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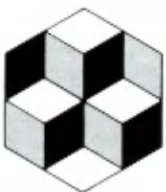
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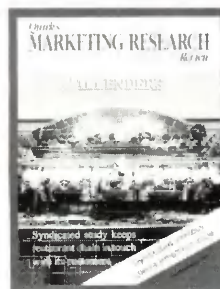
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## Cover

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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# Agri-marketers monitor direct mail with syndicated study



**W**ith 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 IA 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 IA 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-lit 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.

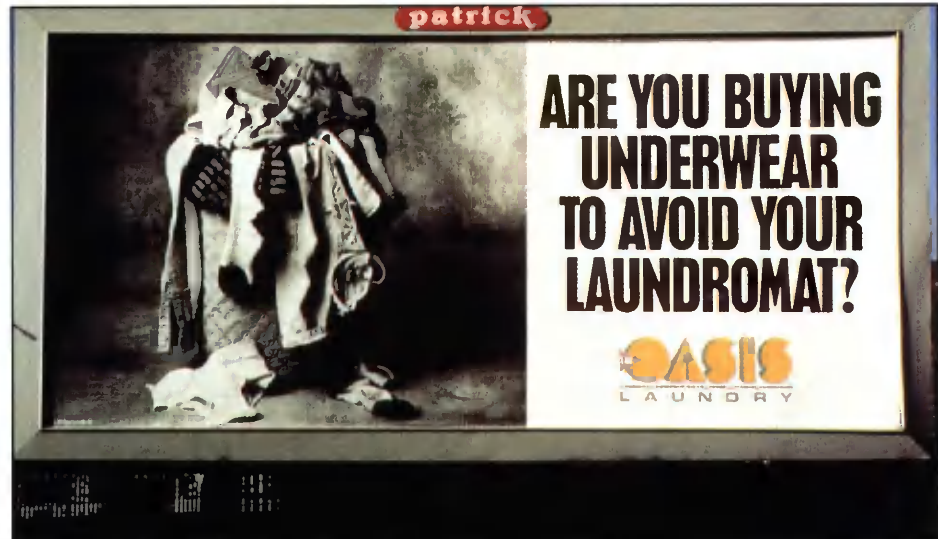
"What they described is what an Oasis laundromat is today," Christensen says.

## 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 videocassette, 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."

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. Reve-

nues 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 custom-

ers—for films, magazines, food and beverage choices.

"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."

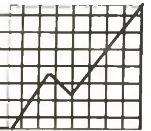
The surveys provide information on how much laundry customers do, how they rank the amenities in terms of importance, and they also provide Oasis with an idea of who their customers are.

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



Christensen



## 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.

**M**ultidimensional 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.

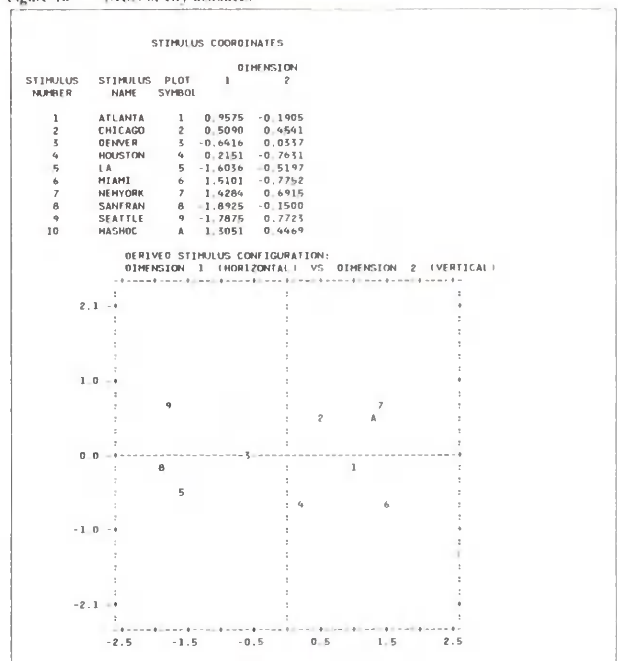
Suppose that you were given the reverse task. That is, start

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





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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 ALSICAL 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 measure-

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

ment properties. Nonetheless, this is where MDS is extremely useful, for we can specify that the dissimilarities be treated as ordinal measurements and have ALSICAL produce its map.

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-

continued on p. 24

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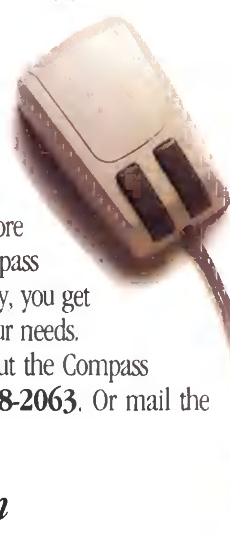
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## Food for thought

*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

---

*"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*

---

better price/value relationship in the eyes of its customers.

### 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."

# CALLENDER'S PIE SHOP & BAKERY

## Salad Bar



"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

*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.*

for us but also in relationship to our competitors—so we can be aware of those which we have to take action on."

### 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-

continued on p. 34

# 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 inter-

view, 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 home:** Interviewing accomplished by use of interviewer’s home phone.

### PERSONAL

**Mall/shopping 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 continue:** 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.



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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.

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### 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

continued on p.42

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# NAMES OF NOTE

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



Pearson



Pertzborn

**Sherryl Pertzborn** 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 man-

ager 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.

