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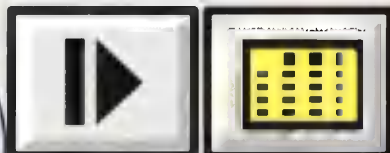
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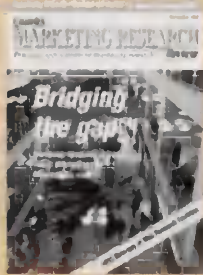
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Volume IX, Number 9

November 1995

Cover
The Ridgedale Mall in Minnetonka, Minn., uses a sophisticated database to learn more about frequent shoppers. Photo by PhotoDisc, Inc. © 1994.

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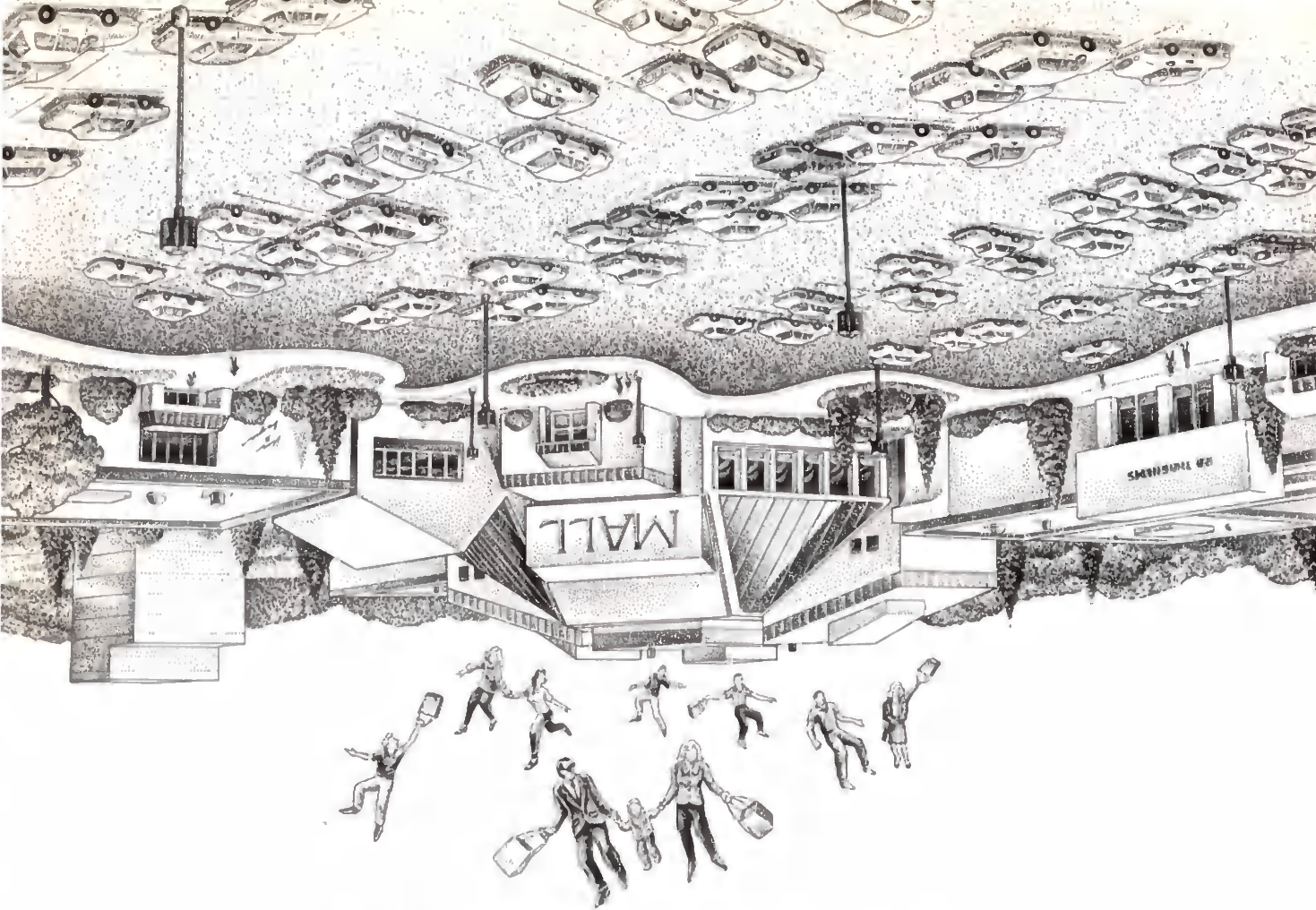
Quirk's Marketing Research Review (ISSN 08937451) is issued 10 times per year - Jan., Feb., Mar., Apr., May, Jun./Jul., Aug./Sep., Oct., Nov., Dec. - by Quirk Enterprises, Inc., 8030 Cedar Ave., Ste. 229, Bloomington, MN 55425. Mailing address: P.O. Box 23536, Minneapolis, MN 55423. Tel: 612-854-5101; Fax: 612-854-8191. Second class postage paid at Minneapolis, MN and additional mailing offices.

Subscription Information: U.S. annual rate (10 issues) \$50; two years (20 issues) \$92; three years (30 issues) \$132. U.S. single copy price \$10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change. **POSTMASTER:** Please send change of address to QMRR, P.O. Box 23536, Minneapolis, MN 55423.

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Survey Monitor

Credit card offers soar to record high; response rates drop to near-historic low

Credit card solicitations, which reached record levels last year, are soaring to even greater heights in 1995, according to Mail Monitor, the direct mail credit card acquisition tracking service managed by BAI (Behavioral

Analytics Inc.), a Tarrytown, N.Y., marketing research and consulting firm.

The volume of credit card offers mailed to consumers climbed 37 percent to a record high 723.2 million pieces in the first three months this year, compared to the first quarter of 1994. The offers reached three out of every four families in the U.S. at least once each month, Mail Monitor found.

While banks and other card issuers are reaching more households than ever (up from 65 percent of households last year to 75 percent in the 1st quarter of 1995), consumer response to the direct mail offers fell to a near record low of 1.2 percent in the first quarter, says Robert G. Skolnick, executive vice president of BAI.

"As the acceptance rate continues to drop, the cost to banks to acquire new card holders continues to increase,"

Skolnick says. "This intense competition puts pressure on prices, resulting in lower APRs and increased offers.

"Consumers are the winners in the intensely competitive race among card issuers," Skolnick says. "They are getting good deals and have come to expect low interest rates. This will raise some interesting questions in the near future as introductory rates begin to expire, and card base rates climb. How will consumers react? Will they continue to use these cards? Will they switch? The jump in

base rates may significantly affect their attitudes and loyalty to the cards they already hold."

In 1994, direct mail solicitations reached an historic high of 2.4 billion offers, representing an increase of nearly 60 percent over 1993. At the same time the response rate for 1994 decreased to a low of 1.6 percent. In actual numbers, however, 38 million new credit card offers were accepted by consumers in 1994, compared to 33 million in 1993.

"For 1995, the jump in offers in the first

quarter portends the strong possibility that as many as three billion credit card offers will be mailed this year," Skolnick says.

"Historically, response rates decline as mail volume increases," Skolnick points out, "although not in direct proportion. The decline in response rates is generally smaller than the increase in mail volume, so that in the end you do see more credit cards issued."

The Mail Monitor study also found that:

- The three out of four households receiving offers were getting, on average, 3.6 bank card offers each month.

- For the first time in over a year, affinity/co-branded credit card offers did not produce a markedly higher response rate than traditional bank cards.

- The first quarter in 1995 saw bank card mail volume (VISA/MasterCard) climb to 694 million pieces, a 37 percent increase over the first three

If you call them, they may switch

July's "Bruskin/Goldring Research Report" newsletter, published by Bruskin/Goldring Research, Edison, N.J., reported that during April, May and June of this year more than four in ten (42 percent) adults said they received phone calls from telephone companies such as AT&T, MCI, or Sprint asking them to switch their long distance service. The calls seem to have worked: more than one quarter (27 percent) of people who received calls say they switched services as a result of the call.

Younger respondents, aged 18-24, are most likely (46 per-



cent) to switch long distance services as a result of telemarketing calls, while those aged 50+ are more loyal to their current long distance company and are the least likely (13 percent) to switch. Southerners are somewhat more apt (29 percent) than people from other regions to make a change, and those from the West are the least likely (24 percent). Higher-income earners (household income of \$50,000+) are more likely (32 percent) than others to try a new service, while respondents from households with incomes less than \$20,000 are the least likely (25 percent) to switch. For more information, call 908-572-7300.

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Product & Service Update

UHC picks Picker for patient surveys

The University Hospital Consortium (UHC), Oak Brook, Ill., has signed an agreement with The Picker Institute to provide a wide range of patient satisfaction surveys and follow-up services. The UHC is an alliance of academic health centers throughout the U.S. Under its agreement with The Picker Institute, patient satisfaction surveys will be conducted for adult medical/surgical, pediatric and obstetric inpatients, as well as ambulatory surgery and emergency care patients and physician-office outpatients. The Picker Institute, Boston, helps health care organizations develop strategies for assessing and improving patient care that address patient needs

and concerns, as they define them. It has conducted research on patient-centered care in the U.S., Canada and the U.K. for the past seven years. For more information, call Dave Drachman, director of UHC's satisfaction measurement and improvement program, at 708-954-1700.

Tri-CR available as toolkit

Tri-CR, the recognition technology in Cardiff Software Inc.'s Teleform, is now available as a toolkit. Tri-CR enhances and translates hand-print and machine-print information from images received via fax machine or scanner. Tri-CR's DLL access is designed to meet the needs of Windows developers

with robust function calls for hand-print recognition, machine-print recognition, field syntax, context checking, character/multi-line segmentation and dictionary matching. For more information, call 800-659-8755.

Saporito offers insurance industry database

Saporito & Associates, Inc., a New York research and consulting firm specializing in the insurance industry, has released INSCite, a new electronic insurance industry information database. INSCite contains over 1,300 insurance industry information resource citations and descriptive abstracts. Resource types include books, databases, periodicals,

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DECEMBER SAWTOOTH SEMINARS

Sawtooth Technologies has scheduled three seminars for researchers who are interested in conjoint analysis and discrete choice modeling but who have had little or no practical exposure to the techniques. The dates and topics are: December 4-5 (1-1/2 days), conjoint analysis; December 5 (1/2 day), introduction to the ACA System; December 6, choice-based conjoint. With the exception of the ACA session, these classes are not training classes for Sawtooth Technologies products; the focus is on theory and practice. Topics covered include study design, sampling, and analysis and presentation of results. Case studies are also presented. The ACA session is intended for those who want to learn more about the company's ACA System for Adaptive Conjoint Analysis. The semi-

nars will be held in Evanston, Ill., near the company's office. Fees are: conjoint analysis seminar, \$750; choice-based conjoint, \$500 (\$400 if attending conjoint seminar); introduction to ACA, \$200. Discounts are available for three or more attendees from the same company. For more information, call Nicole Garneau at 708-866-0870.

