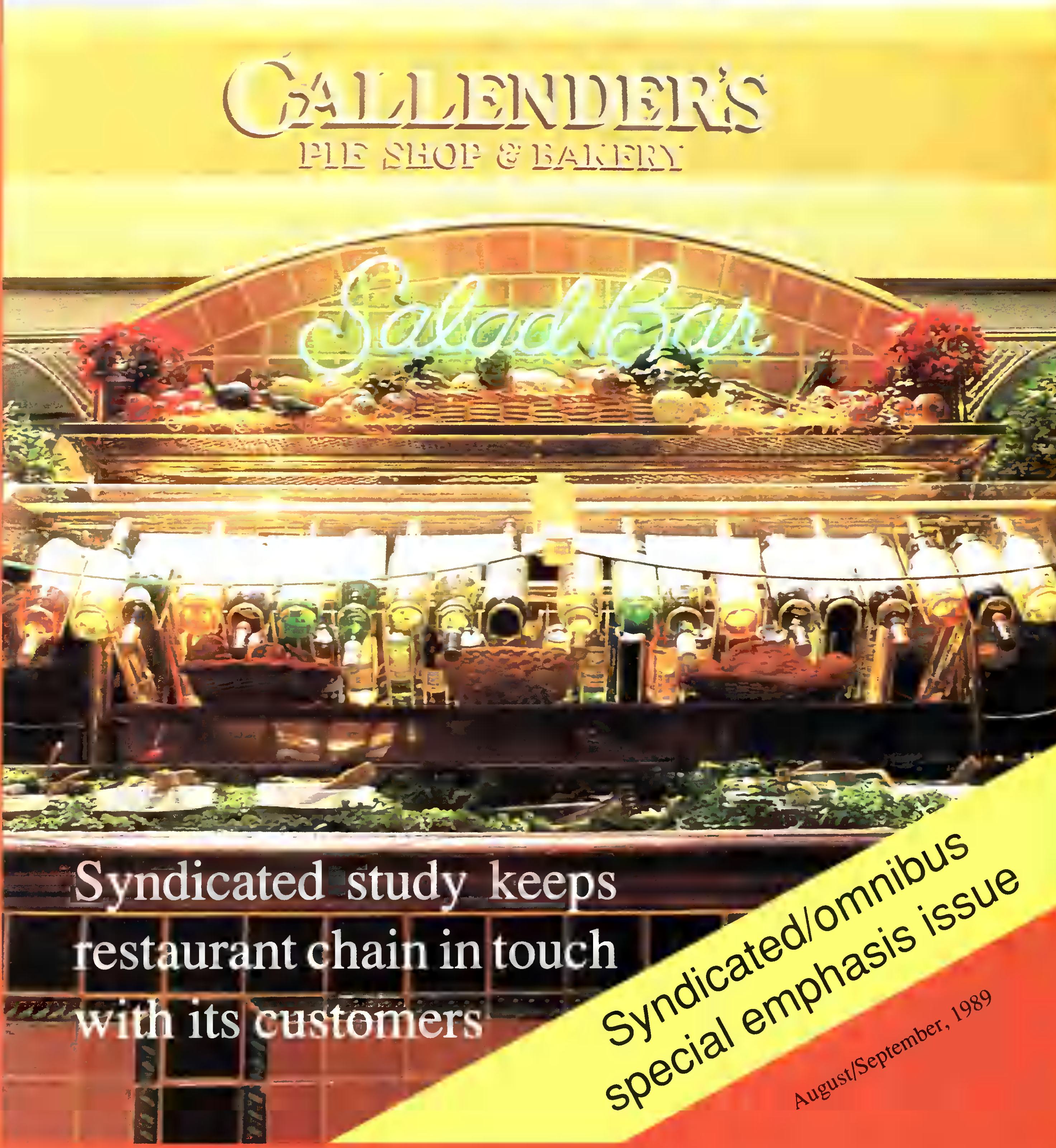
Quirk's
MARKETING RESEARCH
Review



Syndicated study keeps restaurant chain in touch with its customers

Syndicated/omnibus special emphasis issue

August/September, 1989

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Review

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Contents

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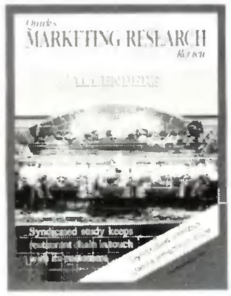

Cover

A syndicated tracking study helps Marie Callender's Restaurants stay in touch with the needs of the Los Angeles-area market. See p. 14

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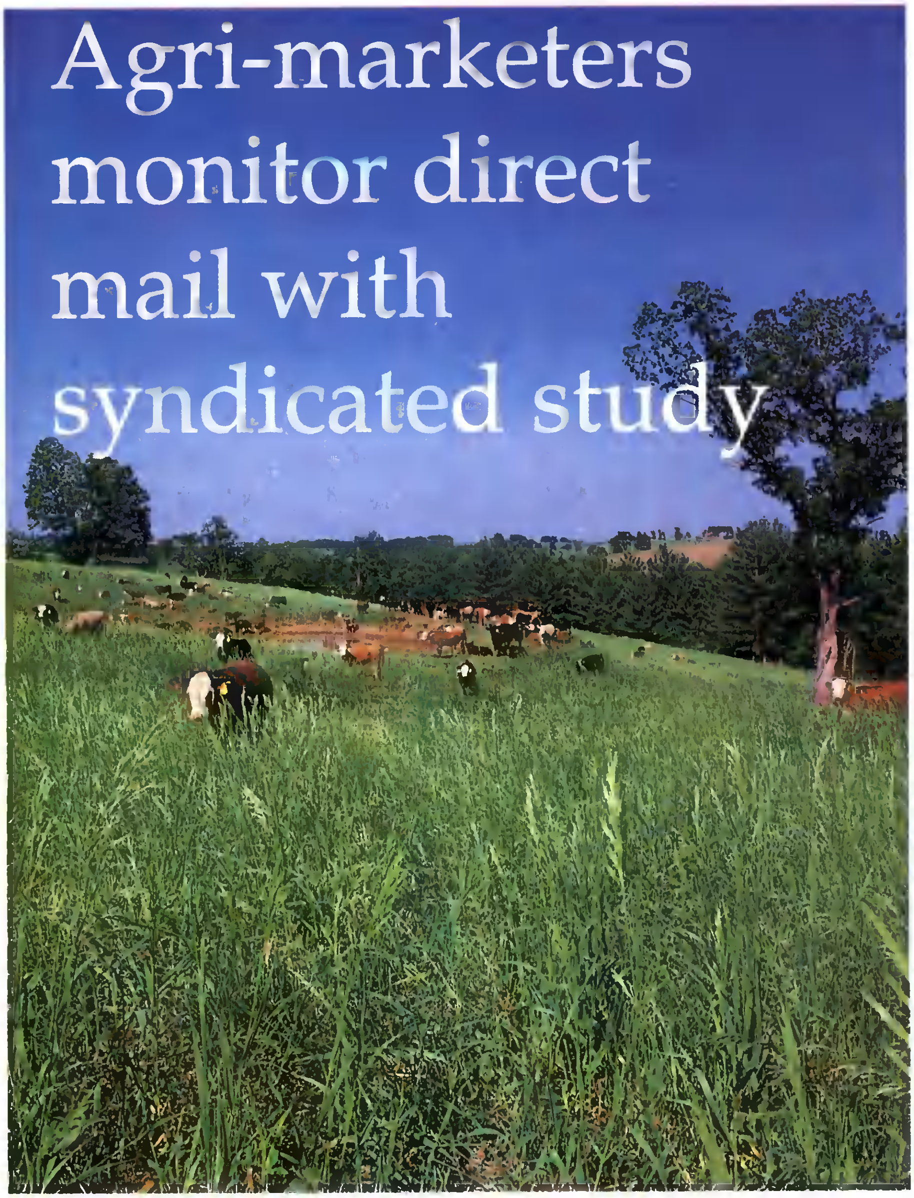
Circle No. 822 on Reader Card

Agri-marketers monitor direct mail with syndicated study



With direct mail being used more and more in the agriculture industry, farm equipment, seed, and chemical marketers are seeking answers to questions about how farmers are receiving their messages. For example, how thoroughly do farmers read agriculturally-related direct mail? What action do they take based on it?

Agri-marketers also have questions about the direct marketing efforts of the competition. What kinds of pieces are they sending out, and when? How are their messages being received?

For the past two years, some answers to these questions have been provided by Mail Monitor, a syndicated study—performed by St. Paul-based Rockwood Research—that compiles the reactions of farmers in 12 states to the direct mail they receive.

The study gathers information in areas such as the level of readership and action taken for each piece, its size and carrier type (i.e. postcard, envelope, self-mailer, magazine) and the quantity of mail farmers receive.

Methodology

For the 1988/1989 study, 1530 Class 1A farmers (those with at least $100,000 in annual sales) operating farms in the East and North Central regions of the U.S. were contacted by telephone and asked a series of questions on crop and livestock demographics, seed corn brand usage, corn and soybean herbicide usage and tractor/combine brand ownership. They were also asked if they would agree to participate in the study, which would require them to collect all the agricultural direct mail they received during a two-week period or "wave."

During the 12 collection waves, almost 8,500 direct mail pieces were returned to Rockwood Research. The average participant collected 6.5 pieces of direct mail.

Participants were asked to save only direct mail pertaining to agricultural products or services. To gather data on the carrier of each piece, Rockwood specifically instructed farmers to return the envelope along with its contents.

For publications, respondents were told to keep those to which they subscribed and return to Rockwood those published by an agricultural company for promotional purposes. To clarify this, the farmers received a sample list identifying those publications to keep and those to return.

To indicate the level of readership and action taken, participants were sent color-coded stickers near the end of the collection period to affix to each piece. Prior to this, they had no knowledge that Rockwood was interested in the degree of readership or action taken.

Each readership sticker had a number from one to four on it, designating, for example, "I read all of the mail piece," or "I read none of the mail piece."

The action stickers used the numbers five to eight to indicate the type of action taken. For example, a five meant "I called or intend to call an 800 number," while a six meant "I contacted or intend to contact a dealer or sales representative." A blank sticker indicated no action was taken.

Buying power

Class 1A farmers are of special interest to ag companies because of their buying power, says Roger Zuehl, manager, agriculture advertising and sales for farm equipment manufacturer J. I. Case Co. The farmer who buys expensive farm machinery probably buys 15 or 20 times as much seed or chemicals as the average farmer involved in production agricul-

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Focus groups shape successful

by Joseph Rydholm
managing editor

A few years ago, when Oasis Laundries co-founder Bill Christensen first started thinking seriously about adding a new wrinkle to the laundromat industry, he did some very basic marketing research. The aspiring entrepreneur visited several laundromats and asked the customers what they would change to make them better.

They said make them clean, well-lighted places with plenty of working washers and dryers, staff them with an attendant who can help us if we have problems, and give us something to do while we're waiting for our clothes to dry.

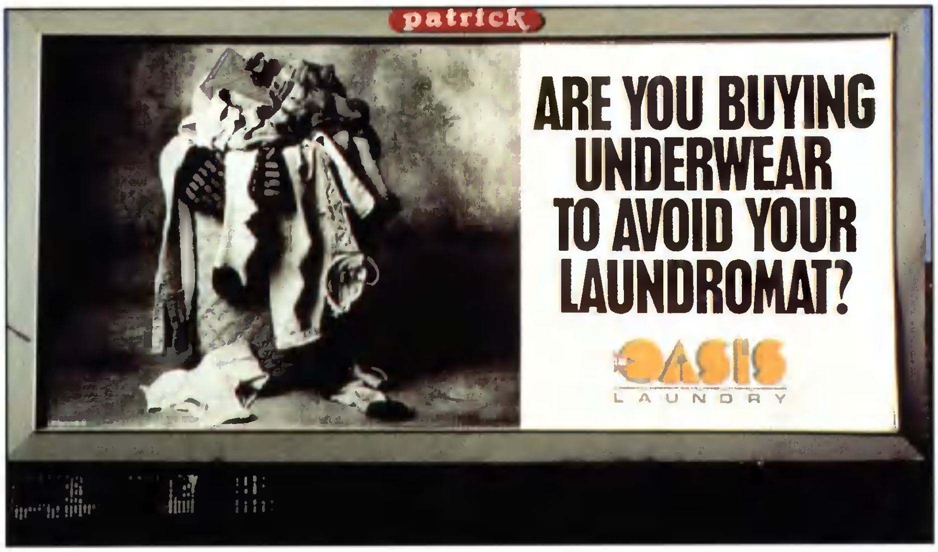
"What they described is what an Oasis laundromat is today," Christensen says.

Numerous amenities

Unlike the laundromats most people are used to, Oasis locations boast numerous amenities, including modern decor, an on-duty attendant, projection TV with monitors placed throughout the laundromat showing films on videocasette, current magazines (instead of ancient, dog-eared copies of *Popular Mechanics*), snack bars, restrooms, and at least one dryer for every washer. Some stores also offer dry cleaning and a drop-off service which will wash, dry and fold clothes.

The first Oasis opened in April of 1987, 10 are now open in the San Jose metropolitan area (five are company-owned, the rest are franchises). By the end of this year, Christensen estimates an additional 20 to 25 locations will have been added.

The industry is fertile ground for such an idea. According to the Coin Laundry Association, 45,000 laundromats in the U.S. make up a $4.5 billion industry serving 20 million people each week.



This billboard was inspired by a focus group respondent's admission that buying new underwear was preferable to visiting a laundromat to wash the underwear they already owned.

Ad campaign

Since Christensen's early efforts, the company has continued to use research in many ways. Probably the most visible result of this is an outdoor advertising campaign that arose out of a series of focus groups.

Working with the San Francisco ad agency Mandelbaum Mooney Ashley, Oasis held groups with two target customer types: once-a-week laundromat users and apartment dwellers who didn't use laundromats because their buildings already had facilities.

"We wanted to do some basic learning about how people feel about laundromats," says Don Ashley, partner, Mandelbaum Mooney Ashley. "And we wanted to test some initial hypotheses we had about what might motivate them to use a new kind of laundromat."

OASIS LAUNDRIES, INC.