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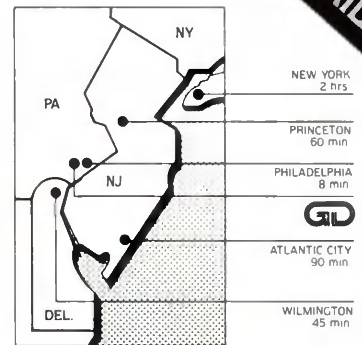
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**Brian Heinecke** has joined *Nielsen Marketing Research* as vice president, client service-customer information services. Previously he was with the marketing research department of Procter & Gamble as manager-development, Market Measurements Organization. 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.

**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.



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*.



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.

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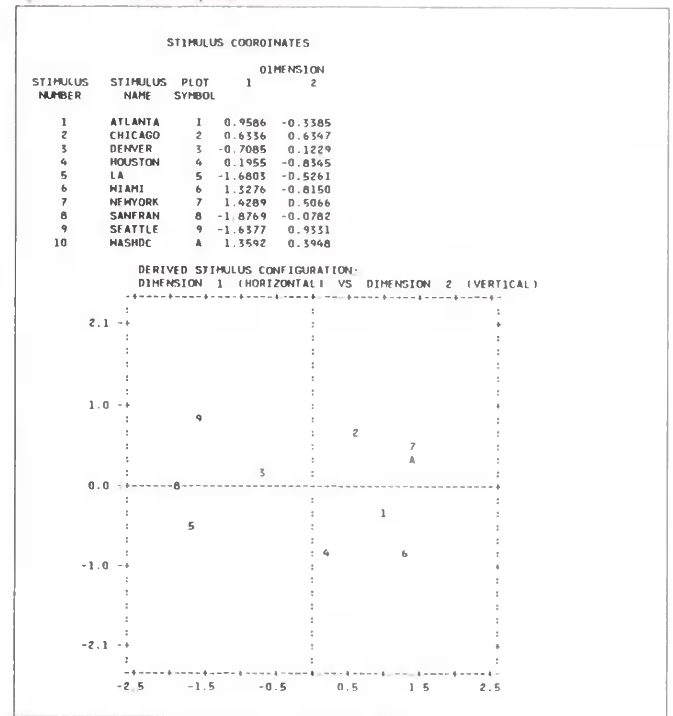
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**Data Use**  
 continued from p. 12  
 ery of actual distances.

Figure 2b MDS of city dissimilarities



**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

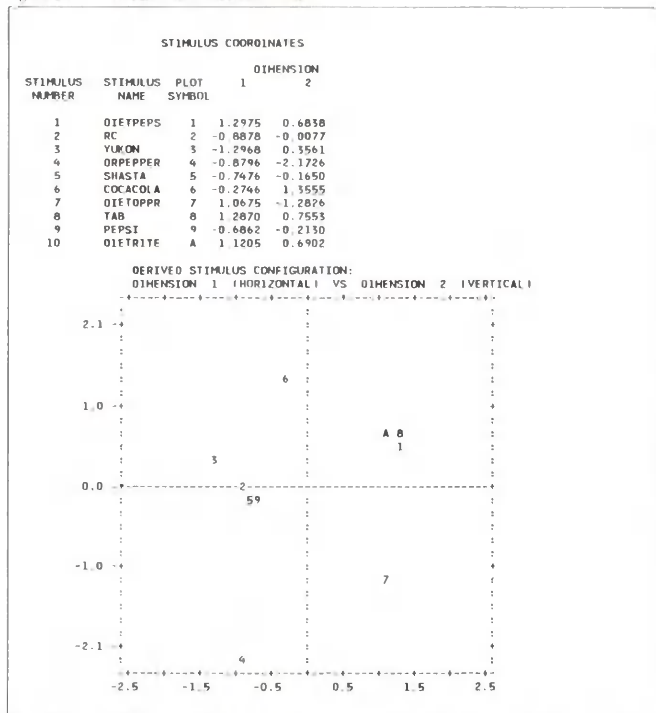
book, they present individual subject data. The data in Figure 3 are averages of all the individual subjects' dissimilarities. The data are from some years ago, and thus do not necessarily reflect the present-day market. Note that the dissimilarities are on a 0 to 100 scale, where low scores indicate 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



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) might 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



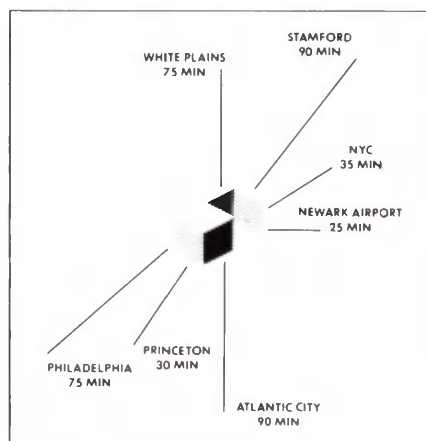
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a little or a lot. Presumably, the subject tastes the difference, whether it is a difference in sugariness, saltiness, cherry-ness, or whatever. In this, MDS differs from many other techniques which require the researcher to enumerate and include all 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,



## MAIL MONITOR

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."

---

*"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-

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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-

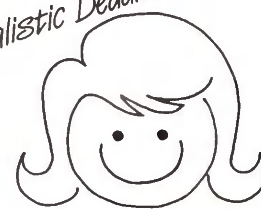
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Circle No. 839 on Reader Card

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.

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*"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%).

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## 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."