GIS CONFERENCE CALL FOR PAPERS

GIS World invites researchers to participate in "Business Geographics for Educators and Researchers," May 30, 1996 in Chicago. An open call for papers has also been issued to researchers. The special day-long conference, co-sponsored by the Association of American Geographers, is a part of "Business Geographics '96," a gathering of business geographics professionals, users and vendors. For more information about submitting a paper or attending, contact Sylvia Marshall at 970-223-4848 or e-mail sylvia@gisworld.com

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Packaging research

Qualitative technique helps Scott Paper find out if consumers cotton to new Cottonelle

By Joseph Rydholm, QMRR editor

For the ambitious revamping of its Cottonelle bath tissue line, Scott Paper Co., started from the bottom up. With the help of a qualitative research technique that turns consumers into product designers, the Philadelphia firm radically changed the product's packaging, positioning and identity.

The end result is the Advanced Personal Hygiene line, which Scott introduced nationally in July in a bid to increase its share of the \$3.4 billion bath tissue category. The line includes three products, all bearing the Cottonelle name: a hypo-allergenic bath tissue free of inks, dyes or fragrances; a bath tissue with micro-fine baking soda (that "neutralizes and reduces odor"); and moist personal wipes with aloe.

The products are designed as a two-step approach to personal hygiene in which consumers are urged to use one of the toilet papers in tandem with the moist personal wipe for maximum personal cleanliness.

Lest you think that that sounds like overkill, there's research to back it up. (Isn't there always?)

In talking with consumers, Scott found that 60 percent of the population felt additional cleansing was necessary after a visit to the bathroom, indicating that existing toilet papers weren't doing the job. "Additional cleansing" included everything from wetting the toilet paper or using a disposable wipe to showering afterwards.

These findings, in the context of the country's increased health consciousness, indicated to Scott that new products designed to meet this need could help reposition the Cottonelle line based on hygiene rather than that old standby in the toilet tissue business: softness.

Brainstorming sessions had produced a number of ideas on how to reposition the line, says Joan Bassett, senior research manager, Scott Paper. "We tried to get all the best thinking available, no holds barred. Everything was fair game. From that we pared it to a manageable few that were judged to be distinctive while still meeting a consumer need based on our earlier learning," Bassett says.

Focusing on something other than softness was an excellent way to differentiate Cottonelle from competitors, says Rob Wallace, president of Wallace Church Associates, the New York firm that handled the packaging redesign work. "We had an opportunity to rebuild a brand. The only thing we wanted to maintain was the brand name, because Cottonelle had strong recognition and we wanted to literally build it around consumers' evolving needs and talk to them in a way that they had never been talked to before—about personal hygiene as opposed to softness.

"It's toilet paper, after all. You're not supposed to think too much about it. It was a one-attribute category. The challenge was to find a new attribute to talk about that would be meaningful to consumers and leverage that to separate Cottonelle from the competition in a value-added way."

Build the ideal product

For preliminary testing of the advanced personal hygiene concept and others, Scott Paper talked to consumers in 1994 in three cities in the east, midwest and west, using Building Blocks, a qualitative research technique created by New Directions Consulting, White Plains, N.Y.

Building Blocks is designed to get consumers to build their ideal product, says Jane Goldwasser, principal, New

"The only thing we wanted to maintain was the brand name, because Cottonelle had strong recognition and we wanted to literally build it around consumers' evolving needs and talk to them in a way that they had never been talked to before — about personal hygiene as opposed to softness."

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Mall research

Customer research drives sales, promotions at Minneapolis mall

By Scott R. Bryden

Editor's Note: Scott R. Bryden is manager of account services at IQ, Intelligent Marketing Systems, Inc., a Minneapolis database management and marketing firm.

The Minneapolis-St. Paul area is the birthplace of the shopping mall — Southdale, the first enclosed shopping center, opened in 1956 in suburban Edina — so it's no surprise that its 2.2 million residents have an abundance of malls to choose from — including one of the largest in the world. The challenge for each shopping center in the Twin Cities is to differentiate itself from the competition and cultivate a following of loyal, repeat shoppers.

For Ridgedale Mall, a sister mall of Southdale located

in the well-to-do suburb of Minnetonka just west of Minneapolis, ongoing, in-depth research, has been the answer.

The 150-store, million-square-foot shopping center decided to learn as much as possible about its customers and potential customers — and to use that knowledge to profile an audience of likely customers to target for promotions.

The strategy has been very successful. Gwendolyn Cowle, marketing coordinator for Ridgedale, believes that this pinpointed information — and how the mall uses it — is responsible for a steady increase in annual sales each of the last five years.

Profiling the “premier” customer

Over that period, IQ/Intelligent Marketing Systems, Inc., a Minneapolis database management and marketing firm, has worked with the mall to build a database that provides an accurate profile of the typical Ridgedale shopper. Constructed from a list of more than 150,000 names that is constantly expanded and updated, the customer profile incorporates detailed demographics and psychographics, including shopping behavior, size of average purchase, etc., to paint an in-depth portrait of Ridgedale’s “premier customer,” the individual most likely to become a habitual shopper at the mall.

That profile becomes the basis of cost-effective and highly targeted promotions. To keep the cycle going, the mall tries as much as possible to build into every promotion an opportunity to query shoppers for additional information that is fed into the database.

Continuous process

IQ created the database first by purchasing some 40,000 names in the

region from commercial list houses as a starting point (later augmented with a second purchase of 60,000 names), and then immediately began the continuous process of adding to and qualifying the database. New entries now come from sales slips, responses to mailings and from in-mall promotions that have a double purpose — to build traffic and also to serve as the occasion for securing more data.

Based on recent updates, the database amassed these facts about Ridgedale customers:

- Eighty-seven percent of them are homeowners, living in two definable areas.
- The value of these single-family houses is typically between \$75,000 and \$125,000.
- Thirty-four percent of Ridgedale families profiled by IQ have three adults living in the same household, including elderly parents of children older than 18 living with their parents.
- Nearly 50 percent said they have bought products through the mail.
- Of the 75 percent who are married, a little over half have children.
- Of credit card holders, 335 own bank cards and/or a card issued by a store or a gas station.

Research is key to sales

Research continues all year, spinning off responses to promotions. For example, during the Christmas holidays last year, shoppers were invited to pick up a free mug if they stopped by Ridgedale’s customer service center and filled out a short survey form that elicited information about purchase habits, income level, occupation, number of children, etc.

The database has also inspired a newsletter, “Right Now,” which is mailed quarterly to selected segments

of the database and serves three functions:

- It communicates advance information on upcoming sales and other events at Ridgedale to these preferred customers.
- It bolsters the image of the “pre-

Constructed from a list of more than 150,000 names that is constantly expanded and updated, the customer profile incorporates detailed demographics and psychographics, including shopping behavior, size of average purchase, etc., to paint an in-depth portrait of Ridgedale’s “premier customer,” the individual most likely to become a habitual shopper at the mall.

mier” Ridgedale customer, who is made to feel part of an elite group.

• It serves as a vehicle for extracting further information that will qualify and quantify the database.

Typically, the newsletter will include a coupon good for a free gift or for a gift with a purchase. For example, a shopper might be offered a tote bag upon presentation of \$100 in sales receipts from Ridgedale. When the shopper takes advantage of the coupon, it creates another opportu-

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Data Use

Using classification tree analysis: a review of the method and a new software package for CHAID/CART By Steven Struhl

Editor's note: Dr. Steven Struhl is vice president, senior methodologist at the Chicago office of Total Research.

Classification tree analysis (most commonly CHAID or CART) remains less familiar than many other analytical methods, although it often solves thorny problems with complex data that can defeat most other approaches. After a brief summary of these methods and what

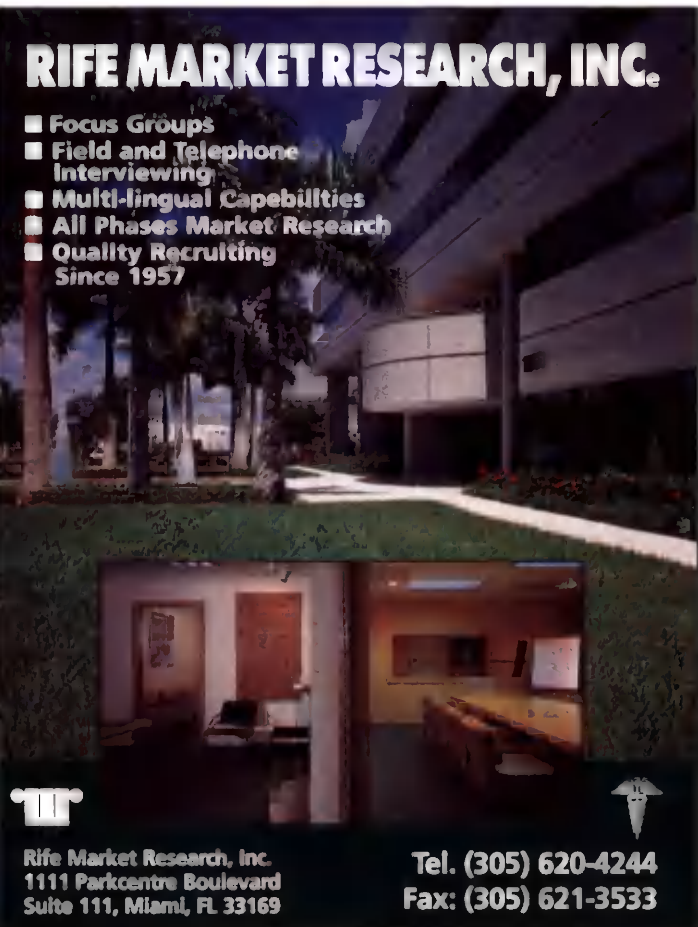
they do we'll review KnowledgeSEEKER 3.1, the new CHAID/CART program.

CHAID and CART work by splitting the sample to create groups that differ as much as possible in terms of a dependent (or criterion) variable that the analyst chooses. As most statisticians use the nomenclature, CHAID (or Chi-Square Automatic Interaction Detection) works with categorical dependent variables such as region of the country, gender, market segments to which people belong, etc. CART (or Classification and Regression Trees) works with continuous dependent variables, such as dollars spent, number of boxes of SoggyOs cereal consumed, and so on.

Looking at "How Classification Tree Analysis Works" (Fig. 1), we see first that the procedure starts with a sample (usually of moderate to large size like this one) and a dependent variable specified by the analyst. In this case, the dependent variable is likelihood to eat everybody's favorite breakfast substance, SoggyOs.