They wanted to learn more about the attitudes that each group had about laundromats, and for the apartment dwellers in particular, what features a laundromat would have to have to entice them away from their apartment facilities.

Strong negative perception

Initially, Ashley says, the plan was to tout the many positive features of an Oasis in the advertising. But the focus groups changed that plan. They uncovered such a strong negative perception of laundromats that the decision was made to sell against the negative aspects of regular laundromats.

"The focus groups turned out to be fascinating learning experiences because we found out just how much people really hate laundromats," Ashley says, citing some of the adjectives that focus group participants used to describe laundromats: dirty, crowded, stuffy, unfriendly, and unsafe.

Humorous billboards

These negative perceptions were turned into humorous billboards that poke fun at the horrors of laundromat-going. One shows a row of prison cells with the

ad campaign for Oasis Laundries

Oasis research revealed that three of the most important attributes customers look for in an "ideal" laundromat are that it is clean, has plenty of folding tables, and has plenty of dryers.

Each Oasis has a snack bar featuring a variety of snacks such as pizza, burritos, hot dogs, candy, mineral water, coffee, and sodas. The centers also stock a variety of laundry items for sale.

caption "Most people would rather spend time here than in a laundromat." Another features a shot of an operating room with the caption "It's almost as clean as our laundromats."

The content of a third ad came directly from a focus group respondent who claimed to prefer buying new underwear to visiting a laundromat to wash the underwear they already owned. This inspired a billboard showing a clothes basket overflowing with dirty clothes, bearing the tagline "Are you buying underwear to avoid your laundromat?"

Ashley says that playing off the drawbacks of other laundromats had a significant effect on the success of the advertising.

"The information from the focus groups gave us a course correction prior to doing any advertising that I think made a substantial difference in the results. We knew we had really struck a chord and we really had to play on the negativity of laundromats."

Created a presence

Along with meeting the obvious goal of increasing sales, Christensen says the advertising also created a presence in the San Jose- area market and increased franchise interest.

"It helped in a number of ways. Revenues increased on average between 11 and 20% per store between the first quarter of 1989 and the fourth quarter of 1988. We got a lot of attention from potential franchisees who became aware of Oasis because they saw a billboard and inquired about the company.

"And it gave us corporate identity and awareness that we really needed because the typical laundromat draws from a very small area, it's a very localized neighborhood-oriented business, so to get any kind of identity is difficult."

Customer surveys

Customer surveys have also been used on an ongoing basis to determine the preferences of each location's customers—for films, magazines, food and beverage choices.

Christensen

"Those little questionnaires have been of great value to us," says Tanya Roberts, manager, marketing communications, Oasis Laundries. "They're a staple of our whole operating kit. We've seen a huge impact in sales just by changing from muffins to bagels, for example. Something that simple can make a big difference."

The surveys provide information on how much laundry customers do, how they rank the amenities in terms of importance, and they also provide Oasis with an idea of who their customers are.

Roberts says that while there isn't really a typical Oasis customer—everyone from young families to senior citizens are patrons—a large percentage are 18 to 34 year old apartment dwellers. But these profiles will change over time as Oasis adds new services like dry cleaning and drop-off laundry service. Learning more about the users of those new services will be the next research project the company will undertake, she says.

"The drop-off customer is one that we really don't know much about at this point, but through customer surveys and demographic analysis, we should have a clearer picture very soon." MRR

Multidimensional scaling for market research

by Tony Babinec

Tony Babinec is a market manager at SPSS Inc., a company that writes and markets software for market research and analysis.

Multidimensional scaling (MDS) is a very useful technique for market researchers because it produces an invaluable "perceptual map" revealing like and unlike products, thus making it useful in brand similarity studies, product positioning, and market segmentation. We motivate the use of MDS using a popular example, namely distances between U.S. cities. We then show its use in an example involving soft drinks.

Metric MDS on distances

Suppose you were given a map of the United States showing the positions of the following 10 cities: Atlanta, Chicago, Denver, Houston, Los Angeles, Miami, New York, San Francisco, Seattle, and Washington, D.C. Then, with a suitably scaled ruler, it is a straightforward task to transform the information in the map into a square array of distances between all pairs of cities. See Figure 1.

Figure 1 Distances between cities

0	587	1212	701	1936	604	748	2139	2182	543	ATLANTA
587	0	920	940	1745	1188	713	1858	1737	597	CHICAGO
1212	920	0	879	831	1726	1631	949	1021	1494	DENVER
701	940	879	0	1374	968	1420	1645	1891	1220	HOUSTON
1936	1745	831	1374	0	2339	2451	347	959	2300	LOS ANGELES
604	1188	1726	968	2339	0	1092	2594	2734	923	MIAMI
748	713	1631	1420	2451	1092	0	2571	2408	205	NEW YORK
2139	1858	949	1645	347	2594	2571	0	678	2442	SAN FRANCISCO
2182	1737	1021	1891	959	2734	2408	678	0	2329	SEATTLE
543	597	1494	1220	2300	923	205	2442	2329	0	WASHINGTON D.C.

In the above distance matrix, every row and column corresponds to a city. For example, Atlanta is the first row and column. The diagonal is filled with zeros, since a city is no distance apart from itself. 587, the distance between Atlanta and Chicago, is found at the intersection of the first row and the second column or the second row and the first column.

Suppose that you were given the reverse task. That is, start with a square array of distances between cities and assume that you are geographically naive and don't know their relative positions. Then, given the distances, you must represent the cities in a low-dimensional plot so that, as much as possible, the distances between cities in the low-dimensional plot resemble the distances between cities in the actual distance matrix. It might take one, two, three, or maybe more mathematical dimensions to adequately represent the distances between objects. In a nutshell, this is the type of problem that can be solved by the technique of multidimensional scaling.

If we apply ALSCAL—one of a number of popular MDS programs—to the square matrix of distances between cities, it produces the plot shown in Figure 1b.

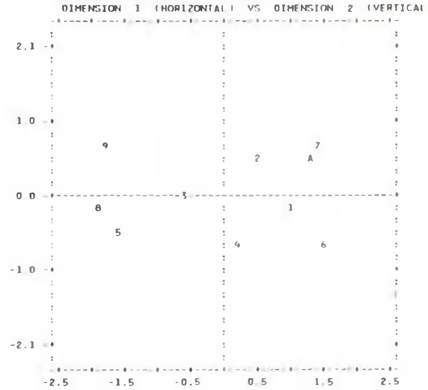
Examination of the plot reveals that the array of cities in the plot resembles the position of the cities on a map of the United States. City 6, for example, is Miami, which we know can be

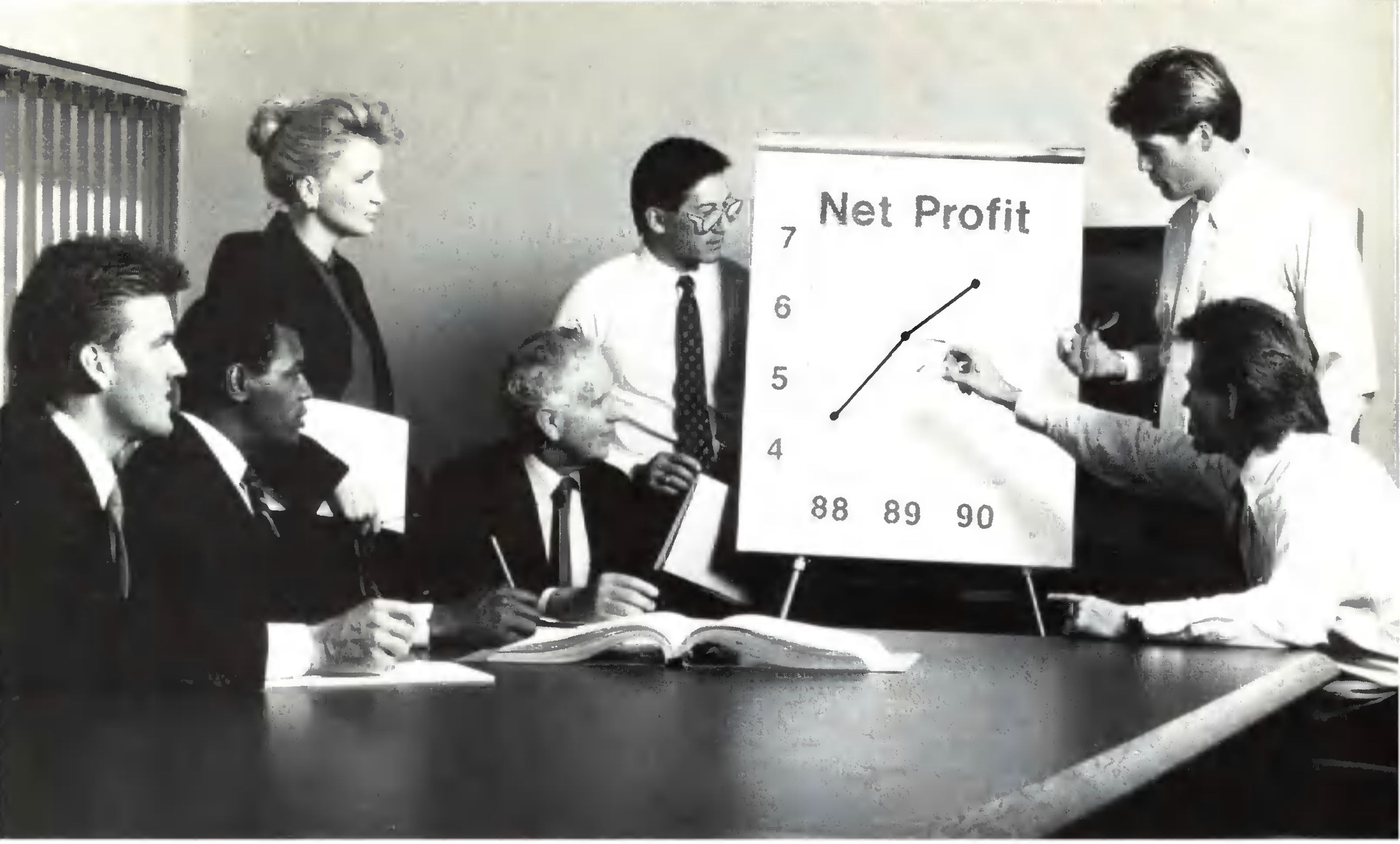
Figure 1b MDS of city distances

STIMULUS COORDINATES

STIMULUS NUMBER	STIMULUS NAME	PLOT SYMBOL	DIMENSION 1	DIMENSION 2
1	ATLANTA	1	0.9575	-0.1905
2	CHICAGO	2	0.5090	0.4541
3	DENVER	3	-0.6416	0.0337
4	HOUSTON	4	0.2151	-0.7631
5	LA	5	-1.6036	-0.5197
6	MIAMI	6	1.5101	-0.7752
7	NEWYORK	7	1.4284	0.6915
8	SANFRAN	8	-1.8925	-0.1500
9	SEATTLE	9	-1.7875	0.7723
10	WASHDC	A	1.3051	0.4469

DERIVED STIMULUS CONFIGURATION:
DIMENSION 1 (HORIZONTAL) VS DIMENSION 2 (VERTICAL)




Net Profit
7
6
5
4
88 89 90

found in the southeast corner of the United States at the southern tip of Florida. Opposite Miami is Seattle, point 9 in the plot. The placement of the axes in this plot is arbitrary, although by coincidence they correspond roughly to east-west and north-south directions.

Several measures of goodness-of-fit help quantify how much distances between points in the plot emulate distances between cities. For example, one such measure, S-STRESS, should be near 0 when fit is good, and the S-STRESS measure for this plot is 0.003, which is very good.

In arriving at our MDS solution, we specified to ALSCAL that the distances in our distance matrix have ratio measurement properties. As an example, Chicago and Denver are 920 miles apart, while Chicago and San Francisco are 1,858 miles apart. The ratio of 1,858 to 920 is a little over 2 to 1, and we say that San Francisco is twice as far from Chicago as Denver is. Since the S-STRESS measure in our analysis indicates very good fit, the distances between points 2 and 3 and points 2 and 8 in Figure 1b very much represent this ratio property of the distances between cities in the actual distance matrix.

Nonmetric MDS on ordinal dissimilarities

Suppose you assemble a small panel of experts. You don't expect them to know actual distances between cities off the top of their heads, but you do expect that they have some sense of whether cities are close or far. You instruct your panel that when you name a pair of cities, they are to use a 1 to 9 scale to specify whether the pair are close together or far apart.

Suppose this exercise produces the dissimilarity matrix shown in Figure 2 ("dissimilarity matrix " refers to the fact that a large number means a lot of dissimilarity while a small number means a little dissimilarity):

These dissimilarities are now not actual distances. If a pair of cities is rated as being a 9—that is, very far apart—and another pair of cities is rated as being a 3—that is, fairly close—it is not correct to say that the first pair is 3 times as far apart as the second pair. In other words, these dissimilarities do not have actual distance properties, but instead have ordinal measurement properties. Nonetheless, this is where MDS is extremely useful, for we can specify that the dissimilarities be treated as ordinal measurements and have ALSCAL produce its map.

Figure 2 Dissimilarities between cities

0	1	5	2	7	2	2	7	8	1	ATLANTA
1	0	3	3	7	5	2	7	6	1	CHICAGO
5	3	0	3	3	6	6	4	4	6	DENVER
2	3	3	0	5	4	5	6	7	5	HOUSTON
7	7	3	5	0	8	9	1	4	8	LOS ANGELES
2	5	6	4	8	0	4	9	9	3	MIAMI
2	2	6	5	9	4	0	9	8	1	NEW YORK
7	7	4	6	1	9	9	0	2	9	SAN FRANCISCO
8	6	4	7	4	9	8	2	0	8	SEATTLE
1	1	6	5	8	3	1	9	8	0	WASHINGTON, DC

The resultant map is shown in Figure 2b:

The S-STRESS measure from this solution is 0.07, which is still very good. Comparison of Figure 2b, derived from ordinal dissimilarities, with Figure 1b, derived from actual distances, shows very little difference between the two analyses in recov-

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Food for thought

A syndicated tracking study helps Marie Callender's Restaurants stay in touch with the needs of the Los Angeles-area market

One complaint a restaurant chain probably wouldn't count on hearing from its customers is that its portions are too large. But that's just what some patrons of the Marie Callender's restaurant chain said in focus groups.

