-408-1832
Fax 202-408-1255
Suzanne Clark, Ph.D., Sr. V.P. Rsch.
Studies:
National Travel Survey (O)
TravelScope® (S)

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

TVQ - Svcs. of Marketing Evaluations, Inc.
1615 Northern Blvd.
Manhasset, NY 11030
Ph. 516-365-7979
Fax 516-365-9351
Steven Levitt, President
Studies:
Cartoon Q (S)
Performer Q (S)
Sports Q (S)
Product Q (S)

Unidex Research
1827 Powers Ferry Rd.
Atlanta, GA 30067
Ph. 800-528-5342
Fax 404-956-9933
Matthew Ford
Studies:
The Unidex Report (S)
The Unidex Affluent Quarterly (S)
The Unidex Small Bus. & Prof. Quarterly (S)
The Unidex Quarterly (S)

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

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

WestGroup Research
1110 E. Missouri Ave., Ste. 780
Phoenix, AZ 85014
Ph. 800-999-1200
Fax 602-631-6844
E-mail: westgrp01@aol.com
Ted Apostol, President
Studies:
WestTrack (O)

The Youth Research Company
36 Tamarack Ave.
Danbury, CT 06811
Ph. 203-797-0666
Fax 203-748-1735
Karen Forcade, President
Studies:
The Youth Rsch. Omnibus-Children (O)
The Youth Rsch. Omnibus-Teens (O)

Section Two Study Subject Index

Advertising

Advertising Research Corp. (ARC) (S)
Beta Research Corporation (S)
Bruskin/Goldring Research, Inc. (O)
California Retail Survey (O)
Chilton Research Services (O/S)
The Consumer Network, Inc. (S)
Creative Research International, Inc. (S)
Gallup & Robinson (S)
Hospital Research Associates (S)
ICR Survey Research Group (O)
IntelliQuest, Inc. (S)
International Demographics (S)
Interviewing Service of America, Inc. (O)
Leemis Marketing, Inc. (S)
Macro International, Inc. (O)
Market Trends (O)
Mediamark Research, Inc. (S)
Medical Data Management (O/S)
Mendelsohn Media Research (S)
NFO Research (S)
Opinion Research Corporation (O)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (O)
Rockwood Research Corp. (S)
Roper Starch Worldwide (S)
Simmons Market Research Bureau (S)
TVQ-Svcs. of Marketing Evaluations (S)
Video Storyboard Tests (S)
The Youth Research Company (O)

African-Americans

Data Insight, Inc. (S)
Interviewing Service of America, Inc. (O)
Market Segment Rsch. & Cnsltg., Inc. (S)
Angus Reid Group, Inc. (O)
Travel Industry Assoc. of America (O/S)

Agricultural

Doane Marketing Research, Inc. (S)
MacKay & Company (S)
Maritz Marketing Research (S)
Angus Reid Group, Inc. (O)
Rockwood Research Corp. (S)

Airlines

Creative Research International, Inc. (S)
Interviewing Service of America, Inc. (O)
Mendelsohn Media Research (S)
MRCA Information Services (S)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (O)
Strategic Vision, Inc. (S)

Asian-Americans

Data Insight, Inc. (S)
Market Segment Rsch. & Cnsltg., Inc. (S)
Travel Industry Assoc. of America (O/S)

Automotive

Bruskin/Goldring Research, Inc. (O)
Chilton Research Services (O/S)
Creative Research International, Inc. (S)
Interviewing Service of America, Inc. (O)
MacKay & Company (S)
Macro International, Inc. (O)
Market Opinion Research (O)
Mendelsohn Media Research (S)
Opinion Research Corporation (O)
J.D. Power and Associates (S)
Strategic Vision, Inc. (S)