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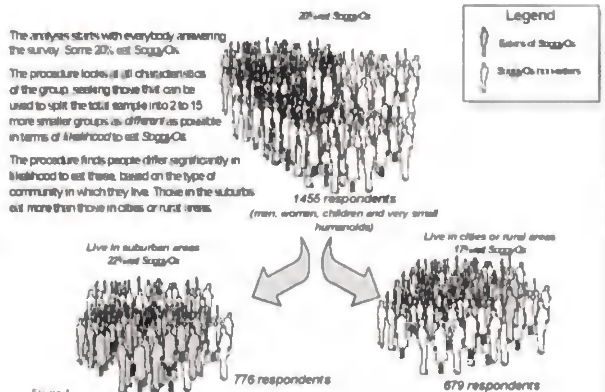
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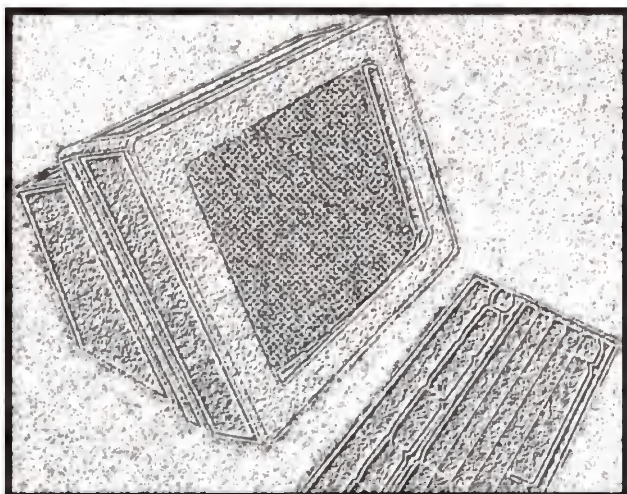
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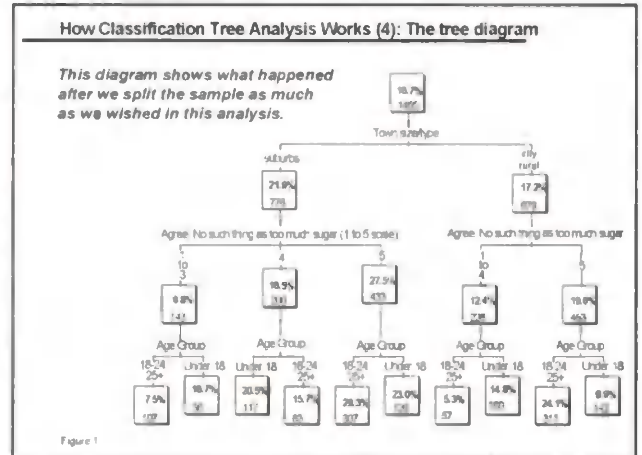
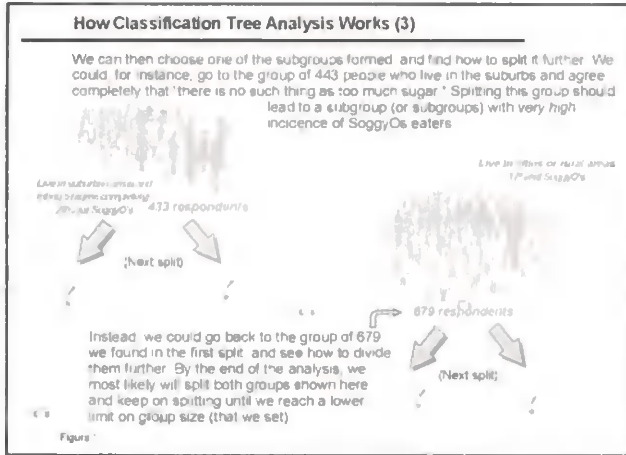
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much sugar.” Of those who agreed completely with this modest proposition, some 28 percent ate SoggyOs. Of those who disagreed completely, only 10 percent did. Those with middling levels of agreement were about as likely as the overall average to be SoggyOs eaters (some 19 percent). Now, based on one attitudinal and one demographic variable we have already identified several groups differing strongly in terms of the behavior we wish to understand (eating SoggyOs).

as too much sugar.” Or perhaps, we could go back and look at the 679 rural and urban respondents who we have not yet analyzed. Panel 3 of Fig. 1 describes the choice at this juncture in the analysis in more detail.

The analysis continues, creating smaller and smaller subgroups until it reaches some minimum group size (that the analyst sets) or until no more significant predictors emerge. (The analyst also sets the threshold for statistical significance.)



After performing this split of the sample, we could further analyze the three new subgroups formed. For instance, we could look at the 433 respondents who both lived in the suburbs and agreed completely that “There is no such thing

The full analysis appears in Panel 4 of Fig. 1, in the form of a “tree diagram.” This tree serves as a basic way of displaying and working with data in this form of analysis.

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War stories:

True life tales in marketing research

By Art Shulman

Editor's note: "War stories" is a regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. Readers are invited to call or write Shulman with stories of their own.

Recently, I was finalizing the details of a project in the office of a new client when a brownish moth fluttered in out of nowhere and into the space between us. I thrust out my hand and, to my surprise — and my client's consternation — the moth disappeared into my now closed hand.

I was prepared to accept compliments for my proficiency and adeptness, for a demonstration to her of how I could take care of any contingency, for saving a damsel from a vile, clothes-eating creature, when she said, "That's revolting," and asked me to "take the moth, in whatever state it is now, outside."

She did not cancel the project, but on the other hand, she declined to shake my hand as I left.

Ken Rosenhek of The Pine Company cites a story told to him about a president of a large market research company whose presentation in the board room at his client's corporate headquarters was interrupted by the phone ringing. When the person answering the phone announced, "Someone wants to know if we have a 'Secksauer' here," one of the participants cracked, "Hell no! We don't

even get a coffee break!"

Jamie Boyer of PG Research reports that his partner Todd Powers was conducting one-on-one interviews, with his clients viewing behind a one-way mirror and the interviews being audio and video taped, when one particularly buxom respondent began to complain about the temperature and removed her sweater. As the interview progressed, she continued to disrobe, piece by piece, ignoring the normally unflappable Powers's protests, until she was clad only in her underwear.

Behind the mirror the clients were hooting it up. Finally, the clients, helplessly laughing, let Power off the hook by interrupting the interview and informing him that they'd hired the stripper to break him down.

Now, why don't I have clients like that?

Focus group moderator Gary Friedan recalls riding in a limousine from the airport to a focus facility, along with a very important client. The limo driver, a burly woman in her 50s, was tailgating, much to Friedan's discomfort. So he asked her nicely not to stay so close behind the car in front of them. She continued to tailgate, and again Friedan nicely (at least he thought) asked her not to get so close. The woman swerved to the shoulder, stopped, turned around and told Friedan, "If you don't keep quiet you're out of this car right now! Understand?"

"Yes," Friedan answered meekly, wondering what his important client

thought of him now. He also thought, "There goes your tip, lady."

By the way, the name of Friedan's client that day was Danny Kaye. Yes! Now the director of Research Applause, that's his real name. (Know any other marketers with a celebrity name? Send me their name and affiliation.)

Nancy Levine reports that in a ride-and-drive car study she conducted, a respondent who was curious about trunk space unscrewed his artificial leg and crawled into the trunk. Nancy resisted the temptation to shut the trunk behind him.

Shelley Donow of Donow & Associates tells about a telephone interview conducted with a high-level executive who was asked to rate the statements using a 1 to 10 scale. When the interviewer got to the eleventh statement the respondent replied, "I can't answer that one," which was the same answer he gave when the next statement was read. When the interviewer asked why he couldn't rank it, this high-powered leader of men and women said, "I have no numbers left. I used them all up."

What's wrong with those people who can't understand the simple difference between rating and ranking?

In future issues, we'll report on more quirky, loopy and strange happenings in the world of market research. Whether you're a research provider or a client, if you'd like your story to be told please call me (818-782-4252) or, better yet, write it up and fax it to me (818-782-3014).



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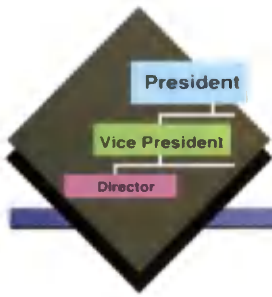


Facilities

The Focus Group Suite is a contemporary, tastefully decorated, private facility centrally located with easy accessibility.

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Names of Note

IrwinBroh & Associates, a Des Plaines, Ill., research firm, has promoted **Bob Rowe** to senior vice president. In addition, **Arnold Krawitz** has joined the firm as vice president.

Debbie Bruce will lead the staff of *Quality Controlled Services'* Stratford Square Mall in Chicago as mall manager. **Kathy Hangach** has been promoted to mall manager at QCS' Lakewood Center Mall in Los Angeles.

Michelle Kusley has been promoted

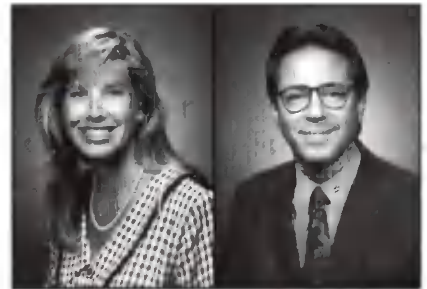
to manager of the editing and coding department at *Decision Analyst, Inc.*, Arlington, Texas.

CLT Research Associates, Inc. has appointed **Mark Eisner** as research director-executive vice president.

Spatial Insights, Inc., a Vienna, Va., geographic information services firm, has added four new positions to its project services and data sales divisions. **Yogi Yogan** has joined the firm as account executive; **Nicole Solyka** as manager,

GIS project services; **Michael Ampula** as GIS application specialist; and **Michael Deuber** as GIS technician.

Julie Taylor has been named vice president-interviewing services in *NFO Research's* Northwood, Ohio, facility.



Taylor

Ribeiro

Also at the Northwood location, **Efrain Ribeiro** has been named vice president-panel services.

Frederick Palumbo has been added to the marketing department of *Rockwood*



Palumbo

Research, St. Paul, as research consultant.

FGI, a Chapel Hill, N.C., marketing services firm, has promoted two associates in its research unit: **Caroline Goodwyn** is now marketing research analyst and **Paul Wegner** is research assistant.

