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MARKETING RESEARCH

Review

Scan data adds up
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for Ocean Spray



Syndicated/omnibus
special emphasis issue

August/September, 1988



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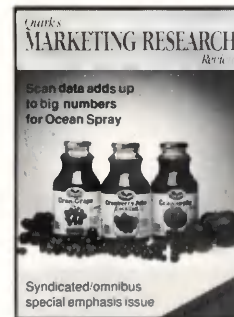
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Cover

Ocean Spray gets measurements of volume, market share, price and promotional conditions on its products with syndicated research. Read more about its use of this research in this Syndicated/Omnibus Special Emphasis Issue.

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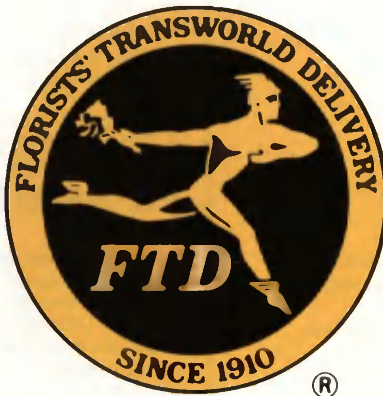
Statistical package helps marketers choose forecasting models

Marketing researchers and marketers who are responsible for forecasting data are frequently faced with a difficult decision: finding models that will produce the best forecasts. With Forecast Pro, a statistical forecasting package designed for PCs, such a decision is no longer difficult.

A product of Business Forecast Systems, Inc., Belmont, Mass., Forecast Pro is an advanced forecasting package that allows the business user to prepare forecasts of time series data quickly, easily and accurately. It includes three basic methodologies - Exponential Smoothing, Box Jenkins and Dynamic Regression - that will solve nearly any business forecasting problem.

In Forecast Pro, form follows function. Its modular form - data handling, model building, diagnostics, forecasting and utilities - follows the function of the forecasting process. The expert system framework guides the user to the optimal technique and model for one's particular forecasting application.

The program can be used in two different modes: interactive and batch. In the interactive mode, the user constructs a forecasting model interactively under the guidance of a built-in expert system or the user's own. The batch mode lets the user develop a command file based on interactive use of Forecast Pro. Forecast Pro can then play back the user's commands without the need for human



Owens-Corning Fiberglas is a manufacturer of glass fiber materials and a major producer of polyester resins and high-performance composite materials. With these materials, Owens-Corning serves industries ranging from construction, automotive and recreation to marine, energy, aerospace and defense. Many of its products and materials are under the trademark Fiberglas. The company operates principally in three domestic and one international segment.

Florists' Transworld Delivery Association (FTD), Southfield, Mich., was founded in 1910. The 24,000 member FTD has 15 retail florist shops in North America selling flowers, gifts, candy and fruit by wire. FTD conducts specialized advertising, education and research programs, sponsors competitions, bestows awards, compiles statistics, conducts business and floral design workshops, special interest seminars and a zip-code marketing service.

interaction.

Owens Corning

Forecast Pro is widely used at Owens Corning Fiberglas, says Bruce Harned, market development manager in the Toledo, Ohio, company's roofing products division.

According to Harned, the roofing products division has two primary needs for Forecast Pro: to find out what the general size of the market will be for roof area on an annual basis in the residential roof and

flat roofing markets. Residential roofs use shingles, and flat roofing, while found in residential roofing, is primarily found in the commercial market. "We want to find out what the total opportunity is to sell in these two markets on a national, regional, and district level basis."

Forecasting is also performed

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Scan data adds up to big

Ocean Spray Cranberries, Inc., Plymouth, Mass., is a marketing cooperative of 800 cranberry and citrus growers throughout the U.S. and Canada. Ocean Spray posted sales of \$735 million in fiscal 1987, the 12th consecutive year in which the cooperative achieved record sales. Ocean Spray is a member of the Fortune 500, ranking 385 in the publication's latest poll.

Not long ago, persons in the consumer packaged goods industry may have been happy with marketing tools that answered the question, "How's business?"

Since the advent of supermarket scanning data, these industry officials can now go beyond that and find out the answer to

the question, "What's driving my business?"

Having access to this information has made many of these people happy and Information Resources, Inc., an equally proud supplier of such data.

The Chicago-based IRI has provided a

scanning data service since 1986 when it launched InfoScan™. InfoScan provides

"The key to IRI's system is its ability to identify and measure the conditions and marketing mix at key stores. The store level data allows for greater sensitivity in modeling applications."

John Tarsa

insight into a brand's performance and the consumer behavior behind that performance. It does this by tracking consumer



numbers

purchasing for every UPC-coded product sold in supermarkets across the country,

"Every week, several million numbers are new to the database. We must be able to take that data and turn it into information that the brand manager can use. What we're dealing with now is translating those numbers into information."

John Tarsa

together with all the promotional activities - price reductions, retailer newspaper

ads, couponing and in-store displays - that motivate purchasing. As a result, InfoScan provides its clients' sales and marketing departments with scanner-based weekly measurements of volume, market share, price and promotional conditions, item-by-item, week-by-week and city-by-city. Approximately 2,400 stores in 76 markets are part of IRI's sample. In addition, InfoScan integrates this scanner database with the individual purchases of more than 70,000 representative households. Using UPC scanners, everything these consumers buy is recorded.

The representative households are what make up IRI's consumer panel. The panelists can shop at any store and merely present an ID card to the cashier upon check-out. All of their purchases, even in drug stores, are electronically recorded and individually tracked. The panel reflects total market behavior and provides

for the analysis of trial and repeat, buying rate, loyalty, purchase cycles, brand shifting, demographics and other issues con-

"The challenge of being able to translate numbers into information requires people who have a blend of skills: marketing research, marketing and systems knowledge."

John Tarsa

cerning purchasers' behavior.

Ocean Spray

Ocean Spray Cranberries, Inc., Ply-

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IRI serves packaged goods marketers

Information Resources, Inc., (IRI), Chicago, is a multifaceted research company which has been a leader in scanner data as a way of measuring sales of consumer packaged goods. Using proprietary technologies which are part of an integrated system, IRI offers a wide range of services for packaged goods marketers.

InfoScan

The best-known product, InfoScan™, is a single source database providing sales information on all UPC-coded items from 2,400 grocery stores within 76 regional markets in the U.S. It was introduced in January, 1987. The minimum annual volume for a participating store is \$2 million. This category of stores represents 80% of total U.S. grocery sales.

The basic information, including data on weekly market share, merchandising and pricing is provided for every four-week period. The data is available approximately four weeks after the end of the period.

InfoScan also utilizes a panel of 70,000 households whose purchasing patterns can be tracked at specific stores to provide special analysis for systems users.

PromotionScan

Linked to InfoScan is PromotionScan™, a syndicated service whereby marketers can measure the effect of promotional activities, such as newspaper advertisements, in-store displays, price reductions and coupons. The service enables manufacturers to determine the incremental volume generated by each pro-

motional activity based on actual purchases by consumers.

IRI was built around the BehaviorScan® system beginning in 1980. BehaviorScan involves the use of specialty wired cable television homes to provide an electronic test marketing system. It is a "real world laboratory" to measure the effects of advertising and promotion on sales for both new and existing products.

Other areas of IRI's involvement in marketing research include ABA Groups, Inc., a marketer of software systems and database services aimed at retailers and manufacturer sales forces, and the Data Group, Inc., a full-service market survey firm with strong capabilities in telephone interviewing.

Ocean Spray

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mouth, Mass., has been an IRI and A.C. Nielsen Co. scanning data user for several years. John Tarsa, manager, marketing research at Ocean Spray, says the key to IRI's system is its "ability to identify and measure the conditions and marketing mix at key stores. The store level data allows

for greater sensitivity in modeling applications," says Tarsa. The company gets weekly scanning data from both IRI and Nielsen. The information is on data tapes which is loaded onto Ocean Spray's main-frame computer. "This computer is devoted entirely to this type of data," says Tarsa.

Ocean Spray also makes use of IRI's

PromotionScan™. This syndicated service allows the company to clearly measure the sales increase generated by each of its promotional events, such as newspaper ads, in-store displays, price reductions and coupon distributions.

PromotionScan capitalizes on a major trend in the consumer packaged goods industry: a shift occurring in promotion

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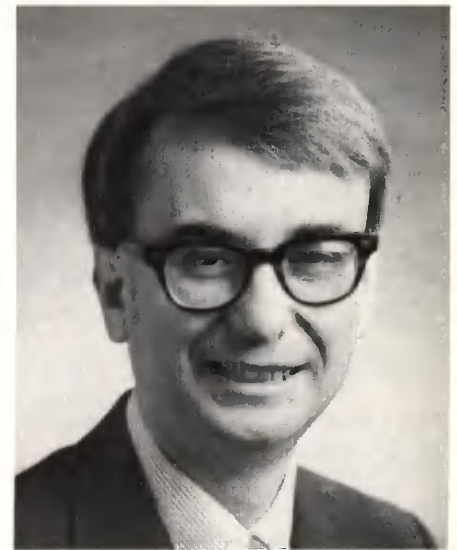
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John Tarsa is manager, marketing research, at Ocean Spray Cranberries, Inc., Plymouth, Mass. Tarsa began his career at Ocean Spray in 1976 as consumer research analyst. Previous experience includes work as project director at Foote Cone & Belding Advertising, Inc. Tarsa holds an M.A. degree in mathematics from the University of Michigan and a B.A. degree in mathematics from American International College. Tarsa is a member of the American Marketing Association, the Association for Consumer Research, the Market Research Society and the Advertising Research Foundation.

vs. advertising spending. The consumer packaged goods industry spends billions a year on promotion. Consider couponing, for example. Almost 200 billion coupons were distributed in 1986, a doubling over the level in 1981. With an average coupon

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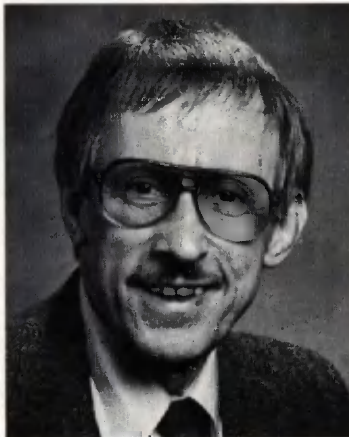
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Problems inherent in using a test market

By Robert L. Zimmermann

Robert L. Zimmermann is senior research manager for design and analysis at Maritz Marketing Research, Inc., Minneapolis division, a company he has been with for four years. He is currently a clinical assistant professor of psychiatry at the University of Minnesota in which he is a statistical consultant to grants in the areas of addiction and eating disorders. Zimmermann has taught at the University of Winnipeg and held research positions at George Washington University and the University of Minnesota. He holds an M.A. and Ph.D. in psychology from the University of Minnesota and has published over 60 articles in psychiatric, educational and marketing research.



unique that a market cannot be said to exist, then a test market would involve establishing such a market on a limited basis.

I am contrasting the use of test markets with a range of procedures which I call analytical research tools. These include perceptual mapping, conjoint analysis, segmentation studies, concept tests and in-home trials. The methods tend to be more complex in research design and involve more complex data analysis procedures. The defining characteristic as the terms are used here, however, is that analytical research tools use hypothetical models to gain insight into real market forces whereas test markets take place within a slice of the real market. Many, possibly all, substantive issues can be addressed with both approaches, e.g., price sensitivity can be studied

This article focuses on some of the problems inherent in using a test market to assess the impact of some change in marketing. By test market I refer to a procedure whereby some subset of the real market is altered to obtain an understanding of the impact on volume, market share or profit. In the case of a product so new and

using conjoint analysis or real market manipulations.

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Syndicated study tracks trends in

Unless your office furniture doesn't "fit," isn't functional, or causes you problems like back pain, it's probably something you don't think much about. It may, however, be something you have become attached to without really realizing. Certain pieces of furniture have become "your" space, "your" domain from which you can work most productively and from where you may even feel a sense of comfort.

How useful, functional and how well you like that furniture is something persons in the office furniture industry do think and care a lot about. With so many well-known and well-respected companies in this industry, consumers are besieged with more than enough choices and options. It's furniture manufacturers' challenge, then, to monitor and stay ahead of this growing and changing industry.

This high level of industry activity has been leashed by Kennedy Research, Inc., through Office Trends, a quarterly industry tracking study. For manufacturers of office seating, systems, components, telecommunications equipment supplies and the industry trade association, KRI has collected insights and information on the office industry from designers, dealers and facilities managers. Through this panel of key industry experts drawn primarily from top dealers, contractors, general managers, design firms, architects and Fortune 500 companies, KRI provides up-to-date, relevant information and a nationwide perspective and view of the office environment, its equipment and furnishings.

Each study measures sales expecta-

tions, tracks trends in product, pricing and promotion and analyzes changes affecting

"We need more specific information about our industry but it's often too cost-prohibitive and time-consuming to research on our own. It's the only tool that reaches a cross-section of industry people."

Ken Malik

office environment, equipment and furnishings. Specific product areas are explored each quarter to measure awareness and image perceptions of major manufacturers.

Studies have involved subjects such as: new product introductions, demand for full-height movable walls, use of file cabinets in open offices, evaluation of furniture systems, design concept evaluations, compatibility of office systems with electronic equipment, analysis of office telecommunications needs, installations of furniture, fixtures and equipment in new buildings, advertising awareness studies and brand image evaluations.

"Office trends helps manufacturers, designers and others keep a finger on the pulse of the office furniture market," says Richard Kennedy, president of KRI. "We're also able to chart trends and provide insights no other source can match."

Study objectives

Specifically, the objectives of the study are as follows:

1. To measure sales expectations for each quarter;
2. To track average delivery times;
3. To determine awareness of special promotional activities or programs;
4. To track trends in office furniture sales in these areas: product mix (wood vs. metal, budget vs. high quality, systems/computer support/traditional furniture and case goods), pricing, use of open vs. private offices and new vs. renovated space; and
5. To measure awareness and image perceptions of major office furniture manufacturers. To obtain the needed information, KRI uses a panel of key industry experts who participate in an ongoing basis to ensure continuity of results. The panel is structured in this way:
 1. 100 dealers from companies such as Steelcase, Herman Miller, Haworth, Allsteel, Knoll, Kimball, Westinghouse, GF, and Hon.
 2. 100 major interior designers and
 3. 100 facilities managers from Fortune

"The information helps our sales and marketing people better understand the competitive environment."