Business-To-Business

California Retail Survey (O)
Behavior Research Center (O/S)
Beta Research Corporation (S)
Environmental Research Associates
Erdos & Morgan (S)
Find/SVP (S)
Find/SVP Published Products, Inc. (S)
IntelliQuest, Inc. (S)
Macro International, Inc. (O)
Market Facts of Canada (S)
Mediamark Research, Inc. (S)
Mendelsohn Media Research (S)
Simmons Market Research Bureau (S)
WestGroup Research (O)

Cable

ICR Survey Research Group (O)
Interviewing Service of America, Inc. (O)
I.S.I.S. - Integrated Strategic Info. Svcs. (S)
Mediamark Research, Inc. (S)
MRCA Information Services (S)
J.D. Power and Associates (S)

Carpeting

Bruskin/Goldring Research, Inc. (O)
Creative Research International, Inc. (S)
Interviewing Service of America, Inc. (O)

Chemical Industry

Cambridge Reports/Research International (S)
Doane Marketing Research, Inc. (S)
Market Facts of Canada (S)

Children

Bruskin/Goldring Research, Inc. (O)
Children's Market Research (S)
Data Insight, Inc. (S)
ICR Survey Research Group (O)
Interviewing Service of America, Inc. (O)
Macro International, Inc. (O)
Market Facts, Inc. (O)
MRCA Information Services (S)
Opinion Research Corporation (O)
Roper Starch Worldwide (S)
TVQ-Svcs. of Marketing Evaluations (S)
The Youth Research Company (O)

College Students

Creative Research International, Inc. (S)
Data Insight, Inc. (S)
Interviewing Service of America, Inc. (O)
Macro International, Inc. (O)
Roper Starch Worldwide (S)
The Wagner Group (O)
The Youth Research Company (O)

Computers

Creative Research International, Inc. (S)
Erdos & Morgan (S)
Find/SVP (S)
IntelliQuest, Inc. (S)
Interviewing Service of America, Inc. (O)
Mendelsohn Media Research (S)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (O)
TrenData, Inc. (S)

Consumer-Canada

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

Consumer-Europe

IntelliQuest, Inc. (S)
Macro International, Inc. (O)
MarketResponse International (O)
Medical Data Management (O/S)
J.D. Power and Associates (S)
Roper Starch Worldwide (S)

Consumer-Local

Behavior Research Center-AZ (O/S)
Cambridge Reports/Research Int'l.-MA (S)
Dittman Research-AK (O/S)
Environmental Research Associates-NJ (S)
IntelliQuest, Inc.-TX (S)
Market Trends-WA (O)
Mediamark Research, Inc. (S)
Mendelsohn Media Research-NY (S)
Northwest Research Group-WA (O)
Lee Slurzberg Research, Inc.-NY(O)
Southeastern Institute of Rsch.-DC (O)
Southeastern Institute of Rsch.-MD (O)
Southeastern Institute of Rsch.-VA (O)
Talmey-Drake Research-CO (O)
WestGroup Research-AZ (O)

Consumer-U.S.

Audits & Surveys Worldwide (O/S)
Beta Research Corporation (S)
Irwin Broh & Associates, Inc. (O/S)
Bruskin/Goldring Research, Inc. (O)
Cambridge Reports/Research International (O/S)
Chilton Research Services (O/S)
Custom Research, Inc. (O)
Data Insight, Inc. (S)
Elrick & Lavidge (O)
Find/SVP (S)
Find/SVP Published Products, Inc. (S)
ICR Survey Research Group (O)
IMR Research (S)
IntelliQuest, Inc. (S)
Interviewing Service of America, Inc. (O)
Leemis Marketing, Inc. (S)
Philip Levenstein & Associates (O)
Maritz Marketing Research (S)
Market Facts, Inc. (O)
Market Segment Rsch. & Cnsltg., Inc. (S)
Mediamark Research, Inc. (S)
Mendelsohn Media Research (S)
MRCA Information Services (S)
NFO Research (O)
A.C. Nielsen (S)
Opinion Research Corporation (O)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (O)
Roper Starch Worldwide (O/S)
Simmons Market Research Bureau (S)
Strategic Vision, Inc. (S)
Total Research Corp. (S)
Travel Industry Assoc. of America (O/S)
TrenData Inc. (S)