SSI-SNAP

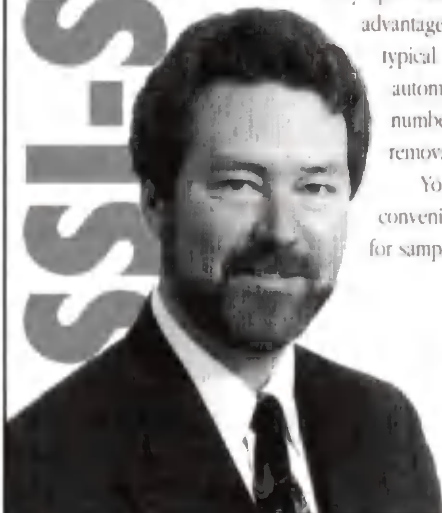
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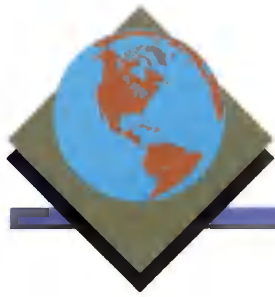
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Research Company News

Catherine Bryant & Associates Market Research, Winston-Salem, N.C., celebrated its tenth anniversary by moving to a new custom designed facility in the Hanes Mall area. It includes a new focus group suite, a central location test center, a textile lab, a telephone interviewing center, a data processing center and office space. For more information, call Amy Anderson at 910-765-1234.

Quality Controlled Services has expanded its Overland Park, Kan., facility to include three focus group suites, a multi-purpose room, a central phone room with 48 CRT stations, a test kitchen and 12 pre-recruit stations. For more information, call Shirley Musgrave at 800-525-1952.

SDR, Inc., Atlanta, a data processing and statistical analysis firm, has expanded its range of services to include survey research project consulting, design and planning; sample consulting, planning and sample generation; data collection and preparation; marketing database design, development and management; advanced statistical analysis; statistical modeling; and consulting in data interpretation. In other news, the firm has spun off its Chicago tabulation operation into a separate company. With SDR's support, Jim Miller, formerly SDR's director of marketing and a member of its board of directors, has formed Miller Research Group (MRG), purchasing SDR's Chicago Tabulation Services Group and its assets. SDR's Chicago office and MRG will continue to be co-

located at 10 South Riverside in Chicago.

Cunninghis Associates, Holmes Beach, Fla., has a new phone number: 941-778-7050. The fax number is 941-778-4843.

Focus Market Research, Bloomington, Minn., has opened a videoconferencing center at its Edina, Minn., location. The center offers AT&T and PictureTel equipment for

transmission to the offices of Focus clients or 23 other markets that are linked through membership in the VideoConferencing Alliance Network. The facility will also offer public room videoconferencing. For more information, call Judy or Stan Opstad at 612-881-3635.

Marketing Evaluations, Inc. has moved to 1615 Northern Blvd., Manhasset, N.Y., 11030. Phone 516-

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Message to research firms: Your first impression might be your last

How a research company responds to an initial query may tell a lot about the quality of work it does

By Ron Sellers

Editor's note: Ron Sellers is in charge of primary and secondary research for Bank One, Western Region. Previously he worked on the vendor side as a project director for the Barna Research Group, Ltd.

There are research firms from Anchorage to Tampa, from Providence to San Diego. All of them want business. Most of them are competing against other vendors in the same general location or area of expertise. Yet it's amazing sometimes how little thought research firms seem to put into getting the business of potential clients — even when that client is making the first contact.

Contact any five research companies, and the chances are that at least one of them will make a rather poor first impression. For many clients, this is the only impression that will be necessary, because the proposed business will go to a competitor.

Take it from someone who has made first contact with all too many companies: there are ways that vendors communicate very clearly the quality of the work they are likely to do, even in this first contact. As a client or as a vendor, here are some things to look for.

Knowledge of the client's expecta-

tions and needs. Vendors sometimes assume that all clients want the same thing, whether that is low price, in-house RDD sample, or great food during focus groups. While you spend your time hyping how low your costs are, your potential client may be wondering about the level of service she'll receive or your company's experience in her industry. I've been insulted by vendors who want to sell me on their focus group facility solely because they cater gourmet meals and are within 20 minutes of three championship golf courses. I'm there to do serious research, not to eat eggplant parmesan and play 18 holes! Yet other potential clients may find these aspects very important.

Like any good marketer, you need to find out what your target wants, and give it to him or her, whether it's details on your financial industry research experience or a list of local luxury resorts.

The quality of the communications. What you say is important, but how you say it and how it looks are also vital. I once rejected a bid from a potential vendor because it had a typographical error...in the letterhead! If the company could let something that major get through without noticing (or could notice it and just not care), what are the chances that the work they do will show

any attention to detail?

Open any edition of The GreenBook from the AMA and you'll see at least one or two advertisements that look as if they were designed by an eight-year-old and faxed in at low resolution. Promotional literature and advertising doesn't have to be four-color, glossy, and expensively produced to communicate that the research firm is a quality organization. But using poor grammar in a cover letter, spelling the client's name wrong, providing brochures that are yellowed, worn or written on, or sending out something that just looks like poor quality clearly communicates the kind of work the client can expect.

This applies to telephone communications, as well. A convoluted voicemail system or an unprofessional receptionist gives a very poor first impression. The last thing a client wants to hear is, "He's too busy to take your call. He'll have to call you back tomorrow."

The amount of information available. Some vendors seem to have a thoughtful answer to almost any question. Others apparently can't believe they're being asked questions. Clients will often want details. What tab package or statistical software is being used? What

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Of black holes and killer budgets

Some thoughts on developing new products

By Jerry W. Thomas

Editor's note: Jerry Thomas is president of Decision Analyst, an Arlington, Texas, research firm.

Every product, day-by-day, inch-by-inch, is creeping toward obsolescence. The products and the companies that are frozen in the status quo die a little every day. The only hope of business immortality lies in constant improvement and a constant search for the new and better. Product improvements and new products are the pathways to the future, the lifeblood of strategic survival. From our catbird perch, as marketing research advisors to hundreds of different companies, we see some that consistently develop and introduce successful new products. We also see companies that rarely ever develop any new products. The contrast between successful "new products" companies and those that don't succeed provides some valuable lessons for any company that aspires to improve its new product efforts. Here are some things we have learned about new products.

A state of mind. New products are a state of mind, an attitude. Mental rigidity is the antithesis of new product thinking. A negative attitude is the kiss of death. Bureaucratic calcification is a

formidable barrier to new products. Creating new products requires openness, optimism, imagination, freedom, risk-taking and persistence. These psychological qualities must be nurtured within the organization generally, and specifically within the individuals or group responsible for new product development.

An ongoing activity. New products thinking is an ongoing activity. It's not a one-time thing. The world and everything in it are in motion, evolving, changing. The search for product improvements and new products, therefore, must be continuous — or the world will pass you by — quickly.

Fashion cycles. Every industry is affected by fashion cycles. What fashion trends are affecting your industry? The fashion cycles can be very fast (cosmetics, clothing, hair styles), glacially slow (legal industry, religion, government) or somewhere in between. But every industry has its fashions and fads, no matter how slow or obscure the process might be. Perceiving and understanding these fashion cycles can be stimulants to the creation and timing of new products.

Industry blindness. Each industry has its own vocabulary, mythology, biases and beliefs. Collectively, these biases

and beliefs can create a type of "industry blindness." Everyone is somewhat a captive of his/her industry's culture and common experience. You must get outside of your industry at times to learn what's going on in the world. Visit and observe companies in other industries if possible. Draw in outside expert help from time to time to add perspective to your company's new product effort.

A small start. New products often start small. The volume potential for many new products will not be large at first. Many large companies set arbitrary minimum sizes for product categories of interest (i.e., we're not interested in anything less than \$20 million in sales and so on). This kind of arbitrary constraint often rules out many of the best and brightest new products. It's okay for new products to start small, since the successful ones will tend to grow exponentially anyway. For example, the Mexican salsa category, pioneered by Pace Picante Sauce, was a tiny, small volume category for a number of years, but now the salsa category is bigger than the ketchup category. Also, it's next to impossible to accurately estimate market potential for completely new products. So don't

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continued from p. 17

When completed, the tree shows all the splits that we chose to make in the course of differentiating those more likely to eat SoggyOs than those less likely to eat them. The last variable we chose to enter into the analysis was the respondent's age. We found that younger eaters consumed more SoggyOs than did older people, once we allowed for the other two variables (type of town or city, and agreement with "no such thing as too much sugar.") We now have 10 subgroups, ranging in likelihood of consuming from 5 percent to 29 percent. The groups range in size from 36 to 311.

For this example, we created a nice, fairly symmetrical tree, with the same variables appearing in all locations (or "nodes") in a given level or tier of the tree. You do not need to create trees that "match" across each level, as this one does. Creating this highly consistent diagram in fact caused the model to fall short of the apparently "optimal" one, by about 2 percent correct classification. In this case, we felt that this was a small penalty to pay in overall accuracy to arrive at a model that the client found completely intelligible and useful.

Some distinctive features of classification tree methods

Using classification tree methods, you almost always can construct many alternative models with nearly the

same predictive power. (In somewhat more statistical terms, you can create many "nearly optimal" models.) Some statisticians have criticized this method because it can create models that look very different and yet have about the same predictive power overall. We could argue, though, that this is in fact a real strength of the method. For instance, you can create a "nearly optimal model" with just demographic items, another with just responses to a survey and other models combining the two. Once you get away from the idea that you need one "best" model, and understand that you can create many useful and "nearly best" models, this technique starts to appear much more powerful.

I never run KnowledgeSEEKER on its "automatic" model building setting, although you can. It provides much greater insight into the data to use the program to find which variables would be significant predictors at each point in the splitting and re-splitting of the sample. Examining these, you can then find which of these candidate variables will provide the most useful information and instruct the program to display the most significant sample-split based on that variable. After completing a model, I invariably go back and create other alternative ones. This process of interactive model-building can give you a thorough understanding of the data, particularly about the characteristics of sub-groups you might not otherwise find.

Classification trees become increasingly valuable as the data we try to analyze becomes more complex or more "peppered" with the irregularities that often frustrate other analytical approaches. The issue of dealing with complicated and sometimes incomplete or inconsistent data emerges as more critical as organizations try to make more strategic use of databases or to link databases with surveys.

These procedures in particular have great strength in handling missing data. With most multivariate methods (including for instance, regression, discriminant analysis and factor analysis) missing data can pose serious problems. If respondents have any missing response, these procedures will (by default) drop them entirely from the analysis. You can fill in the missing values with means (or some other values) but by doing this you introduce something into the analysis not present in the original data.


Classification tree analysis treats a missing value as a type of response but with extra control over how it is handled. Missing responses can be allowed to combine freely with any responses, so that they lead to groups varying as much as possible in terms of the dependent variable. Alternatively, the procedure can hold them to one side, not allowing them to combine with any other response.