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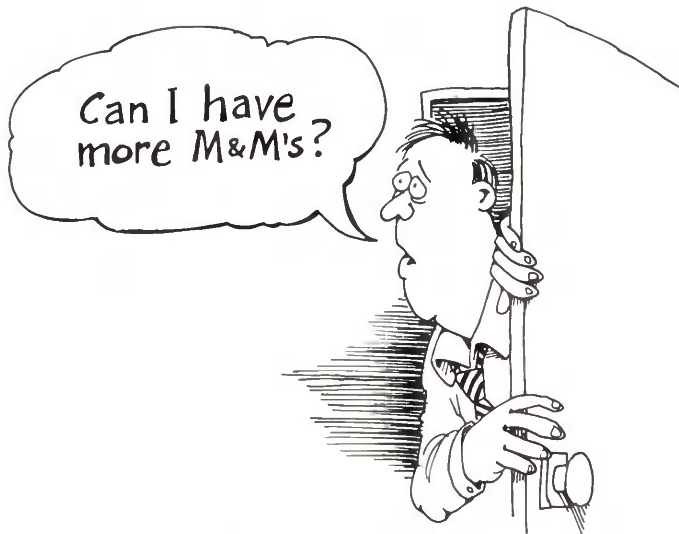
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This data, combined with information gathered from focus group research and other customer comment data, has been used in creating several programs to improve service.

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

*"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

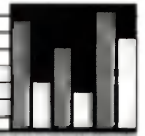
table to complete the ordering process. We discovered that giving the customer so many options is not always a benefit," Naroff says.

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



## Would 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.

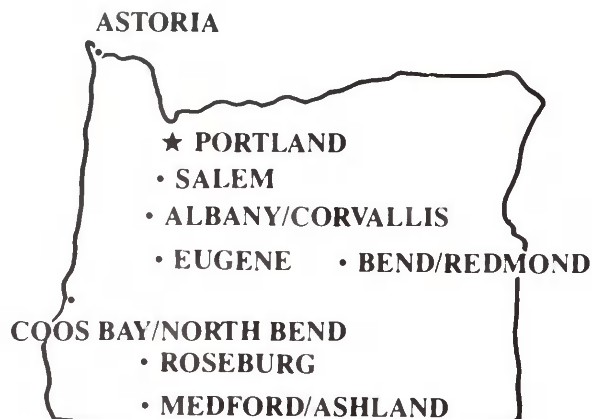
Stanley H. Kaplan, founder and CEO of the test preparation organization, says he commissioned the study after becoming concerned last year by stories of students paying other students to take the SAT (Scholastic Aptitude Test) for them to ensure entrance into their college of choice.

"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

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## Literacy an important consideration when conducting research projects

by Tom Quirk

**M**uch 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



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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 individuals which 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

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## 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 comput-



ers. 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.

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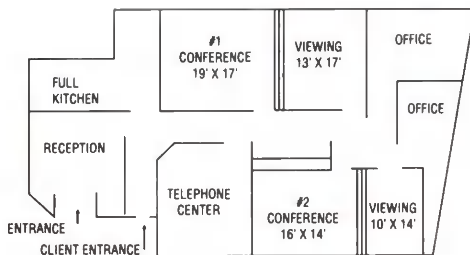
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## Telephone sampling system introduced

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## Opinion research software program update

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## Software product accesses business information

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spondence 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

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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 opera-

tional 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-

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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 facil-

ity 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.

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## Philadelphia Focus

I N C.

100 N. 17th St., Philadelphia, PA (215) 561-5500



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

	<u>1985</u>	<u>1988</u>
Initial	17%	24%
Refused To Continue	2%	1%
Qualified-Refused	2%	2%
<b>TOTAL REFUSED</b>	<b>21%</b>	<b>27%</b>

### Refusal Rate for Interviews of 6 to 12 Minutes

	<u>1985</u>	<u>1988</u>
Initial	35%	32%
Refused To Continue	1%	3%
Qualified-Refused	5%	4%
<b>TOTAL REFUSED</b>	<b>41%</b>	<b>39%</b>

### Refusal Rate for Interviews of 13 Minutes or More

	<u>1985</u>	<u>1988</u>
Initial	40%	41%
Refused To Continue	3%	1%
Qualified-Refused	4%	3%
<b>TOTAL REFUSED</b>	<b>47%</b>	<b>45%</b>

- 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%
<b>TOTAL REFUSED</b>	<b>30%</b>	<b>32%</b>

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

•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.*

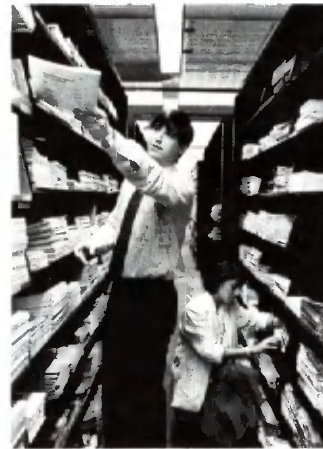
*YOC also educates industry professionals on the importance of the public's participation and cooperation in research and encourages guarding against methodological abuses that erode such cooperation.*

*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).*

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QR8

## 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, nematocide, 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, nematocide, and growth regulator use on tree fruit, tree nuts and grapes.

Doane Farm Radio Listener-ship 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  
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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  
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Port Washington, NY 11050-0402  
Ph. 516/625-2220  
Fax 516/625-2222  
Insta-View(o)

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Fairfield, NJ 07006-2402  
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ians (o)  
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Ph. 215/565-9280  
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on CRT system. Five day inter-  
viewing period with results avail-  
able following last interviewing  
day.(o)  
(See Advertisement on Page 47)

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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 Auto-  
motive 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.  
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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  
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brand share and tracking of farm  
pesticide usage in the U.S. and  
Canada.