Rick Arnold

500 industrial and service firms.

The dealers and interior designers are drawn from six regions to obtain a geographically balanced sample:

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office furniture



Kimball International, Inc., Jasper, Ind., is a vertically integrated company comprising 50 service and manufacturing divisions, among which principal companies are: Kimball Office Furniture Co., Artec, National Office Furniture Co., Kimball Healthcare Co., Kimball Hospitality Co., Kimball Piano and Organ, Bosendorfer Klavierfabrik (Vienna, Austria) and Kimball Furniture Reproductions, Inc.



Steelcase, Inc., Grand Rapids, Mich., is a leading designer and manufacturer of office furniture, systems furniture, seating, office lighting and computer-assisted programs to assist those who plan, provide and manage effective and efficient office environments. It employs 17,500 people around the world and has a sales volume in excess of \$1.6 billion. Steelcase has more than 16 million square feet of manufacturing and administrative facilities in eight countries.



Allsteel, Inc., began business in 1912 under the name Allsteel Equipment Co. Allsteel initially manufactured electrical cutout boxes and shop tote boxes. Since then, the company has grown to be a leading contract furniture manufacturer of panel systems, electronic support furniture, desks, seating and filing products. Allsteel's entry into the office furniture industry occurred in 1936 through the purchase of an Aurora, Ill.-based metal cabinet company and has continued to grow through acquisition and product line expansion.



Allsteel's Syntrax™ System. Photo courtesy Allsteel.

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Test Markets

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Quality, quantity

There are two kinds of issues involved in assessing the usefulness of test markets: issues involving quality and quantity of the information obtained. The primary issue with regard to quality is predictive ability: Will the results obtained from the research study generalize to the market as a whole? Quantity is an issue of efficiency.

Test markets possess what a measurement expert would call content validity. This means they are comprised of a sampling or subset of the actual phenomena to be assessed. It needs to be stressed that content validity does not guarantee predictive validity.

Predictive validity requires an adequate sampling as well as control or evaluation of the effects of all non-random variables which might affect the criterion measure.

Corollary examples

The following are some corollary examples from other areas of applied science to illustrate the difference between predictive validity and content validity.

Suppose one is confronted with the training of a large number of people in skills for which they have had little or no relevant experience, for example, the U.S. armed services at the beginning of the first and second world wars. The most certain method of determining if people would succeed in a specialized training program is simply to put them in the program. But this method is very costly. Many would fail the program, yet for those who succeed, one does not know if this is their optimally successful area. Two or three days of initial testing markedly reduces the risk of faulty placement. Few would argue that a test is either more real or more valid at predicting future success than an actual trial in the training program. It is simply much more efficient.

In medicine, certain bacterial infections are differentially sensitive to different antibiotics. One way of determining the appropriate antibiotic is to try each in succession in the patient. This might take one or two weeks per antibiotic, but if the patient lived long enough and if there were no other complicating factors to cloud one's evaluation, one would eventually determine the appropriate medication. One can grow a culture of the bacteria in an artificial media and test all the potential medications within a few days. The question is not which is more real but which is more efficient.

Possible problems

There are at least four areas in which problems may arise in implementing a test market: market selection, test implementation, uncontrollable extraneous factors and test assessment. The selection of a market or markets in which to make the test should aim at putting together a microcosm that matches the larger market. The two should be functionally equivalent on all variables that might affect the criterion measure. Note that equivalence includes not only geodemographics but temporal cycling,

continued on p. 55

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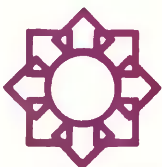
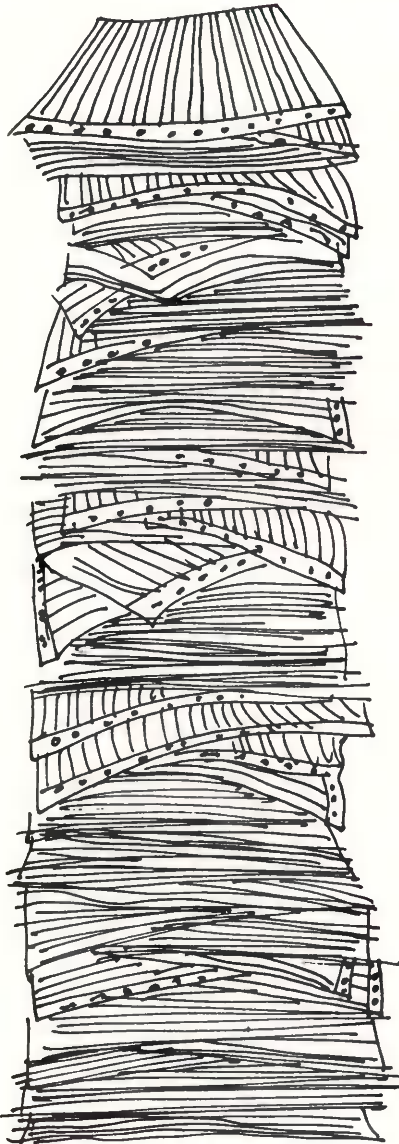
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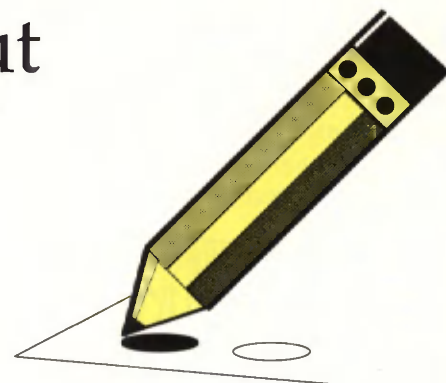
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Survey turnaround time cut with scanning technology



Did you ever take tests in school that required you to answer questions by filling in circles with a No. 2 pencil? Students may wonder why they take tests this way, but for teachers it provides a quick and easy way to create and correct them. All the teacher needs to do is put the punched out circles of the answer key on top of the students' tests and in no time, the tests are scored.

In a similar vein, many companies, government agencies and nonprofit institutions are using this type of technique to

gather and analyze all kinds of market information. Like teachers with hundreds of tests to grade each year, many companies and organizations have hundreds of market surveys to conduct and process each year on a tight deadline. While some of the parts of the process can be pushed, there is no way to accelerate preparing the survey questionnaire or entering the raw data into the computer. Until now.

Such time consuming and error-prone tasks can be virtually eliminated with Survey Network by National Computer Sys-

tems, Minneapolis. According to NCS, the Survey Network is a desktop publishing system that allows the user to design and print questionnaires, then enter and evaluate the survey data quickly and easily.

Simple, direct

An especially attractive feature about this survey system is that users need not be computer programmers to operate it. It is simple, direct and requires no lengthy training sessions. Survey Network pro-

continued on p. 24

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Forecast Pro

continued from p. 6

to project the market share for particular products the department uses. "For example, with shingles, we examine the vary-

"We plug in several variables and product sales. Then, Forecast Pro comes up with the best methodology to forecast and the most significant variables. If you accept the recommendations for the model it has proposed, it runs right into the forecasting option."

Bruce Harned

ing growth rates and the variables that determine market share."

In a simplified fashion, Harned explains how Forecast Pro works. "We plug in several variables such as economic conditions in specific geographic markets. Then we plug in product sales. Forecast Pro then comes up with the best methodology to forecast and the most significant variables. If you accept the recommenda-

We can manipulate data on a monthly basis and change environmental variables as information becomes available or as we see appropriate."

Harriet Gallu

tions for the model it proposes, it runs right into the forecasting option."

Harned praises the system's easy-to-use format. "It's user friendly. It provides a simplified way of doing what can be a highly complex process. No service of which I am aware projects roofing oppor-

tunities as simply as Forecast Pro."

FTD

Cost was initially a major reason why Florists' Transworld Delivery (FTD) Southfield, Mich., turned to Forecast Pro. Harriet Gallu, project supervisor of quantitative research in FTD's research department, says it was very expensive going through an outside vendor to forecast FTD's data. "We were also limited by the vendor's schedule and received updates only twice a year. That's when we decided to check out different software packages," says Gallu.

"In general, the system gives us a working forecast," notes Gallu. "By making adjustments for seasonality and changing

"The system is user-friendly. It provides a simplified way of doing what can be a highly complex process. No service of which I am aware projects roofing opportunities as simply as Forecast Pro."

Bruce Harned

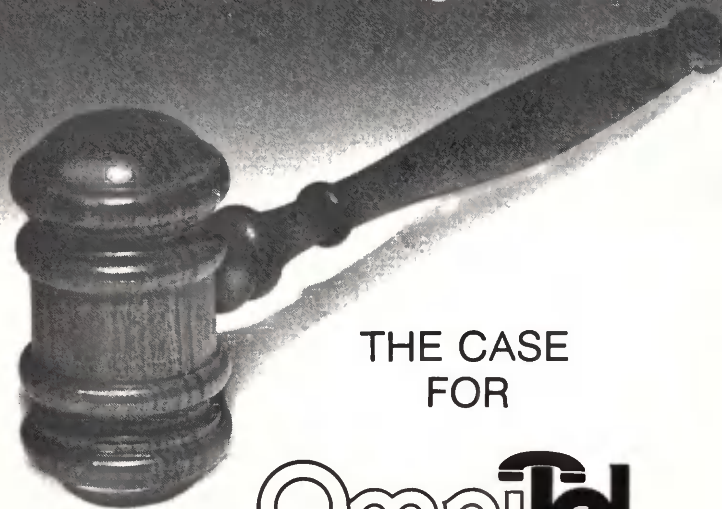
market conditions, we can improve the accuracy of the forecast." Gallu is confident about the accuracy of the numbers they receive because they have tested the forecast with actual data from two to five years ago and projected last year's levels with Forecast Pro.

Having control over the forecasting system is a big advantage to FTD's research department. "We can manipulate data on a monthly basis and change environmental variables as information becomes available or as we see appropriate. Plus, even though I don't have a strong background in forecasting, Forecast Pro is easy to follow." MRR

For more information about Forecast Pro, contact Business Forecast Systems, Inc., 68 Leonard St., Belmont, MA 02178.

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THE CASE FOR



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SAMPLE

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SUPPLEMENTS

Teens, children, in-home audits, leave-behinds with personal retrieval.

BENEFITS

Use of exhibits, cards, scales. Personal interviewing at a fraction of custom costs. Demographic breakdowns included.

IN SUMMARY

12,000 in-home, personal interviews each year.

THE CASE FOR



METHOD

Telephone Interviewing

FREQUENCY

WEEKLY (every Friday)

SAMPLE

1000 interviews. 500 females, 500 males, 18 and over. A national random digit dialing (RDD) sample of U.S. households.

SUPPLEMENTS

Teens, children, ethnic groups.

BENEFITS

Results delivered 3-4 working days from start. Low cost. Demographic breakdowns included.

IN SUMMARY

52,000 telephone interviews each year.

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Steelcase's Series 9000 Systems Furniture. Photo courtesy Steelcase Inc.

Office Trends

continued from p. 14

1. Northeast: Boston, Philadelphia and Washington, D.C.
2. Midwest: Detroit, Chicago and Cincinnati
3. South: Atlanta and Tampa
4. Southwest: Dallas and Phoenix
5. West: Los Angeles and San Francisco and
6. New York City.

To facilitate participation while minimizing respondent "burnout," a mail questionnaire is used. The panel is initially recruited by telephone and some over-

"It provides another data point in our decision-making process. It's another checkpoint that may initiate a different course of action or rethink the current proposal."

Ken Malik

recruitment is done to provide for respondent fall-out. Monetary incentives are offered to participants along with a summary of findings to encourage participation. Dealers and interior designers complete a questionnaire each quarter; facili-

"Office Trends is a periodic, cost-effective way to monitor key business activity issues and to address special topics in detail throughout the year."

Rick Arnold

ties managers do so only once a year.

To maintain a reasonable questionnaire length, dealers and designers are asked a base of core questions each quarter with certain issues addressed only once or twice a year.

Core questions

The core questions cover the following issues:

1. Sales expectations/product mix
 - a. Are order levels expected to increase, decrease, or remain unchanged in the next three months? Why?

continued on p.61

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CfMC

Scanning

continued from p. 18

vides all the tools necessary to conduct a survey: software and hardware to design and print scannable questionnaires, and a versatile scanning technology that puts the data directly into the user's microcomputer.

Here's how the system works. First, users design their questionnaire on the screen of a microcomputer by formatting the survey questions and responses using the desktop publishing software. All the software functions are set out in clean and uncomplicated screens.

Next, the questionnaire is printed on NCS open-format scanning forms. Users determine the size of the response bubbles and where they go as well as where the questions and response titles are positioned.

Printing options include a range of laser printers, from the Apple Laser Writer, through heavier duty cycle laser printers like the Data Products LZR 2665 and TI 2115, through console laser printers like

the IBM 3800 and Xerox 8700. Commercial offset printing can also be used when

A critical feature of NCS scanners is their ability to distinguish between levels of mark intensity. This means the scanner can tell erasures and smudges from the respondent's final choice when the questionnaire is scanned, thus assuring that users are getting all the information that's available on the survey.

volume demands it and time permits.

After the data are collected, NCS' scanning technology is used to send the data from the completed surveys directly into

the user's microcomputer for analysis and output.

Scanning technology

The NCS Survey Network is built around a technology called Optical Mark Reading (OMR). The NCS OMR scanner is the bridge between the user's questionnaire and computer.

According to NCS, an OMR scanner is fast and accurate because there's no "middle man." Those surveyed indicate their responses by using a No. 2 pencil to darken the bubbles on the questionnaire. The questionnaires are then fed into an NCS scanner which sends the responses directly to the computer. Using an OMR scanner to collect survey data provides an accuracy rate better than key entry, and the scanner places the data directly on a microcomputer's hard disk.

A critical feature of NCS scanners is their ability to distinguish between levels of mark intensity. This means the scanner can tell erasures and smudges from the respondent's final choice when the ques-

continued on p. 51

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NAMES OF NOTE

Joining Phil Balducci & Associates, Inc., Tampa, FL, is **Cindy S. Chamber** as senior research analyst. Previously she was a marketing research analyst for Embassy Suites, Inc., Dallas.