The focus groups were used to follow up on findings of a syndicated study of patrons of Los Angeles/Orange County-area coffee shop/family-style restaurants.

Specifically, says Neil Naroff, vice president, marketing, Marie Callender's, the study found some customer dissatisfaction with the relationship of price to value at Marie Callender's. To isolate the source of dissatisfaction, the focus groups looked at the components of price/value—ambiance, price, quality of food, and portion size.

"We've always thought that we had a good price/value relationship mainly because our portions are so big," Naroff says. "But the fact that a customer has a lot of food doesn't always justify the price that they're paying for it. In fact, when there is food left on the table, sometimes they believe they're paying too much because they can't eat it and it's not of value to them."

As a result, Naroff says, the company is evaluating its portion sizes to establish a better price/value relationship in the eyes of its customers.

"I think it's a good gauge of subtle differences. It makes you aware of a direction and enables you to do something about it before it becomes a problem. To me, that's the important thing. You want to be aware of what's going on before it becomes a serious issue."

Neil Naroff

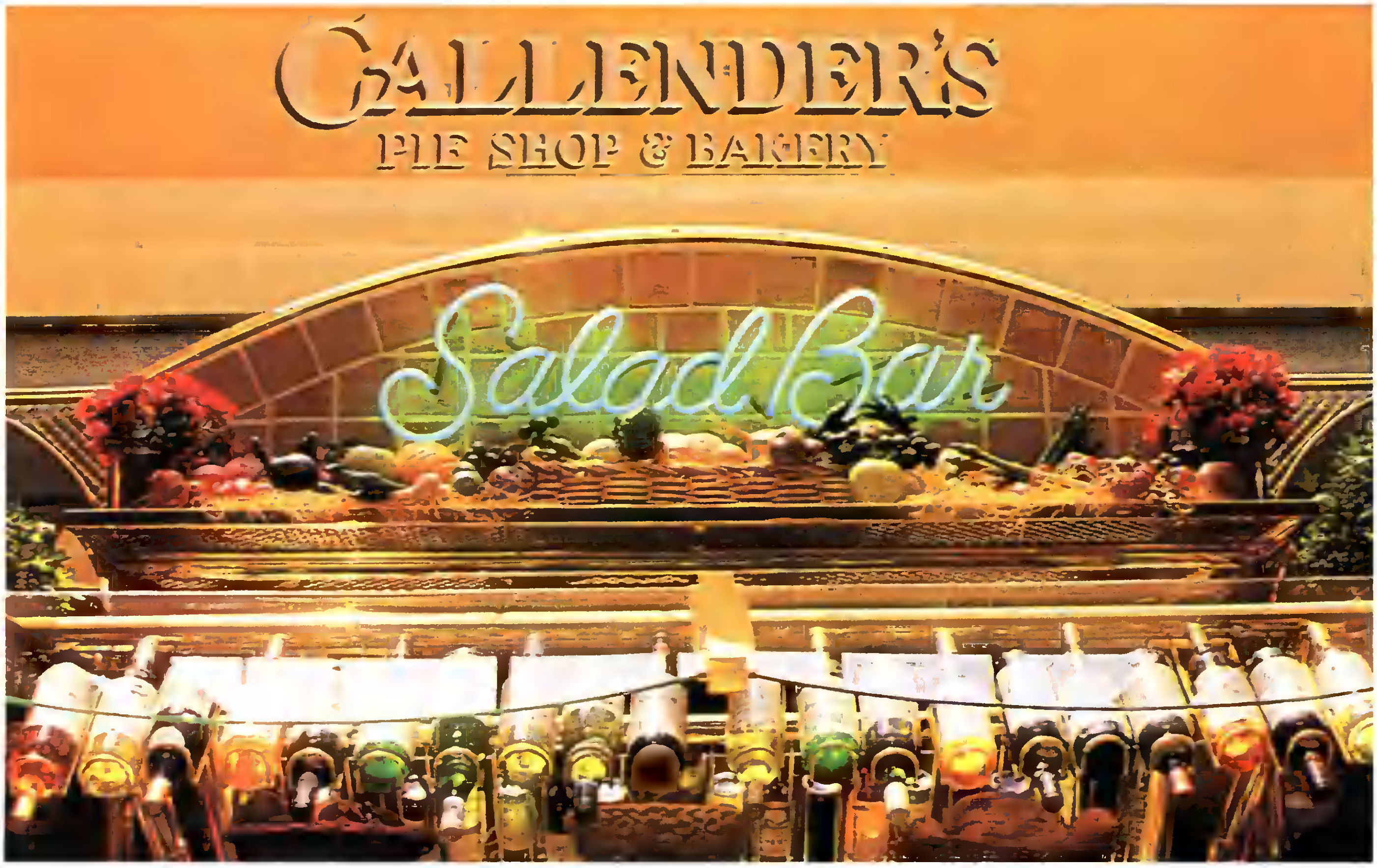
Quarterly survey

The syndicated study, which is conducted quarterly by Restaurant Research Associates (RRA), Tustin, Calif., surveys 500 randomly selected users of coffee shops and family-style restaurants in the Los Angeles/Orange County area for several major competitors.

During the 10-minute telephone interview the respondents answer questions in key areas such as brand image and advertising awareness, purchase intent and category usage. Study subscribers can also insert proprietary questions to obtain more in-depth information.

Lynn Stalone, partner, Restaurant Research Associates, says the study gives clients concrete data on specific topics.

"If a company sees sales going down, they may not know the reasons why. They may have sales data, but the study can give them specific information, telling them, for example, which groups of people have slowed their use, or stopped going to their restaurants. You may have a gut feeling about what's going on, but it's nice to have the numbers to back it up."



"That's the rationale for using a tracking study," Naroff says. "It can tell us the dynamics of our customer base over time and give us an idea of how effective our competitors are in marketing as well as how effective we are. It's important for us to have a grasp on who uses the restaurant and why, what they think of us, and how they compare us to others in the family dining category so that we can provide the kinds of things they're looking for."

Identify trouble spots

By keeping Marie Callender's aware of the shifts and changes of its own scores as well as those of its competitors, Naroff says the study has enabled the company to identify potential trouble spots in advance.

"I think it's a good gauge of subtle differences. It makes you aware of a direction and enables you to do something about it before it becomes a problem. To me, that's the important thing. You want to be aware of what's going on before it becomes a serious issue.

"For example, we're starting to see interesting shifts in speed of service scores because people are increasingly convenience- and time-oriented. The study has been sensitive to those shifts—not only for us but also in relationship to our competitors—so we can be aware of those which we have to take action on."

Marie Callender's is a family-style restaurant chain best known for its high quality, "home-baked" products, serving the mid-priced dining segment with more than 150 restaurants primarily located in the Western United States. The firm started more than 40 years ago when Marie Callender began making pies for a few restaurants in the Orange County, California area. The wholesale pie business grew steadily and in 1961, with the addition of other menu items, the first Marie Callender's was opened.

Broader competitive matrix

Ron Clark, senior partner, Restaurant Research Associates, says that along with cost-efficiency, the main benefit of syndicated tracking study is that it provides what he calls a "broader competitive matrix" than a company might get if it performed its own tracking study.

Private tracking studies can paint an unrealistic picture of the market since they often compare the client's brand with just one or two others because companies may find it hard to justify devoting a great deal of time and money to studying their competitors.

"The restaurant marketplace is very diverse, very competitive, and it's becoming more and more competitive all the time. Being able to compare yourself against seven brand image matrices is much better than doing it against two. It has a wider competitive frame of reference," Clark says.

Operating plan

Naroff says work sessions with representatives of RRA and Marie Callender's helped formulate an operating plan for the remainder of 1989 and 1990 address-

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Study tracks trends in refusal rates

In 1985, the "Your Opinion Counts" National Steering Committee conducted a benchmark study of survey respondents' refusal to be interviewed. The study was intended to shed light on what many in the research industry felt was a pervasive problem—consumer cooperation—by determining the level and nature of respondent refusal rates on general purpose quantitative consumer survey research studies.

It was conducted through the participation of survey research firms who are members of The Council of American Survey Research Organizations (CASRO). CASRO companies provided information for each cluster/location on all studies they conducted during September of 1985.

The study was repeated in 1988, using identical methodology, to determine if progress had been made and, if so, in what areas. The four types of personal interview procedures covered were:

•mall/shopping centers with a permanent field facility

•mall/shopping centers with a temporary field facility

•all other central locations

•door-to-door

The results were tabulated to gauge refusal rates by type and location of interview, by length of interview, by geographic region (North East, Southern, North Central, Western), and by subject matter.

Findings

In general, very few differences exist between the 1985 and 1988 results. The overall refusal rate stayed the same between 1985 and 1988 at 38 percent. Ini-

Definition of Terms

TELEPHONE

WATS: Centralized set-up with on-going supervision for long distance calling. Not limited to AT&T equipment or systems.

Other central location set-up: Centralized set-up for local interviewing and selected long distance calling, i.e. when not using WATS lines.

From interviewer's bome: Interviewing accomplished by use of interviewer's home phone.

PERSONAL

Mall/sbopping center: "Permanent set-up"—survey research facility which is always there; "temporary set-up" survey research facility which is there only on a study-by-study basis.

All other central locations: Not part of a mall/shopping center, e.g. schools, churches, mobile labs, office buildings.

Door-to-door: Interviewer goes to respondent's home

REFUSAL

Initial refusal: Respondent refuses to participate in interview before and during introduction.

Refused to eontinue: Respondent refuses to continue with questions after introduction has been read and screening questions have begun.

Qualified-refused: Respondent has answered all qualifying questions but refuses at any point after that.

Ineligible: Respondent has cooperated by answering but was not allowed to go any further because of an inappropriate response to a qualifying question.

tial refusal is still the major problem. In 1988, it increased to almost 90 percent of total refusals, up from 84 percent in 1985.

The following are the major differences found between the two studies:

•Personal interview refusal in "other central locations" was 26 percent in 1988, up from 19 percent in 1985. This was due mainly to an increase in qualified refusal.

•Personal interview refusal for door-to-door studies was 36 percent in 1988, up from 29 percent in 1985. This difference is mainly due to increases in initial refusal.

•Interviews of five minutes or less showed a 27 percent refusal rate in 1988, up from 21 percent in 1985. This increase was caused by a change in the level of initial refusal.

•The only geographic region to show an increase in refusal rates is the Northeast region, which also shows the highest level of refusal in the country. The refusal rate in this region increased from 41 percent in 1985 to 49 percent in 1988, due to an initial refusal increase.

Refusal Rate by Specific Subject Matter

	1985	1988
Household Cleaners	37%	57%
Health Products	34%	54%
Foods	41%	47%
Media	20%	26%
Beauty Aids	53%	50%
Public Opinion	43%	42%
Personal Care Products	35%	30%
Retail	50%	42%
Services	40%	27%
Leisure Time	38%	19%

•There was a variation in refusal by specific subject matter, and the biggest change occurred for household cleaners and health products. Both show the highest level of refusal in 1988. Household cleaners increased 20 percentage points, from 37 percent in 1985 to 57 percent in 1988, while health products increased from 34 percent in 1985 to 54 percent in 1988. The biggest drop in specific subject matter occurred for leisure time studies, which dropped from 38 percent in 1985 to a low of 19 percent in 1988.

Suggestions to reduce refusal rates

The report notes that although it is encouraging that the overall refusal rate is the same as in 1985, the industry must continue to focus on reducing the consumer's reluctance to participate in research studies. The "Your Opinion Counts" committee suggests that the research industry implement the following steps, whenever possible, to help reduce refusal rates:

•Exercise courtesy when considering what hours of the day to call into a respondent's home. YOC believes a good

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820	821	822	823	824	825	826	827	828	829	830	831	832	833	834	835	836	837	838	839
840	841	842	843	844	845	846	847	848	849	850	851	852	853	854	855	856	857	858	859
860	861	862	863	864	865	866	867	868	869	870	871	872	873	874	875	876	877	878	879
880	881	882	883	884	885	886	887	888	889	890	891	892	893	894	895	896	897	898	899
900	901	902	903	904	905	906	907	908	909	910	911	912	913	914	915	916	917	918	919

Name: ______________________ Title: ______________________
(Please Print)

Company: ______________________

Address: ______________________

City: ______________ State: __________ Zip: __________

Phone: ______________________

Signature: ______________________

PLACE
STAMP
HERE

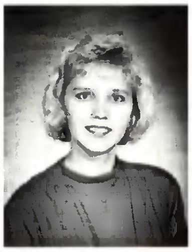
Quirk's
MARKETING RESEARCH
Review

P.O. Box 23536
Minneapolis, Minnesota 55423

NAMES OF NOTE

Thomas Pearson has been promoted to vice president of Minneapolis-based *IMI Research*.

Pearson



Pertzhorn

Sherryl Pertzhorn has joined *Gene Kroupa & Associates*, Madison, WI, as account supervisor in charge of focus groups.

Total Research Corp., Princeton, NJ, announces the following staff additions/promotions: **Elaine S. Walker** has joined as field director. Previously she was field director for Schrader Research. **James M. Hennessey** was named project director. Previously he was a study director for the Gallup Organization. **Christopher W. Kuever** has joined as director of operations. Previously he was manager of data processing at The Data Group, Inc. **Sue Sender** has joined as director of focus group and conference facilities. Previously she was regional field supervisor with ABG Television Research. **William J. Dorman** was named manager of client services. **Doris Antonello** has also joined as manager of client services. Previously she was client service manager for McGraw-Hill Research. **Stanley M. Zdep, Ph.D.**, has joined as vice president. Previously he was vice president of Audits & Surveys, Inc. **Thomas J. Duhanoski** was promoted to director of client services. **Suzanne Janny** has been promoted to senior research analyst. **Joan Fredericks** has been promoted to senior methodologist. **Ken Zeldis** has been promoted to research director in the Financial Services division.