Credit Cards

BAI (Behavioral Analysis Inc.) (S)
J.D. Power and Associates (S)

Direct Mail

BAI (Behavioral Analysis Inc.) (S)
Market Facts of Canada (O/S)
Angus Reid Group, Inc. (O)
Rockwood Research Corp. (S)

Energy - Petrochemical

Cambridge Reports/Research International (S)

Entertainment

Audits & Surveys Worldwide (O/S)
Bruskin/Goldring Research, Inc. (O)
Chilton Research Services (O/S)
Creative Research International, Inc. (S)
ICR Survey Research Group (O)
Interviewing Service of America, Inc. (O)
I.S.I.S. - Integrated Strategic Info. Svcs. (S)
Mendelsohn Media Research (S)
MRCA Information Services (S)
Opinion Research Corporation (O)
Angus Reid Group, Inc. (O)
Strategic Vision, Inc. (S)
TVQ-Svcs. of Marketing Evaluations (S)

Environmental

Audits & Surveys Worldwide (O/S)
Bruskin/Goldring Research, Inc. (O)
Cambridge Reports/Research International (S)
Environmental Research Associates (S)
Interviewing Service of America, Inc. (O)
Opinion Research Corporation (O)
Angus Reid Group, Inc. (O)
Roper Starch Worldwide (S)

Eyecare/Eyewear

Philip Levenstein & Associates (O)

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)

Codes
S=SYNDICATED STUDY
O=OMNIBUS STUDY

Financial

BAI (Behavioral Analysis Inc.) (S)
Bruskin/Goldring Research, Inc. (O)
Canadian Facts (S)
Chilton Research Services (O/S)
Creative Research International, Inc. (S)
Erdos & Morgan (S)
Interviewing Service of America, Inc. (O)
Macro International, Inc. (O)
Market Facts of Canada (O/S)
Mendelsohn Media Research (S)
MRCA Information Services (S)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (O)
Unidex Research (S)
WestGroup Research (O)

Food/Beverage

Audits & Surveys Worldwide (O/S)
Bruskin/Goldring Research, Inc. (O)
California Retail Survey (O)
Children's Market Research (S)
Chilton Research Services (O/S)
The Consumer Network, Inc. (S)
Creative Research International, Inc. (S)
Custom Research, Inc. (O)
Danis Research (S)
Data Insight, Inc. (S)
Ehrhart-Babic Ascts. (S)
Find/SVP Published Products, Inc. (S)
HealthFocus, Inc. (S)
ICR Survey Research Group (O)
Interviewing Service of America, Inc. (O)
Macro International, Inc. (O)
Market Facts of Canada (O/S)
Mendelsohn Media Research (S)
MRCA Information Services (S)
Opinion Research Corporation (O)
Angus Reid Group, Inc. (O)
Restaurant Research Associates (S)
Strategic Vision, Inc. (S)
The Youth Research Company (O)

Gaming

Creative Research International, Inc. (S)
MRCA Information Services (S)
Angus Reid Group, Inc. (O)
Travel Industry Assoc. of America (O/S)

Health Care/Medical

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

Hispanic

Behavior Research Center (O/S)
Market Development, Inc. (MDI) (S)
Market Segment Rsch. & Cnsltg., Inc. (S)
MDI Interviewing Services (O)
NuStats International (S)
Angus Reid Group, Inc. (O)
Simmons Market Research Bureau (S)
Lee Slurzberg Research, Inc. (O)
Strategy Research Corporation (O/S)
Travel Industry Assoc. of America (O/S)

Household Appliances

Market Facts of Canada (O/S)

Insurance

Bruskin/Goldring Research, Inc. (O)
Creative Research International, Inc. (S)
Erdos & Morgan (S)
ICR Survey Research Group (O)
Interviewing Service of America, Inc. (O)
Market Facts of Canada (S)
Mendelsohn Media Research (S)
Strategic Vision (S)