Myra Ebner, president, Convention Research Corp., Marietta, GA, was inducted as president of the 1988-89 board of directors' for the Marketing Research Assn. at the organization's 30th Annual Conference in May in Chicago. Other officers inducted at the convention were **Nancy Hayslett**, manager, Walker Research, Tempe, AZ, as president-elect; **Janith P. Fuller**, senior vice president of client services, Market Facts, Inc., Chicago, as vice president; **Betsy Schnepf**, vice president, field and administration, The Wirthlin Group, McLean, VA, as secretary; and **Carol Davis**, president, Davis Market Research, Calabasas, CA, as treasurer.

Steven C. McFadden has been promoted to executive vice president and member of the board of directors at International Communication Research, Inc., Media, PA. McFadden has been in opinion research for 13 years. His new responsibilities

include management of the company's client services group.

Pat Sawyer has been named managing director of Precision Field Services in Atlanta. **Cathy Johnson** has also joined the Atlanta office of PFS as director of telephone operations. She has seven years of market research experience at the supplier level and field service firms.

Louis J. Pappalardo has formed Trendata, Inc., Norwalk, CT, a supplier of



Pappalardo



Foster

syndicated marketing research for the consumer durable industry. Previously he was president of Trendex, Inc., where he

published the Buyership Report for 20 years. **Lisa Foster** joins the company as vice president. Previously she was client service manager at SAMI/Burke.

Peter A. Fushan has joined Chilton Research Services, Radnor, PA, as an account executive. He will be responsible for the sales, design, implementation and analytical interpretation of various consumer and industrial studies. Fushan was previously vice president and group manager at Data Development Corp.

William R. Eddins has joined Bellomy Research, Inc., Winston-Salem, NC, as director of analytical services. Previously he was marketing research manager for RJR Nabisco.

Kay Wall has been named president of Simmons Syndicated Studies, New York. She will be responsible for sales, marketing, technical management and new service development. Previously she was ex-

continued on p. 30

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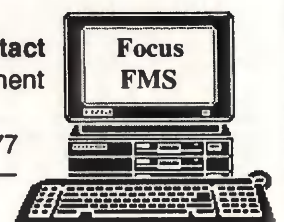
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From time to time it's necessary for us to field survey instruments that are technically complex and require more than ten to twenty minutes of a respondent's time. For these surveys, we've found that answers are more accurate when respondents can examine questions and answer choices directly. So, we use mail surveys whenever we have questionnaires of this type.

A NEED FOR FLAWLESS EXECUTION

Last year, we developed a questionnaire as part of a study of database software users; it was longer than our average survey and required technically complex answers. We had several concerns about the implementation of this study. First, we were concerned that the lengthiness of this survey would reduce response rates. Second, it was important that the survey be executed exactly as intended. We needed to be sure that skip patterns and branchings would be followed, and that the sequence of questions would be observed.



Karen Zevin, Ashton-Tate

THE BENEFITS OF COMPUTER INTERVIEWING

We decided that the best way to ensure that this questionnaire was properly executed was to do it by computer. So, we fielded our mail study using computer interviewing disks instead of paper questionnaires.

The computerized format masked the skip patterns and branchings and did not allow the respondent to answer questions out of order. In addition, the length of the survey was not an issue: once respondents began to complete the survey, they were so intrigued that we ended up with a response rate of over 50% within thirty days.

We are pleased that our respondents enjoyed this interview experience, and that the technique provided us with higher quality data. The next time we are faced with a lengthy and complex questionnaire requiring a mail survey, we will certainly consider computer interviewing again.

Karen Zevin
Market Research Manager
Ashton-Tate

For more information about computer interviewing, contact:
Sawtooth Software, 1007 Church St., Evanston, IL 60201
312/866-0870

Names of Note

continued from p. 26

Executive vice president and director of sales and marketing of this major division of Simmons Market Research Bureau.

Earnestine Hargrove has joined the Vanderveer Group, Inc., Fort Washington, PA, as a project director specializing in research and consulting for financial institutions. Dr. Hargrove was formerly the director of marketing research at First Atlanta Bank in Atlanta where she was responsible for the direction of all primary and secondary research for consumer corporate marketing.

In order to better serve a growing list of accounts in southern California, **Nielsen Marketing Research** has opened a new sales/service office at 4 Hutton Centre Dr., Suite 700, Santa Ana, CA 92707. Telephone: (714) 549-9500. The new facility is an extension of Nielsen's Menlo Park office and reflects the firm's on-going commitment to bringing its services directly to customers. These facilities will

support a complete staff of client service executives, analytical specialists, trade services, neodata and NPD/Nielsen personnel. The office will be directed by **John Walling**, vice president and general manager of the Nielsen Western sales territory.

S&O Consultants, San Francisco, has promoted **Margaret H. Widelock** to executive vice president/chief operating officer. She was previously senior vice president. Widelock will oversee client services with responsibility for program management and for providing key strate-

gic input for the identity, packaging and name development programs conducted by S&O. She will also direct NOVA Research, a subsidiary of S&O.

Bart Zuurdeeg has been promoted to marketing research director at Royal Crown Cola Co., Rolling Meadows, IL. He was previously assistant marketing research director. Prior to joining RC in 1986, he was a research analyst with Richard Day Research.

Carol Smeja has joined DDB Needham Worldwide, Chicago, as research supervisor. She was previously senior analyst at Foote, Cone & Belding.

Betsy Braun has been promoted to research director, Independent Television Sales, New York, from group research manager.

Emily Barbour, formerly vice president-interviewing services at NFO Research,



Widelock



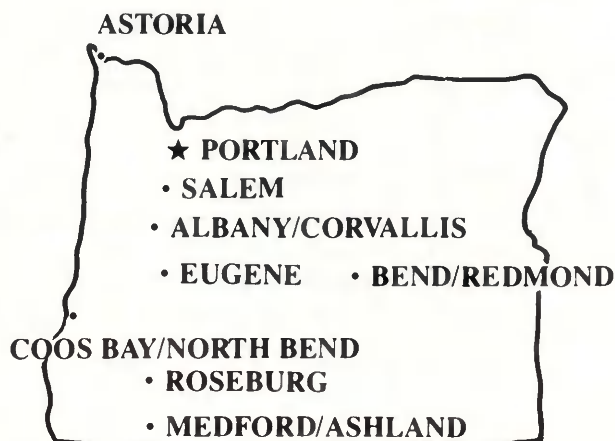
Zuurdeeg

continued on p. 32

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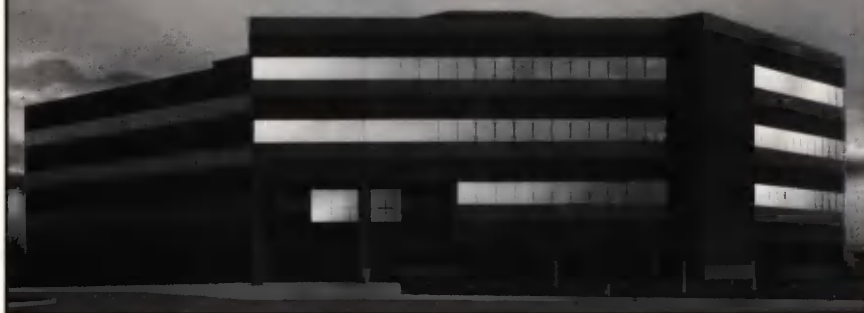
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Names of Note

continued from p. 30

Inc., announces the formation of Barbour Research, Inc., 5241 Southwyck Blvd., Suite 201, Toledo, OH 43614. Telephone: (419) 866-3475. Barbour is president and **Linda Hagedorn** is manager. The company specializes in two basic services; telephone interviewing on a nationwide basis and consulting services for all data collection aspects of a market research project.

Keith C. Stevens has joined AB Research Associates, Norwalk, CT, as a client services vice president. He was previously client services manager at General Foods Corp.



Stevens



Fox

Mary Fox has been named vice president at NOVA Research, San Francisco. She will manage all phases of quantitative and qualitative research projects and assume overall responsibility for field activities, visibility research technologies and data processing. Fox joined the company in 1979 and was previously account supervisor.

Susan Spencer has been promoted to senior research director at Response Analysis, Princeton, NJ, and **Patricia Bourdette**, **Gary Fuchs**, and **Steven Olszewski** have joined the staff as research assistants.

Michael A. Pajor has joined Dimension Research, Inc., Lisle, IL, as an account manager. He is responsible for handling client accounts, providing consultation on research design, management of in-house work and the interpretation and presentation of results. He specializes in

quantitative analysis. Prior to joining the company, Pajor served as manager of market research for the American Hospital Assn.

Kathy Hammonds-Slaughter has joined Standard Rate & Data Service, Inc., Wilmette, IL, as product development manager. Prior to moving to SRDS, she was account supervisor at BEC Advertising for Beltone Electronics Corp. She directed marketing, circulation and promotional activities for Beltone divisions.

Joel Brown has joined CMR Market Research, New York, as a senior vice president. Most recently he was senior vice president at R.H. Bruskin Associates. Prior to that he was with the American Express Co. and McCaffrey & McCall Advertising Agency.

Mary Ann McCollough has been appointed general manager of marketing services at Heinz U.S.A., a division of H.J. Heinz Co., Pittsburgh. She will be re-

sponsible for market research, consumer kitchens, packaging design, promotion and advertising services. Formerly, she was a product manager with Borden, Inc., before joining Heinz U.S.A. in 1982 as the product manager for new business marketing.



McCollough



McDonald

Carol McDonald has joined Centrac, Inc., Bergenfield, NJ, as director of operations/general manager. She was previously with Stewart Surveys as general manager.

Joe Calvanelli has joined Harte-Hanks National WATS Services, River Edge, NJ, as vice president. He was previously with Centrac, Inc., as director of marketing.

Robert Rindge has joined the Ehrhart-Babic Group, Englewood Cliffs, NJ, as director of marketing services. He was previously vice president, account manager with A.C. Nielsen.

Karl Preuss has joined Maritz Marketing Research, Inc., St. Louis, as New York division manager. He was formerly a senior vice president with SAMI/Burke where he was responsible for sales, marketing, research and trade relations.

Ann Potter & Associates has recently

Lance Schoff has joined Rockwood Research, St. Paul, MN, as a market research analyst and will assist account executives with a variety of research projects. Prior to joining Rockwood, Schoff attended Iowa State University and graduated with a degree in psychology and a minor in statistics.

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If you hate the time it takes to wash dishes, invest in a dishwasher. A report by the Association of Home Appliance Manufacturers says dishwashers save their owners an estimated 3.8 hours weekly, more for larger households. On a yearly basis, you can save 200 hours, the equivalent of a two-week vacation.

While those without dishwashers say they would like to have one in the future, they are not a priority item. Microwaves and VCRs are priority items because they are considered beneficial to the entire family and not just the wife and/or mother of the house, who is presumably the dishwasher. The prevailing attitude among the women surveyed was that the dishwasher was a benefit only to themselves. According to the report, "Many of the nonowners expressed a strong personal desire for a dishwasher but put other family members' needs and desires ahead of their own. In fact, they took pride in satis-

fyng their own needs last."

More moms working

The number of mothers returning to work or starting jobs outside the home is growing and they're going back to work sooner after giving birth, the Bureau of Labor Statistics reports.

In March, 1987, 52% of mothers with children one year-old or younger were working or looking for work, up from 43% five years previously and 32% in 1977. These figures are from the Labor Department's report on mothers and families in the work force.

For mothers whose youngest child was between two and five years-old, participation in the labor force has also risen but not as much. Mothers in the work force whose youngest child was two years old comprised 59% of the total and those whose youngest child was five years old made up 63%. In 1982, those ranges were, respec-

tively, 52% to 57% and in 1977, 42% to 51%.

Generally, three-fifths of the country's children under 18 were in families with a working mother, a rise of 55% from the preceding five years and 48% in 1977. Among divorced mothers, who tend to be older, 80% were in the labor force and 56% of never-married mothers were in the work force.

Teachers affluent and responsive, study shows

Teachers are a surprisingly affluent, responsive and largely untapped group of consumers, a report by Market Data Retrieval shows.

The report found that America's three million teachers have an average household income that exceeds \$50,000 a year and are almost 50% more likely to respond to mail and phone offers than the general public. The report also uncovered a num-

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ber of unexpected statistics when teacher lifestyles were compared to those of other adults:

- Teachers are 91% more likely to have spent over \$500 on direct response purchases during the past 12 months.

- Teachers are 93% more likely to have played tennis, 72% more likely to have skied and 61% more likely to have played golf in the past year.

- Teachers, many of whom do not qualify for social security, are more likely to invest in Money Markets (115% more likely), IRAs, (90% more) and Brokerage Accounts (59% more).

- Heavy users of premium credit cards, teachers are more than twice as likely to have an American Express Gold Card.

With 185 days off a year, teachers also have more time for travel, leisure activities and hobbies. More than 70% of teachers took a domestic trip in the past year and they are almost 60% more likely than other adults to belong to a health club. Their favorite hobbies are photography, music, personal computing and hiking.

The profile of teachers that emerges from the MDR study is of a large, sophisticated and active group of affluent consumers who are much more likely than other adults to spend their substantial disposable income in response to direct marketing. The study also notes that teachers are a fertile yet relatively under-exploited consumer group.

Market Data Retrieval, a wholly-owned subsidiary of Dun & Bradstreet, specializes in researching, compiling and publishing educational data.

Teens like TV, dislike commercials

Teens tune in TV more than any other medium but tune out most TV commercials, according to a study published by Teenage Research Unlimited.

TRU's Teenage Attitudinal Study summarizes the results of interviews with more than 2,000 persons aged 12-19. It probes their motivations, attitudes and opinions about various issues. Results indicate that although television commercials introduce teenagers to a wide variety of new products, many of which they go on to purchase, commercials in general are not

popular among the teen population.


"What the data indicate are that teens can be dramatically responsive to TV advertising," says Peter Zollo, executive vice president of TRU. "But advertisers need to beware. Teens will only be responsive if advertising directed to them is developed with precision," explains Zollo.

Television is the primary source of new product information for teenagers. Sixty-four percent of those surveyed agreed with the statement, "I learn a lot about new products from watching television," com-

pared to only 37% for radio and 33% for magazines. Moreover, 36% of the teens admitted that after they see a product advertised on television, they often go out and purchase it.