Brian Heinecke has joined *Nielsen Marketing Research* as vice president, client service-customer information services. Previously he was with the marketing research department of Procter & Gamble as manager-development, Market Measurements Organization. Also, **Gary Parkhurst** has been named vice president, general manager—Western Region. **William McNair** has been named customer research/information analysis coordinator.

Two developments from the 31st annual conference of the National Marketing Research Association: **Priscilla K. Kamrath**, vice president of sales and customer service for Walker: DataSource, received the Member Service Award; **Nancy Hayslett**, branch manager of Walker: DataSource's Tempe, AZ, Telephone Center, was named president of the Marketing Research Association.

Harry S. Sunenshine, Ph.D. has been appointed division president of *Walker: Research & Analysis*, a unit of Indianapolis-based Walker Research, Inc. Previously, he was senior vice president of development for Kentucky Fried Chicken Corp.

Sunenshine

Hiramoto

Gary Hiramoto has been named vice president/client services for *The Response Center*, Philadelphia. Previously he was vice president and senior account manager for Accountline Financial Services, Inc.

Walter Eduardo Meneses has been promoted to vice president of operations for San Diego-based *Analysis Research.*

Laura Ranieri has been hired as a research associate at *New South Research*, Birmingham, AL. Also, **Wendy Murry** and **Demitrius Miller** have been named administrative assistants; **Lisa Trehan** has been named research associate and **B.J. Melton** has been named national accounts manager.

Jim Trullinger, Ph.D., has been named vice president-telemarketing and general manager of Stamford, CT-based *Coast to Coast Telephone Center.*

Bob Rowe will head the new Marine Management division of Des Plaines, IL-based *Irwin Broh & Associates.*

David M. Passe, Ph.D. has joined *Rockwood Research*, St. Paul, as project director. Also, **Lisa Schwartz** has been promoted to senior project director.

Irwin Korman has been named research director of New Brunswick, NJ-based *R.H. Bruskin Associates*. **Bill Gay** has joined the company as director of new business development. Also, Judi **Lescher** and **Michael Brooks** have both been promoted to associate research director.

Thomas J. Finkle, Ph.D., has been named vice president general manager of *Goldfarb Consultants*' recently opened New York office.

Audrey Moriarty has been promoted to field and technical services director at *Catherine Bryant & Associates*, Winston-Salem, NC. In addition, **Shelby Redmond** has joined the Technical Services division of CB&A and **Bobbie Sapp** has been promoted to Technical Services team leader.

Steven Akerson, senior vice president and market research director, Colle & McVoy, Inc. has been appointed to the Marketing Research Council of the American Marketing Association.

Akerson

Weinberg

Susan Weinberg has joined *AB Research Associates, Inc.*, Norwalk, CT, as a senior project director.

David S. Shanker has been named trade service manager in the Trade Relations Department at the SAMI division of *The Arbitron Co.* in Parsippany, NJ.

John J. O'Hara has been named vice president, sales, of *The Ehrhart-Babic Group*, Englewood Cliffs, NJ.

Data Use

continued from p. 12

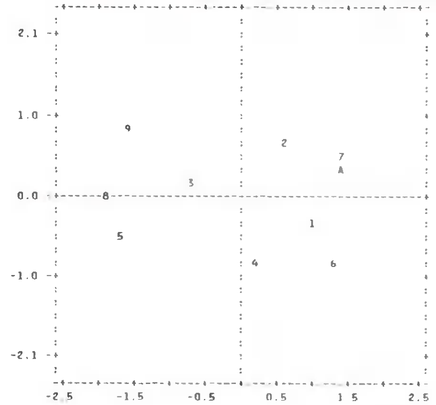
ery of actual distances.

Figure 2b MDS of city dissimilarities

STIMULUS COORDINATES

STIMULUS NUMBER	STIMULUS NAME	PLOT SYMBOL	DIMENSION 1	DIMENSION 2
1	ATLANTA	1	0.9586	-0.3385
2	CHICAGO	2	0.6336	0.6347
3	DENVER	3	-0.7085	0.1229
4	HOUSTON	4	0.1955	-0.8345
5	LA	5	-1.6803	-0.5261
6	MIAMI	6	1.3276	-0.8150
7	NEWYORK	7	1.4289	0.5066
8	SANFRAN	8	-1.8769	-0.0782
9	SEATTLE	9	-1.6377	0.9331
10	WASHDC	A	1.3592	0.3948

DERIVED STIMULUS CONFIGURATION:
DIMENSION 1 (HORIZONTAL) VS DIMENSION 2 (VERTICAL)



A soft drink example

Figure 3 shows a matrix of dissimilarities involving colas: The particular colas are Diet Pepsi, Royal Crown, Yukon, Dr. Pepper, Shasta, Coca Cola, Diet Dr. Pepper, Tab, Pepsi, and Diet Rite Cola. The data come from Schiffman, Young, and Reynolds' book entitled "Multidimensional Scaling." In their

Figure 3 Dissimilarities between colas

0										DIET PEPSI
34.8	0									RC
79.2	54.4	0								YUKON
86	56	70.5	0							DR PEPPER
76.3	30.5	51.2	66.3	0						SHASTA
63.3	40.7	37.8	90	35.4	0					COCA COLA
57.9	86	77.7	50.1	76	77.1	0				DIET DR PEPPER
62.5	80.7	71.6	88.6	67.5	54.1	66.1	0			TAB
65.6	23.6	69.4	66.2	22.6	35.1	76.8	71.3	0		PEPSI
26	60.9	70	89.4	63.1	67.9	59.3	33.6	59.3	0	DIET RITE

book, they present individual subject data. The data in Figure 3 are averages of all the individual subjects' dissimilarities. The data are from some years ago, and thus do not necessarily reflect the present-day market. Note that the dissimilarities are on a 0 to 100 scale, where low scores indicate similar colas and high scores indicate different colas. As examples, Shasta and Pepsi were perceived to be similar, as their average dissimilarity is 22.6, while Dr. Pepper and Coca Cola were perceived to be very dissimilar, as their average dissimilarity is 90.

We ran an analysis of these dissimilarities using an ordinal solution in ALSCAL. This produced the plot in Figure 3b:

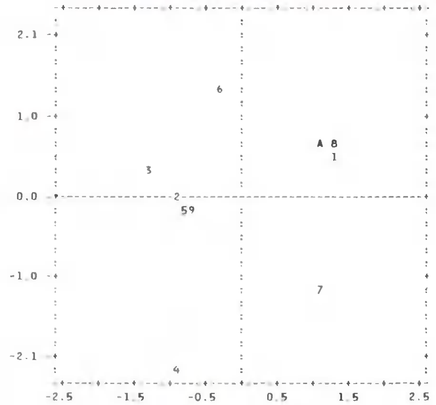
In this type of MDS, no special meaning is attributable to the axes in the plot. You must examine the plot and note which points are near to or far from which other points. For example, the sugar-free colas, represented by 1, 7, 8, and A, are on the right, while the sugared colas are on the left. The "cherry"

Figure 3b MDS of cola dissimilarities

STIMULUS COORDINATES

STIMULUS NUMBER	STIMULUS NAME	PLOT SYMBOL	DIMENSION 1	DIMENSION 2
1	OIETPEPS	1	1.2975	0.6838
2	RC	2	-0.8878	-0.0077
3	YUKON	3	-1.2968	0.3561
4	ORPEPPER	4	-0.8796	-2.1726
5	SHASTA	5	-0.7476	-0.1650
6	COCACOLA	6	-0.2746	1.3555
7	OIETOPPR	7	1.0675	-1.2826
8	TAB	8	1.2870	0.7553
9	PEPSI	9	-0.6862	-0.2130
10	OIETRITE	A	1.1205	0.6902

OERIVEO STIMULUS CONFIGURATION:
OIHENSION 1 (HORIZONTAL) VS OIHENSION 2 (VERTICAL)



flavored drinks (this study occurred before Cherry Coke was launched), represented by point 4 (Dr. Pepper) and point 7 (Diet Dr. Pepper), are along the bottom, suggesting that the bottom-to-top direction is a cherry-noncherry axis. Among the sugared colas, Royal Crown, Shasta, and Pepsi are all perceived to be similar. Yukon, perhaps tasting sweetest, is a small distance away from these three, while Coke is off by itself.

Given the information in Figure 3b, a marketer at Pepsi might take steps to differentiate Pepsi from the other colas. A marketer at Coca Cola (or some other company, for that matter) migbt have noticed that Dr. Pepper has one area of the map to itself, suggesting an entry of a cherry-flavored drink by Coca Cola (if not someone else) into the market.

Useful points to know in applying MDS

The following are some useful points to know in applying MDS.

MDS works well in situations where subjectivity enters, such as eliciting of taste, smell, and perceptual judgments. This is in contrast to other techniques such as conjoint analysis (see Joseph Curry's Data Use article "Understanding Conjoint Analysis in 15 Minutes" in the June/July 1989 issue *Quirk's Marketing Research Review*) which elicit respondent preferences regarding hard, objective attributes, such as preference for a car having either 2 or 4 doors.

A strong plus of MDS is that it assumes that the subject evaluates the object on all relevant characteristics without the researcher having to list them. In the cola example, the subject tastes two colas at a time and is asked whether they differ in taste a little or a lot. Presumably, the subject tastes the difference, whether it is a difference in sugariness, saltiness, cherry-ness, or whatever. In this, MDS differs from many other techniques which require the researcher to enumerate and include all relevant attributes or variables, and in which omission of an important variable from the study can fatally bias the results. On the other hand, if you have measurement of specific external attributes, you can determine whether objects differ on these attributes through property fitting, which fits a vector along which objects vary in the perceptual map produced by MDS.

Another virtue of MDS is that it does not require that the input to the technique be quantitative data. As we have shown, MDS can take as input dissimilarities about which we make no stronger than an ordinal assumption. This is a very nice feature, as in market research, psychometrics, and many other areas, we often cannot do better than measure along ordinal scales.

The researcher can vary the number of dimensions in the solution until a suitable fit is attained. While a two-dimensional solution often works, sometimes three or more dimensions might be necessary to adequately represent dissimilarities between objects.

No special meaning is attached to the placement of the axes in the perceptual map. Given a good fit, the researcher examines the array of points in the plot and sees which objects are near to and far from which other ones, regardless of compass direction in the plot.

Finally, there exist many versions of MDS. In individual differences scaling, the individual subjects' dissimilarity matrices are not averaged but are read in "stacked" form. The resulting analysis allows for individual differences in perception. For example, one subject might be very sensitive to differences in saltiness in products being rated, while another subject might not sense variation in saltiness across products.

In unfolding models, the input to the analysis is a rectangular matrix in which rows represent subject, columns represent brands or products, and the elements in the matrix are preference ratings (a low score means "prefers a little" while a high score means "prefers a lot"). The resulting perceptual map places subjects close to brands/products they prefer and far from brands/products they do not prefer.

Conclusion

Market researchers can often only measure at the ordinal level. The respondent can successfully rate items as being similar or dissimilar using a scoring scheme about which the researcher is unwilling to assume distance or ratio properties. These data can be used by the market researcher to assess how a particular product or brand relates to others. Multidimensional scaling is a powerful tool which produces insightful plots for determining brand or product position, or for finding market segments. Multidimensional scaling is available in software such as SPSS-X from SPSS Inc. MRR

Correction

The June/July Data Use ("Understanding Conjoint Analysis in 15 Minutes") contained two typographical errors.

In Figure 2a, instead of "4 holes," the first column heading should be "54 holes."

In Figure 5, the far right vertical column should read:

20
5
0

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Mail Monitor

continued from p.6

ture, and the companies recognize this.

"Farmers who are grossing over $100,000 a year are going to be coming into focus in the promotional sights of just about anyone who is in the seed, chemical, or equipment business," he says.

Zuehl says the study provides information in two important areas.

First, it shows subscribers how much of their competitors' mail is reaching the potential customer. Second, it gauges readership levels for the company's mailings and shows how those levels compare to the scores of competitors' pieces. This data can be used to make decisions about future mailings.

For example, the study has allowed Case to measure the effectiveness of various direct mail programs it has undertaken in conjunction with its dealers.

"It gives us the opportunity to apply that measurement against the costs associated with the promotional mailings and to make determinations regarding expansion, reduction or any other changes that might be considered necessary," Zuehl says.

Sample pieces

As part of the Mail Monitor information package, subscribers have access to samples of competitors' direct mail pieces collected for any agricultural segment represented by the study.

Gary Hennerberg, manager of the direct marketing group for advertising agency CMF&Z Inc., says that the samples give his clients insight into how competitors handle their direct mail pieces.

"Direct mail, unlike print advertising, is hard to monitor because you can't actually see what the competition is doing. If they run an ad in a farm publication, you know what they're doing because you have access to examples of their advertising. But with direct mail you don't have that same luxury."

MAIL MONITOR

"Direct mail, unlike print advertising, is hard to monitor because you can't actually see what the competition is doing. If they run an ad in a farm publication, you know what they're doing because you have access to examples of their advertising. But with direct mail you don't have that same luxury."

Gary Hennerberg

Major findings

Overall, company/association-sponsored publications such as J.I. Case's *Farm Forum*, John Deere's *The Furrow*, and *Ford New Holland News* made up the largest category of direct mail re-

Circle No. 837 on Reader Card

ceived by farmers, taking up 23% of the total, followed by crop equipment (15%), pesticide (15%), and seed (9%) companies. The remaining pieces fell into categories such as animal health, breeders, and co-ops.

Farmers received the greatest volume of direct mail between January and April, but study results showed that readership levels were typically lower during this time period than other points throughout the year.

For example, with the onset of winter, farmers read more company-sponsored publications in their entirety. In the end of January and early February, respondents read 69 percent of all publications thoroughly. Readership declined sharply in mid-February (47%) just as marketers were increasing the number of publications being sent out.

"One of the most significant services the study provides is letting you see how the rest of the industry times their mailings," says Ron Miller, advertising manager, Mobay Chemical Corp. "You like to plan your mailing so that everybody doesn't hit the mailbox the same day, but you also have to be in season."

Knowing when to send is critical to ensuring maximum impact for a direct mail message, says Spencer Cohen, senior market research analyst with pesticide manufacturer Rhone Poulenc Ag. Co.