International

Behavior Research Center (O/S)
IntelliQuest, Inc. (S)
I.S.I.S. - Integrated Strategic Info. Svcs. (S)
Macro International, Inc. (O)
Market Development, Inc. (MDI) (S)
Medical Data Management (O/S)
Angus Reid Group, Inc. (O)
Roper Starch Worldwide (S)

Internet

Find/SVP (S)
IntelliQuest, Inc. (S)

Latin America

Market Development, Inc. (MDI) (S)

Lodging Industry

Bruskin/Goldring Research, Inc. (O)
Interviewing Service of America, Inc. (O)
Mendelsohn Media Research (S)
MRCA Information Services (S)
Opinion Research Corporation (O)
Angus Reid Group, Inc. (O)
The Youth Research Company (O)

Management

Hospital Research Associates (S)
Mendelsohn Media Research (S)
Simmons Market Research Bureau (S)

Manufacturers

Leemis Marketing, Inc. (S)

Media

Advertising Research Corp. (S)
Audits & Surveys Worldwide (O/S)
Bruskin/Goldring Research, Inc. (O)
Chilton Research Services (S)
Creative Research International, Inc. (S)
Find/SVP (S)
Erdos & Morgan (S)
ICR Survey Research Group (O)
IntelliQuest, Inc. (S)
I.S.I.S. - Integrated Strategic Info. Svcs. (S)
Hospital Research Associates (S)
International Demographics (S)
Interviewing Service of America, Inc. (O)
Macro International, Inc. (O)
Mediamark Research, Inc. (S)
Mendelsohn Media Research (S)
Opinion Research Corporation (O)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (O)
Roper Starch Worldwide (S)
Simmons Market Research Bureau (S)
Strategic Vision, Inc. (S)
Strategy Research Corporation (S)
WestGroup Research (O)

Mothers

Bruskin/Goldring Research, Inc. (O)
Children's Market Research
Interviewing Service of America, Inc. (O)
Macro International, Inc. (O)
Market Facts, Inc. (O)
Market Facts of Canada (O)
MRCA Information Services (S)
The Youth Research Company (O)

Office Products

California Retail Survey (O)
Erdos & Morgan (S)
IMR Research (S)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (O)

Pet Foods

Creative Research International, Inc. (S)
Interviewing Service of America, Inc. (O)
MRCA Information Services (S)

Pharmaceutical

Creative Research International, Inc. (S)
Doane Marketing Research, Inc. (S)
Interviewing Service of America, Inc. (O)
Medical Data Management (O/S)
MRCA Information Services (S)
National Healthcare Research (O/S)

Political Affairs

Cambridge Reports/Research International (S)
Creative Research International, Inc. (S)
Erdos & Morgan (S)
Interviewing Service of America, Inc. (O)

I.S.I.S. - Integrated Strategic Info. Svcs. (S)

Promotions

Innovative Marketing, Inc. (O)
Leemis Marketing, Inc. (S)
TVQ-Svcs. of Marketing Evaluations (S)

Public Policy Issues

Cambridge Reports/Research International (S)
Creative Research International, Inc. (S)
Erdos & Morgan (S)
Interviewing Service of America, Inc. (O)
Angus Reid Group, Inc. (O)
Strategic Vision, Inc. (S)

Restaurants/Fast Foods

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

Retail

Bruskin/Goldring Research, Inc. (O)
California Retail Survey (O)
Chilton Research Services (S)
The Consumer Network, Inc. (S)
Creative Research International, Inc. (S)
Custom Research, Inc. (O)
Ehrhart-Babic Ascts. (S)
Interviewing Service of America, Inc. (O)
Macro International, Inc. (O)
Mendelsohn Media Research (S)
MRCA Information Services (S)
A.C. Nielsen (S)
Opinion Research Corporation (O)
Strategic Vision, Inc. (S)