You specify how CHAID and CART handle missing values as part of the general definitions you make for all the independent, or predictor, variables in the analysis. You can handle these variables either as continuous or categorical. Continuous variables, like weight, dollars owed or boxes of SoggyOs consumed, can have one or several missing value codes specified. The program will

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report means and standard deviations for variables of this type.

You can treat categorical variables in several ways: as monotonic, floating, free or with no combination. Monotonic variables must define subgroups with the variables' codes kept in strict sequence. If, for instance, you have codes 1, 2, 3 and 4, then you cannot create a group defined by those with codes 1, 2 and 4, contrasting with a group defined by code 3. This type of grouping often makes sense with rating scales but usually would not be useful if the codes 1, 2, 3 and 4 actually stood for nominal values such as North, South, East and West. With nominal variables, using the free combination option works better. Supposing we had a variable with the values North, South, East and West, the program would then allow these regions to group in any way that led to the strongest differences in the dependent variable.

Floating variables are like monotonic ones, with the added feature that missing values are allowed to combine freely with any other group formed (or float). Actual codes must get grouped in sequence, but the missing responses can appear as a code in any of the groups formed. For example, suppose we had a variable with codes 1, 2, 3, 4 and missing. The procedure could not (for instance) create a group defined by those with codes 1 and 4 (and another with codes 2 and 3), but it could create a group defined by code 1 and missing responses vs. codes 2, 3 and 4. Or codes 1 and 2 could appear in one group and codes 3, 4 and missing in another — and so on. This gives

great flexibility in dealing with missing responses, and also gives a way of "filling" these with values that will maximize differences in the dependent variable in the analysis.

Specifying no combination forces the program to create a subgroup corresponding to each code in the variable. A variable with four codes will lead to four subgroups, a variable with five codes will lead to five groups — and so on. If you specify a variable as no combination, and it then does not pass tests for statistical significance and minimum group size, then it will not get onto the list of significant predictors. You probably will not use this option often; I have seen it in two or three analyses over the last 10 years.

KnowledgeSEEKER 3.1 for Windows

KnowledgeSEEKER (from ANGOSS Software) is a fine piece of software that deserves far more recognition. In their recent thoughtful and scholarly review of CHAID and CART software, Chaturvedi and Green (1995) did not even mention this program. This is unfortunate, because KnowledgeSEEKER's analytical capabilities place it ahead of its principal competitors — strong as these products are in their own right. (These products are CHAID for Windows from SPSS and CART from Salford Associates. We will discuss them briefly in this review.) With its new release, KnowledgeSEEKER (KS) has become the most comprehensive and analytically powerful program available for classification tree analysis.

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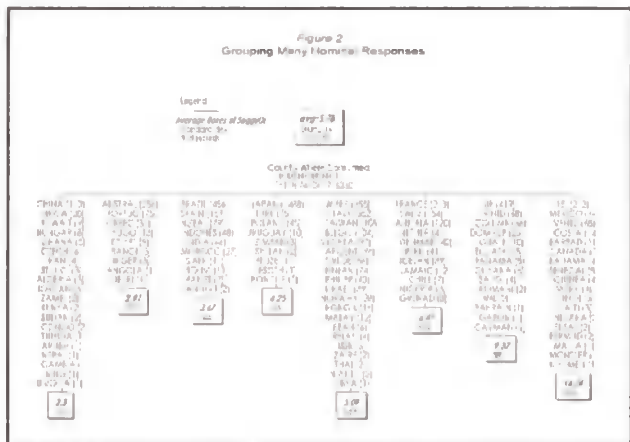
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KnowledgeSEEKER excels in handling categorical variables with many categories. For instance, let's look into the hypothetical worldwide SoggyOs analysis in Fig. 2. Here we have respondents from over 100 countries and how many boxes of SoggyOs they ate on average. (This comes from a real classification tree analysis, with SoggyOs substituted for the real dependent variable to protect the innocent.)

KnowledgeSEEKER analyzed this problem simply and easily. It sorted the 100 countries of origin into eight groups.



The countries in each group differed significantly from the countries in all other groups in terms of how many boxes of SoggyOs respondents consumed. In the diagram, the first box shows the worldwide mean, its standard deviation and the total number of respondents. Boxes lower in the diagram

dispense with the standard deviations and show just means and numbers in each group formed. The number directly below the phrase "country where consumed" is the significance level of the split. (This is some 3×10^{-15} , or very, very significant. The test used to determine significance comes directly below, showing an F-value of 118.7.) The parenthetical numbers next to the countries show the numbers of respondents from each. As you can see, KS has tackled a highly difficult comparison and has found just a few groups differing very dramatically in terms of boxes of SoggyOs eaten.

The major competitive products could handle this problem to an extent — but either would require more work from you or provide less detail. CHAID from SPSS has a limit of 31 categories in a dependent variable. The procedure simply skips any variable with 32 or more categories in its responses. You can recode any offending variables manually (using the base program of SPSS or another statistical program), combining countries into 31 groups or fewer. This involves ample extra work, though, and might obscure some detail that you would find useful. Like KS, CHAID from SPSS can create anywhere from two to 15 subgroups at any point in the tree — as needed by the analysis, and as permitted by lower size limits on groups created. Again, the number of groups created gets determined by statistical tests, looking at all possible ways of splitting the sample.

CART from Salford Associates can handle many codes in dependent variables, but only can split the sample into two groups at any point (or, as statisticians will sometimes state, "bifurcate" the sample). Salford provides a rationale for limiting CART to two-way splits, in part maintaining that a series of two-way splits can lead to the same outcome as one many-way split. In this writer's experience, though, you do not get the same informational content or descriptive value from many two-way divisions as from a single many-way split that lays out the strongest contrast in one step. But here we get into a difference of opinion based on experience, rather than any hard and fast statistical rules. No matter what we believe statistically, though, restricting the analysis to two-way splits imposes a definite structure on the data. Splitting the sample in no more than 15 ways at a point imposes a structure also, but allowing the sample to split into as many as 15 subgroups seems closer to our (human) analytical limits — and so less of a real-world restriction.

KnowledgeSEEKER can handle categorical variables (like the country where SoggyOs were eaten) having up to about 2,000 categories. If you restrict the categorical variable to monotonic combination, it can handle 4,000 to 5,000 categories. KS can mix categorical with ordinal and continuous variables in one analysis. KS also guesses (usually correctly) how to handle each dependent variable — as continuous or categorical, and if categorical, whether treated as monotonic, floating or freely-combining. You can override its informed decisions — and checking the variable specifications (as we will discuss later) plays a critical role in any classification tree analysis.

In identifying variables by type and in determining statistical significance, highly complex rules (amounting to a form

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of artificial intelligence) come into play. Making complex many-way comparisons involves much more than at first may be apparent. Some early work in the development of KnowledgeSEEKER, published in IEEE proceedings on artificial intelligence (DeVilje, 1990), pointed out the difficulties inherent in determining whether results are statistically significant. Exhaustive testing (in the form of "Monte Carlo simulations") showed that the methods typically used for handling many-way comparisons in analysis of variance tended to become inaccurate with larger numbers of comparisons. (For instance, the SNK method tended to be too liberal in declaring results "significant," while Scheffe's method was too stringent.) KnowledgeSEEKER's statistical rules for complex comparisons come directly from the empirical results of this extensive testing. As a result, the analyst can allow this program to attack data of incredible complexity with assurance that any results identified as statistically significant truly pass the requisite tests.

Working with KnowledgeSEEKER

We used KnowledgeSEEKER extensively on two IBM-compatible PCs, both "middling" in power. One was a 486-based DX2-50 with 16 MB of RAM, the other a 486 DX2-66 with 32 MB of RAM. We tried the program under Windows 3.11, the "final release" Beta (or test) version of Windows 95, and the actual Windows 95 operating system. We saw no appreciable differences in operation of the program based on the different computers or versions of the operating system used.

Setting up the program

Installation of the program is simple and ran smoothly from three floppy disks. The program occupies less than 4 MB of hard drive space, including example files and its graphing module. The program automatically makes its own group, or window, under Windows 3.1, but it is a simple matter to move the three KS icons elsewhere, should you wish.

Starting the program

KnowledgeSEEKER starts with a simple, blank screen. You must first identify the data file and then have the program convert it into KnowledgeSEEKER's proprietary format. Conversion times usually are nominal for survey-sized data files. With more cases and variables, though, and with more complex variables (usually nominal-level variables with many codes), conversion times can get longer. For instance conversion took 20 minutes in an analysis starting with 11,000 records and 450 variables (about a dozen of which were nominal-level with a few hundred possible responses).

Before you convert the file to KS format, you must have in mind the dependent variable (the one forming the basis for all splitting of the sample). You can later change this variable, but you must identify something for the analysis to begin. KS will examine this variable and make an informed guess about whether it is continuous or categorical. This matters, because with a continuous variable you will see an average (or mean) value at each point in the tree, while with a categorical variable, you will see the percentage in each category. (You can see examples of each type of dependent variable in the

figures in this article.)

Once the data appears in KS format, several other menu selectors appear, in this order:

File Edit View Grow Reshape Options Window Help

Each of these selectors can sprout a menu at the appropriate time. Figure 3 shows how the full menu bar looks once a KS data file is open. The name of the file (in this case, the poetically titled T4368NB1.DAT) appears in the title bar.

You can start with data in an ASCII file, in dBASE, Paradox or Lotus worksheet formats, and SPSS or SAS file formats, among others. If you use SAS or SPSS files, KS will



use both any long variable names and any long value labels that you have defined. This means that if, for instance, you have a variable with the long label "Region of the country," that long label will appear in your KS analysis. Similarly, if you have labels for the values, such as North, South, East, and West (for codes 1, 2, 3 and 4), then these descriptive labels (not the number codes) will appear in the analysis. You can see how KS uses long labels in Fig. 2.

The first critical decisions: "Edit View"

You should save the file immediately once KS converts it. Then you should start checking all the variables to make sure that KS has correctly identified them, and so will be handling them in the way you want. This checking takes place under the Edit menu, within the operation called Edit View. With-

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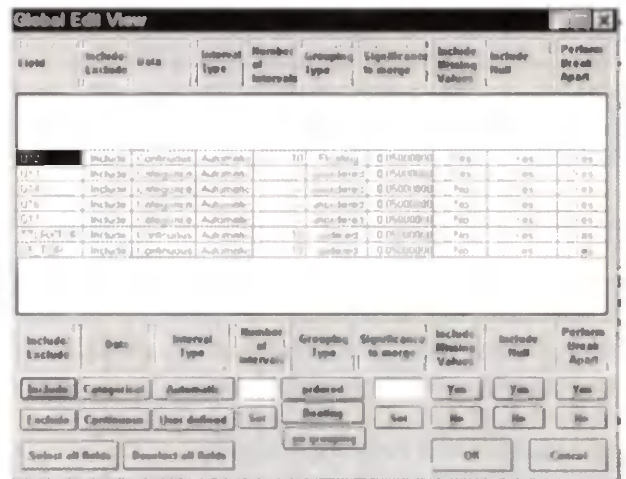
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out doubt, this serves as one of the most important steps in the analysis. If you do not check how the program plans to handle variables, you inevitably will find yourself going back to Edit View, to change definitions repeatedly. The program does the best it can, but it still does not understand the variables and what they mean the same way that you do. Oddly enough, it seems that variables which get mis-specified (from your perspective) have a way of often appearing on the list of significant predictors.