"In order to increase the action that we'd like taken on our direct mail, it's very helpful to get statistics that give us an idea of when the best opportunities are to mail and not get lost in the clutter," he says.

Excluding company/association-sponsored publications, which are aimed at enhancing public image rather than promoting specific products, over two-thirds of the direct mail marketers gave recipi-

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ents some means of replying. Response rates for these pieces varied between categories; from 12 to 17 percent of direct mail pieces requesting action elicited a response from the recipient.

Use of the various methods of reader reply varied by direct mail category, but overall, a business phone number (29%) or a reply card (29%) were the types used most often. Business reply envelopes (21%) and "800" numbers (18%) were also used.

One-third of the pieces collected in Mail Monitor included some kind of special offer, typically in the form of price discounts and free merchandise.

Carrier data

27 percent of the 8,463 pieces received were self-mailing, a decrease of 4 percent from last year's study. Envelope use increased six percent from the previous year, to 35% of the total. 21% of the direct mail was in the form of magazines and catalogs. The remainder consisted of newspapers or shoppers, postcards, merged mail and ad packs/card decks.

As might be expected, readership was significantly higher for postcards (71%) than for any other type of carrier. While magazine and catalog readership was not as high as that of postcards, it was considerably higher than mail sent in envelopes or self-mailers.

"In order to increase the action that we'd like taken on our direct mail, it's very helpful to get statistics that give us an idea of when the best opportunities are to mail and not get lost in the clutter."

Spencer Cohen

Also as expected, readership levels were influenced by the number of enclosures in a direct mail piece. Envelopes with one enclosure had much higher readership than those with multiple enclosures or those sent as self-mailers. While self-mailers were not read as thoroughly as a single insert in an envelope, the percentage of respondents who claimed to have read all or some of a self-mailer was much higher than for envelopes containing three or more inserts.

The number of pages also played an important part in determining readership of catalogs and magazines. Participants were more inclined to read all or most of the direct mail piece if it contained 21 to 50 pages (60%). Interestingly, publications fewer than 20 pages in length were not read as thoroughly (50%). Readership decreased dramatically for catalogs and magazines over 50 pages (38%).

MRR

Marie Callender's

continued from p. 15

ing areas in which the company has to move to remain competitive.

"(RRA) specifically analyzed Marie Callender's in relationship to the other companies that they're tracking and helped identify for us some of the key trends and key areas that they felt we needed to pay attention to, near-term and long-term, in order for us to compete well."

This data, combined with information gathered from focus group research and other customer comment data, has been used in creating several programs to improve service.

One of those programs involves streamlining the menu to shorten the time it takes for a customer to place their order, after research showed that customers felt they were being asked an inordinate amount of questions.

"Our menu was structured such that you had so many options that it could take a server several minutes per person at a table to complete the ordering process. We discovered that giving the customer so many options is not always a benefit," Naroff says.

"The restaurant marketplace is very diverse, very competitive, and it's becoming more and more competitive all the time. Being able to compare yourself against seven brand image matrices is much better than doing it against two. It has a wider competitive frame of reference."

Ron Clark

So while still allowing ample choices, the new menu will speed up ordering times by more clearly specifying which items the customer automatically receives. Naroff says other speed of service options will also be tested, including an express lunch program with a limited menu for speedy lunch service.

Brand awareness

Another area where the study data has been used is in the area of overall brand awareness. Marie Callender's only recently started advertising, unveiling an outdoor advertising campaign last summer which drove sales impressively in the short term. But now the company is noticing that overall brand awareness hasn't changed appreciably, so it is currently evaluating its advertising program to determine what changes are necessary.

MRR

TRADE NEWS

Wonld you cheat on a test?

A study recently commissioned by the Stanley H. Kaplan Educational Center, Ltd. asked teenagers whether they would cheat on a test to obtain a good grade. Slightly less than one third stated strongly that "Cheating on an exam is morally wrong and I would never do it under any circumstance." Females felt that cheating was wrong more strongly than males; 34.6% strongly agreed that they would never cheat and 13.1% agreed somewhat. Among male students polled, 32.9% were strongly against cheating, and 14.0% agreed somewhat. When asked, "Depending upon the circumstances, might you cheat on an exam to assure a good grade," 7.6% of the males and 5.7% of the females strongly agreed that they might consider cheating, and in both groups, 17.9% said they agreed somewhat.

The survey queried 2,000 12 to 19 year-olds, currently in junior high, high school, or college. The respondent's age, sex, and race were chosen to mirror the American population according to U.S. Census data.

Stanley H. Kaplan, founder and CEO of the test preparation organization, says he commissioned the study after becoming concerned last year by stories of students paying other students to take the SAT (Scholastic Aptitude Test) for them to ensure entrance into their eollege of choice.

"I wanted to see if it really is true that students are missing the ethical values that I would hope everyone shares. While

continued on p. 52

FROM THE PUBLISHER

Literacy an important consideration when conducting research projects

by Tom Quirk

Much attention has been given to the large number of Americans who are illiterate. Public service commercials appear on television, billboards stress the importance of being able to read, and many people have volunteered to assist those who have never mastered this very important skill.

The emphasis of this campaign to reduce illiteracy has rightfully centered on two major benefits. One is the improvement of opportunities for the individual who overcomes this handicap. He or she will have a greatly improved chance of living a fuller and more productive life. The other is the benefit to the country because of its need for citizens who can function in an increasingly technical world where reading skills are essential.

Marketing research studies can be affected by the literacy levels of those participating in the study. It is important that any written instrument be tested to insure that respondents can read and understand it. One should not take reading skills for granted.

Through most of my career I conducted research with middle- or higher-income groups. I did not give much thought to whether any of the individuals involved might be illiterate. If there were any it was assumed to be such an inconsequential number that the results of the study would not be affected.

I was aware that there are differences in reading abilities. When participants at focus groups were given copy to read it was obvious that some individuals read faster than others. It was a problem when the copy was long because the fast readers finished early and became distracted. But even those who were slower were at

least still reading and getting the message.

The importance of knowing literacy abilities became very apparent to me while doing a project a few years ago. It was a study which involved obtaining quantitative and qualitative information from the same individuals. To do this, we held a series of 12 meetings with approximately 40 people attending each meeting.

Each individual would begin by completing a four-page questionnaire. It was estimated that this portion would take approximately 30 minutes. We would avoid the problem of differing reading speeds by beginning a focus group whenever one-fourth of those in attendance completed the written portion. This way we would have four focus groups at each meeting. There was no consideration given to the possibility some of those attending might be illiterate.

The questionnaire was tested at a meeting with eight individualswhich was held close to the client's headquarters in an area with a very low illiteracy rate. The results of this test were excellent and only minor changes were needed in the questionnaire.

Before going into the field with the study we discussed the option of reading the questionnaire aloud. We decided it would increase the time required to complete the questionnaire by five to ten minutes and that it would be too difficult to keep many of the 40 people from going ahead on their own. It was determined to stay with the method used for the test.

The first two meetings went well. They were held in areas where illiteracy rates were low. The client and I were feeling confident about the project.

At the next meeting I noticed a few of the attendees going randomly from page to page. They apparently were studying the questions but did not appear to be completing the blanks. The questionnaire followed a natural sequence and there was no reason for this type of behavior. One attendee asked if he could take the questionnaire home and return it to us by mail. He apparently felt he could get help from his spouse or friends.

As the individuals I had noted turned in their questionnaires, I put them into a separate pile. After the group sessions these were reviewed. It became obvious we had responses from a group of people who had reading skills which were minimal or non-existent.

We did not want to change the testing procedure which had already been used through the first part of the study. It was decided to determine the severity of the problem by closer scrutiny of attendees at future meetings. Those who appeared to be having troubles with the questionnaire would be noted and their papers would be put into a separate group for review. In this way we would be able to obtain an estimate of the illiteracy problem within the study group.

After the 12 meetings, a review of the separated questionnaires indicated that almost 10 percent of our attendees were unable to read basic English. It was an important discovery which the client was able to take advantage of. A special packet using visuals along with an audio cassette tape was developed as the communication instrument to reach those with limited reading skills.

We were fortunate the problem was detected early in the study. It eliminated the confusion which might have arisen regarding incomplete questionnaires. It also made me keenly aware of the need to take literacy levels into account when planning future projects. MRR

Study to profile motorsports entbusiasts

Nordhaus Research, Inc. announces TRACS—the Total Racing Audience Composition Study—which will provide racing sponsors and marketers with information on demographics, lifestyles, and buying and media habits of the racing fan. Optional brand profile components and custom questions are also available. For more information contact Nordhaus at 313-827-2400.

New statistical software package

SPSS Inc. introduces a new software system, SPSS/PC+ CHAID, which stands for CHi-square Automatic Interaction Detection. It is a stand-alone, menu-driven product for MS-DOS personal computers. It can be used to predict the effectiveness of marketing functions, such as estimating response to direct mail pieces, profiling prospective customers and testing packaging. For more information contact SPSS at 312-329-2400.

Tallying system gatbers and tabulates audience responses

Quick Tally Systems introduces the Quick Tally interactive response network, which allows up to 1500 participants to

enter their responses to questions using small handsets that resemble TV remote controls. The handsets gather and tabulate answers to questions posed by a moderator and can display the results in graphics on TV monitors throughout the room within two seconds. For more information contact Quick Tally Systems at 213-651-0891.

Telephone sampling system introduced

Maritz Marketing Research unveils the Maritz Sampling System, which gives access to more than 90% of available working listed telephone numbers in the U.S. for a flat rate fee. Other services included in the flat rate fee are job set-up, cell quota set-up, record coding, magnetic tape, and others. Contact Phil Wiseman at 314-827-1949.

Opinion research software program update

Cybernetic Solutions Co. announces version 2.91 of The Survey, their opinion research software program for PCs. The new release contains features such as random number reports, skip patterns during data entry, comment text handling capabilities, and more. For more information call 801-756-8279.

Software product accesses business information

Dun's Direct Access, a new PC software product, provides access to specific marketing information on more than 6 million U.S. businesses contained in the Dun & Bradstreet marketing database of 8 million establishments. Researchers can choose from several search criteria such

DUN'S

DIRECTACCESS

as business size, location, and industry and sales volume. Users can download as few as one or two and as many as 500 records at a time directly to disk, screen or printer. This information can then be saved and transferred into most spreadsheet, word-processing and database software packages. For more information call 201-605-6000.

New release of perceptual mapping software

Market ACTION Research Software Inc. has released an update of MapWise perceptual mapping software for correspondence analysis. Users can now download any set of cross-tabs in an ASCII file, use many default options for creating a map, test the power, significance and validity of the solution, and print the map on any printer or plot maps on a Hewlett Packard Color Plotter. For

Market ACTION

more information, contact Dr. Betsy Goodnow at 309-677-3299.

Minneapolis-based **SPAR Marketing Services** and Cincinnati-based **Burgoyne Information Services** have merged their operating units into SPAR/Burgoyne.

Total Research Corp., Princeton, NJ, has entered into a marketing and operational affiliation with RISC US, the U.S. arm of the Research Institute on Social Change, an international research and consulting group. RISC, based in Nyon, Switzerland, monitors socio-cultural trends in Europe, the Far East, and North and South America.

Opinion Research Corp. has opened a new office in Cambridge, MA, at the corporate headquarters of its parent company, Arthur D. Little Inc. at Acorn Park, Cambridge, MA, 02140-2390.

Claritas Corp., Alexandria, VA, has entered into a license agreement to oper-

 Circle No. 850 on Reader Card

ate the business of Accountline Financial Services, Inc., a supplier of marketshare data to the financial services industry.

National Opinion Polls, the parent company of R.H. Bruskin Associates, was acquired by the MAI Group of London, England.

Comprehensive Research Group has opened a permanent mall research facility in the Har-Mar Mall, 2100 N. Snelling Ave., Roseville, MN, 55113. Telephone 612-635-0204.

United Marketing Services, Lubbock, TX, will now operate as an independent corporation, no longer affiliated with United Coupon Clearing House.

David P. Forsyth, formerly vice president, research for McGraw-Hill Inc. has opened **The Forsyth Group**, a consulting company devoted to the research needs of specialized publications and magazines. Offices are located at 12 Longview Avenue, North Caldwell, NJ, 07006. Telephone 201-403-0567.

Irwin Broh & Associates, a Des Plaines, IL-based marketing research company, announces the formation of its Marine Management division, which will provide syndicated and custom marketing research and consulting services to the recreational boating, marine engine, and marine accessories industries.

Harvey Magier and Bill Tripp have formed **Consumer Outlook Inc.,** which will focus on the strategic and tactical market research needs of advertisers and agencies. Offices are located at 900 Broadway, New York, NY, 10003. Telephone 212-353-8380.

Fairfax, VA-based **CACI International Inc.** has merged its North American and European divisions.

Market Choices Research & Consulting Services, Inc. has relocated its Orlando-area office to 1216 Lake Piedmont Circle, Apopka, FL 32703. Telephone 407-886-3373.

DCW & Associates Audit and Interview Service has relocated its office to Central Plaza, 2229 Beckett St., Suite B, Bossier City, LA 71111. Telephone 318-742-0126.

YOUR OPINION COUNTS

continued from p. 18

guideline would be calling during the hours between 9 a.m. and 9 p.m.

•When mall respondents indicate it is not a convenient time, make an appointment to do the interview at a later time.

•Data collectors should routinely administer interviewer training programs. Data collection firms need to ensure their people are effective at their jobs at all times.

Refusal Rate for Interviews of 5 Minutes Or Less

	1985	1988
Initial	17%	24%
Refused To Continue	2%	1%
Qualified-Refused	2%	2%
TOTAL REFUSED	21%	27%

Refusal Rate for Interviews of 6 to 12 Minutes

	1985	1988
Initial	35%	32%
Refused To Continue	1%	3%
Qualified-Refused	5%	4%
TOTAL REFUSED	41%	39%

Refusal Rate for Interviews of 13 Minutes or More

	1985	1988
Initial	40%	41%
Refused To Continue	3%	1%
Qualified-Refused	4%	3%
TOTAL REFUSED	47%	45%

•The subject matter should be revealed to the participant if it can be done without biasing the data. The more information a person is provided, the less reason (s)he has to be suspicious.