Animal Products Use Study-  
Syndicated study conducted ev-  
ery 6 months with 2,000 hog pro-  
ducers providing information on  
feed and pharmaceutical product  
usage.

Farmers' Pesticide Satisfaction  
Study-Annual syndicated study  
with 10,000 growers providing in-  
formation on growers' satisfac-  
tion 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 re-  
cently introduced automotive ve-  
hicles.  
(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  
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(See Advertisement on Page 11)

Market Decisions Corporation  
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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)  
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ness, market share or image, use INSIGHT as a mini-study. These inexpensive surveys are perfect for finding out whatever you need to know about what these populations know, think, use, or want to do. Here are the specifications. **Sample:** New probability sample each month of 300 male and female household heads in each market — projectable to all in the area.

### Deadlines:

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<b>Rich</b>	6/30	4	1	9/29	3	1
<b>B.C.</b>	7	11	8	6	10	8
<b>H/N</b>	14	18	15	13	17	15
<b>Balt</b>	21	25	22	20	24	22

**Report:** X-Tab by 9 Demos — available in 3 weeks.  
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(See Advertisement on Page 2)

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New York, NY 10017  
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Fax 212/916-8918  
Study of Media & Markets For Food Industry(s)  
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The Sinrod Marketing Group  
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Hicksville, NY 11801  
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Fax 516/433-3201  
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Lee Slurzberg Research, Inc.  
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Ft. Lee, NJ 07024  
Ph. 201/461-6100  
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Fax 804/358-9761  
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(See Advertisement on Page 48)

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Fax 305/649-6312  
Contact: Jim Loretta, VP  
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# Cross Index of Study Providers by Category

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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

NFO Research(s)

## Chemical Industry

Chemark Consulting(s)

## Children

Children's Market Research(s)  
PlayLab Research(o/s)  
Youth Research(o)

## Communications

Gartner Group Inc(s)

## Computers

Info Corporation(s)  
Princeton Data Search(s)

## Consumer(Local)

Behavior Research-AZ(o)  
Dittman Research-AK(s)  
Dittman Research-AK(o)  
Harrington Market Rsch-MI/IN(o)  
Market Trends-WA(s)  
O'Neil Associates-AZ(o)  
Profile Marketing Research-FL(o)  
Russell Marketing Rsch.-NY  
MSA(o)  
Sievers Rsch Co.-CA.(o)  
SE Institute of Rsch-Mid.Atl.(o)  
West Grp. Mktg. Rsch.-AZ(o)

## Consumer-Canada

Canadian Facts(o)  
Gallup Canada(o)  
IMR Research(s)  
Market Facts of Canada(s)  
Market Facts of Canada(o)

## Consumer-U.S.

Irwin Broh Assoc.(o)  
Irwin Broh Assoc.(s)  
Bruskin Associates(o)  
Cambridge Reports(o)  
Cambridge Reports(s)  
Custom Research Inc.(o)  
Home Testing Institute (o)  
ICR Survey Research Group(o)  
IMR Research(s)  
Maritz Marketing Research(o)  
Market Facts, Inc.(o)  
Mediamark Research, Inc.(s)  
Monroe Mendelsohn Research(s)  
NFO Research(o)  
A.C. Nielsen(s)  
The Roper Organization(o)  
Trendata, Inc.(s)

## Dental

Health Research, Inc.(o)

## Electronics

Link Resources(o)  
Link Resources(s)

## Finance

Analysis/Research Limited(s)  
International Demographics(s)  
Market Decisions Corp.(s)  
Market Trends Research-NW(s)

## Food/Beverage

Danis Research(s)  
Ehrhart-Babic Assoc.(s)  
MRCA Info. Svcs.(s)  
NFO Research(s)  
Simmons Market Research Bureau(s)

## Health Care/ Medical

Beta Research(o)  
Healthcare Communications, Inc.(s)  
Hospital Research Assoc.(s)  
Hospital Research Assoc(o)  
Palshaw Measurement(o)

## Hispanic

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Hispanic Marketing Research Communication(o)  
Hispanic Marketing Research Communications(s)  
Lee Slurzberg Research, Inc.(o)  
Strategy Research Corp.(o)

## Lodging Industry

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## Mail Order Industry

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## Media

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Beta Research Corporation(s)  
Doane Marketing Research(s)  
International Demographics(s)  
Marketing Evaluations-TVQ(s)  
Mediamark Research, Inc.(s)  
Rockwood Research Corp.(s)  
Survey Sampling, Inc.(s)

## Mothers

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PlayLab Research (s/o)  
Sinrod Mktg Grp(o)

## Restaurants/Fast

## Foods

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Market Facts of Canada(s)

The NPD Group(s)  
Restaurant Research Assoc-So.CA.(s)

## Retail

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Information Resources(s)  
A. C. Nielsen(s)  
SPAR/Burgoyne (s)

## Senior Citizens

Goldring & Co.(s)

## Sports

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

## Teens

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PlayLab Research (s)  
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## Travel

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## 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 purchasing habits

A recent national study by R.H. Bruskin Associates of 1000 men and women discovered that the average adult spent ap-

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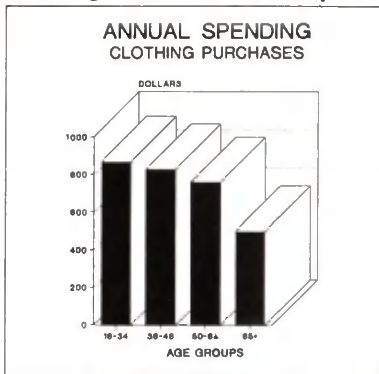


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proximately \$800 on his or her per that as people grow older they tend to spend less on clothing. While those 18-34 years of



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-

continued on p. 58

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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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8044 Montgomery Rd., Suite 625  
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Cincinnati, OH 45242  
513/489-9000  
Contact: Maribeth McGraw  
Consumer,HealthCare,Prof.,  
Focus Groups,One-On-Ones

**Arbor, Inc.**  
3401 Market St.  
Philadelphia, PA 19104  
215/387-5300  
Contact: Kathy Hammersla, Ph.D.  
25 Years Service in Industry.  
Qual/Quant Ad Hoc Research.