Seniors/Mature/Elderly

Creative Research International, Inc. (S)
Interviewing Service of America, Inc. (O)
Mature Marketing & Research Int'l. (O)
Travel Industry Assoc. of America (O/S)

Shopping Malls

Market Facts of Canada (O/S)

Small/Home Businesses

Creative Research International, Inc. (S)
IntelliQuest, Inc. (S)
Unidex Research (S)

Sports

American Sports Data, Inc.
Irwin Broh & Associates, Inc. (S)
Bruskin/Goldring Research, Inc. (O)
Children's Market Research (S)
Chilton Research Services (S)
Creative Research International, Inc. (S)
Interviewing Service of America, Inc. (O)
Market Facts of Canada (O/S)
Mendelsohn Media Research (S)
Opinion Research Corporation (O)
Strategic Vision, Inc. (S)
TVQ-Svcs. of Marketing Evaluations (S)

Technology

Creative Research International, Inc. (S)
Erdos & Morgan (S)
IntelliQuest, Inc. (S)
Interviewing Service of America, Inc. (O)
Mendelsohn Media Research (S)
Angus Reid Group, Inc. (O)

Teens

Bruskin/Goldring Research, Inc. (O)
Creative Research International, Inc. (S)
ICR Survey Research Group (O)
Macro International, Inc. (O)
Market Facts, Inc. (O)
Mediamark Research, Inc. (S)
Opinion Research Corporation (O)
Roper Starch Worldwide (S)
Teenage Research Unlimited (S)
The Youth Research Company (O)

Telecommunications

Creative Research International, Inc. (S)
Erdos & Morgan (S)
Find/SVP (S)
ICR Survey Research Group (O)
Interviewing Service of America, Inc. (O)
I.S.I.S. - Integrated Strategic Info. Svcs. (S)
Mendelsohn Media Research (S)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (O)

Textiles

Bruskin/Goldring Research, Inc. (O)
Creative Research International, Inc. (S)
Interviewing Service of America, Inc. (O)
MRCA Information Services (S)
Opinion Research Corporation (O)

Transportation

Audits & Surveys Worldwide (O/S)
Interviewing Service of America, Inc. (O)
I.S.I.S. - Integrated Strategic Info. Svcs. (S)
Mendelsohn Media Research (S)
Strategic Vision, Inc. (S)

Travel

Bruskin/Goldring Research, Inc. (O)
Creative Research International, Inc. (S)
Interviewing Service of America, Inc. (O)
Mendelsohn Media Research (S)
MRCA Information Services (S)
Opinion Research Corporation (O)
J.D. Power and Associates (S)
Angus Reid Group, Inc. (O)
Travel Industry Assoc. of America (O/S)

Trucking

I.S.I.S. - Integrated Strategic Info. Svcs. (S)
MacKay & Company (S)
Maritz Marketing Research (S)
J.D. Power and Associates (S)

Utilities

WestGroup Research (O)

Veterinary Medicine

Doane Marketing Research, Inc. (S)

Listing Additions

Please add the following firms to the 1996 Telephone Interviewing Facilities Directory:

Higginbotham Associates, Inc.
8010 E. McDowell, Ste. 208
Scottsdale, AZ, 85257
Ph. 602-946-7535
Fax 602-946-1170
Roger Bedessie, Gen. Mgr.
80-80-80-30

The Gallup Organization - Irvine
18400 Von Karman Ave., Ste. 720
Irvine, CA 92715
Ph. 714-474-7900
Fax 714-474-5963
132-132-132-132

Meta Information Services
9806 Old Winery Pl.
Sacramento, CA 95827
Ph. 916-368-9474
Fax 916-368-0705
Patricia Jenkinson
40-40-40-0

The Gallup Organization - Atlanta Downtown
303 Peachtree St.
One Peachtree Ctr., 27th fl.
Atlanta, GA 30308
Ph. 404-525-9930
Fax 404-525-8645
80-80-80-80