Fig. 4 shows the Edit View screen, with several variables selected for checking at once. You can check and change the variables one at a time or select a group (as in this figure) and

change them all in various ways. Earlier, we mentioned that you should save the file before going into the Edit View window. That is important because this is one of the few places where KS might get bogged down and, under certain circumstances, stop working. In our experience, these rare



failures always occurred when we were trying to change the types of too many complex variables at once. (In particular, changing several variables with many categories from being defined as "monotonic" to being defined as "free" — or freely combining — can bring the program to a halt.) The solution to this problem (aside from saving your work often) lies in simply not selecting too many highly complex variables to work on in the Edit View window at one time. KS does not often have this type of failure, but the last thing you want to see when working on a complex file is a message window saying "Assertion Failed," followed by the program shutting down. Perhaps the makers of KS can adjust the program to prevent the user from putting too many complex variables into the Edit View window at the same time. Or perhaps they can rewrite the program to prevent it from ever overloading. Either of these changes would come first on a wish list for future development of KS.

"Mapping Data" — Also under the editing menu, this option allows you to do simple recoding of the data. (Mapping means recoding in current KS parlance.) If you have complex recoding to do, or need to recode many variables, you will find it faster and easier to use a full-featured statistics program. As mentioned above, KS will use both variable labels and value labels that you have defined in either SPSS or SAS files. Also, while KS imports data (reads it into its own format), it does not export data back out again. Any recoding that you do within KS will stay strictly within KS. You can generate a "view" of a data file in spreadsheet format, and then paste the entire thing into a program such as Lotus 1-2-3 or Excel, but this seems rather cumbersome. An "export" feature is also on the wish list for this program.

"Grow" — This menu houses the central activity of this program. Here you tell the program to find all possible ways to split the sample at a given point in the analysis or to "force" a split of your devising. The program makes good use of shortcut keys in this and other basic operations. Simply highlight the point in the tree you want to analyze and type a lower case "j" to find all splits. Alternatively, type an upper

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case "F" to force or specify a particular way of splitting the sample.

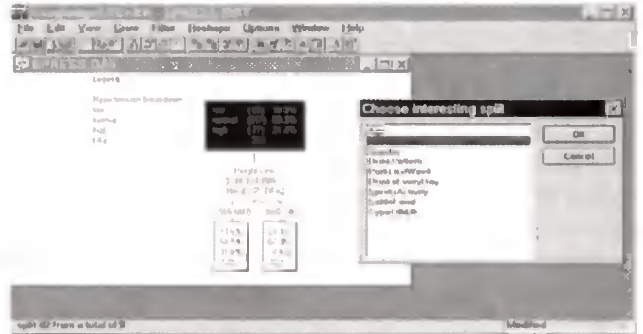
Once you find splits, typing a "g" opens a window that shows all variables that pass the criteria you have set (more on criteria below). Figure 5 shows the window that opens, titled "Choose interesting split." (The selection hidden under the gray bar is "height [cm]," the variable that appears on the screen.) You can scroll through these possible predictors and quickly examine how the tree will look choosing each of the candidates for defining the split. Alternatively, you can see how all the possible predictors work, one at a time, in order of statistical significance, by repeatedly typing "i."

You also can let the program run on "automatic" from this point. Smart as KS is about statistical testing, though, do not expect it to think through your problem for you. You almost inevitably will find it more useful to examine possible ways of splitting the sample at each point and to select the one you find most useful.

"Filter" — Here we find another critical decision for growing trees, namely the minimum significance level that you will accept for a split. If you choose, for instance, the 0.01 (or 99 percent certainty) level, then the program will restrict the possible candidates for splitting the sample to those variables that pass the test. For each candidate variable, KS will find the one best way for defining a split of the sample.

KS allows you to set this as tightly or loosely as you wish. For instance, if you set this to 0.99, every variable with a 1 percent or better chance of being significant will appear on the list of candidates. This is one definitive way to settle all

arguments with those who insist that some favorite concern of theirs must have just missed statistical significance by some fluke or the slightest of whiskers. You can, as a result, have the great satisfaction of (for instance) telling the second assistant brand manager that, as an idea for a premium, the membership in the great books club stands about a snowball's chance in hell of piquing more buying interest. And you will have the numbers to prove it.



"Reshape" — This lets you get rid of splits that you do not want and prune entire levels away from the tree. This often proves handy when the analysis goes in directions you do not find useful or the model grows too complex.

"Options" — Hidden in the Options menu, unfortunately, you will find one of the most crucial controls for running KS, labeled somewhat cryptically "tree growing" and then "create size." This sets the minimum size for any group that the program splits off from the rest. You need to set this. The

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default size is ONE.

While it may make sense with certain precision measurements to isolate one case from all others (and KS will perform the test correctly), this never works with real world data. Set your minimum to something much larger than a single case.

If you want a good suggestion for a minimum size, look at the value the program selects for its "stop size," the smallest group that it will form running on automatic. We usually set the minimum group size at about 5 percent of the total for samples in the hundreds, and about 3 percent for samples in the thousands. No matter how small the total sample, we recommend that you regard as largely qualitative any splitting which results in groups of fewer than 20. Again, since KS uses statistical testing that has been optimized for small samples, it may tell you that everything seems just fine if you elect to split off tiny groups. But I know and you know that real data simply has too many anomalies to trust with tiny samples, no matter what the computer says.

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The Options menu also allows you to test how well you have done up to a given point in the analysis. The "Resub Error" option will show the correct classification level for a categorical dependent variable or the r-square for a continuous dependent.

A short KS wish list

This program rates a solid "excellent" (if not "indispensable") overall, but it still remains software, and as such, could do certain things better. We already mentioned its occasional tendency to quit during complex "Edit View" operations and its lack of file export capabilities as areas that could use some work. Perhaps the largest gap in this program's capabilities comes in its relatively slender data manipulation capabilities. It will not create any new variables once you have the file in KS format, so you can't do a simple operation like adding two variables together or taking the difference of two variables. You must go to the program that created the

data file, do the manipulations there, and then re-import the whole file. Similarly, KS cannot append variables to a file it has already saved in its format. Every time you think of something else you might have done with the data (and a thorough KS analysis will encourage plenty of this type of thought), you have to go back and start from scratch, rebuilding the entire KS file. This can get irritating with smaller files, and truly try your patience with larger files where the data transformation into KS format takes longer.

You must take the classification tree output from KS and paste it into another program to use it. KS does not save the finished classification tree as an entity separate from the data file. You will find it simple to edit the tree diagrams with most graphics and presentation packages. However, it would be much more convenient to have a means in KS for saving these images so that you can call them up later at your leisure. Please note that with Windows 95, and plenty of RAM (we used computers with 16 MB or more), you can keep KS open indefinitely, while you work with your other applications, moving back and forth, cutting and pasting until you reach exhaustion. (Windows 95 is another topic that we will tackle in a later issue of *Quirk's*.)

KS also produces some text-based output, in particular gains analyses, that you may find very useful. Gains analyses show all groups formed, in descending order of prevalence of the dependent variable. So if the dependent variable is boxes of SoggyOs consumed, then the groups get listed in order of incidence of eating SoggyOs. The group at the top of the list has the highest level and the unenlightened group at the bottom the lowest incidence. KS will save these text files separately from the analysis data set.

Major advances

Overall, we find classification tree analysis and particularly KnowledgeSEEKER, to provide major advances in analyzing complex data. KnowledgeSEEKER's great flexibility in handling different kinds of data and missing data make it a particularly valuable tool for revealing strategically useful information. Once the new user grows accustomed to the classification tree as a way of looking at the data, the program is straightforward and quite friendly to use. The largest obstacle in this program for many would-be users, in fact, seems to lie in the basic idea of splitting (and resplitting) the sample to find contrasting groups. Once you pass this barrier, you should find KnowledgeSEEKER an indispensable tool making informed decisions. □

Note: KnowledgeSEEKER, from ANGOSS Software International, Toronto (416-593-1122), is also available from Sawtooth Software, Evanston, Ill. (708-866-0970).

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Survey Monitor

continued from p. 6

months of 1994, and significantly higher than the 613.5 million offers mailed in the second quarter of that year.

Mail Monitor, a joint venture of BAI and Market Facts, Inc., is a syndicated service based on the credit card solicitation experiences of a representative sample of households nationwide. Some 10,000 households are covered during the year and report on credit card offers on a monthly basis. For more information, call 914-332-5300.

Women see Colin Powell as a contender

As speculation of Presidential candidates grows nationally, Gen. Colin Powell ranks as the most popular contender among a majority of informed American women. The results of the first Lifetime Television/Chilton Lifestyles Poll monitoring women's issues surrounding the 1996 Presidential election conclude that 56 percent of all women polled give Powell a favorable rating compared to 53 percent for Clinton. Even more astonishing is that among just the 60 percent of women who feel they know enough about Powell to form an opinion, an overwhelming 92 percent give him a favorable rating, considerably more than any other potential candidate including Clinton, whose comparable favorability rating is only 58 percent.

Among Republicans, Sen. Robert Dole (R-Kan.), has the highest recognition and favorability rating, scoring the highest of all hopefuls with a 37 percent favorability rating among all women.

"It is common for many of the contenders to be still unknown to the majority of Americans at this point in the race," says Kirsten Zapiec, business manager of Chilton Research Services' Express Omnibus Survey. "It is impressive that Gen. Powell ranks fourth in recognition among the top ten candidates following Clinton, Ross Perot and Dole."

The least known possible candidates are New Jersey Governor Christine Whitman and Sen. Arlen Specter (R-Pa.) with 81 percent and 77 percent, respectively, of women surveyed saying they do not know enough about these candidates to form opinions.

The Lifestyles Poll also asked the sample of women to address the largest problems facing women as a group. Twenty percent labeled equal pay and 15 percent pointed to job discrimination as the top women's issues. Abortion appears 10th on the list registering only 4 percent.

The Lifetime Television/Chilton Lifestyles Poll was conducted by Chilton Research Services among a random national sample of 500 women, age 18 or older, between September 13-17, 1995. Results have a margin of error of ± 4.4

percent. Chilton Research Services is located in Radnor, Pa. For more information, call 610-964-4694.