**Brand Consulting Group**  
17117 W.Nine Mile Rd./Ste. 1020  
Southfield, MI 48075  
313/559-2100  
Contact: Milton Brand  
Consumer,Advertising Strategy,  
New Product Strategy Research

**Concepts In Marketing  
Research (CIMR)**  
400 North Robert St.  
St. Paul, MN 55101-2098  
612-228-5667  
Contact: Kara Marx  
Consltng., Qual. Rsch., Fac/Recruit/  
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Media, PA 19063  
215/565-6222  
Contact: James D. Lewis  
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**Consumer Opinion Services**  
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206/241-6050  
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1315 23rd Avenue  
San Francisco, CA 94122  
415/564-8923  
Contact: Cliff Levy  
Product/Pkging Advq & Social  
Concepts /30 Yrs. Prof. Exp.

**Fedder Research**  
1560 N. Sandburg, #3708  
Chicago, IL 60610  
312/440-0510  
Contact: Curt Fedder  
Male Moderator/Client Marketing  
Background/Expert Analysis

**Findings International Corp.**  
1641 S.W. 87th Avenue  
Miami, FL 33165  
305/266-9798  
Contact: Orlando Esquivel  
Bi-Lingual/Cultural Serving Major  
Markets with Qfcs inPuerto Rico.

**First Market Research Corp.**  
1111W. 6th St., Suite 220  
Austin, TX 78703  
800/First-TX (347-7889)  
Contact: James R. Heiman  
High Tech, Publishing,  
Bus-To-Bus, Colleges

**First Market Research Corp.**  
121 Beach St.  
Boston, MA 02111  
617/482-9080  
Contact: Linda M. Lynch  
Consumer, Retail, Banking,  
Health Care

**First Market Research Corp.**  
121 Beach St.  
Boston, MA 02111  
617/482-9080  
Contact: Jack M. Reynolds  
Banking, Health Care, Ad  
Testing, Consumer, Executive

**Focused Research**  
8247 Valley Dr.  
Chagrin Falls, OH 44022  
216/543-9340  
Contact: Susan Ray Stone  
13 Yrs. Exp., Advertising, P.R.  
Consumer, High-Tech.

**D.S. Fraley & Associates**  
1205 East Madison Park  
Chicago, IL 60615  
312/536-2670  
Contact: Diane S. Fraley  
Full Qual. Specialty:Child/Teen/  
In-Home/Observational Rsch

**Lynn Greenberg Associates**  
36 Country Ridge Road  
Scarsdale, NY 10583  
914/723-3121  
Contact: Lynn Greenberg  
Strategic Qualitative Marketing/  
Research Consulting

**Greenfield Consulting Group, Inc.**  
1560 Broadway  
New York, NY 10036  
212/730-1890  
Contact: Andrew Greenfield  
Qual./Quan. Rsch. New Product  
Dev., Finc Svcs, Toys/Games.

**Gross Marketing Research**  
10711 Baile Ave.  
Chatsworth, CA 91311  
818/831-1905  
Contact: Ronald P. Gross  
24 Yrs Exp/Creative/Insightful  
Fresh/Practical/Clear Results

**Hammer Marketing Resources**  
12 Maymont Court  
Timonium, MD 21093  
301/252-5757  
Contact: William L. Hammer  
New Product, Consumer & Indust-  
rial/Commercial, Executive

**Hispanic Marketing  
Communication Research**  
1535 Winding Way  
Belmont, CA 94002  
415/595-5028  
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Hisp. Biling./Bicult. Foc Grps Any-  
where In U.S./Quan. Strat. Cons.

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Expert Guidance In Design,  
Implementation And Analysis

**InfoDirect, Inc.**  
230 South Broad St.  
Philadelphia, PA 19102  
215/735-7416  
Contact: Jonathan Brill  
Financial Services, Consumer,  
Healthcare, Geriatric, Hi-Tech

**Intersearch Corporation**  
132 Welsh Rd.  
Horsham, PA 19044  
215/657-6400  
Contact: Robert S. Cosgrove  
Medical, Industrial, Business,  
Consumer, Bio-Tech, Commun.

**K C A Research**  
701 Howe Avenue, Suite H58  
Sacramento, CA 95825  
916/920-2841  
Contact: Lynne Cunningham  
Experts: Health Care and Senior /  
Adult Care Givers.

**Kennedy Research Inc.**  
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Grand Rapids, MI 49503  
616/458-1461  
Contact: Mary P. Tonneberger  
Cons. & Ind., Telecom., Health,  
Office Systems, Chemicals,  
Drugs

**Langer Associates, Inc.**  
19 W. 44th St., Ste. 1601  
New York, NY 10036  
212/391-0350  
Contact: Judith Langer  
Spec. In Qual. Rsch. On  
Mktg. & Lifestyle Issues

**LaScola Qualitative Research**  
3701 Connecticut Ave., N.W.  
Washington D.C. 20008  
202/363-9367  
Contact: Linda J. LaScola  
Public Affairs, Healthcare,  
Telecommunications, Financial

**Marketeam Associates**  
555 No. New Ballas Rd.  
St. Louis, MO 63141  
314-569-1324  
Contact: Richard Homans  
Financial Services, HealthCare,  
Consumer, Pkgd Goods, Agric

**Market Navigation, Inc.**  
**Teleconference Network Div.**  
2 Prel Plaza  
Orangeburg, NY 10962  
914/365-0123  
Contact: George Silverman  
Telephone Focus Groups for  
High-Level Respondents.