Information Specialists Group, Inc.
9905 Hamilton Rd.
Eden Prairie, MN 55344
Ph. 612-941-1600
Fax 612-942-0747
Bob McGarry, Jr., President
16-16-16-16

Please add the following firm to the 1996 Focus Group Facility Directory:

Montreal Focus
4120 Ste. Catherine West, 2nd flr.
Westmount, PQ H3Z 1P4
Ph. 514-937-4515
Fax 514-937-7561
Michelle Massie
1,3,6,7B,8,9
Rm. 1) 23x18 Obs. Rm. Seats 14

Notices

Upper Midwest MRA to Meet in July

The Minnesota/Upper Midwest Chapter of the MRA will hold a summer social on Tuesday, July 23 from 5:30 p.m. to 7:30 p.m. at the corporate headquarters of SuperValu at 11840 Valleyview Rd. in Eden Prairie, Minn. The cost is $12 in advance, $15 at the door. Cash or check only; no credit cards please. For reservations, call Terri at 612-339-0085 or fax to 612-339-1788. Reservation/cancellation deadline is 4:00 p.m. on July 18. No-shows will be billed.

Corrections

In the Compass Marketing Research display ad on p. 69 of the May *QMRR*, the name "Joe Farris" should be spelled "Joe Ferris."

The URL for Chilton Research Services that appeared in list of research-related Web sites on p. 30 of the May *QMRR* is incorrect. It should read: http://www.chiltonco.com/.

Sales Offices

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

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

Classified Ads

MARKET RESEARCH ANALYST

Research and consulting firm in Miami seeks an analyst with 5-7 years research firm (preferably supplier side) experience. Position includes client service, study design, project management and analysis/report writing for custom research projects. Qualified candidates should send/fax background and salary requirements in complete confidence to:

Sylvia Nieto-Vidal
Vice President
Market Segment Research & Consulting
1320 S. Dixie Highway, Suite 120
Coral Gables, FL 33134
Fax: (305) 669-3901

Trade Talk

continued from p. 74

your favorite rag just about anywhere but it's pretty tough to fold one or put it in your back pocket.

Plus, you'll never go broke trying to figure out the point of that essay in *Harper's* because "traditional" newspapers and magazines don't charge you for the time you spend with them, as many on-line information providers do.

And while it's fun to pull up your local daily on the computer it just isn't the same as spreading it out on the kitchen table while you're eating breakfast. To paraphrase Robert Duvall's character in "Apocalypse Now," I love the smell of newsprint in the morning. Cyberspace may have a lot of things going for it but it doesn't have a scent — though I'm sure someone's working on that.

Click and wait

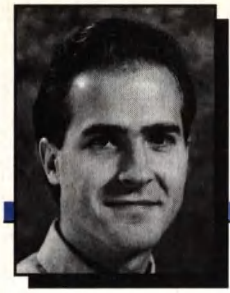
Despite all the hoopla about the Internet, I really haven't spent much time on it. My home computer is an aging Mac, woefully underequipped for the rigors of on-line adventuring. Plus I'm an America Online subscriber — another strike against me. So whenever I get on the Net it's click and wait . . . and wait. Accessing the Net is easier here at work, where our various Macs and PCs are all fairly powerful. (Of course, I limit my Web crawling to strictly work-related information gathering.)

As far as I'm concerned, the real value of all this on-line business is that it allows anyone with a computer and a modem to search through vast amounts of information. It also lets people in distant locations communicate easily and cheaply.

For example, a few months back I was hungry for information about one of my favorite bands, The Blue Nile, a reclusive bunch of Scots who tend to take the better part of a decade to put out each new record. A little detective work on the Web (while at home, mind you) uncovered a site devoted to the band, where I learned that a new record was imminent. I also subscribed to an E-mail list through which fanatics like me can exchange news about the band and trade near-confessional anecdotes about why their music means so much to us. I may never meet Phil from Australia, a fellow Blue Nile acolyte, but I can share a bond with him, thanks to my computer. That's pretty cool.