•Researchers should consider limiting questionnaires to a reasonable length for both phone and personal interviews. "We must discipline ourselves in this arena and educate our clients as to the importance of this issue relative to refusal rates," the report says.

Telephone Refusal Rate	1985	1988
Initial	26%	27%
Refused To Continue	2%	2%
Qualified-Refused	2%	3%
TOTAL REFUSED	30%	32%

Telephone Refusal Rate For Other Central Location	1985	1988
Initial	30%	27%
Refused To Continue	2%	1%
Qualified-Refused	4%	6%
TOTAL REFUSED	36%	34%

•Strive to make the interviewing process as pleasant and appealing as possible to encourage repeat participation.

•Support the "Your Opinion Counts" Public Education Program by using the YOC consumer brochure, spreading the message through speaking engagements, college seminars and community activities, and closing every survey with "Your Opinion Counts." MRR

"Your Opinion Counts" is an industry-wide information and education program directed to the general public and the research professional. Its objectives are to increase the public's awareness of the importance of the research process and the effect their participation has on opinion polls, on the development of products and services, and on the quality of their lives.

YOC also educates industry professionals on the importance of the public's participation and cooperation in research and encourages guarding against methodological abuses that erode such cooperation.

The "Your Opinion Counts" Public Education Program was founded to combat the eroding image of the marketing and opinion research industry. Increasing negative press coverage due to abuses in the name of research have resulted in a decrease in public cooperation.

Six major industry associations have joined together to support and aid in the development of an expanded program: Advertising Research Foundation (ARF), American Marketing Association (AMA), The Council of American Survey Research Organizations (CASRO), Marketing Research Association (MRA), National Council on Public Polls (NCPP), and the Travel and Tourism Research Association (TTRA).

Codes:
S=Syndicated
O=Omnibus

Editor's Note: This list was developed by mailing forms to those organizations we have found who offer Omnibus/Syndicated Research Studies in their advertisements, publicity or others published material.

American Sports Data, Inc.
234 N. Central Ave.
Hartsdale, NY 10530
Ph. 914/328-8877
American Sports Analysis(s)

Analysis Research Limited
4655 Ruffner St., Suite 180
San Diego, CA 92111
Ph. 619/268-4800
Fax 619/268-4892
A/RL Pulse of the Hispanic Market(o)- Phone survey of Hispanics within the major metropolitan Markets.(o)
Analysis/Research Limited Banking Study(s)-Phone survey with 800 consumers in the San Diego and Los Angeles areas.(s)
(See Advertisement on Page 53)

Advertising Research Corporation
230 Sherman Avenue
Berkeley Heights, NJ 07922
Ph. 201/464-4400
Fax 201/464-8767
ARC Yellow Pages Ad Size Study(s)
ARC Syndicated Measurement Study of Yellow Pages(s)
ARC/TAG Voice Information Services Study(s)
ARC 1988 Product/Service Reports(s)
ARC/TAG Talking Yellow Pages Study- 1988(s)
ARC Multiple Headings Study(s)

Behavior Research Center, Inc.
P.O. Box 13178
Phoenix, AZ 85002
Ph. 602/258-4554
Fax 602/252-2729
ConsumerTrack(o)
MetroTrack(o)
Business Track(s)

Beta Research Corporation
6400 Jericho Turnpike
Syosset, NY 11791
Ph. 516/935-3800
Fax 516/935-4092
Beta Editorial Tracking Svce-BETS(s)
Subscriber Advertising Measurement (s)
Omni-Health(o)

Irwin Broh & Associates, Inc.
1011 E. Touhy Avenue
Des Plaines, IL 60018
Ph. 312/297-7515
Fax 312/297-7847
Marcom(o)
National Consumer studies(s)

Bruskin Associates
303 George Street
New Brunswick, NJ 08903
Ph. 201/249-1800 or 212/349-0781
Fax 201/349-1823
Omnitel(o)
AIM(o)
Teen OmniTel(o)

Cambridge Reports, Inc.
675 Massachusetts Avenue
Cambridge, MA 02139
Ph. 617/661-0110
Fax 617/661-3575
Cambridge Reports Omnibus Surveys(o)
Cambridge Report Program(s)
Quarterly Opinion Review Program(s)
Quarterly Opinion Briefing Program(s)

Canadian Facts, Div. SK/CF Inc.
1075 Bay Street,3rd Floor
Toronto, ONT, M4Y 1R2
Ph. 416/924-5751
Fax 416/923-7085
Monitor(o)

Center For Marketing Graphics
1117 No. Third St.
Phoenix, AZ 85004
Ph. 602/258-4554
Fax 602/252-2729
Symbols and Graphics Study(s)

Chemark Consulting
9916 Carver Rd/Ste 103
Cincinnati, OH 45242
Ph. 513/891-9502
Fax 513/891-2196
Chemical Industry Studies(s)

Children's Market Research, Inc.
1385 York Ave., Ste. 27G
New York, NY 10021
Ph. 212/794-0983
Fax 212/879-8495
Children's Market Report: Convenience Foods(s)
Children's Market Report: Snack Foods(s)
Children's Market Report: Clothing/Sneakers(s)
KidTrends Report(s)

Chilton Research Services
One Chilton Way
Radnor, PA 19089-0193
Ph. 215/964-4820
Fax 215/964-4682
Private Truck Council of America Cost Index Survey(s)

Custom Research, Inc.
10301 Wayzata Blvd./P.O. Box 26695
Minneapolis, MN 55426
Ph. 612/542-0809
Fax 612/542-0864
Criterion© Omnibus Concept Screen (o)- Personal face-to-face early-on concept screen with female head of household. (o)
(See Advertisement on Page 33)

Danis Research
One Gothic Plz/Rt 46W @ Hollywood Ave.
Fairfield, NJ 07006-2402
Ph. 201/575-3509
Fax 201/575-5366
Fresh Track(s)

Dittman Research Corp. of Alaska
8115 Jewel Lake Road
Anchorage, AK 99502
Ph. 907/243-3345
Fax 907/243-7172
Multi-Quest(o)
The Alaska Poll(s)

Doane Marketing Research, Inc.
555 No. New Ballas Rd.
St. Louis, MO 63141
Ph. 314/993-4949
Fax 314/993-7033
Farm Rodenticide Usage Study-Bi-Annual syndicated study of 1,200 farms which provides projected total U.S. market for rodenticides expressed in brand shares; livestock and poultry groups; purchasing methods.
Feed Market Study-Syndicated study conducted annually among over 4,000 swine, beef and dairy farmers which provides identification of brand market shares, types of feeds fed and source of purchase.
Animal Health Market Study-Annual syndicated study of over 7,000 farmers and ranchers. The study provides market share information for anthelmintics, biologicals, feed medications and additives, implants, and pharmaceuticals.
Dealers Attitudes Toward Chemical Manufacturers-Syndicated study conducted every two years among more than 1,300 dealers which studies manufacturers' images with their retail dealers.
1986 Weed infestations in Corn and Soybeans- Bi-annual syndicated study among more than 6,500 growers providing information on the distribution of major weed species in corn and soybeans.
Doane Pesticide Profile Study-Annual syndicated study among over 14,000 growers providing information of herbicide, insecticide/miticide, fungicide, nematicide, and growth regulator use on agricultural crops & no-cropland areas.
Doane Specialty Crops Pesticide Study-Syndicated study conducted every year with over 4,000 growers providing information on herbicide, insecticide/miticide, fungicide, nematicide, and growth regulator use on tree fruit, tree nuts and grapes.
Doane Farm Radio Listenership Study-Annual national syndicated study providing information on radio listenership patterns among Class I and IA farmers. Over 100 interviews conducted per station market.
U.S. Feed Medication Report-Annual syndicated study with over 500 distributors providing quantitative information on feed medication and feed anthelmintic products sold in the U.S.
U.S. Farm Seed Study-Annual syndicated study among over 10,000 farmers of source and brands of farm seeds.

Ehrhart-Babic Assoc.
120 Route 9W
Englewood Cliffs, NJ 07632
Ph. 201/461-6700
Fax 201/461-0435
National Alcoholic Beverage Index(s)
National Retail Tracking Index(s)

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(Please Print)

Address/P.O. Box ______________________________________

City ______________________ State ____________ Zip ____________

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Areas of Research Interest *(Check All That Apply)*

☐ Consumer Non-Durable   ☐ Service (Banks, Ins., Etc.)   ☐ Health Care
☐ Consumer Durable   ☐ Business-To-Business   ☐ Other (Specify) ____________

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Minneapolis, Minnesota 55423

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

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

Gartner Group, Inc.
56 Top Gallant Rd.
Stamford, CT 06904
Ph. 203/964-0096
Fax 203/324-7901
Comtec Market Analysis Services(s)

Goldring & Company, Inc.
820 N. Orleans St., #210
Chicago, IL 60610
Ph. 312/440-5252
Fax 312/266-1742
The Geromarket Study(s)

Harrington Market Research, Inc.
Div. William R. Biggs/Gilmore Assoc.
511 Monroe St.
Kalamazoo, MI 49007
Ph. 616/342-6783
Fax 616/345-7337
Harrington Survey(o)

Healthcare Communications, Inc.
3371 Route One
Princeton, NJ 08543
Ph. 609/452-0211
Fax 609/734-8456
Various Medical Studies(s)

Health Research, Inc.
220 White Plains Rd.
Tarrytown, NY 10591
Ph. 914/332-5070
Fax 914/332-1138
Dental Omnibus Survey(o)

Hispanic Marketing Research & Communication, Inc.
4550 Northwest Loop 410, #140
San Antonio, TX 78229
Ph. 512/736-2000
Fax 512/736-2004
Hispanic Annual House To House Survey-Impact (o)
Hispanic Semi-Annual House To House Survey (s)

Home Testing Institute
900 West Shore Road
Port Washington, NY 11050-0402
Ph. 516/625-2220
Fax 516/625-2222
Insta-Vue(o)

Hospital Research Associates
383 Route 46W
Fairfield, NJ 07006-2402
Ph. 201/575-3650
Medical Related Studies(s)
Telephone Omnibus - Physicians (o)
Hospital Omnibus(o)

ICR Survey Research Group
105 Chesley Drive
Media, PA 19063
Ph. 215/565-9280
Fax 215/565-2369
EXCEL-A consumer omnibus of 1,000 interviews (1/2 male & 1/2 female) conducted twice weekly on CRT system. Five day interviewing period with results available following last interviewing day.(o)
(See Advertisement on Page 47)

IMR Research
140 Burlington
Clarendon Hills, IL 60514
Ph. 312/654-1077
Fax 312/654-0147
Continuing Consumer Survey-U.S.(s)
Continuing Consumer Survey-Canadian(s)
Continuing Consumer Automotive Maintenance Survey(s)

Info Corporation
2880 Lakeside Drive
Santa Clara, CA 95054
Ph. 408/980-4300
Computer Industry Studies(s)

Information Resources, Inc.
150 N. Clinton
Chicago, IL 60606
Ph. 312/726-1221
Fax 312/726-8214
InfoScan(s)

International Demographics, Inc.
3000 Richmond Avenue/#170
Houston, TX 77098
Ph. 713/522-1016
Fax 713/522-5727
The Media Audit(s)
The Financial Audit(s)

Codes:
S=Syndicated
O=Omnibus

Link Resources Corp.
79 Fifth Avenue
New York, NY 10003
Ph. 212/627-1500
Fax 212/620-3099
Various Electronic Studies(s)
Various Electronic Studies(o)
National Work-At-Home Survey (o)

Maritz Marketing Research, Inc.
1395 North Highway Drive
Fenton, MO 63099
Ph. 314/827-1610
Contact: Ronald Lipovsky, Vice President

Farmers' Pesticide Use Study-Annual syndicated study 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
Ph. 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)

Maritz Marketing Research, Inc.
400 No. Schmidt Road
Bolingbrook, IL 60439
Ph. 312/759-0700
Fax 312/759-0700
Contact: Bruce Westcott, Vice President
SuperScreen(o)- A uniquely cost-effective vehicle for locating low-incidence consumers, strengthening study designs or just tapping into a continuous daily telephone dialog with the nation's consumers. Interviews with 1,550 households every day, except holidays.(o)
(See Advertisement on Page11)

Market Decisions Corporation
8959 SW Barbur Blvd/Ste 204
Portland, OR 97219
Ph. 503/245-4479
Various Financial Studies(s)

Market Facts, Inc.
676 No. St. Clair,
Chicago, IL 60611
Ph. 312/280-9100
Fax 312/280-8756
TeleNation(o)
New Data Gage(o)
MiniScreen(o)

Market Facts of Canada
77 Bloor St. West, 12th Flr.
Toronto, ON M5S 3A4 CANADA
Ph. 416/964-6262
Fax 416/964-5882
Consumer Mail Panel/Canada(o)
TeleNation/Canada(o)
InfoStudy/Canada(s)
Household Equipment Study/Canada(s)

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Market Trends Research
3633 136th Place SE, #110
Bellevue, WA 98006
Ph. 206/562-4900
Fax 206/562-4843
Statewide Opinion Monitor-Washington(s)
Financial Institutions(s)

Marketing Evaluations/TVQ
14 Vanderventer Ave
Port Washington, NY 11050
Ph. 516/944-8833
Fax 516/944-3271
Various Television Related Studies(s)
Sports Q(s)
Magazine Q(s)

The Marketing Workshop, Inc.
3294 Medlock Bridge Rd.,
Ste. 200
Norcross, GA 30092
Tel. 404/449-6767
Fax 404/449-6739
Guest Satisfaction Measurement(s)

Mediamark Research, Inc.
341 Madison Avenue
New York, NY 10017
Ph. 212/599-0444
Fax 212/682-6284

Survey of American Consumers(s)
Upper Deck(s)
Local Markets-Top 10(s)

Monroe Mendelsohn Research, Inc.
352 Park Avenue So.
New York, NY 10010-1781
Ph. 212/684-6350
Fax 212/689-5296
Survey of Adults & Markets of Affluence(s)

MRCA Information Services
2215 Sanders Rd.
Northbrook, IL 60062
Ph. 312/480-9600
Fax 312/480-9600
Menu Census(s)
Dietary Intake Studies(s)