**Market Research Institute**  
7315 Frontage Rd./Ste. 200  
Merriam, KS 66204  
913/236-6060  
Contact: Trish Benskin  
Gtrr Kansas City; Full Svce;  
Exp: Cons/Fin/Ind/Health Care

**Market Views Research, Inc.**  
1215 Hightower Trail, D-150  
Dunwoody, GA 30350  
404/992-1289  
Contact: Dan Brown  
Advertising, Decision Makers  
Marketing Quality Circles

**Martin Research Inc.**  
P.O. Box 8595  
Roanoke, VA 24014  
703/342-1970  
Contact: Frank Martin, III  
Focus group facilities in Norfolk,  
Roanoke, Winston-Salem

**MedProbe Medical Mktg. Rsch**  
7825 Washington Ave. S., Ste 245  
Minneapolis, MN 55435  
612/941-7965  
Contact: Asta Gersovitz, Phrm.D.  
MedProbe Provides Full Service  
Custom Market Research

**Menendez International**  
7951 S.W. 40th St./Ste. 208  
Miami, FL 33155  
305/266-0550  
Contact: Teresa Menendez  
Hispanic/Gen Market-15 Years  
Qualitative/Quantative Exp.

**Mercadotecnia Consulting**  
**Div. of The Creative Group**  
31800 Northwestern Hwy.  
Farmington Hills, MI 48018  
313/855-7813  
Contact: Claudia Ruiz-Shipe  
Hispanic/Black Interviews,  
Grps, Surveys, Panels, Placements

**Moosbrugger Marketing Research**  
901 W. Hillgrove Ave.  
LaGrange, IL 60525  
312/354-5090  
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205 Lexington Ave.  
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205/322-9988  
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Focus Groups, Mystery Shops

**PlayLab Research, Division of**  
**The Creative Group, Inc.**  
31800 Northwestern Hwy.  
Farmington Hills, MI 48018  
313/855-7812  
Contact: Dana Blackwell  
Children, Youths, Teenagers  
Students, Parents & Teachers

**Reid Qualitative**  
2149 S. Grape Street  
Denver, CO 80222  
303/758-6424  
Contact: Michael Reid  
Consumer, Tech/Indust., New  
Prod., Concept Test/Refinement

**Research Arts, Inc.**  
1300 Iroquois/Ste. 100  
Naperville, IL 60563  
312/420-2064  
Contact: Francesca Jaskowiak  
Qualitative Firm, 5 Moderators  
on Staff. Own Facility

**Research Incorporated**  
521 Plymouth Road/Ste. 115  
Plymouth Meeting, PA 19462  
800/828-3228  
Contact: Harley Mitchell  
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Svces; Concepts/Pkg Des. Tests

**Rockwood Research Corp.**  
1751 W. County Rd. B  
St. Paul, MN 55113  
612/631-1977  
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High Tech, Executives, Bus.-To-  
Bus., Ag, Specifying Engineers

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**Research, Inc.**  
2325 West Broad St.  
Richmond, VA 23220  
804/358-8981  
Contact: Rebecca H. Day  
Est. 1964, Full Service  
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South River Rd.  
Cranbury, NJ 08512  
609/395-1200 or 800/257-9440  
Contact: Jack Paxton  
Pkg Goods/Retailing/Travel/  
Entertainment Reg/Exec. Grps.

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**Services, Inc.**  
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Honolulu, HI 96813  
808/537-3356  
Contact: Sheila M. Sanders  
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New York, NY 10021  
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Contact: Julie Horner  
Focus Groups And One-On-Ones  
In Broad Range Of Categories

**Dwight Spencer & Associates**  
1290 Grandview Avenue  
Columbus, OH 43212  
614/488-3123  
Contact: Betty Spencer  
4'x16' Mirror. Viewing rm seats 8-  
12. In house audio/video equip.

**Strategic Marketing Services**  
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Portland, ME 04112  
207/774-6738  
Contact: Robert W. Cuzner  
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591 Rheem Blvd.  
Moraga, CA 94556  
415-376-1924  
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400 Groups Hi-tech/Medical/  
Financial/Transportation Svcs.

**Sweeney International, Ltd.**  
246 Federal Road, Suite B22  
Brookfield, CT 06804  
203-775-8507  
Contact: Timm Sweeney  
Qualitative Research. Member:  
QRCA/AMA/Adv. Club

**Taylor Research**  
3990 Old Town Ave., #201A  
San Diego, CA 92110  
619/299-6368  
Contact: Beth Ilas  
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ious Facilities/Attn To Security

**Thorne Creative Research Services**  
10 Columbia Place  
Mt. Vernon, NY 10552  
914/699-7199  
Contact: Gina Thorne  
Ideation, Teens, New Product, Ad  
Concepts, Package Goods

**TrendFacts Research, Division**  
**of The Creative Group, Inc.**  
31800 Northwestern Hwy.  
Farmington Hills, MI 48018  
313/855-7810  
Contact: Dr. Jim Leiman  
Hi-Tech, Industrial, Financial  
Health Care, Consumer, Retail