Many of the teens, however, expressed displeasure with the content of television advertising. Three-quarters of the respondents complained that TV commercials don't tell them what they'd like to know about products and 65% believe TV commercials talk down to teens.

continued on p. 36



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Teenagers also seem to be taking advantage of modern electronics to avoid sitting through commercials they don't like. Nearly two-thirds of the teens reported channel-switching to avoid commercials. Video cassette recorders seem to make the practice of bypassing commercials even more widespread, with 98% of the sample indicating that when watching a videotape of a television program, they fast-forward through the commercials. Teenagers express dissatisfaction with television com-

mercials, but they seem generally satisfied with the products being advertised. Seventy-seven percent of all teens surveyed agreed with the statement, "American corporations make products with good value," a statistic that is high across all demographic categories.

So if teenagers don't like what they're seeing in television commercials, what do they like?

The findings of the TRU study indicate a strong belief in traditional values among the teen population: 84% of the teens surveyed enjoy spending time with their

families; more than two-thirds believe in draft registration and a strong military, and 61% cite their religion as one of the most important parts of their lives.

Church membership

A 1987 Gallup audit shows that seven in 10 U.S. adults - 69% - claim they are members of a church or synagogue, the same figure as that in 1986.

Church or synagogue membership was shown to differ by gender. As in past years, the 1987 audit shows a higher proportion of women (75%) than men (63%).

Membership increases steadily with age, from 62% of 18-29 year-olds to 76% among those 65 and older.

While education doesn't appear to be a major factor in church or synagogue membership, sharp differences are bound by region, with Southerners more likely and Westerners less likely to be members.

The findings from this survey of 4,740 people are self-classifications, representing the proportions of people who say they are members of a church or synagogue and therefore may include some who are not actually listed as members of a local church. Furthermore, it is necessary to add that adherents of certain churches, for example, the Roman Catholic and Eastern Orthodox, are considered members at birth.

Health care costs rising

In 1987, the cost of providing health care benefits to employees increased to an average of \$1,985 per worker, according to a survey conducted by A. Foster Higgins & Co.

The survey of 2,016 corporate and government employers found that their costs climbed 7.9% last year, an average of \$128 per employee. In 1986, the average cost had risen 7.7%. For one-fifth of the surveyed employers, health costs rose 20% or more and for 6% of them, cost increases exceeded 30%. Director of the study, David Rahill, said "increases in the actual price of medical care supplied by doctors, hospitals or other providers are the fundamental reason for the plan cost hikes."

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The study, which examined employers with a total of 13 million employees, stressed the need for tighter cost-controls. Just 31% of the surveyed employers were able to hold costs constant or reduce them in 1987, the survey showed.

Sixty-one percent of the employers didn't require employees to contribute to their individual coverage but 88% did

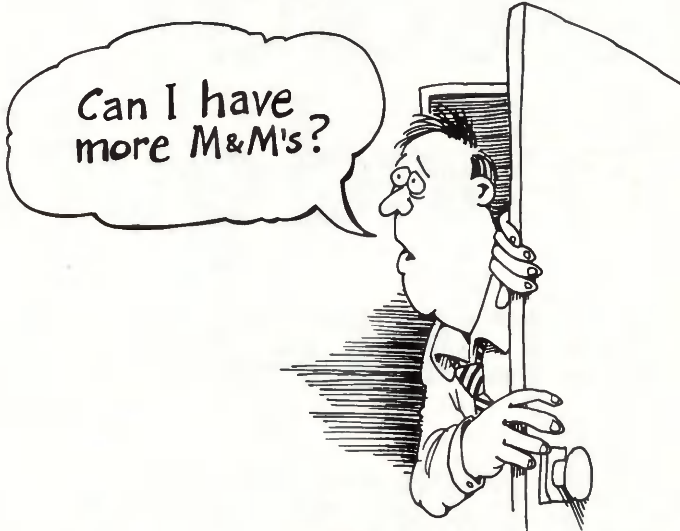
require their employees to pay a deductible. About a third of the employers said they raised deductibles in the past two years, the study found.

Side dish choices

Corn is the favorite side dish at dinner, a survey by MRCA Information Services has found. The top luncheon side dish was potato chips and fruit was popular as a

secondary choice at meals. Those over 55 were found to be the largest consumers of side dishes, eating 22% more of them than the average American. Typically, these are healthy side dishes, including vegetables, fruit and salads.

Potatoes as side dishes are decreasing in popularity. Baked potatoes are now more popular than mashed, but French fries are still the top choice.



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TV is favorite pastime

Watching TV is the favorite leisure activity among schoolchildren, while reading is the least preferred pastime, according to a survey conducted by *Weekly Reader*. The youngsters say they trust what they hear on TV more than what they read in newspapers, the survey says. Reading books is popular among those in the lower grades but that interest subsides by grades four to six.

Weekly Reader's survey of reading and TV habits was gathered from teacher summaries representing about 117,000 of more than 340,000 children who answered questionnaires in class. The survey was not a statistically random sample whose results could be projected, but the sample was large enough to be taken as representative.

Newspaper reading was popular with 28% of second-graders but only 11% of fifth- and six-graders.

Asked what they usually do at home, 55% said watch TV, 14% said play, 14% talk on the telephone, 11% listen to the radio and 6% read.

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CHiPS(o)
(See Advertisement on Page 36)

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ARC/TAG Talking Yellow Pages
Study(s)
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of Yellow Pages(s)
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914/332-5070
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Business Travelers Omnibus(o)

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602/258-4554
ConsumerTrak(o)
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(See Advertisement on Page 21)

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C-Store Sweep(s)

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Chemical Industry Studies(s)

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Farm Rodenticide Usage Study -
Annual syndicated study of 1,200
farms which provides projected
total U.S. market for rodenticides
expressed in brand shares;
livestock and poultry groups; pur-
chasing methods.

Feed Market Study -Syndicated
study conducted each April
among over 3,000 swine, beef
and dairy farmers which provides
identification of brand market
shares, types of feeds fed and
source of purchase.

Animal Health Market Study-
Semi-annual syndicated study of
over 7,000 farmers and ranchers.
The study provides market share
information for anthelmintics, bi-
ologicals, feed medications and
additives, implants, and pharmaceu-
ticals.

Fertilizer Market Study -Annual
syndicated study among 10,000
farmers which measures U.S.
farmers' use of and expenditures
for fertilizers expressed as NPK
by product type and by geographi-
cal regions.

Dealers Attitudes Toward Chemi-
cal Manufacturers - Syndicated
study conducted every two years
among more than 1,200 dealers
which studies manufacturers' im-
ages with their retail dealers.

1986 Weed infestations in
Corn and Soybeans - Syndicated
study among more than 6,500
growers providing information on
the distribution of major weed
species in corn and soybeans.

Prospects for Fungicide Usage
in U.S. Cereal Grain Production -
Syndicated study among over
800 growers and key influences
reporting on the factors which
will influence the adoption of fun-
gicides in cereal production.

Doane Pesticide Profile Study -
Annual syndicated study among
over 14,000 growers providing in-
formation of herbicide, insecti-
cide/miticide, fungicide, nemati-
cide, and growth regulator use on
agricultural crops & no-cropland
areas.

Doane Specialty Crops Pesti-
cide Study I -Syndicated study
conducted every two years with
over 4,000 growers providing in-
formation on herbicide, insecticide/
miticide, fungicide, nematocide,
and growth regulator use on tree
fruit, tree nuts and grapes.

Doane Specialty Crops Pesti-

cide Study II -Syndicated study
conducted every two years with
over 5,000 growers providing in-
formation on herbicide, insecticide/
miticide, fungicide, nematocide,
and growth regulator use on
selected vegetables and minor
field crops.

Doane Media Study -Annual na-
tional syndicated study providing
information on radio listenership
patterns among Class I and IA
farmers. Over 100 interviews con-
ducted per station market.

East West Research Institute
735 Bishop Street, #235
Honolulu, HI 96813
808/531-7244
Omnibus Survey-Residential(o)
Omnibus Survey-Visitor(o)
Syndicated Health Study(s)

Gallup Canada, Inc.
180 Bloor St. W., 10th Floor
Toronto, ONT, M5S 2V6
416/961-2811
Gallup Omnibus(o)
Gallup Report on Eating Out(s)

Gallup & Robinson, Inc.
575 Ewing Street
Princeton, NJ 08540
609/924-3400
Advertising Impact Research
Services(s)

Gartner Group, Inc.
56 Top Gallant Rd.
Stamford, CT 06904
203/964-0096
Comtec Market Analysis
Services(s)

Goldring & Company, Inc.
737 N. Michigan Ave.
Chicago, IL 60611
312/440-5252
The Geomarket Study(s)

Harrington Market Research, Inc.
511 Monroe St.
Kalamazoo, MI 49007
616/342-6783
Michigan Market Survey(o)
Indiana Market Survey(o)

Harrison Owen Co.
5050 Quorum Dr., Ste. 700
Dallas, TX 75240
214/980-7051
The SCORE Study(s)

Health Research, Inc.
220 White Plains Rd.
Tarrytown, NY 10591
914/332-5270
Dental Omnibus Survey(o)

Codes:

O = Omnibus
S = Syndicated

Hospital Research Associates
383 Rte 46W
Fairfield, NJ 07006
201/575-3650
Medical Related Studies(s)
Telephone Omnibus Physicians(o)
Hospital Omnibus(o)

HTI Custom Research
900 West Shore Road
Port Washington, NY 11050
516/625-0700
Insta-Vue(o)
A to Z Insta-Vue(o)

International Communications Research(ICR)
105 Chesley Drive
Media, PA 19063
215/565-9280

EXCEL -Weekly omnibus study using a national probability sample of 1,000. Conducted using CRT's. Deadline for questions noon Thursday with results available the following Tuesday.
(See Advertisement on Page 41)

International Demographics, Inc.
3000 Richmond Avenue/#170
Houston, TX 77098
713/522-1016
The Media Audit(s)
The Financial Audit(s)

Information Resources, Inc.
150 N. Clinton
Chicago, IL 60606
312/726-1221
InfoScan(s)

Link Resources Corp.
79 Fifth Avenue
New York, NY 10003
212/627-1500
Various Electronic Studies(s)
Various Electronic Studies(o)
National Work-At-Home Survey(o)

Majors Corporation
1010 Summer Street
Stamford, CT 06905
203/324-6355
Featurlab(s)

Maritz Marketing Research, Inc.
1395 North Highway Drive
Fenton, MO 63099
314/827-1610

Contact: Ronald Lipovsky, VP
Farmers' Pesticide Use Study - Annual syndicated among 30,000 growers which provides brand share and tracking of farm pesticide usage in the U.S. and Canada.

Animal Products Use Study -Syndicated study conducted every 6 months with 2,000 hog producers providing information on feed and pharmaceutical product usage.
Farmers' Pesticide Satisfaction Study -Annual syndicated study with 10,000 growers providing information on growers' satisfaction with pesticide products.
(See Advertisement on Page 11)

Maritz Marketing Research, Inc.
3035 Moffat Drive
Toledo, OH 43615
419/841-2831
Contact: Kathy Keim, Research Mgr.
Initial Buyer Study -Syndicated study among early buyers of recently introduced automotive vehicles.
(See Advertisement on Page 11)

Market Decisions Corporation
8989 SW Barbour Blvd/Ste 204
Portland, OR 97219
503/245-4479
Various Financial Studies(s)

Market Facts, Inc.
676 No. St. Clair,
Chicago, IL 60611
312/280-9100
TeleNation-Weekend "Hotline To America" telephone interviewing. Questions by Friday noon turn in to answers by following Wednesday.(o)
Data Gage-Card sized questionnaires mailed on a shared cost basis to consumer mail panel households.(o)
(See Advertisement on Page 31)

Market Trends Research
14711 NE 29th Place/#101
Bellevue, WA 98007
206/885-4900
Statewide Opinion Monitor-
Washington(s)
Financial Institutions(s)

Marketing Evaluations/TVQ
14 Vanderverter Ave
Port Washington, NY 11050
516/944-8833
Various Television Related Studies(s)

The Marketing Workshop, Inc.
3294 Medlock Bridge Rd., Ste.

EXCEL's 2000 weekly interviews give you everything you need from an omnibus service, more or less.

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Sometimes, less is more. Whether you require 1000 or 2000 interviews per week, you still get your information in far less time than with other kinds of research — top-line results the day after interviewing stops, and full tabs the day after that.

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200
Norcross, GA 30092
404/449-6767
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341 Madison Avenue
New York, NY 10017
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The Survey of American
Consumers(s)
Mediamarkets-10 Markets(s)
Business-To-Business(s)

MRCA Information Services
2215 Sanders Rd.
Northbrook, IL 60062

312/480-9600
Menu Census(s)
Dietary Intake Studies(s)

NFO Research, Inc.
P.O. Box 315
Toledo, OH 43691
419/666-8800
Share of Intake Panel(s)
Carpet and Rug Study(s)
Mail Order Companies and
Related Industries(s)
Multicard(o)

O'Neil Associates, Inc.
412 E. Southern Avenue
Tempe, AZ 85282

602/967-4441
Valley Monitor(o)
East Valley Monitor(o)

Palshaw Measurement, Inc.
P.O. Box 1439
Pebble Beach, CA 93953
408/625-2500
Annual Corporate Financial
Officer Tracking Study(s)
Multi-client Personal Interview
Medical Surveys(o)

Parker Int'l Mktg. Group
76 No. Broadway
Hicksville, NY 11801
212/888-2111
Various Travel Surveys(o)

Perception Research Svcs, Inc.
440 Sylvan Avenue
Englewood Cliffs, NJ 07632
201/568-8151
Open Eyes(s)

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Farmington Hills, MI 48018
313/855-7810
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pectant and new-born mothers.
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dren in 5 major markets. Person-
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thinkers.(S/O)
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major multivariate study con-
ducted annually in 25 markets
among children and their mothers
regarding their brand request/
specification impact for various
consumer products categories or
classifications.(S/O)
PlayLab Segmentor™ Survey-A
series of sophisticated market seg-
mentation studies conducted na-
tionally among children and
teenagers. Proved product and
purchaser segmentation analyses
utilizing multivariate and multide-
mensional methods. Categories
include: cereals, cookies and con-
fectionaries.
(See Advertisement on Page 43)

Project Research, Inc.
University Technology Center
1313 5th Street SE
Minneapolis, MN 55414
612/331-9222
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bus study among 1,000 consum-
ers. Tracks consumer perception
of healthcare providers in selected
markets. Subscribers may add
custom questions. Administered
semi-annually in each market
(Mpls./St. Paul and Chicago
areas).(o/s)
(See Advertisement on Page 37)