Americans' dietary habits conflict with their nutrition knowledge

According to a survey by CDB Research & Consulting Inc., New York, a majority of Americans (65 percent) find it very hard to eat a balanced diet. Although most Americans feel that they are

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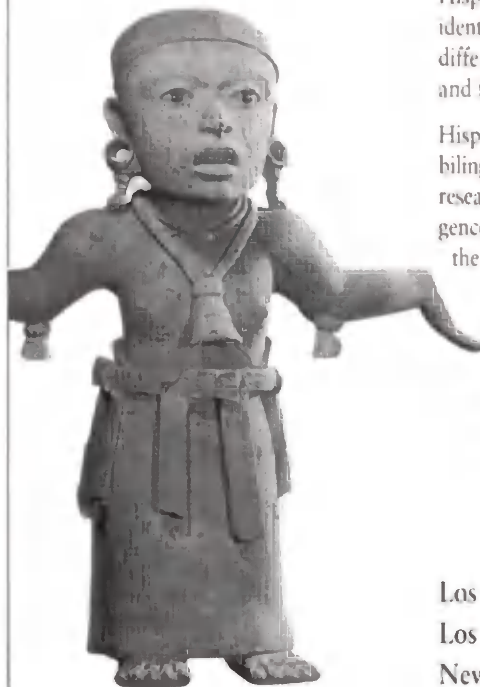
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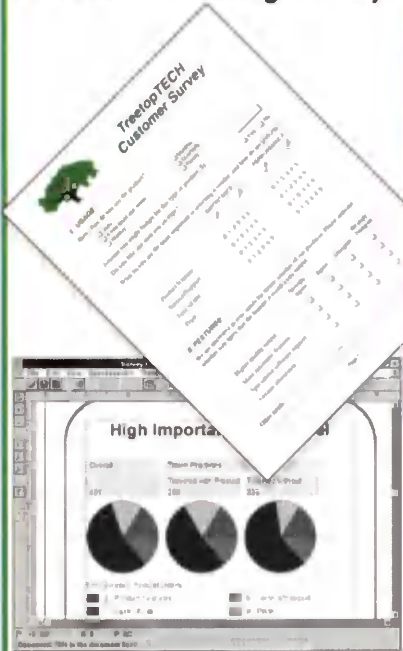
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very knowledgeable about nutrition (61 percent), they say that they are confused by news stories that report they should avoid eating certain foods (67 percent). Consumers reported they also have a hard time including the recommended number of servings of fruits and vegetables in their daily diet.

"As the results of this survey show, Americans are becoming more knowledgeable about nutrition. The next step is to incorporate the knowledge into their daily lives by practicing the basics of a healthy diet — moderation, balance and variety," says Dr. Larry Chiagouris, managing director of CDB Research & Consulting.

In addition, says Penny Clark, M.S., R.D., and CDB's registered dietitian, "Americans should keep in mind that there are no 'good' or 'bad' foods and that by balancing different foods throughout the day and eating in moderation, all foods can be part of a healthy diet. You don't need to give up your favorite foods, just eat them in moderation."

Sixty-five percent of respondents agree they find it very hard to eat a balanced diet. More men found it harder to eat a balanced diet than women; 69 percent of men agree it is very hard, compared to 64 percent of women. Women under 40 years of age report they find it harder to eat a balanced diet (67 percent) than women 40 and over (61 percent).

Of those surveyed, 61 percent felt they were very knowledgeable about nutrition. Those respondents who felt they were most knowledgeable were women 40 and over (65 percent), followed by women under 40 (60 percent), and then by men (54 percent). Confidence in nutrition knowledge seemed to correspond with their use of food labels; women 40 and over agreed most often that they read food labels (85 percent), followed by women under 40 (79 percent), and by men (77 percent).

A majority of Americans (67 percent) said they were confused by news stories that report they should avoid eating certain foods. More men than women claimed to be confused (71 percent versus 63 percent, respectively).

Of the 356 consumers surveyed, less than half (44 percent) eat at least five servings of fruit and vegetables every

day, the minimum daily serving recommended by the National Cancer Institute and the USDA's Food Guide Pyramid. Women 40 and over were more likely to eat the daily suggested serving of fruit and vegetables than women under 40 (54 percent versus 38 percent, respectively), while men were least likely (36 percent).

"Many Americans feel overwhelmed by the recommendation to eat 3-5 servings of vegetables and 2-4 servings of fruit daily," says Clark, "but what they often don't realize is how small these recommended servings actually are. For instance, one serving of vegetables equals 1/2 cup of chopped, raw or cooked vegetables, and one serving of fruit is equal to one piece of fruit or 3/4 cup of juice or juice drink."

CDB Research's proprietary National Research Panel follows consumer attitudes and trends, including perceptions and experiences with food and health issues. Survey questionnaires were mailed to 1,030 panel members across the nation. A total of 356 completed and returned the survey, a response rate of 35 percent. For more information, call 212-887-8123.

Consumer optimism reigns in urban China

Over four in 10 consumers in China expect their standard of living to rise in the next 12 months, and a large majority seem predisposed to spend their earnings on Western goods, according to a new survey by SCMR (South China Marketing Research)-Research International.

"We deliberately conducted this survey in China's leading triad of markets — Shanghai, Guangzhou and Beijing — not only because these are the most important markets in China, but because these three markets are arguably harbingers of future trends," says Daphne Chandler, New York-based president of Research International World Service.

"In China, things are moving so quickly that to stay on top of them we need to use a different strategy than might be appropriate in more mature markets, where national surveys are often more helpful. In China, it's important to look for indicator markets

that can help detect major trends rather than just describe the quickly out-of-date status quo," says Chandler.

The survey, based on 1,500 face-to-face interviews conducted earlier this year, showed very strong optimism at the consumer level. "People really seem to sense that things are continuing to get better," Chandler says. The proof, she notes, is the virtual absence of pessimism. "Only about one in 20 urban Chinese feel things will get worse before they get better. In my experience, that's really a very strong bulls-to-bears ratio."

A key finding of the SCMR-Research International study is the built-in predisposition toward products from the West. "Eight out of 10 Chinese consumers believe that articles made in the West are likely to be of higher quality than comparable products produced in China. And over 75 percent think that Western products will last longer and be more durable than similar items made in China," Chandler says. Even more importantly, the survey revealed that over seven in 10 Chinese think that Western goods are a better value for money than their locally produced equivalents.

However, Chandler cautions that this goodwill toward things made in the West may be very short-lived. "It's important to recognize that, for the most part, these beliefs are not as yet modified by reality. As experience becomes a greater component of these perceptions, the onus is clearly upon marketers to deliver," she suggests.

The China Clipper Survey, a twice-yearly omnibus, also probed the awareness of leading global brands. Over nine in 10 Chinese interviewed are aware of Coke, Pepsi and Sprite, as well as Marlboro and Nescafé. And not far behind are Sony, Panasonic, Kodak and Nestlé. As might be expected, consumers in Beijing and Shanghai are more likely to recognize foreign brands than are those who call Guangzhou home.

"But beware," says Ms. Chandler. "While awareness is high when you use the Chinese names of Western brands, it falls off sharply when those same brand names are presented in English. Coke, for example, with 99 percent awareness in Beijing, drops 40 points to 59 percent when you present the brand name in

English."

Do strong brands enjoy a special advantage beyond mere recognition in China? The China Clipper Survey strongly suggests they do. On average, 72 percent of the urban Chinese questioned agreed that it's best to buy famous brands; only 12 percent of Chinese consumers felt there was no advantage in buying famous brands.

While three-quarters of the consumers SCMR-Research International talked with agreed that advertising was a good way to find out about brands and products, smaller proportions felt that ads were a trustworthy information source. In Beijing, in particular, doubts about the credibility of advertising were high. In that city, only 47 percent felt advertising is trustworthy, while 33 percent disagreed.

This wariness, suggests Chandler, may reflect the fact that the major "advertiser" has historically been the government, and the issue of trust undoubtedly raises the question of the veracity of political messages. However, it appears that the Chinese believe themselves to be capable of discounting

messages. For example, a purposely negative query found that on average only 27 percent of the Chinese believe that advertising encourages people to purchase things they don't need, but 55 percent disagree.

"These patterns are amazingly similar to results of surveys Research International has made in Eastern and Central Europe," Chandler observes. "In Poland, for example, seven in 10 consumers told us that advertising was a good way of finding out about products. That was in 1991, when Poland's consumer economy was just emerging. By 1993, that figure had climbed even higher, to 85 percent."

Do Chinese consumers like advertising? It would seem so. Forty-six percent say that they generally enjoy looking at advertising, while just 21 percent disagree. And only 16 percent feel advertising gets on their nerves. Considering the lengthy commercial blocks typical of Chinese TV, where 20 or more commercials appear back-to-back, these positive reactions to advertising in general are encouraging. For more information, call 212-973-2300.

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Deadline upcoming to participate in 40+ study

The Maturing Marketplace Institute, a division of Strategic Directions Group, Inc., Minneapolis, will conduct its fifth annual 40+ industry-specific shared-cost study in January 1996. Deadline for joining one or more of the studies is November 30, 1995. The study's sample is 3,000 persons 40 and older. The questionnaire covers the attitudes, behaviors, media usage, direct marketing responsiveness, activities and demographics of baby boomers and their elders. Topics such as industry attributes, specific products, new product usage, couponing and brand loyalty are addressed. Participation is limited to three companies within the seven industries covered. Participating companies receive a half-page or more for their own proprietary questions within a 16-page questionnaire. The use of one of five separate 40+ segmentation strategies developed by Strategic Directions Group is included at no additional cost. For more information, call Carol Morgan or Doran Levy at 612-341-4244.

New products, capabilities from Equifax NDS

Equifax National Decision Systems, Atlanta, has introduced Consumer-Facts, a database on spending patterns for more than 400 products and services in more than 15 major categories, with regional spending differences incorporated. In addition to current year estimates, it provides five-year projections reflecting the impact of economic and demographic conditions such as income, employment, population and household changes, on consumer spending. The database was created jointly by Equifax NDS and The WEFA Group (Wharton Econometric Forecasting Associates). The database was built using information from the Bureau of Labor Statistics, the Bureau of Economic Analysis and the Census Bureau, combined with The WEFA Group's economic forecasting abilities and Equifax NDS' demographic estimates and forecasts. The data is available to license via Infomark for Windows and in diskette, magnetic tape and CD formats.

Equifax NDS has also issued Infomark for Windows 6.2, the newest version of its desktop market data delivery and analysis system. The new version has database updates and software enhancements, including Consumer-Facts and ArcView 2.1, a desktop mapping and analysis program from Environmental Systems Research Institute. Users can export data directly from Infomark into ArcView, allowing them to compare multiple data sets on one screen and to display, query, integrate and analyze multiple data types, including their own data.