**Total Research Corporation**  
5 Independence Way  
Princeton, NJ 08540  
609/921-8100  
Contact: Hugh J. Devine, Jr.  
10 Moderators; 2 State of Art  
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**Trotta Associates**  
13160 Mindanao Way/Ste. 180  
Marina del Rey, CA 90291  
213/306-6866  
Contact: Diane Trotta  
Focus Group Facs & Moderator  
w/20 Yrs Exp. Bus-To-Bus & Cons

**Paul A. Warner Associates, Inc.**  
3355 Lenox Road, NE Suite 665  
Atlanta, GA 30326  
404/239-0101  
Contact: Robin S. Salter  
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**Lucy Warren & Associates**  
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San Diego, CA 92104  
619/295-0342  
Contact: Lucy Warren  
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Needs With Quality / Experience

**The Winters Group, Inc.**  
14 Franklin St.  
Rochester, NY 14604  
716/546-7480  
Contact: Susan Morrison-Vega  
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Pri/Sec Rsch, Cnsltg, TeleMktg

**Wolf/Altschul/Callahan, Inc.**  
171 Madison Ave.  
New York, NY 10016  
212/725-8840  
Contact: Ed Wolf  
All Consumer/Business-To-  
Business Qualitative Needs

**Youth Research/CSI**  
Brookfield Commons B-22  
246 Federal Rd.  
Brookfield, CT 06804  
203/797-0666  
Contact: Karen Forcade  
Consultants In Mktg To Children  
Full Svc Qualitative/Quantitative

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Lucy Warren & Associates

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Sweeny International, Ltd.  
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**Colorado**  
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**Washington D.C.**  
LaScola Qualitative Research  
Martin Research Inc.

**Florida**  
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SMS Research & Marketing Svce

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Moosbrugger Marketing Rsch.  
Research Arts, Inc.

## Kansas

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Hammer Marketing Resources

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First Market Rsch(L. Lynch)  
First Market Rsch(J. Reynolds)

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Mercadotecnia Consulting  
PlayLab Research  
TrendFacts Research

## Minnesota

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MedProbe Medical Mktg. Rsch  
Rockwood Research Corp.

## Missouri

Marketeam Associates

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DTW Marketing Research Group  
Schrader Rsch & Rating Svce  
Total Research Corporation

## New York

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Greenfield Consulting Group, Inc.  
Langer Associates, Inc.  
Market Navigation, Inc.  
Murray Hill Center  
James Spanier Associates  
Thorne Creative Research Svcs  
The Winters Group  
Wolf/Altschul/Callahan, Inc.

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Faber Marketing Research  
Martin Research Inc.

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ADI Research, Inc.  
The Answer Group  
Focused Research  
Dwight Spencer & Associates

## Pennsylvania

Arbor, Inc.  
Consumer/Industrial Rsch Svce  
Creative Marketing Solutions  
Datatactics, Inc.  
InfoDirect, Inc.  
Intersearch Corporation

## Rhode Island

Alpha Research Associates, Inc.

## South Dakota

American Public Opinion Survey  
& Market Research Corp

## Texas

First Market Rsch(J. Heiman)

## Virginia

K C A Research  
Martin Research Inc.  
Southeastern Inst. of Rsch.

## Washington

Consumer Qpinion Services

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ConceptsIn Marketing Rsch.  
DeNicola Research, Inc.  
Dolobowsky Qual. Svcs., Inc.  
Doyle Research Associates  
D.S. Fraley & Associates  
First Market Rsch(J. Reynolds)  
Lynn Greenberg & Associates  
Market Views Research, Inc.  
Menendez International  
Mercadotecnia Consulting  
Research Arts, Inc.  
Rockwood Research Corp.  
Schrader Rsch & Rating Svce  
James Spanier Associates  
Sweeney International, Ltd.  
Thorne Creative Research Svcs  
Total Research Corporation  
Paul A. Warner Associates, Inc.

## AGRICULTURE

Consumer/Industrial Rsch Svce  
Market Navigation, Inc.  
Moosbrugger Marketing Rsch.  
Rockwood Research Corp.

## ALCOHOLIC BEVERAGES

Wolf/Altschul/Callahan, Inc.

## APPAREL

Brand Consulting Group  
PlayLab Research

## AUTOMOTIVE

ADI Research, Inc.  
Schrader Rsch & Rating Svce

TrendFacts Research  
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## BIO-TECH

D.S. Howard Assoc., Inc.  
Market Navigation, Inc.  
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Paul A. Warner Associates, Inc.

## BUSINESS-TO- BUSINESS

Concepts in Marketing Rsch.  
Consumer Opinion Services  
Elrick and Lavidge, Inc.  
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First Market Rsch(J. Heiman)  
D.S. Howard Assoc., Inc.  
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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  
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ADI Research, Inc.  
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PlayLab Research  
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Consumer Opinion Services  
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D.S. Howard Assoc., Inc.  
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Southeastern Institute of  
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The Winters Group  
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Thorne Creative Research Svcs  
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Youth Research/CSI

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First Market Rsch(J. Reynolds)  
Greenfield Consulting Group, Inc.  
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InfoDirect, Inc.  
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Communication Research  
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Thorne Creative Research Svcs  
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Taylor Research  
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Market Navigation, Inc.  
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Total Research Corporation  
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New South Research  
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K C A Research

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Total Research Corporation  
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Sweeney International, Ltd.  
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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