In our near-decade of publishing QMRR, we've tried to foster a bond with you, our readers, by giving you helpful information in a manner that meets your needs. The Web site is an extension of that aim. Please let us know how we can make it better for you. Call us at 612-854-5101, fax us at 612-854-8191 or E-mail us at quirk19@skypoint.com. ❑

Index of Advertisers



Trade Talk

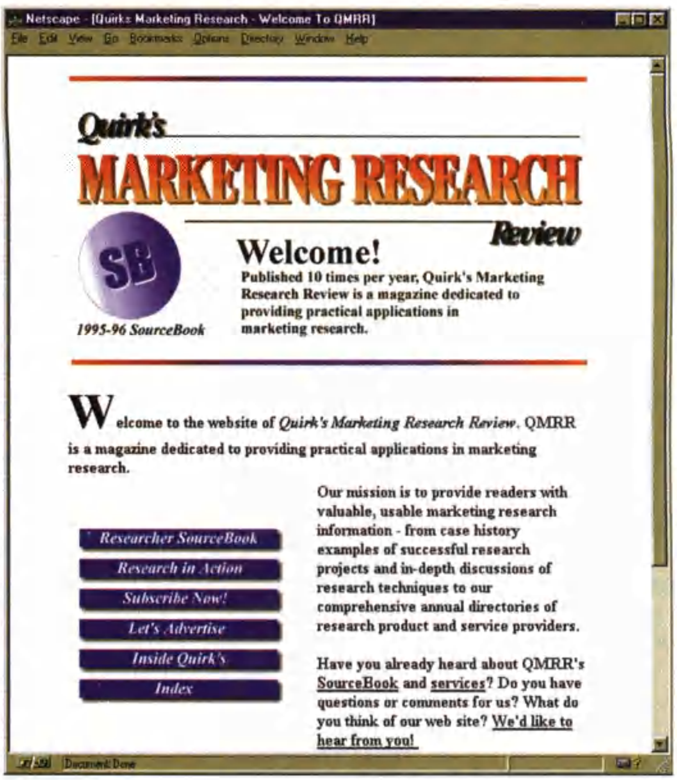
By Joseph Rydholm/QMRR editor

We have lift-off:

QMRR launches into cyberspace

After months of planning, arguing and tweaking, we're finally on the Net! It took longer than any of us planned, I think, but the QMRR Web site is now ready for your perusal at http://www.quirks.com.

Kudos to all who worked on developing the site, especially QMRR's Webmeister Dan Quirk, who oversaw the project from start to finish. From creating the early incarnations of the Web pages to finding a service provider and fine-tuning the search engine, Dan experienced the unique joys of the design-by-committee approach so beloved by his co-workers.



Free searches

The heart of the Web site is a searchable database that lets users locate a research provider in seconds using a variety of criteria — free of charge. There's no software to buy, no subscription fees to pay.

In essence, we took the text of the Researcher SourceBook, our annual directory of research firms, and put it on the Web. So, for example, if you're looking for a company in Chicago that does advertising research, simply select those criteria and let the search engine do the rest.

The Web site currently contains information from the 1995-96 SourceBook. We plan to replace it with the '96-'97 edition this fall. As with our printed directories, our goal is to make the on-line edition of the SourceBook as complete as possible. We give free basic listings to every research company we can find, so your choices aren't limited to firms that have paid fees to be listed.

Visit our site and you can also find out how to submit an article, send us some E-mail, or check out our editorial calendar. In the future we plan to add an employment listing, a research bulletin board and other features. We'd love to hear your suggestions.

Your source

Why did we create the Web site? It's part of our commitment to be your source for marketing research information. We don't envision the electronic edition replacing the printed magazine; rather, we view the two entities as complementary.

I may be in the minority but I just don't see the computer revolution rendering print publications obsolete. In the first place, there's still something special about holding a magazine or newspaper in your hand, carrying it with you to that comfy chair or other favorite sitting place. True, with the right modem a laptop lets you read an on-line edition of

continued on p. 73