Restaurant Research Associates
202 Fashion Lane/Ste 101
Tustin, CA 92680
714/731-7775
Los Angeles Tracking Study-
Restaurants(s)
(See Advertisement on Page 71)

Rockwood Research Corp.
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- *An on-going research panel of expectant and new mothers. Continuous tracking of awareness, attitudes, preferences and purchasing behavior. Approximately 500 expectant mothers added to data base annually.*

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(Now Available)

- *A monthly contact with over 240,000 residential, suburban households for low-incidence data base generation and research utilization. Data base development of potential low-incidence research respondents at no cost to requesting clients.*

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PLAYLAB REQUESTQRSM SURVEYS

(November, 1988)

- *A major multivariate study conducted annually in 25 markets among children and their mothers regarding their brand request/specification impact for various consumer product categories. A second directed study involves the generation of child/mother supermarket shopping communication interaction and purchase behavior utilizing supermarket observations, intercept interviews, and group discussions.*

PLAYLAB SEGMENTORSM SURVEYS

(February, 1989)

- *A series of sophisticated market segmentation studies conducted nationally among children and teenagers providing product and purchaser segmentation analyses utilizing multivariate and multidimensional methods. Categories include: cereals, cookies, candy and confectionaries.*

PLAYLAB COMMUNICATORSM TEST

(March, 1989)

- *A syndicated children television programming and commercial evaluation and information service being developed for quarterly implementation. The commercial copy testing service will provide recall, persuasion and diagnostic measurements and normative data-comparisons per sex, age/grade, and product classification category.*

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- NATIONAL COLLEGIATE BRAND PREFERENCE STUDY

(Monthly Omnibus)
(April, 1989)



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Mail Monitor -Annual ongoing syndicated study among 1,200 farmers providing an evaluation of the use and effectiveness of agricultural direct mail.
 AgTel Studies -Series of omnibus studies conducted monthly covering a variety of agricultural crops, livestock and management categories.
 (See Advertisement on Page 12)

The Roper Organization
 566 E. Boston Post Road
 Mamaroneck, NY 10543
 914/698-0800
 Limobus(o)

Russell Marketing Research Inc.
 152 E. 71st Street
 New York, NY 10021
 212/879-3350
 Qualitest-NYC MSA(o)

Sievers Research Company
 1414 Fair Oaks/Suite 9
 So. Pasadena, CA 91030
 818/441-5900
 California Omniview(o)

Simmons Market Research Bureau
 380 Madison Avenue
 New York, NY 10017
 212/918-8928
 Study of Media & Markets For Food Industry(s)
 Top Management Insight(s)

The Sinrod Marketing Group
 76 No. Broadway
 Hicksville, NY 11801
 516/433-3200
 Various Surveys of Mothers(o)

SMS Research & Marketing Services, Inc.
 1042 Fort St. Mall, Ste. 200
 Honolulu, HI 96734
 808/537-3356
 Quarterly Consumer Survey(o)
 Simmons/SMS Hawaii Study of Media & Markets(s)
 Hawaii Financial Services(s)

Southeastern Institute of Research
 2325 W. Broad Street
 Richmond, VA 23220
 804/358-8981
 Insight Studies-Norfolk, Baltimore, Richmond and Washington D.C.(o)

Stanford Klapper Associates, Inc.
 GPO 1539
 San Juan, PR 00936
 809/753-9090
 Contact: Barbara Bargman, VP
 Target Trak-Puerto Rico(o)

Strategy Research Corporation
 100 NW 37th Avenue
 Miami, FL 33125
 305/649-5400
 Contact: Jim Loretta, VP
 U.S. Hispanic Omnibus(o)

Survey Sampling, Inc.
 One Post Road
 Fairfield, CT 06430
 203/254-1410
 Directory Data's Yellow Page Audience Measurement Service(s)

Teenage Research Unlimited (TRU)
 721 N. McKinley Road
 Lake Forest, IL 60045
 312/295-5580
 Various Teenage Studies(s)

U.S. Travel Data Center
 1133 21st Street NW,
 Two Lafayette Center
 Washington DC 20036
 202/293-1040
 National Travel Service(o)
 Survey of Business Travelers(o)

Valentine-Radford
 P.O. Box 13407
 Kansas City, MO 64199
 816/842-5021
 Comprehensive Understanding of Buyer Environments(s)

Valley Forge Information Service
 Valley Forge Corporate Center
 King of Prussia, PA 19406
 800/345-6338 or 215/666-0611
 Quest™ - VF's Information Service's national telephone omnibus. Each month, it surveys 2,000 households(1,000 every two weeks) on a national probability basis. Each month's survey is a

fresh national sample, not a panel. Since all interviewing is done using our on-line, CRT system, questions can be submitted up to 46 hours before the start of the interviewing. Tabulated data for all closed-ended questions are delivered 48 hours after the last day of interviewing.(o)
 (See Advertisement on Page 42)

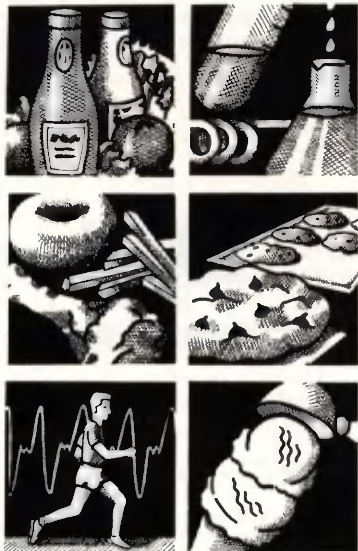
West Group Mktg. Rsch.
 1110 E. Missouri Ave/#780
 Phoenix, AZ 85014
 602/264-4915
 Centel Market Monitor-Phoenix, Tucson(o)

Wolff Associates Inc.
 165 Laurel Hill rd
 Mountain Lakes, NJ 07046
 201/263-1409
 Various Mobile Communications Studies(s)

Youth Research/Div of CSI
 Brookfield Commons B-22
 246 Federal Road
 Brookfield, CT 06804
 203/797-0666
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The study will cover FDA status of fat substitutes, industry and consumer reactions, assess market potential and constraints, and forecast their potential economic impact on ancillary industries.

Costs: \$3,750 until August 31, 1988; \$1,500 now with acceptance balance of \$2,250 on delivery of final report in September, 1988. After August 31, 1988, \$4,400.

If you would like to subscribe to the study, contact Ray Dull, director of business development, Experience Inc. at (612) 338-7844.

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Behavior Research-AZ(o)
Dittman Research-AK(o)
East West Research Institute-
HI(o)
Harrington Market Rsch-MI(o)
Market Trends-WA(s)
O'Neil Associates-AZ(o)
Russell Marketing Rsch.-NY (o)
Sievers Rsch Co.-CA.(o)
SMS Research & Marketing
Services-HI(s)
SMS Research & Marketing
Services-HI(o)
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West Grp. Mktg. Rsch.-AZ(o)

Consumer-Canada

Canadian Facts(o)
Gallup Canada(o)

Consumer-U.S.

Irwin Broh Assoc.(o)
Irwin Broh Assoc.(s)
R.H. Bruskin Assoc(o)
Cambridge Reports(o)
Cambridge Reports(s)
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**International Communications
Research(o)**
Market Facts, Inc.(o)
Mediamark Research, Inc(s)
NFO Research(o)
PlayLab Research
The Roper Organization(o)
Valentine-Radford(s)
Valley Forge Info. Service(o)

Dental

Health Research, Inc.(o)

Electronics

Link Resources(o)
Link Resources(s)

Financial

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Media

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Services, Inc.(s)
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Mothers

PlayLab Research
Sinrod Mktg Grp(o)

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East West Research-HI(s)
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Work-At-Home

Link Resources(o)

Youth

PlayLab Research
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Trucking

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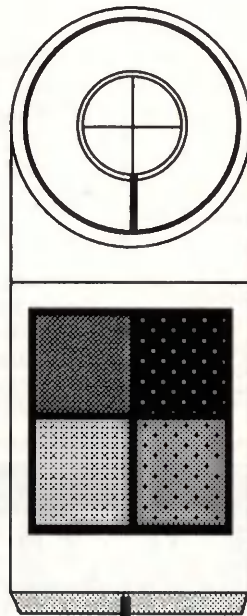
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602/ 391-0551



Circle no. 537 on Reader Card

Shoppers want quality produce

Quality produce is the No. 1 factor in choosing which supermarkets to shop in, a survey of consumers by the Food Marketing Institute has found. A close second is a wide variety of products and quality meats. Courteous and friendly employees ranked third, followed by low prices, convenience of location and readable and accurate shelf tags. A supermarket's availability of generic products was the least important among the surveyed consumers.

Women outnumber men in most states

The population of women in the U.S. exceeds that for men in 43 states, according to a recent Census Bureau report.

The national figure as of July 1, 1986, shows that women outnumbered men 123,718,000 to 117,360,000.

Only five states were shown to have more men than women and in two states the sexes were evenly split.

For people under age 18, males outnumber females in every state, the study of state populations found. Because of higher mortality among young men, their populations are practically even in the 18-24 age groups but women are ahead in older ages. About 60% of the nation's elderly are women.

The nation is continuing to grow older, the study also noted, because of the maturing post-World War II baby boom generation and its relative lack of offspring to fill in the young age groups.

Drinkers' personalities

A recent *Family Circle* magazine survey of waiters from 48 New York restaurants shows that red- and white-wine drinkers have completely different personality characteristics.

The waiters considered red-wine drinkers as "wild," "dangerous" and "sensual," the magazine reports, while white-wine drinkers are "better dressed," "more chic" and "more cool."

PRODUCT AND SERVICE UPDATE

Bar coding system

Datamap, Inc., announces Stardust, a bar coding system. The system provides information encoding on outbound promotional pieces and response analysis on inbound customer redemptions. A confi-

Datamap, Inc.

dential code for each coupon permits tracking it back to its "drop." Contact Datamap, Inc., 7176 Shady Oak Rd., Eden Prairie MN 55344. (612)941-0900.

Voice messaging system

The voice systems division of Xerox Corp. announces System V Entree, a compact entry-level voice messaging system that serves from 50-800 users and provides up

XEROX

to 64 hours of message storage. The system is available with as few as two ports, or installation can be upgraded on-site to as many as 16 ports, the maximum size. System V Entree provides graphic display of vital system status information, remote monitoring, reliability testing and diagnostics, call answering, voice-mailbox directory and automated records management and statistical tracking. Contact C. Dunlop, Xerox Corp., Xerox Square, Rochester NY 14644. (716)423-5078.

Financial services directory

Financial Sourcebooks announces Financial Sourcebooks' Sources, a directory of more than 500 research products and services for financial marketers, indexed by category. It provides a brief but detailed description of research studies and services available including product descriptions, pricing, frequency and contact information. Contact Dominique Raccah, Financial Sourcebooks, P.O. Box 313, Naperville IL 60566. (312)961-2161.

Commercial testing tool

BRX, Inc., announces marketing agreements for two services: Inner Response™ Diagnostic Commercial Testing and Organization Diagnosis. Inner Response allows advertisers and agencies to identify the elements which make a commercial successful. It's based on the use of physio-

BRX Inc.

logical measure, the Galvanic Skin Response, to identify how the viewer's attention rises or falls second-by-second throughout the duration of the commercial. Organization Diagnosis is a computer-driven approach to diagnose the health of an organization based on non-financial variables such as organization structure, stage of development, political culture, strategy and leadership style. Contact Joel Axelrod or John Monaco, BRX, Inc., 169 Rue de Ville, Rochester NY 14618. (716)442-0590.

Future trend predictor

Wisard Software Co. announces Wisard Forecaster Add-In, a forecasting program and decision tool for managers that allows

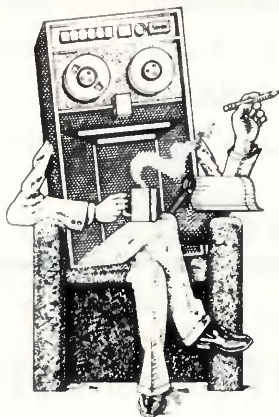
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SOFTWARE CO.

them to build better models of the future using 1-2-3. Managers can project future trends based on the historical data stored in their spreadsheets. Some of its features include: 1-2-3 type menus and commands; context-sensitive help screens; and a new process which automatically determines the seasonal patterns calculating the season length and seasonal factor. It also checks for white noise. Contact Wisard Software Co., 333 Main St., P.O. Box 19730, Green Bay WI 54307-9730. (800) 223-5166. In WI, (414) 436-2341.

continued on p. 48

AND THIS ONE?



Hard-to-find #2

Owners of highly sophisticated, 15 million dollar mainframe computer. Only 40 exist in the USA.

We found: ...several of these owners in the New York metropolitan area. Confidentiality was respected and respondents were in our group sessions in a record two-week turnaround.

Product and Service

continued from p. 47

Greeting card study

Retail sales of greeting cards will increase from their current volume of \$3.7 billion to \$5.2 billion by 1992, according to a recently-published study by Packaged Facts. Chief factor in market growth will be the continuing success of the so-called "alternative" greeting cards, whose sales performance over the past five years has fueled overall sales of greeting cards to a level 30% higher than sales at the beginning of the 1980s. "The Greeting Card Market" study covers every facet of the greeting card industry from sales and the competitive situation to the situation at retail among the various outlets selling the cards and consumer purchasing practices. Contact Edward Weiss, Packaged Facts, 274 Madison Ave., New York NY 10016. (212) 532-5533.

Advertising study

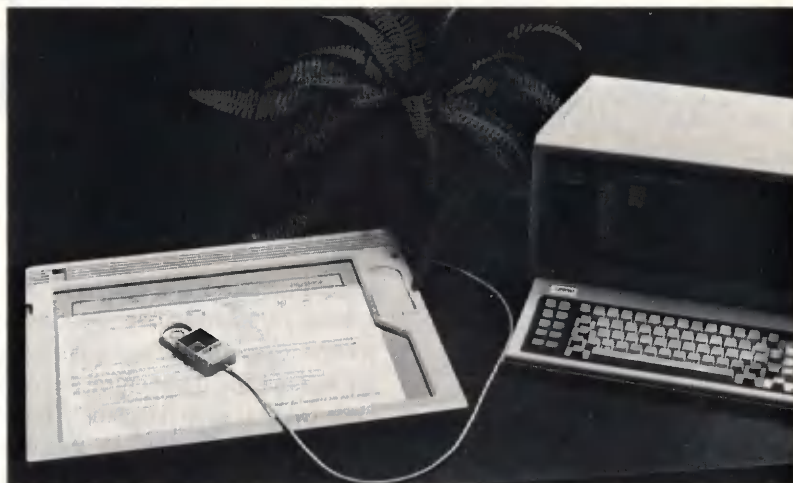
The Salinon Corp. announces its study of advertising slogans and other expressions. "Key words in America's Advertising Slo-

gans" focuses on analyzing which key words appear most often. Results are given for 18 different industry groups. For a free copy of the multi-page report, contact the Salinon Corp., 7430 Greenville Ave., Dallas TX 75231. (214) 692-9091.