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

A.C. Nielsen
Nielsen Plaza
Northbrook, IL 60062
Ph. 312/498-6000
Fax 312/498-7280
Scantrack(s)
Scantrack Household(s)

Nielsen Marketing Research
70 Seaview Avenue
Stamford, CT 06904
Ph. 203/324-6355
Featurlab(s)

Nordhaus Research, Inc.
20300 W. Twelve Mile Road
Southfield, MI 48076
Ph. 313/827-2400
Fax 313/827-1380
Total Racing Audience Composition Study-TRACS(s)
Comprehensive market study of motorsport enthusiasts with in-depth information on demographics, lifestyles, buying and media habits; optional brand profile components and custom questions are also available.
(See Advertising on Page 51)

The NPD Group
1300 W. Higgins Road
Park Ridge, IL 60068
Ph. 312/692-6700
Fax 312/692-6049
Crest(s)

NDP Special Industry Services
900 W. Shore Rd.
Port Washington, NY 11050
Ph. 516/625-0700
Various consumer durable product studies (s)

O'Neil Associates, Inc.
412 E. Southern Avenue
Tempe, AZ 85282
Ph. 602/967-4441
Fax 602/967-6122
Valley Monitor(o)
East Valley Monitor(o)

Palshaw Measurement, Inc.
P.O. Box 1439
Pebble Beach, CA 93953
Ph. 408/625-2500
Multi-client Personal Interview Medical Surveys(o)

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

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PlayLab Research, Division of The Creative Group
31800 Northwestern Hwy.
Farmington Hills, MI 48018
Ph. 313/855-7810
Fax 313/855-2368
PlayLab Baby Care™ Panel-An on-going, research panel of expectant and new-born mothers. Approximately 500 expectant mothers added annually. Continuous tracking of awareness, attitudes, preferences and purchasing behavior. (s/o)
PlayLab Predictor™ Panel-A unique, annually replenished research panel of predictive children in 5 major markets. Personally screened and qualified on the basis of their being peer leaders, trendsetters, and innovative thinkers. (s/o)
PlayLab Requestor™ Survey-A major multivariate study conducted 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 segmentation studies conducted nationally among children and teenagers. Proved product and purchaser segmentation analyses utilizing multivariate and multidimensional methods. Categories include: cereals, cookies and confectionaries.
(See Advertisement on Page 2)

Princeton Data Search
Member The ICT Group
800 Town Center Drive
Langhorne, PA 19047
Ph. 215/757-0200
Fax 215/757-4538
LANSearch(s)

Profile Market Research
4020 So. 57th Street
Lake Worth, FL 33463
Ph. 407/965-8300
Fax 407/965-6925
Qtrly. Omnibus of So. Florida(o)

Restaurant Research Associates
202 Fashion Lane/Ste 101
Tustin, CA 92680
Ph. 714/731-7775
Fax 714/731-7759
Coffee Shop/Family-Style Restaurant Tracking(s)- Quarterly tracking, measuring awareness, image, share purchase interest and advertising.(s)

Rockwood Research Corp.
1751 W. County Road B
St. Paul, MN 55113
Ph. 612/631-1977
Fax 612/631-8198
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 49)

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

Russell Marketing Research Inc.
152 E. 71 Street
New York, NY 10021
Ph. 212/879-3350
Fax 212/535-4543
Qualitest-NYC MSA(o)

Sievers Research Company, Inc.
1414 Fair Oaks/Suite 9
So. Pasadena, CA 91030
Ph. 818/441-5900
Fax 818/799-1964
Omniview-California(o)

Simmons Market Research Bureau
380 Madison Avenue
New York, NY 10017
Ph. 212/916-8926
Fax 212/916-8918
Study of Media & Markets For Food Industry(s)
Top Management Insight(s)

The Sinrod Marketing Group
76 No. Broadway
Hicksville, NY 11801
Ph. 516/433-3200
Fax 516/433-3201
Various Surveys of Mothers(o)

Lee Slurzberg Research, Inc.
158 Linwood Plaza
Ft. Lee, NJ 07024
Ph. 201/461-6100
LSR Nat'l Hispanic Omnibus Poll(o)

Southeastern Institute of Research
2325 W. Broad Street
Richmond, VA 23220
Ph. 804/358-8981
Fax 804/358-9761
Insight Studies- Tidewater, Baltimore, Richmond and Washington D.C.(o)-Separate telephone omnibus surveys conducted monthly among cross-section within each area.(o)
(See Advertisement on Page 48)

SPAR/Burgoyne
One Centennial Plaza
Cincinnati, OH 45202-1909
513/621-7000
Burgoyne Limited Item Syndicated Service(s)
C-Store Sweep(s)
Hot Button Sweep(s)

Strategy Research Corporation
100 NW 37th Avenue
Miami, FL 33125
Ph. 305/649-5400
Fax 305/649-6312
Contact: Jim Loretta, VP
U.S. Hispanic Omnibus(o)

Survey Sampling, Inc.
One Post Road
Fairfield, CT 06430
Ph.203/254-1410
Fax 203/254-0372
Directory Data's Yellow Page Audience Measurement Service(s)

Teenage Research Unlimited
601 Skokie Blvd.
Northbrook, IL 60062
Ph. 312/564-3440
Fax 312/564-3641
Teenage Media/Market Study(s)

Trendata, Inc.
9 Mott Ave., Ste. 201
Norwalk, CT 06850
Ph. 203/866-3113
Trendata Report(s)

U.S. Travel Data Center
1133 21st Street NW,
Two Lafayette Center
Washington DC 20036
Ph. 202/293-1040
Fax 202/293-3155
National Travel Service(o)
Survey of Business Travelers(o)

Video Storyboard Tests
107 E. 31st Street
New York, NY 10016
Ph. 212/689-0207
Fax 212/689-0210
Campaign Monitor(s)

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

Youth Research
246 Federal Rd., Ste. 22B
Brookfield, CT 06804
Ph. 203/797-0666
Fax 203/748-1735
Youth Research Tag-Along Omnibus/6-12 yrs(o)

Cross Index of Study Providers by Category

Advertising
Beta Research(s)
Bruskin Associates(o)
Center For Marketing Graphics(s)
Gallup & Robinson(s)
Healthcare Communications(s)
Video Storyboard Tests(s)

Agricultural
Doane Marketing Research(s)
Maritz Marketing Research(s)
Rockwood Research Corp(o)

Automotive
IMR Research(s)
Maritz Marketing Research(s)
Nordhaus Research, Inc.(s)

Carpeting
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Dittman Research-AK(s)
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Profile Marketing Research-FL(o)
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IMR Research(s)
Market Facts of Canada(s)
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Consumer-U.S.

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Children's Market Research (s)
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Market Facts of Canada(s)
The NPD Group(s)
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Information Resources(s)
A. C. Nielsen(s)
SPAR/Burgoyne (s)

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Marketing Evaluations/TVQ
Nordhaus Research, Inc. (s)

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Teenage Research Unlimited(s)

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U.S. Travel Data Center(o)

Trucking

Chilton Rsch. Svcs.(s)

Work-At-Home

Link Resources(o)

Trade News

continued from p. 35

I have always believed that students should strive for excellence, they must understand that this means doing the work on their own."

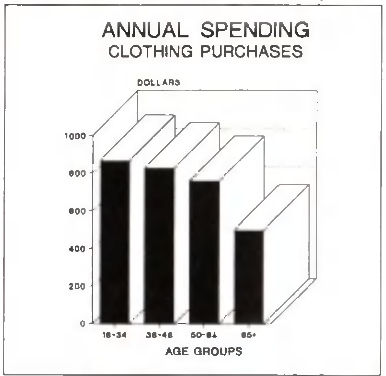
The study revealed that the majority of high school students consider getting good grades to be extremely important and over 95% claimed that it held some importance to them.

The study also asked the students whether they thought ethics and morals should be taught at home or in school.

Teenage girls felt most strongly that ethics should be taught in both places; 31.3% of the females agreed strongly and 24.7% agreed somewhat, compared to 27.9% of boys who agreed strongly and 20% who agreed somewhat. More boys felt that "ethics and moral values should be taught at home, not at school" (16.5% of males agreed strongly vs 14.6% of females), while more teenage girls felt that "schools should teach ethics" (46.2% of female respondents favored this vs. 41.2% of male respondents).

Clotbing purcbasing habits

A recent national study by R.H. Bruskin Associates of 1000 men and women discovered that the average adult spent approximately $800 on his or her per that as people grow older they tend to spend less on clothing. While those 18-34 years of



age spent $870 each, the 35-49 group spent $830, those 50-64 spent $760, and the 65 and over group spent only $500 each. By income, those in the $40,000-plus group had the greatest expenditures, at $1,250 for clothing over the past year.

A new way to bet on football

In July the Oregon Lottery Commission approved consumer betting on pro football games through a new lottery game that begins in September. Under the Oregon system bettors will be able to use any Oregon lottery outlet to fill out parley cards in which they attempt to pick the winners based on point spreads of from 4-10 games or all 14 NFL games, with bets ranging from $1 to $20 per card.

A new study by R.H. Bruskin Associates of 1000 U.S. adults gauged reaction to the idea.

21% of all adults indicated they would be extremely or very interested in playing such a game if it were available in their state. 32% of men expressed a great deal of interest, whereas only 11% of women were interested in playing the game. Younger adults—those under 35 (29%)—and those with incomes between $15,000 and $40,000 (25%) were the age groups with the most interest in such a game.

Geography also seems to play a part in interest in a football betting game. For example, 24% of people in the Northeast and South show interest, versus only about 17% of residents of the Northcentral and Western states.

The key finding, however, arises from an analysis of those people who currently play lottery games or football betting cards. Of the 500 people in the sample (50%) who had bought state lottery tickets in the past year, 28% indicated that they were extremely or very interested.

More importantly, of those who said they had played football betting cards during the past year (about 9% of the total sample), 58% said they would be extremely interested or very interested in a football betting lottery in their state.

Viewers rate cable TV's performance

The rapid growth of the cable television industry was one of the great success stories of the 1970s and 1980s. The industry's growth was propelled to a great extent by the public's appetite for premium pay cable stations such as HBO, Showtime, and Cinemax. However, a recent study conducted by Opinion Re-

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QUALITATIVE RESEARCH/FOCUS GROUP MODERATORS

Listed below are names of companies specializing in focus groups. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. 612/861-8051.

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605/338-3918
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San Diego, CA 92111
619/268-4800
Contact: Arline M. Lowenthal
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The Answer Group
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513/489-9000
Contact: Maribeth McGraw
Consumer,HealthCare,Prof., Focus Groups,One-On-Ones

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Philadelphia, PA 19104
215/387-5300
Contact:Kathy Hammersla, Ph.D.
25 Years Service in Industry.
Qual/Quant Ad Hoc Research.

Brand Consulting Group
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Southfield, MI 48075
313/559-2100
Contact: Milton Brand
Consumer,Advertising Strategy, New Product Strategy Research

Concepts In Marketing Research (CIMR)
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St. Paul, MN 55101-2098
612-228-5667
Contact: Kara Marx
Consltng., Qual. Rsch., Fac/Recruit/Moderation/Analysis

Consumer/Industrial Rsch Svce
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Media, PA 19063
215/565-6222
Contact: James D. Lewis
Health Care;Agri-Bus;Ind; Trad'l;Tele;One-On-One

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Seattle, WA 98168
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Contact: Jerry Carter
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Contacts: Reva Dolobowsky
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Male Moderator/Client Marketing Background/Expert Analysis

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Contact: William L. Hammer
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San Diego, CA 92110
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Thorne Creative Research Services
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Hi-Tech, Industrail, Financial Health Care, Consumer, Retail

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Contact: Karen Forcade
ConsultantsInMktgToChildren FullSvcQualitative/Quantitative

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The Answer Group
Focused Research
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Market Views Research, Inc.
Menendez International
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Research Arts, Inc.
Rockwood Research Corp.
Schrader Rsch & Rating Svce
James Spanier Associates
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Thorne Creative Research Svcs
Total Research Corporation
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PlayLab Research

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Intersearch Corporation
Kennedy Research Inc.
Market Views Research, Inc.
Moosbrugger Marketing Rsch.
Research Incorporated
Rockwood Research Corp.
Southeastern Institute of
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Strategic Marketing Services
Sweeney International, Ltd.
TrendFacts Research
Total Research Corporation
Trotta Associates

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PlayLab Research
Youth Research/CSi

CHILDREN
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Doyle Research Associates
Fedder Research
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Lynn Greenberg & Associates
PlayLab Research
Research Arts, Inc
Youth Research/CSi

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Langer Associates, Inc.
ResearchArts, Inc.
Sweeney International, Ltd.
Total Research Corporation

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First Market Rsch(J. Reynolds)
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Market Views Research, Inc.
Sweeney International, Ltd.

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Consumer/Industrial Rsch Svce
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Fedder Research
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First Market Rsch(J. Reynolds)
Greenfield Consulting Group,Inc.
LaScola Qualitative Research
InfoDirect, Inc.

Marketeam Associates
Moosbrugger Marketing Rsch
New South Research
The Research Center
Rockwood Research Corp.
Schrader Rsch & Rating Svce
James Spanier Associates
Sweeney International, Ltd.
Total Research Corporation
TrendFacts Research
Paul A. Warner Associates, Inc.
The Winters Group
Wolf/Altschul/Callahan, Inc.