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

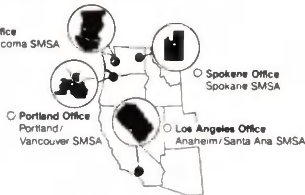
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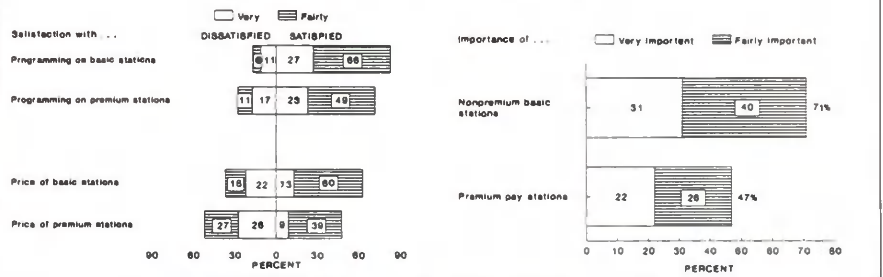
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#### SELECTED VIEWPOINTS OF CABLE TV SUBSCRIBERS



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

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

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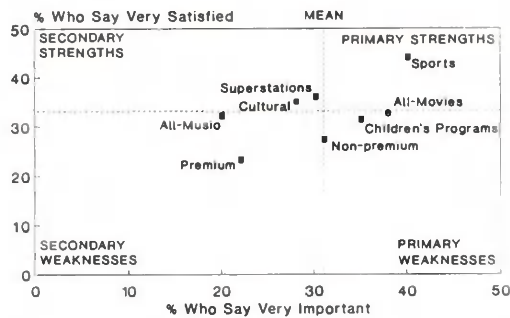


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## CABLE SUBSCRIBERS' ASSESSMENT OF TYPES OF PROGRAMMING



(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.

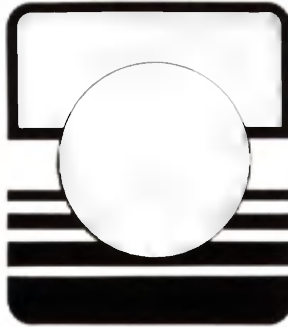
The public's appetite for certain types of cable programming appears to split along socioeconomic lines. As might be expected, professionals and college-educated cable subscribers place greater weight on cultural programming when making a decision to subscribe to cable than do blue collar and high school-educated 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.

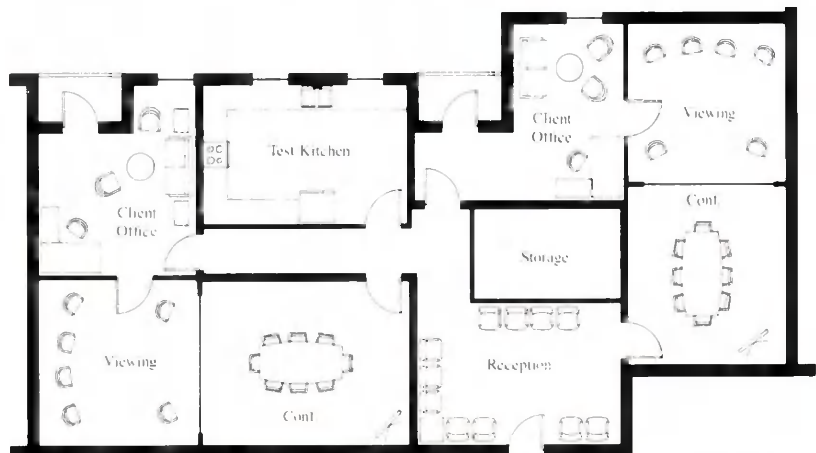
The graph shows that sports programming is cable TV's greatest strength, in



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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 business 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 education. A business degree is the overwhelming choice of executives in finance-related positions, while manufacturing and engineering managers voice a strong 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  
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The National Directory contains the names and addresses of more than five hundred qualitative research facilities, current as of August, 1989.

The book is used extensively by moderators. It's also purchased by research users who either contract directly with the field or who need to know whether moderators are available locally in the markets they need to explore.

The Directory, available in late September, is priced at \$60.00 for a single copy. Additional copies may be purchased for \$45.00 apiece, prepaid.

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(Books will be sent by UPS. Do not use post office box as address.)

## Trade Talk

continued from p. 62

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

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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.

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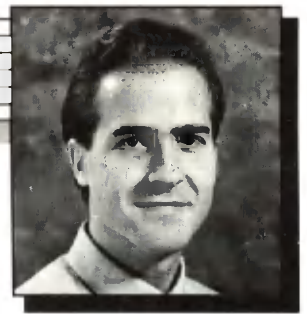
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by Joseph Rydholm  
managing editor

## Brand names offer emotional and psychological benefits

**A**s 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

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Washington D.C. .... July 31–Aug. 2  
Orlando ..... Aug. 14–16  
Cincinnati ..... Sept. 11–13  
Los Angeles ..... Oct. 2–4
  - 3. Marketing Research for Decision Makers**  
Cincinnati ..... Aug. 22–23
  - 4. Questionnaire Construction Workshop**  
Chicago ..... April 4–5  
Boston ..... May 2–3  
New York ..... July 18–19  
Cincinnati ..... Sept. 18–19
  - 5. Questionnaire Design: Applications and Enhancements**  
Chicago ..... April 6–7  
New York ..... July 20–21  
Cincinnati ..... Sept. 20–21
  - 6. Computer-Assisted Questionnaire Design & Data Collection**  
Cincinnati ..... Sept. 22
  - 7. Focus Groups: An Introduction**  
Boston ..... May 4–5  
Orlando ..... June 21–22  
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  - 10. Writing Actionable Marketing Research Reports**  
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  - 11. Effective Oral Presentation of Marketing Information**  
Cincinnati ..... June 7–9  
Cincinnati ..... Oct. 2–4
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Cincinnati ..... Oct. 2–3
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