Data entry software

A new version of the DigiData Entry System software has been released by DigiData. The program, Version 4.0, uses

a digitizing tablet to enter data from printed questionnaires. Little or no computer experience is necessary for an individual to enter data with the system. Version 4.0 permits virtually unlimited questionnaire size; previous versions were limited to about 1,000 question answers per questionnaire. Contact DigiData Entry System, 9637 East Gold Dust Ave., Scottsdale, AZ 85258. (602) 391-0551.



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Scanning

continued from p. 24

tionnaire is scanned, thus assuring that users are getting all the information that's available on the survey.

Survey Network permits a wide range of edits that are performed at scanning time. At the user's option, scanning will stop at an error immediately or later for corrections.

Edits such as blank fields, out of range alpha or numeric and multiple responses are selected from NCS's library. More complete edits can be programmed and then added to the library if desired.

Limitless questions

There is no limit to the number of questions the user can ask. All the user needs to do is print the questionnaires on NCS sheets, staple them into a booklet, have them completed in the survey and then separate them for scanning. Depending on the model, the OMR scanners read 600-15,000 sheets an hour. Survey Network also lets the user incorporate bar codes and optical character recognition wands as peripherals without additional programming.

Even open-end questions can be handled. The user may either enter codes on the questionnaires prior to scanning, or afterwards, entering the data through the micro-computer keyboard directly into the data file.

Cleaning data is faster, too, says NCS. The quality of Survey Network's key entry software is comparable to that used in leading data entry service bureaus. The user's microcomputer keyboard and Survey Network's data entry screens are all that's needed to edit data.

Data analysis

Data are automatically present after scanning in a file that is part of Stat Pac Gold, a statistical analysis and reporting package from Walonick Associates. This can be used for key entry and data analysis reports. Users can also easily upload the data file to their host computer and use their own program for analysis, or remain in the PC and use DBASE III Plus, RBASE 5000, Lotus 1-2-3, or any other program that can access a sequential ASCII file. Survey Network is completely compatible with them and requires no additional programming steps.

Reliable data

OMR captures data at better than a

99% accuracy rate. One-step entry with an OMR scanner exceeds the accuracy of key entry - even with a verification check for "quality control." With an NCS OMR scanner, virtually no errors go undetected.

One user of the Survey Network is Geo-Centers, Inc., Boston office, a firm that handles government contracts. Since February, 1988, Geo-Centers has been designing questionnaires that go out to different military installations throughout the world.

According to Larry Leshner, a statistician at Geo-Centers, the questionnaires are designed to evaluate the acceptability of the food and clothing used by officers and their troops in field tests.

The firm has been using the system because "there is no one else we're aware that offers in-house designing and printing of scannable questionnaires," says Leshner, who is responsible for the analysis of the completed surveys. "That's important to us because we have to design a different questionnaire for each study, so we don't have the time to send each of them out to a typesetter, make revisions and then send them back for corrections. We have to conduct these surveys on a tight schedule."

Fast turnaround

Compared to sending it out to a typesetter, the turnaround time under this system continued on p. 52

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Scanning

continued from p. 51

is cut down "from a few weeks to a few days," says Leshner. "This is from the time the questionnaires come in from the field to the time the data is ready to be put into the final tech-report."

Between 300-400 persons are typically surveyed. Since March 1988, when the first survey was sent out, approximately 10,000 sheets have been scanned and analyzed.

Kathy Rock, a psychology technician, is responsible for the design up to the analysis of the surveys.

A questionnaire comes to Rock in one of two ways. Typically, it is made up on a word processor and Rock transfers it onto an Apple computer into the Survey Network. Less frequently, Rock constructs the questionnaire herself with input from project officers.

After the questionnaire is put into the Apple, it is printed out on a laser printer. "At this point, the project officer in charge of the study and I revise the questionnaire, change questions and make any type of necessary corrections. We then print it out onto the Survey Network bubble form, staple it and send it out."

The surveys are out in the field for one week and when they return, Rock will do the scanning on an IBM computer.

Tech-report

At this point, Leshner steps in to interpret the survey results. Leshner analyzes the survey using the SPSS/PC+ statistical package. He also works with the project officer to discuss what the important points are to draw from the study. The survey results are then packaged into a tech-report and sent to Army bases throughout the world.

The greatest advantage that both Leshner and Rock see to the Survey Network is the turnaround time. "From the time it takes to get a questionnaire printed, sent out in the field, returned and analyzed, it's 2 1/2 weeks," says Rock. Previously, when Geo-Centers had to manually code all the questions, the whole process would take well over a month.

Leshner especially likes that the data sets are clean compared to a key punch or direct entry "that often involve human error. There's less time spent on cleaning the data."

Adds Rock, "With the scanner, we can do more surveys and a more accurate analysis.

"It's a lot easier and faster, too," says Rock. It's also more interesting to me than sitting down at a computer inputting raw data. The questionnaire looks more attractive. It's just a much more profes-



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sional way of doing things."

Response cards

One other Survey Network user is a national consumer products company. The company uses Survey Network to scan consumer response cards which help decide which products the company should add, drop or modify. Between 1,000-2,000 of these cards are filled out monthly by its customers.

One to three times a month, the company will conduct specific customer surveys, for example, new product evalu-

ations and tracking studies. All of these surveys are created, scanned and analyzed on the Survey Network.

The company uses a Macintosh computer to write and design its questionnaires, a laser printer to make copies of it, the scanner to gather the information, and the COMPAQ system to do the analysis.

Reports from the surveys are produced regularly. For the customer response cards, a report is done once a month and distributed to all of the company's regional and divisional managers.

According to the company's research manager, the Survey Network has many positive attributes. "Nothing needs to be hand-tallied, even open-end questions. The turnaround time is fast, it's flexible and easy to use, and the information we get is timely." MRR

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Test Markets

continued from p. 16

marketing patterns and such adventitious factors as droughts, severe winters, factory closings and anything else that might affect response to the test market.

Unfortunately, considerations of statistical adequacy are often forced to give way to other considerations. Markets have natural boundaries defined by distribution channels and other factors. In addition, it may be easier to implement changes in some markets than in others.

More mischievous is when the market choice is based in part on considerations which might clearly bias the data. This happens most frequently in new product introductions where there is the strong tendency to introduce a product in the area(s) where it is expected to have the best chance of doing well. At worst, a test market can become a self-fulfilling prophecy designed to bolster the position of some faction within a company.

Multiple conditions

Market selection is compounded if multiple conditions are being evaluated because then the separate markets must be matched on all factors which might affect response to the test changes. These may be unknown or difficult to evaluate on a market by market basis. It is virtually impossible to statistically equate markets on an ex post facto basis without data on individual consumers.

Next is the problem of implementation. At the most basic level, market researchers may have only indirect control over price and other factors influencing the sale of their product. Wholesalers and retailers may not be wholly responsive to the changes. There may be parochial price competitions, volume discounts, differential use of coupons, competition for shelf space (or simply inefficient or inaccurate stocking of shelves).

Distribution patterns

There may be several distribution patterns at the wholesale and retail level with the boundaries overlapping and only vaguely defined. These affect the geographical and temporal precision associated with the placement of a test market as well as the data that are used to evaluate the test market. Thus, it is often difficult to describe precisely the limits or nature of the market being tested, much less guarantee its representativeness. If market researchers have limited control over their price, they virtually have no control over the policies of competition and in fact, may not even have a clear idea of what those policies are. Competition may or may not keep their pricing structure or other marketing policies constant across the span of a test market and any changes may be different for each competitor and for each market.

In some kinds of markets, e.g., restaurant chains, the major competition may not only be unknown but almost unknowable, varying by type of occasion, dependent on price and location and frequently consisting of a changing group of privately owned establishments each impacting only one or two franchises.

Data often inadequate

Assuming it is possible to maintain adequate control to the question at issue in a test market, the data produced by a test

continued on p. 56

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Test Markets

continued from p. 55

market are often inadequate. Overlapping distribution patterns, variations in the amount of product stored at levels in the distribution system, variations in the speed with which goods move through the distribution system and variability in the efficacy of exerting control over the test factors produce a lack of precision in the data accumulated in a test market.

Even where something approaching an audit trial can be maintained or where data are available at the individual consumer level for a reasonably intact target market, there remains a mushiness to the data. This is because in most real market contexts you cannot directly impinge on an individual consumer in a manner adequate to permit documentation of the timing and degree of awareness of the test changes. (Granted that when you are testing promotions the evaluations of this factor may be precisely the objective of the test market).

Inefficient way

Even given that the data obtained from test markets have an inherent validity to them and that the necessary controls can be invoked to assure that data are unbiased, test markets still remain a very inefficient way to do market research.

Test markets are very expensive and cumbersome. It usually takes a long time and a lot of money to execute them and even so it is usually only practical to test a very limited set of parameters. It is absolutely impractical to test all the relevant parameters within a test market context. Therefore, before a test market is under-

taken, it is essential that preliminary analytic research be performed to determine the optimal parameters to be tested.

Test markets are also by definition intrusive procedures. Their costs are not always limited to the costs of implementing and evaluating the test effects. An inappropriate manipulation may have an extended effect on at least the test market.

Analytic research tools are unquestionably more efficient both in terms of cost and turnaround time. A much wider array of information is obtainable, usually quickly enough to permit and cheaply enough to come back again with additional questions raised by the research itself. Some of these procedures permit simulation, extending the applicability of the results beyond the constraints of the test conditions. This produces a richness of data not obtainable in a test market context.

The drawback

The drawback of analytical research tools, of course, is that most of these procedures contain an unspecified amount of systematic bias and error of measurement. This is especially worrisome with respect to parametric estimates of market share and/or sales volume.

Note specifically, however, I do not list as one of the drawbacks that analytical studies are somehow less real than test markets. It is certainly true that they are all less realistic but that should be an irrelevant issue. The real issue should be what is the

continued on p. 58

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Ocean Spray

continued from p. 10

face value of 27 cents, the industry incurs about \$2 billion each year the cost of distributing those coupons.

Impact on sales

PromotionScan uses the capabilities of IRI's proprietary mathematical models and detailed store sales and household purchase data in InfoScan to measure the

"We think our culture and size will allow us to get the data out in a timely and usable fashion and importantly, ahead of competition."

John Tarsa

impact of promotions on sales. With PromotionScan, a manufacturer can also measure the impact of every promotional event on each brand's consumer franchise, i.e., actually measure an increase or decrease in brand loyalty based on real

consumers and their actual shopping patterns over time.

By identifying which promotions work best, PromotionScan can save IRI clients tens of millions of dollars and help clients protect their most valuable resource, their brand names. While Tarsa says his company is delighted with data it gets through scanning, he describes it as "massive."

Obtaining information

"Every week, several million numbers are new to the database. We must be able to take that data and turn it into information that the brand manager can use. What we're dealing with now is translating those numbers into information."

Continues Tarsa, "this challenge requires people who have a blend of skills: marketing research, marketing and systems knowledge. People who can deal with data, anticipate marketing needs and develop systems to deliver that information are highly desirable."

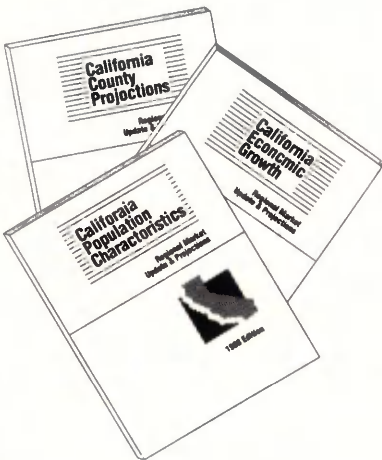
But managing the data "is going to be painful," admits Tarsa, and "it's causing some strain on the organization and up-

heaval in the organizational structure. "We don't have all the answers. But we think our culture and size will allow us to get the data out in a timely and usable fashion and importantly, ahead of competition." **MRR**

Meal preparation

The biggest challenge for the working women who is also the family cook? Meal preparation during the work week, according to a survey by McCormick Schilling. The first priority is making dinner quickly. The survey also shows that, while older women learned to cook from their mothers, younger women learn from magazine recipes, cookbooks and their friends. The recipes most likely to be used are ones without complicated procedures or long lists of ingredients.

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Test Markets

continued from p. 56

most cost effective and reliable predictor of market behavior. It is only when we cannot provide any convincing basis for answering this latter question in favor of analytic procedures that we are forced to fall back in default on test markets. Conversely, it is very difficult to establish the predictive validity of test markets because they are both so cumbersome and so unique that it is difficult to build up a statistically reliable base of predictive test markets. Established, homogeneous, steady state market contexts may be exceptions to this.

Amount and accuracy

In summary, the two questions at issue in comparing test marketing and analytical procedures as methods for answering questions or gaining insight regarding marketing directions are those of efficiency and predictive validity, that is, the amount of information and the accuracy of the information. I am convinced that analytical procedures are by far the most efficient at gaining knowledge of the way the market will perform under a variety of potential manipulations.

Predictive ability is, on the other hand, a moot issue. There is not anything inherent in a test market that guarantees it to have superior predictive ability, except that as the test size is increased in both geographic and temporal extent, the question eventually becomes irrelevant. Nevertheless, test markets will probably remain the court of last resort before full implementation of a critical marketing change.

Discrete parameters

Since a test market can test only a specific set of issues, it should be undertaken only when the options have been reduced to very discrete parameters. This can often be done most efficiently through the proper use of analytic procedures. Finally, when a test market is conducted, resist attributing magical properties to the results. If the information obtained from a test market disagrees markedly with analytic research studies, question both methodologies until you can reconcile the differences. There are as many factors which can impinge on the validity of a test market as can invalidate an analytical research test. MRR

Nutritionally informed

The public is becoming better informed on its health and nutrition benefits, a nationwide study of consumer shopping habits for fresh produce shows. Consumers are buying certain produce and their reasons for doing so correlate with the nutritional advantages of the most frequently purchased items.