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Doyle Research Associates
D.S. Fraley & Associates
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Moosbrugger Marketing Rsch.
PlayLab Research
Schrader Rsch & Rating Svce
James Spanier Associates
Thorne Creative Research Svcs
Paul A. Warner Associates, Inc.
Youth Research/CSi

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Research Incorporated

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The Answer Group
D.S. Fraley & Associates
Langer Associates, Inc.
Mercadotecnia Consulting
PlayLab Research
Schrader Rsch & Rating Svce
Thorne Creative Research Svcs
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First Market Rsch(J. Reynolds)
Greenfield Consulting Group,Inc.
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InfoDirect, Inc.
K C A Research
Kennedy Research Inc.
LaScola Qualitative Research
Marketeam Associates
Market Navigation, Inc.
MedProbe Medical Mktg. Rsch
Moosbrugger Marketing Rsch.
New South Research
Southeastern Institute of Research, Inc.
Strategic Marketing Services
TrendFacts Research
The Winters Group

HISPANIC
Analysis Research Ltd.
Findings International Corp.
Hispanic Marketing Communication Research
Menendez International

HI-TECH
TrendFacts Research

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Analysis Research Ltd.
Brand Consulting Group
Dolobowsky Qual. Svcs., Inc.
Fedder Research
First Market Rsch(J. Reynolds)
D.S. Fraley & Associates
Lynn Greenberg & Associates
PlayLab Research
Research Arts Inc.
Sweeney International, Ltd.
Thorne Creative Research Svcs
Paul A. Warner Associates, Inc.
Youth Research/CSi

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Intersearch Corporation
Kennedy Research Inc.
Market Navigation, Inc.
Strategic Research, Inc.
Sweeney International, Ltd.
Taylor Research
TrendFacts Research

MALES
Fedder Research

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D.S. Howard Assoc, Inc.
Intersearch Corporation
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MedProbe Medical Mktg. Rsch
Strategic Research, Inc.

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Mercadotecnia Consulting
Paul A. Warner Associates, Inc.

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Decision Research
Dolobowsky Qual. Svcs., Inc
D.S. Fraley & Associates
Faber Marketing Research
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Greenfield Consulting Group,Inc.
D.S. Howard Assoc., Inc.
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Menendez International
The Research Center
Research Arts, Inc.
Schrader Rsch & Rating Svce
James Spanier Associates
Strategic Marketing. Svces
Total Research Corporation
Youth Research/CSi

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D.S. Fraley & Associates
Langer Associates, Inc.
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PlayLab Research
Research Arts, Inc.
The Research Center
Schrader Rsch & Rating Svce
Thorne Creative Research Svcs
Total Research Corporation
Trotta Associates
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Youth Research/CSi

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Doyle Research Associates
D.S. Fraley & Associates
PlayLab Research
Youth Research/CSi

PET PRODUCTS
Rockwood Research Corp.
Thorne Creative Research Svcs

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Creative Marketing Solutions
Datatactics, Inc.
DTW Marketing Research Group
D.S. Howard Assoc., Inc.
Market Navigation, Inc.
MedProbe Medical Mktg. Rsch
James Spanier Associates
Total Research Corporation
The Winters Group

POLITICAL RESEARCH
American Public Opinion Survey & Market Research Corp
LaScola Qualitative Research
Mercadotecnia Consulting
New South Research
Total Research Corporation
TrendFacts Research

PUBLISHING
First Market Rsch(J. Heiman)
D.S. Fraley & Associates
Langer Associates, Inc.
Thorne Creative Research Svcs

RETAIL
Brand Consulting Group
First Market Rsch(L. Lynch)
First Market Rsch(J. Reynolds)
Langer Associates, Inc.
Research Arts, Inc.
Paul A. Warner Associates, Inc.

SENIORS
K C A Research

SOFT DRINKS, BEER, WINE
American Public Opinion Survey & Market Research Corp
D.S. Fraley & Associates
Mercadotecnia Consulting
Thorne Creative Research Svcs
Paul A. Warner Associates, Inc.

TEACHERS
D.S. Fraley & Associates
PlayLab Research

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D.S. Howard Assoc., Inc.
Kennedy Research Inc.
LaScola Qualitative Research
Total Research Corporation
TrendFacts Research
Wolf/Altschul/Callahan, Inc.

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Rockwood Research Corp.

TELEPHONE FOCUS GROUPS
Datatactics, Inc.
Market Navigation, Inc.

TEENAGERS
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D.S. Fraley & Associates
PlayLab Research
Research Arts, Inc.
Thorne Creative Research Svcs
Youth Research/CSi

TOYS/GAMES
Greenfield Consulting Group,Inc.
PlayLab Research
Youth Research/CSi

TRANSPORTATION SERVICES
Sweeney International, Ltd.
Total Research Corporation
TrendFacts Research
Paul A. Warner Associates, Inc.

TRAVEL
Schrader Rsch. & Rating Svce.
Sweeney International, Ltd.
Total Research Corporation

YOUTH
Doyle Research Associates
D.S. Fraley & Associates
PlayLab Research
Strategic Research Corp.
Paul A. Warner Associates, Inc.
Wolf/Altschul/Callahan, Inc.

Trade News

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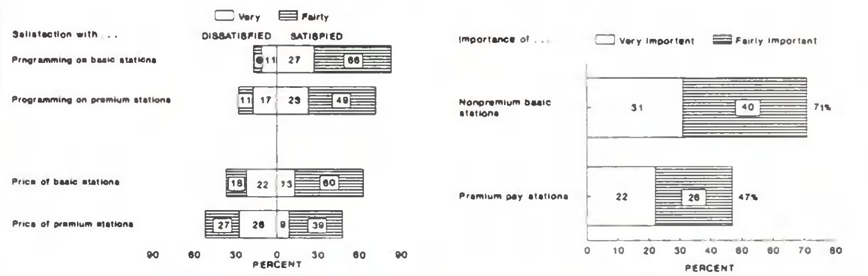
search Corp. suggests that this appetite may have been sated. Cable subscribers now say that premium programming was less important to their initial decision to purchase cable than were basic cable stations. Furthermore, consumers are less satisfied with both the programming on premium stations and the cost of subscribing to them than they are with basic cable's programming and cost.

Another ominous sign for premium stations is that twice as many people say they will be viewing less premium cable TV over the next two years (21%) as say they will be watching more of it (10%).

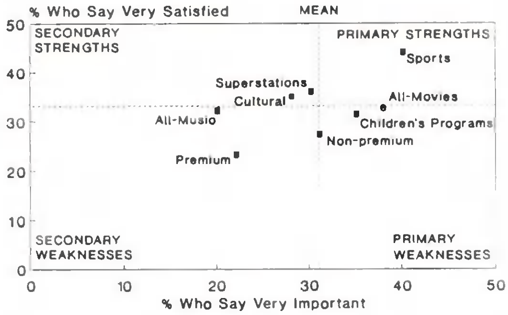
About half (55%) of American households subscribe to cable television, and no single type of programming appears to have been of great importance to most cable subscribers when they made their decision to receive cable TV. However, the strongest magnets appear to be sports, children's programs, and movies. Between 30% and 40% of cable subscribers say that specialized sports programming (40%), all-movie cable stations (38%) or programming for children (35%) were very important to their households when they made the decision to subscribe to cable.

A moderate number of cable subscribers—about three in ten—are very interested in programs that are part of the basic cable service (31%) or the superstations

SELECTED VIEWPOINTS OF CABLE TV SUBSCRIBERS



CABLE SUBSCRIBERS' ASSESSMENT OF TYPES OF PROGRAMMING



(30%). Along with premium pay stations, least important to consumers are arts and cultural programs and all-music stations.

Although there is no single type of programming that attracts all segments of the public to cable TV, one segment of the population does have a specific "hot button." Almost three-quarters (74%) of people with children under 12 years of age say that the availability of children's programming was very important in their decision to describe to cable. For this reason, marketing to parents is likely to be an extremely efficient way for cable system operators to expand their subscriber base.

The public's appetite for certain types of cable programming appears to split along socioeconomic lines. As might be expected, professionals and college-educated cable subscribers place greater weight on cultural programming when making a decision to subscribe to cable than do blue collar and high school-educated people. However, it should be noted that even within these more upscale groups, there is less interest in cultural programming than in sports or other types of cable offerings. On the other hand, superstations such as WGN or WTBS seem to appeal most strongly to blue collar, lower income and less-educated segments of the public.

Most cable subscribers (86%) are at least "fairly satisfied" with cable television, but give somewhat lukewarm approval. While four in five express some level of satisfaction, and only one subscriber in seven (14%) expresses dissatisfaction with cable TV as a whole, only one in three (34%) is "very satisfied." In other words, most subscribers appear to give cable TV a C-plus or B-minus grade, while few give it an A.

Using ORC's Quadrant Analysis, cable TV's performance in satisfying customers can be examined. The horizontal axis of the graph shows the proportion of subscribers who say the particular programming (premium, children's, all-music) is very important; the vertical axis shows the proportion who say they are very satisfied with the programming.

The graph shows that sports programming is cable TV's greatest strength, in that it is viewed as a "very important" ingredient for subscription, and the largest proportion of subscribers (44%) report being "very satisfied" with the quality of cable's sports programming, compared with the other types of programs measured. All-movie stations and children's programs are also cited, with above-average frequency, as "very important" reasons for subscribing to cable. In these areas, however, cable TV has not done as well in meeting subscribers' expectations.

Executives prefer business education background for future managers

An Opinion Research Corp. survey of 503 business executives at America's largest manufacturing and service companies found that a plurality of executives (45%) prefer that their companies emphasize business education when hiring potential managers. However, one-quarter would rather see emphasis on either a liberal arts (26%) or technical background (26%) in their companies' future hiring.

The survey was intended to gather each business executive's opinions regarding education in America, and the preparation of Americans for the challenges of business management.

The continued preference of executives for busmess education is particularly interesting in light of the emphasis they place on writing skills and critical thinking ability--characteristics often associated with a liberal arts background. These findings might imply that executives do not believe that current liberal arts programs are meeting their business and organizational needs.

The academic background preferred by an executive seems to be influenced, to a large extent, by his or her job function. Among marketing executives, almost as many want new managers to be drawn from liberal arts backgrounds as prefer a business eudcation. A business degree is the overwhelming choice of executives in finance-related positions, while manufacturing and engineering managers voice a stong preference for a technical background.

CORRECTIONS

The following listings were inadvertently omitted from the December 1988 QMRR containing the Focus Group Research Facilities Directory:

Message Factors, Inc.
2620 South Parker Road, Suite 275
Denver, CO 80014
303-750-5005
1, 3, 6B

Message Factors, Inc.
5208 Roswell Road
Atlanta, GA 30342
404-256-9405
1, 3, 4, 6C

Pat Woods, Inc.
1755 Lynnfield, Suite 249
Memphis, TN 38119
901-682-2444
1, 3, 6B

The following listings were inadvertently omitted from the May 1989 QMRR containing the Telephone Interviewing Directory:

Pat Woods, Inc.
1755 Lynnfield, Suite 249
Memphis, TN 38119
901-682-2444
Fax: 901-682-2471
32-6-32-0

Keystone University Research Corp.
Columbus Square
652 West 17th St.
Erie, PA 16502
814-453-4713
Fax: 814-453-5502
8-6-1-0

The following listing was inadvertently omitted from the March 1989 QMRR containing the Data Processing/ Software Directory:

Black River Systems
4680 Brownsboro Rd., Bldg. C
Winston-Salem, NC 27106
919-759-0600
Section II
Graphic Display
Regression/Correlation Analysis
Sales Forecasting
Time-Series Analysis

Trade Talk

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Brand Believers "long for the good old days."

Reinforce their self-image

Brand Believers tend to feel that their product choices—particularly with automobiles—reflect their personalities. They are more traditional and home-oriented and their product loyalties are strongly pro-American. Having grown up with American brand names, their use of these products may appeal to a sense of tradition. The research also suggests that Brand Believers are loyal not only to products, but to family, friends, and even the stores they shop at.

Serve as an information shortcut

Brand Believers rely less often on toll-free numbers and free brochures for product information than those with no brand interest.

Represent safety, order and security

Though they are somewhat impulsive shoppers and very interested in new products, Brand Believers tend to be cautious and risk-avoiding, with a strong need for order in their lives. Purchasing brand names lets them indulge their impulsiveness and fulfill their need for variety while minimizing risks.

Demographically, Brand Believers can be found in all household sizes and age groups. They tend to be high school-educated, successful blue collar individuals (with annual household incomes of $30,000+) who live in the East North Central states and suburbs of SMSA's with 2,000,000+.

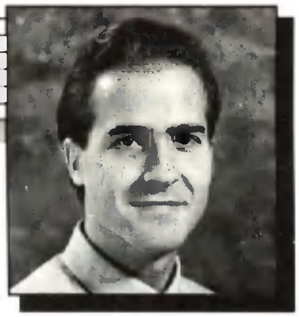
Those with very high and no brand interest show no difference in employment status, but Brand Believers are less likely to work in service occupations, more likely to regard their work as just a job rather than a career, and also more likely to have a spouse employed in a precision production, craft, or repair occupation. Brand Believers who choose not work outside the home tend to do so for the satisfaction of staying home rather than out of a sense of obligation.

Index of Advertisers

The publisher is not responsible for any errors or omissions in the index

TRADE TALK

by Joseph Rydholm
managing editor



Brand names offer emotional and psychological benefits

As part of its annual Life Style study, advertising agency DDB Needham Worldwide has come up with some interesting insights into the impact that brand names have on a segment of the consumer population it calls Brand Believers.

According to the Life Style study, approximately 37 percent of married females have high or very high brand interest. To these Brand Believers nationally advertised brand names provide a range of emotional and psychological benefits.

The study is a mail panel survey of a nationally representative sample of 2000 women and 2000 men in separate households that asks a variety of attitudinal questions in such areas as product usage, media, and leisure activities.

"We use this profile to take a look at different segments of the population," says Ned Anschuetz, associate director of strategic planning and research, DDB Needham Chicago. "It contains some questions that have to do with attitudes towards brand loyalty and we decided to profile those who are interested in brand names and compare them to those who say they aren't interested in brand names."

Anschuetz says that once the Brand Believer segment began to emerge from the study, focus groups were held to define it further.

"We did the groups to take a look at specific product categories and find out why people prefer advertised brand names versus store brands, for example. We wanted to explore it independently of the Life Style survey to see what kind of overlapping information we would get."

The focus groups and the Life Style study findings suggest that for Brand Believers, brand names:

Reassure them about product quality

Brand names are regarded as implicit guarantees of quality and satisfaction. Brand Believers are less conscious of price when shopping and are less likely to return an unsatisfactory product.

Reassure them about the product's "social acceptability"

Brand Believers are concerned with the propriety and appearance of themselves and others.

Satisfy nostalgic longings by evoking pleasant memories associated with past product usage

Unlike those with no brand interest, a large percentage of

continued on p. 61