Fresh fruit is most often consumed as a snack, the survey also found, with apples as the most popular, followed by bananas and grapes. Consumers said the least consistent produce in terms of quality are tomatoes, followed by sweet corn, asparagus, head lettuce and cucumbers.

The survey was commissioned by *The Packer*, a weekly newspaper of the produce industry.

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Quirk's Marketing Research Review



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1. What are the primary problems you have when conducting surveys? (Fill in all that apply)

Data entry

- Elapsed time
- Data accuracy
- Cost
- Labor staffing
- Coding
- Peaks and valleys
- Other _____

Questionnaire preparation

- Last minute changes
- Flexibility
- Aesthetics
- Complex designs
- Assembling
- Typos
- Other _____

2. What is your typical number of respondents per survey?

- | | |
|-------------------------------------|-------------------------------------|
| <input type="radio"/> Less than 200 | <input type="radio"/> 2,001-5,000 |
| <input type="radio"/> 201-500 | <input type="radio"/> 5,001-10,000 |
| <input type="radio"/> 501-1,000 | <input type="radio"/> 10,001-20,000 |
| <input type="radio"/> 1,001-2,000 | <input type="radio"/> Over 20,000 |

3. How many surveys do you conduct per month?

- | | |
|----------------------------|-------------------------------|
| <input type="radio"/> 1-2 | <input type="radio"/> 11-25 |
| <input type="radio"/> 3-5 | <input type="radio"/> 26-50 |
| <input type="radio"/> 6-10 | <input type="radio"/> Over 50 |

4. How do you enter your data?

- Key entry minicomputer
- PC with key entry software
- CRT interviewing system
- Other _____

5. How do you prepare your Questionnaires?

- Word processing
- Computer software product
- Other _____

6. Would you consider using the SURVEY NETWORK™ system for your operation assuming you can reduce costs and it solves the problems you marked in the first question?

- Yes
- No
- Need more information

Name _____

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Office Trends

continued from p. 22

b. What is the product mix relative to wood vs. metal, budget vs. high quality, systems vs. computer support vs. traditional desk and case goods? Are any of these expected to change in the next three months?

2. Delivery times

a. What is the average delivery time? Is it improving/worsening?

b. Are there major variations by type of

furniture or manufacturer?

3. Marketing/promotional activities

a. What new promotions are you aware of?

b. How/where did you learn of them?

4. Price levels

a. What is the average price being paid for a work station? Task chair? Mid-management chair?

5. Open vs. private offices

a. What percentage of furniture sold/

specified is for open/private offices?

b. For what applications are open/private offices being specified?

Supplementary topics

Supplementary topics to be covered each quarter are as follows:

• Evaluation of systems furniture:

For what applications? Percentage wood/metal? Percentage new orders/replacement? Average number of work stations/order? What price range? Percentage budget/mid/high quality? What brands? Brand leaders in terms of design, quality, price/value?

• Office seating evaluation:

Percentage of new orders/replacement? Features desired? What brands? Brand leaders in terms of design, quality, price/value?

• New vs. renovated space:

Percentage of furniture sales to new vs. renovated space? Types/brands sold for new. Types/brands sold for renovated.

• Image evaluation:

Who are the top three manufacturers in terms of design? Who are the top three in



Steelcase movable walls. Photo courtesy Steelcase, Inc.

continued on p. 68

How much wood could an Indianapolis woodchuck chuck...?

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Red is for desserts

The best tasting desserts are packaged in the color red, according to a recent nationwide study conducted by Cheskin-Masten.

The package design firm found that consumers associate the color red with desserts that are hot in temperature, high in calories, sweet-tasting and good for the whole family. They also link the color to brand names such as Betty Crocker, Sara Lee and Duncan Hines.

Blue comes in second as the most preferred color for dessert packaging and Pillsbury products are ones consumers mention, according to the study. Consumers say yellow packaging is associated with desserts that are tart, creamy, a pastry and/or inexpensive. Desserts packaged in pink or silver are considered low-calorie with Weight Watchers products coming to mind. The color silver is also occasionally associated with a dessert rich in calories and expensive, the study shows.

Cherry is No. 1 choice

The flavor of choice among Americans in 1988 is cherry. According to *Gorman's New Product News*, more than 60 cherry-flavored products have been introduced thus far this year. "From a psychological perspective, the growth of cherry-flavored products can be tied to our strong desire for sweetness," says Dr. Frieda Spady, a psychiatrist. "Cherry is one of the sweetest natural flavors we know and it's almost universally associated with reward, which is very pleasing."

Waiting room blues

A recent telephone survey of 400 residents in South Bend, Ind., conducted by Harrington Market Research, revealed that more than three-fourths of respondents claimed that waiting is the most irritating thing about visiting their doctor.

The results may be less than surprising to millions of Americans who have waited to see their physician, but may say a great deal to those who have spent millions to change patient attitudes.

Answers in the Harrington survey were recorded verbatim, condensed and sorted by content. In addition to the 302 mentions of waiting as the chief irritant, there were 21 other mentions of time-related problems. Only 11 respondents had billing- and insurance-related gripes at the top of their list. A few feared long needles.

Says Harrington president Brenda Murphy, "after all we've seen the medical community go through, our survey suggests it may be time for physicians to get back to the basics, to keep it simple."

Thinking about milk

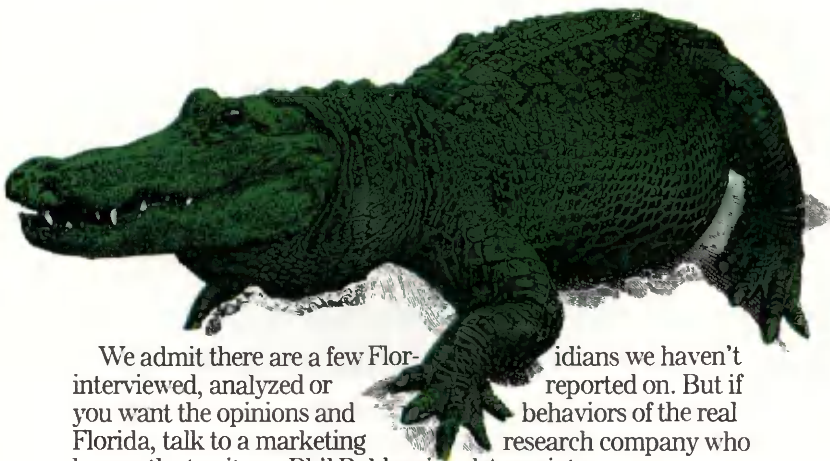
Did you know this about milk?

The five leading dairy states are Wisconsin, California, New York, Minnesota and Pennsylvania. Together, they produce just over half of America's milk supply.

For every dollar you and I spend on milk, 63.2 cents goes to the dairy farmer and the remainder to middlemen.

During the past 10 years, whole milk use dropped 33% while low-fat milk use jumped 52%. Skim milk use also went up 16%.

ONE OF THE FEW FLORIDA RESIDENTS WHOSE OPINIONS WE HAVEN'T WRESTLED WITH.



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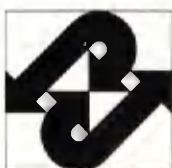
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APPLETON/ MILWAUKEE, WI.	X	X	X	X	MONTEREY/ SALINAS, CA	X	X		X
BOULDER CO.	X	X		X	NEW ORLEANS, LA	X	X	X	X
COUNCIL BLUFFS, IA/ OMAHA, NE	X		X	X	PHOENIX, AZ	X	X	X	**X
DENVER, CO.		X	X	X	PINE BLUFF/ LITTLE ROCK, AR	X	X	X	X
DES MOINES, IA	X	X	X	X	SALT LAKE CITY, UT	X	X	X	X
DETROIT, MI	X	X	X	*X	SAN RAFAEL, SAN FRANCISCO, CA	X	X		X
EAU CLAIRE, WIS./ MINNEAPOLIS, MIN.	X		X	X	SEATTLE, WA	X	X	X	X
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Focus Groups, One-On-Ones

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TELECONFERENCING

Rockwood Research Corp.

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 44061-8000



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Office Trends

continued from p. 61

terms of quality? Who are the top three for price/value?

- NEOCON impressions:

Which displays did you find particularly impressive? Which new products were you impressed with? What foreign influences did you notice?

- Furniture purchases made during the past year: Type, price range and manufacturer.

- Furniture purchases expected for the coming year:

- Type, price range and manufacturer.

- Percentage open vs. private offices; expected change

- Awareness of furniture manufacturers

- Top three manufacturers in terms of design, quality and price/value

- Evaluation of traditional furniture and case goods, including vertical and lateral files: For what applications are traditional furniture being specified? What brands are being specified? What price range?

- Computer support furniture evaluation: What types of companies are using? Features desired? What brands are being specified? Who are the brand leaders? What price range?

Proprietary questions

Clients subscribing to the study also have the opportunity to insert proprietary questions, the results of which are made available only to the question sponsor.

Interview results are coded and edited for completeness and accuracy. Data processing provides cross-tabulations of ap-

proximately 18 variables such as type of respondents, dealer affiliation and region.

Results are then analyzed and a summary report prepared. This report includes charts and graphs tracking changes over time.

Steelcase

While Office Trends has only been available for about one year, it already has attracted a long list of subscribers from highly respected companies nationwide. Steelcase, a major designer and manufacturer of office furniture headquartered in Grand Rapids, Mich., is part of Office Trends' founding subscribers, says Richard Arnold, manager of marketing re-



Allsteel 8900 Series Desk.
 Photo courtesy Allsteel.

search at Steelcase. The study is attractive to the company and the office furniture industry alike.

"In the past, our company and the office furniture industry in general have not done a significant amount of marketing research regarding marketplace perceptions," says Arnold. "We have a need to track major issues in our industry, to have some sort of monitoring system.

"The core items are of interest to us," continues Arnold. "These are order expectations, in other words, what we can expect in future business activity. It also gives us the marketplace perception of our delivery lead times in comparison to the competition, and it gives us an indication of discounting and pricing levels in the industry."

The results of the study have a broad distribution within Steelcase. First, it's compiled into an executive summary outlining the areas of interest and concern to



Kimball Cetra/Artec. Photo courtesy Kimball Office Furniture Co.

Steelcase. "We internalize the executive summary and distribute it to sales and marketing managers, all who have contact with furniture customers, dealers or the design community. The information helps them better understand the competitive environment." The information is also used to validate customized research the company has done or to bridge the gap be-

tween the time one study is conducted and before it's conducted again.

"Office Trends is a periodic, cost-effective way to monitor key business activity issues and to address special topics in detail throughout the year," adds Arnold.

Allsteel

Allsteel, the Aurora, Ill.-based contract furnishings manufacturer, is another Of-

fice Trends' initial subscriber. Ken Malik, director of marketing strategy and planning at Allsteel, says the tool is used because "we need more specific information about our industry but it's often too cost-prohibitive and time-consuming to

"In the past, our company and the office furniture industry in general have not done a significant amount of marketing research regarding marketplace perceptions. We have a need to track major issues in our industry, to have some sort of monitoring system."

Rick Arnold

research on our own. It's the only tool that reaches a cross-section of industry people.

continued on p. 70

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Office Trends

continued from p. 69

It also enables us to submit proprietary questions which provide an extra access point to the market."

Malik says the study is especially important when the company is embarking on a specific product or program.

"It provides another data point in our decision-making process. It's an additional checkpoint that may initiate a different

course of action or rethink the current proposal."

The results go to the company's vice president of marketing, product managers and staff members who "use it as a reference point in our planning and program development. It's another important input in the decision-making process."

Adds Malik, "In this industry, there's little other type of data available at the micro-level, and the KRI report gives us

added input to stimulate our thinking."

Kimball International

Like the two companies previously men-

"In this industry, there's little other type of data available at the micro-level, and the Office Trends report gives us added input to stimulate our thinking."

Ken Malik

tioned, Kimball International, also one of the founding sponsors, has a similar need for Office Trends. According to Martin Vaught, assistant to the senior executive vice president of marketing, the Jasper, Ind., company is continually monitoring all aspects of the office furniture industry



Kimball 5800 Series.
Photo courtesy Kimball Office Furniture Co.

and its involvement in the marketplace.

"It's somewhat of a mirror or added resource," describes Vaught, "to supplement other data we use, such as that supplied by our market research personnel and industry and government information." MRR

Kennedy Research, Inc., a full-service marketing research firm in Grand Rap-

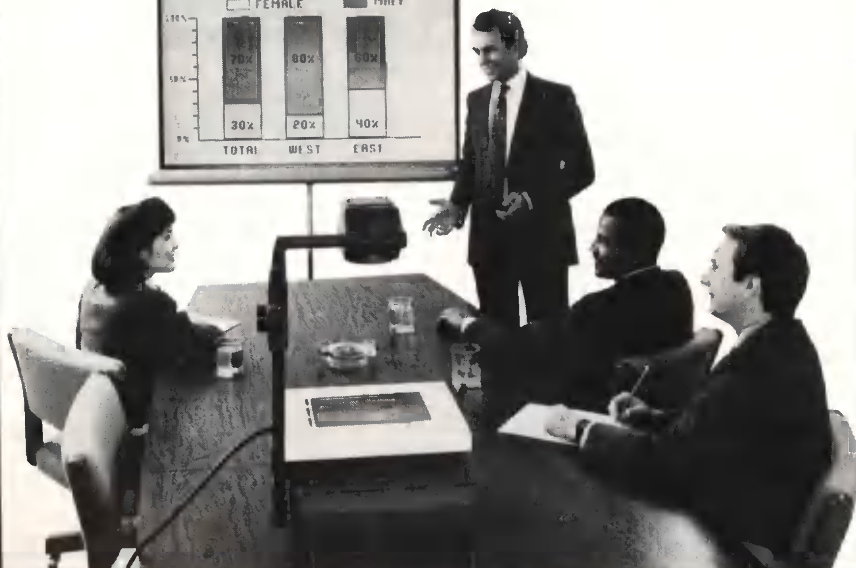
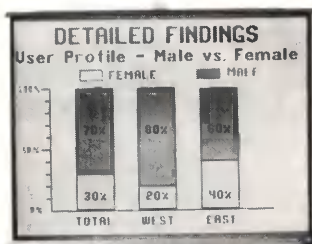
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ids, Mich., has extensive experience serving both consumer and industrial organizations. Its activities in the marketing sphere cover a wide spectrum of marketing services from initial investigation and planning to practical implementation of programs. Primary research services include: market structure research, attitude research, futures research, promotion research, audit research and test marketing. The company offers both qualitative and quantitative research techniques. Its clients include companies such as AT&T, B.F. Goodrich, Campbell Soup, Dow Chemical, General Electric, Humana, Johnson & Johnson, Meijer, United Telecom and Upjohn.

Fast-food eaters

Compared to make-it-from-scratch traditionalists, fast-food eaters view themselves as more sophisticated and adventurous, according to a study by the Food Marketing Institute and the Campbell Soup Co.

The study also says regular buyers of take-out food differ not only in age, sex and education from occasional buyers but also psychologically.

Among the heavy buyers - defined as those who ate take-out food twice a week or more - 41-55% described themselves as "adventurous, modern (up-to-date), successful, career-oriented, pressured and sophisticated."

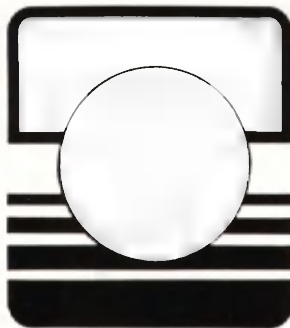
Among the infrequent fast-food buyers, just 23-39% considered themselves as having these qualities. The others considered themselves less harried conservatives who refuse to eat dinner from a carton.

Timothy Hammonds, senior vice president of FMI, a Washington-based trade association, says the organization represents supermarkets that are selling deli sandwiches, salads and partially cooked steaks in competition with fast-food chains and ethnic restaurants.

Men more daring with exotic foods

When it comes to sampling exotic foods, men are more daring than women, a study by the makers of PAM cooking spray report. PAM found in its study of 1,000 people that 41% of the men had sampled sushi and sashimi

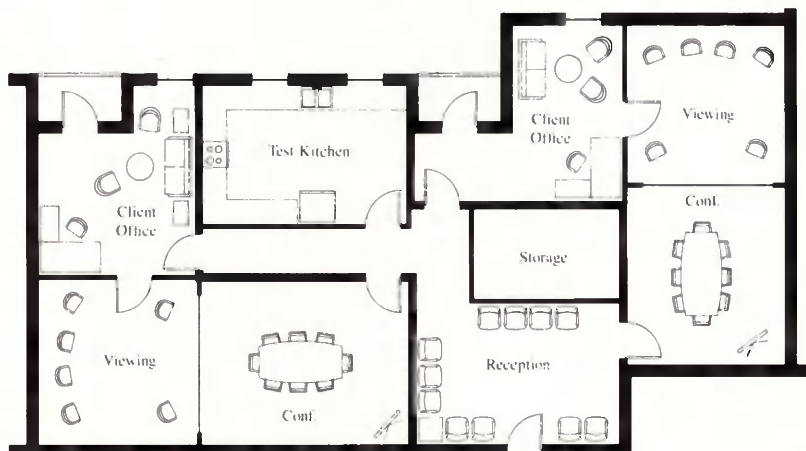
while just 30% of the women had tasted it. Further, 27% of the men and 40% of the women reported that they could never try this food. The survey showed similar responses on buffalo meat and goat milk



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Leader: Bill Zoellick, vice president, Avalanche Development Co.

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Leader: Julie Schwerin, president, Infotech

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T1	T2	T3	9:00 a.m. - 12:30 p.m.
↓	↓	↓	
T4	T5	T6	1:30 p.m. - 5:00 p.m.

9:00 a.m. - 12:30 p.m.

- T-1** Introduction to Compact Disc and Optical Publishing
- T-2** CD-ROM, CD-I, DVI: Multi-Media Formats
- T-3** Implementation of CD-ROM for Corporate Productivity

1:30 p.m. - 5:00 p.m.

- T-4** Introduction to CD-ROM Software Strategies
- T-5** Advanced Software Concepts: Hypertext, Hypermedia
- T-6** In-House Publishing: Developing CD-ROM Applications for Corporate Use

NOTE: Because of the schedule overlap on Monday and Tuesday participants may attend either the Workshop Series or Tutorial Program, but not both.

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I'm intrigued! Please send me further information on the workshops, tutorials, conferences and exhibits at CD-ROM Expo'88, September 26-29, Hyatt Regency, Downtown Chicago.

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Or call TOLL FREE 1-800-225-4698.

X

Corrections

The address for the following listing was incorrect in the June/July, 1988, Healthcare Marketing Research Services Directory. The correct address is below:

Glickman Research Associates, Inc.
354 Old Hook Road Ste 204
Westwood, NJ 07675
201/664-6688

The following listings were inadvertently omitted from the June/July, 1988, Health-care Marketing Research Services Directory:

Aragon Consulting Group
120 South Central, Ste 500
St. Louis, MO 63105
314/726-0746
A-1-2-3-4-5-6-7-8-9
B-1-2
C-1-2-3-4-5-7-8-9

Moosbrugger Marketing Research
901 W. Hillgrove Ave.
LaGrange, IL 60525
312/354-5090
A 1-5-6-7-8-9
B 1-2
C 2-4-5

Arbor, Inc.
The Science Center
3401 Market St.
Philadelphia, PA 19104
215/387-5300
A 5-6-7-9
B 1-2
C 1-2-3-4-5-6-7-8-9

NewSouth Research
700 South 28th St. Ste 106
Birmingham, AL 35233
205/322-9988
A 5-6-7-8-9
B 1-2
C 2-4-5-7-8-9

McGraw-Hill Research,
Telephone Interviewing Center
Princeton-Hightstown Rd.
Hightstown, NJ 08520
A 5-6-7-8-9
B 1-2
C 2-4-5-7-8-9

The following listings were inadvertently omitted from the May, 1988, Telephone Interviewing Directory:

Alpha Research Associates, Inc.
P.O. Box 28497, North Station
Providence, RI 02908-0497
401/521-6660
25-0-25-8

Barbour Research, Inc.
5241 Southwyck Blvd., Ste 201
Toledo, OH 43614
419/866-3475
20-0-20-20

Cook Research & Consulting, Inc.
6600 France Ave. So., Ste 214
Minneapolis, MN 55435
612/920-6251
10-0-10-6

International Data Corp.
5 Speen St.
Framingham, MA 01701
617/872-8200
25-0-4-0

Utell International Telemarketing
10608 Burt Circle
Omaha, NE 68114
1-800/457-4000 or 402/498-4200
80-80-80-80

The following listings were inadvertently omitted from the December/January, 1988, Focus Group Research Facilities Directory:

Barbour Research, Inc.
5241 Southwyck Blvd., Ste 201
Toledo, OH 43614
419/866-3475
1,3,6,7B

Burke Marketing Research
602 Main St. Ste 602
Cincinnati, OH 45202
513/852-8676
1,3,6,7B

Cook Research & Consulting, Inc.
6600 France Ave. So., Ste 214
Minneapolis, MN 55435
612/920-6251
1,3,4,5,6,7B

Concepts In Marketing Research
400 North Robert St.
St. Paul, MN 55101
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Entertainment Researchers

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marketing research.

"We are targeting the 15-45 year-old age group," explains McCullough. "These are the people who have the discretionary income to go to the movies but they are also the ones buying the brand name jeans and other premium quality products."

For this reason, CCM has developed a clientele that goes beyond such entertainment greats as Lucasfilm, Universal Studios, Twentieth Century Fox and Warner Brothers. It also includes companies like The Gap clothing stores, Levi Strauss, La Petite Boulangerie and Visa Card. Through research projects for these clients, CCM has developed an expertise and thorough understanding of its target market.

Thoroughly understanding this market comes also from utilizing a variety of qualitative and quantitative research techniques. For entertainment studies, the pair conducts focus groups, national telephone interviews, personal interviews with those waiting in line for a movie with follow-up calls later on, recruited audiences and sneak previews.

Careful scrutiny

No element associated with a movie is left unexamined. Advertising, posters, concepts, story boards, titles and sneak previews are carefully scrutinized to ensure all communications are on target and that potential viewers aren't misled about a film's content.

For consumers who saw preliminary ads for the original film "Alien," for example, the impression was that it was a comedy or a Satanic occult film, says McCullough. Revisions produced "a much more horrifying ad" and studies uncovered the power of the tag line: "In space, no one can hear you scream."

Sometimes, however, the company's advice can come all too late. One major celebrity commissioned CCM to test consumer reaction to his TV special. The general consensus among focus group participants was less than favorable but at that point it was too late to re-edit. The program went on the air nonetheless and unfortunately, bombed with other viewers, too.

In the case of a potentially "disastrous" movie, CCM might recommend that it open in select theaters on a small scale, rather than in numerous theaters all over the country.

No matching creatives

Canapary and McCullough admit that while research can be extremely beneficial in pointing out any weaknesses or problems tied up with a film and the way it's marketed, it can't match the work of the film's artistic staff.

"It's not the silver bullet," warns Canapary. "It's not a replacement for the creatives or the writers. It's just meant to fine-tune things."

It can, however, help isolate those elements, the "hot button," describes McCullough, that capture an image, an image that entices people to go see a movie or go out and buy a certain brand of jeans or any other product. MRR

Jim McCullough is principal of Corey, Canapary, McCullough Entertainment Market Research and vice president of Corey, Canapary & Galanis Market Research Co. His background includes a wide range of experience in both the entertainment and marketing industries. McCullough is past president of Doodle Products Corp. He is a member of the Hollywood Radio and Television Society and the American Advertising Federation and vice president of the Rock and Roll Museum, San Francisco.



Photo by Tom Duncan, *San Francisco Examiner*.
(L to R) Ed Canapary and Jim McCullough

Ed Canapary, principal of Corey, Canapary, McCullough Entertainment Market Research, has been involved in the industry for 25 years. He is president of Corey, Canapary, Galanis Research and was past research director of Erwin Wasey, Inc. Advertising of Los Angeles. Canapary also has extensive research background with organizations such as Facts Consolidated, Field Research Co., and Market Research Corporation of America. He is past president of the American Marketing Association, San Francisco chapter.

Corey, Canapary, McCullough Research, San Francisco, specializes in entertainment, consumer and "niche" marketing research aimed at the 15-45 year-old demographic segment of the population.

CCM was established in 1981 as an outgrowth of Corey, Canapary & Galanis, the oldest market research company in California. CCM, a partnership venture between Ed Canapary and Jim McCullough, has employed a wide variety of research techniques to assist the marketing strategy for dozens of major motion pictures for Lucasfilm, Twentieth Century Fox, Warner Brothers, The Ladd Co., and Universal, working with research departments, independent producers and directors. In the consumer area, CCM has been instrumental in casual and sports fashion design, product refinement, promotion, advertising, store exterior and interior design, signage and packaging for companies like The Gap stores, Levi Strauss, and La Petite Boulangerie.

In television, CCM has experience in evaluating programming, advertising themes and needs assessment for clients such as Viacom, Showtime and municipal and county cable franchise departments.

In radio, CCM has worked on themes, promotions, format assessment and advertising. In addition, other primary areas of investigation include: electronic technology, telecommunications, gambling, health clubs/spas, recreation/off highway vehicles, education and major wholesale furniture marts/centers and rock concert audience surveys.

By Beth E. Hoffman
managing editor



Lights, camera, action!

Movie industry gets cues from entertainment researchers

Practically everything in our lives today has been affected in one way or another by market research, from the food we eat, the clothes we wear and the types of cars we drive. Believe it or not, it's now also found its way into the movies we pay to see at the box office.

Meet Ed Canapary and Jim McCullough, principals of the San Francisco firm Corey, Canapary & McCullough, two zealous entertainment market researchers who have helped movie producers and studios understand the things that can make a movie a winner or a loser.

Since early 1979, they've put their two cents worth in a wide range of major motion flicks such as "Star Wars," "The Empire Strikes Back," "Raiders of the Lost Ark," "Alien," "Breaking Away," "The Blues Brothers," "The Killing Fields," "Risky

Business," "Body Heat" and "Chariots of Fire."

It was their research, for instance, that helped influence the decision to change the title of the George Lucas film, "Revenge of the Jedi," to "Return of the Jedi."

"Our studies showed that women over 30 and mothers of small children just didn't like the word 'revenge,'" says McCullough. Based on the initial ads for "Breaking Away," Canapary and McCullough learned that consumers thought the film would be a kind of "Animal House." Subsequently the ads were redone, stressing the sports angle and thus giving potential movie-goers a more precise idea of its format.

Color was a big factor in consumers' initial impression of the film "Alien." When the film's original poster was created in red, consumers thought its story line was about an "occult." That's when the poster was changed to green, which appropriately conveyed Alien's message of "suspense."

Growing film industry

In 1979, Jim McCullough started the entertainment division of Corey, Canapary & Galanis, a firm which conducts product and consumer research, political polling for candidates and polls for governmental agencies and the media. Corey, Canapary & McCullough became a partnership in 1981 and broke into entertainment market research partly in response to the needs of the growing film industry in northern California. McCullough says film producers have since begun to learn of the value of market research because, "when you get into an investment that's millions of dollars, it's a kind of insurance to do your homework. The movie may be great, but the posters may be wrong, the tag line can stink. If the public perceives those things the wrong way, it can kill a film."

While entertainment market research may be the specialty for which CCM has gotten a lot of media attention, McCullough is quick to point out that it is only a part of what the firm is really all about. What it does is what McCullough describes as "niche"

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Because most western languages derive from a single source (Indo-European), it is possible to construct "world names"... product and company names which are properly meaningful in most western nations and Japan. (Roughly 10% of urban Japanese is derived from English.)

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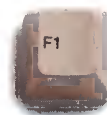
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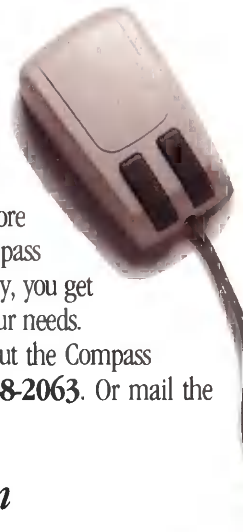
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