Through an agreement with Equifax NDS, users of desktop mapping software from MapInfo Corp. will find it easier to integrate Equifax NDS' marketing data into their MapInfo system. The agreement enables Equifax NDS to offer its more than 60 databases, including its MicroVision customer segmentation system, in native MapInfo format. Deliverable on CDs, diskettes or through Infomark, the data can be imported directly into

MapInfo for analysis, eliminating a conversion process. For more information, call 800-866-6520.

SPSS ships neural net program

SPSS is now shipping Neural Connection, its new neural network computing product. Neural Connection has a set of 15 data management, modeling, forecasting and presentation tools to provide flexible data analysis. Users prepare data by viewing distributions and transforming values within the application. The product includes three neural network tools for prediction, classification, time series analysis and data segmentation. It also includes three statistical tools that let users build hybrid models or benchmark neural model results side by side. For more information, call the SPSS sales office at 800-543-2185.

Viewpoint 1.1 captures outcomes data

National Computer Systems (NCS), Minneapolis, has released a new version of its NCS Viewpoint software that allows users to capture and report patient outcomes data as well as patient satisfaction data. NCS Viewpoint 1.1 software includes the questionnaires and normative databases from two widely accepted instruments for monitoring patient outcomes: the Health Status Questionnaire 2.0, developed by Health Outcomes Institute, and the SF-36, developed by the Medical Outcomes Trust. The software is intended to make it easier and less costly for hospitals, group practices, long-term care facilities and managed care organizations to collect and interpret data. For more information, call 800-347-7226, ext. 3301.

Decisionmark inks links with data providers for desktop package

Decisionmark Corp. of Cedar Rapids, Iowa, has signed agreements with several information providers to make their data usable with Decisionmark's

soon-to-be-released Proximity desktop software package. Proximity users will be able to access Chicago-based National Research Bureau's comprehensive 1995 data on U.S. shopping centers with total gross leasable area of 750,000 square feet or more. Users of the new software will also have the option to license NRB's complete shopping center database, including almost 34,000 center locations and more than 450,000 retail locations. The system will also make available American Business Information's database on

more than 10 million U.S. businesses, including 3.8 million small business owners, 148,000 big businesses, 8,500 public companies, 220,000 growing businesses and 1.1 million professionals. In addition, Proximity will contain subsets of Equifax's 1995 Business Summary Variables, 1995 and 2000 Consumer-Facts Expenditure Data and 1995 MicroVision Lifestyle Variables data sets. More than 100 Claritas variables will also be included. For more information, call 312-541-0100.



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Ridgedale

continued from p. 13

nity to learn more about him or her and add it to the database.

Because Ridgedale is so research-driven, the criteria for evaluating a successful promotion is not just an upsurge in sales and store traffic, but also whether it gives Ridgedale an opportunity to learn more about its customers.

Sharing data with stores

Ridgedale provides a service for

ping season. Among the promotions recommended is a second honeymoon sweepstakes package for next year's travel season, based on awareness that a significant share of married households in the Ridgedale customer database (75 percent of the total base) like to travel.

The fact that most Ridgedale customers are homeowners suggested promotions to market home furnishings within specific — and upscale — price ranges. Mailing costs for such a promotion would be relatively inex-



Gwendolyn Cowle, marketing coordinator for Ridgedale, believes that the mall's pinpointed information — and how the mall uses it — is responsible for a steady increase in annual sales each of the last five years.

client stores by segmenting data to meet specific marketing needs. For example, a store that stocks Scandinavian handicrafts can get a breakout of customers with Scandinavian-sounding names or a stated interest in handicrafts.

Ridgedale also disseminates interesting facts or trends relating to customers to the stores, suggesting appropriate promotions to tie-in with them. Based on its latest wave of customer research, IQ/Intelligent Marketing Systems also suggested store promotions that would key into the database.

Plans are to undertake some of these promotions after the Christmas shop-

pensive, because it would not be a "blind" broadcast mailing, but rather to specific addressees whom research has identified as better-than-average prospects.

The bottom line question about all this research, of course, pertains to the bottom line: Has it paid off in terms of increased sales and traffic at Ridgedale Mall? The answer is a resounding yes. "Thanks to our database efforts," says Cowle, "we know who is shopping Ridgedale, where they're coming from, how much they spend when they get here and where they spend it. Our database is a highly effective and a powerful tool to have." □

First impressions

continued from p. 22

are the demographics of the area from which a focus group facility can recruit? What respondent incentives are necessary in this market? How many clients can fit comfortably in a viewing area? What is the interviewer-to-supervisor ratio of the field center? What are the focus group room sizes? These are all questions that should be relatively easy for a research company to answer. Yet all of them have, at one time or another, completely

be like during the project. If a client sends an RFP that requests a bid, a timeline, a client list and a local map, that is what she is expecting to receive. Either fulfill her request or tell her why you cannot. After being burned once by holding a focus group in what amounted to a closet, I've made a practice of asking for a facility layout and/or room sizes. It astounds me how many facility managers can't provide either, and aren't willing to take two minutes to pace off their rooms if they have to, in order to answer my question.

A focus group facility once provided me with a very nice reply to an RFP. Unfortunately, the reply came a week after the project had already been awarded and recruiting had started, even though the reply deadline was clearly noted in the RFP. I've even had vendors say, "Well, it would be a real hassle for us, but I

guess we could work this into our schedule." By telling the client how busy you are, you run the risk of implying that you don't have time to do a good job on the project.

Research and market knowledge. Local or regional research specialists spend most of their time in Phoenix or Pittsburgh or New Haven — wherever their market happens to be. Clients often don't. Local vendors should know their market and know their business. If you don't know something, don't assume — ask the client, even if it's just in the bid process. I've had times when a vendor provided a bid that was twice as high as other bids on the same project, because they made an assumption about the population or the incidence. Had the vendor only called to ask a simple question, they might have had a reasonable opportunity to win the bid.

It's much better to ask a client ques-

Vendors that don't return calls, don't meet bid deadlines, are rude or indifferent on the phone, provide only partial information, are unwilling to follow the parameters of the request for proposal, or make sure to tell the client everything they can't do rather than what they can — all are supplying very strong hints of what the service will be like during the project.

stymied the representative of a vendor with whom I've spoken. If the firm can't or won't easily answer questions such as these, a client is likely to go to another vendor that knows its business more completely.

The level of service the client can expect. One of the most important things research vendors are paid for is service, service in recruiting or interviewing, service in confirming respondents or validating interviews, service the night of the groups or the day of the presentation. Vendors that don't return calls, don't meet bid deadlines, are rude or indifferent on the phone, provide only partial information, are unwilling to follow the parameters of the request for proposal, or make sure to tell the client everything they can't do rather than what they can — all are supplying very strong hints of what the service will



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tions every day than to have them show up at the facility and find a group of improperly recruited people munching on M&Ms and waiting to be interviewed. In a project for a religious organization, one vendor included Mormons, Catholics, Jehovah's Witnesses, agnostics, and other non-Protestant belief systems in a focus group that was supposed to be for evangelical and mainline Protestants only — just because the facility manager wasn't sure what "Protestant" meant and never bothered to ask.

Attitude about the project. Do you want the project? Then prove it! Don't be indifferent, condescending, unprofessional or bothersome. Clients want calls returned promptly. They want questions answered accurately and succinctly. They want the vendor to be personable and easy to work with. They don't want to be bothered with calls every other day asking, "Have you awarded the project yet?"

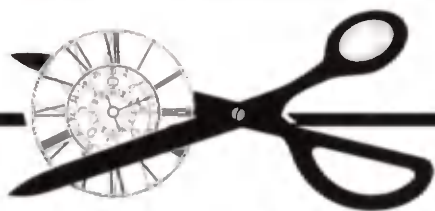
I once had to send out an anonymous request for information on a

highly confidential project. Vendors were provided only my personal name and fax number and asked to fax back general information on their firm (number of interviewers, industry experience, etc.). All but one vendor complied. The objector faxed back a snotty note informing me that if I provided my company name and a formal RFP, he would consider whether to fulfill my request. I was delighted to fax a reply that a formal RFP on about \$60,000 worth of research was being prepared and would be sent to all local companies that had provided the information — which was everyone but him.

Don't denigrate the competition. I sent a project out to bid once that received proposals with costs ranging from \$60,000 to \$80,000. One company faxed back a cost of \$110,000. When I called to make sure they had read the RFP correctly, I was informed rather condescendingly that, "We simply provide better service than your other vendors do. They aren't capable of doing this kind of

work properly." The vendor didn't even know who my other potential vendors were. That will be the last RFP they receive from me. (Besides, for an extra \$30,000, I'd better be getting breakfast in bed every day as part of their "superior" service.) If you have an advantage over the competition, tell the client why you're so

When I called to make sure they had read the RFP correctly, I was informed rather condescendingly that, "We simply provide better service than your other vendors do. They aren't capable of doing this kind of work properly." The vendor didn't even know who my other potential vendors were. That will be the last RFP they receive from me.



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good — but not why other vendors are so bad.

Everyone works with service industries, from getting a mail survey done to having your car repaired. If you work at a research firm, think carefully about good and bad experiences you've had with service industries and salespeople. Try to emulate those you liked and avoid those you didn't when you are attempting to attract business from a new client. If you are annoyed when your dentist's office doesn't return your calls promptly or when your real estate agent sends you a letter that includes three extra vowels in your last name, consider how much this annoys your clients when you do it to them.

There are scores of research companies out there. You're not always going to provide the lowest bid but you can always demonstrate to a potential client that you want his business and are willing to act as a high-quality service provider in order to get it. □

Black holes

continued from p. 24

worry about a small start.

Opportunity everywhere. Every product "category" is ripe for new products. Very often companies focus their whole new product effort upon so-called "growth" categories and ignore stagnant or dying categories. Very often, these stagnant or dying categories represent fertile new product opportunities, partly because no one is paying attention to them. A client once told us that his company was not interested in a particular canned meat category because the category was declining. We were able to show the client that the category was declining because all of the brands in the category were of poor quality, and that the category represented a great opportunity for a new high quality brand.

Start anywhere. New products can start with a concept, a product or anywhere in between. The traditional "new products" model burned into most packaged goods managers' brains is "first define the concept, and then make a product that fits the concept." Sometimes this approach works; other times it does not. It's just as fruitful to start with a product and build a concept as it is to start with a concept and build a new product; and sometimes you have to start with half a product and half a concept and somehow make the two come together.

Find a need and fill it. This mythology rests upon an archaic packaged goods paradigm, that all marketers must do is find an unfulfilled need and new product success will surely follow. This is not to say that the "unfulfilled need" model never works; sometimes it does. But needs are often wispy, vaporous things that cannot be identified in the absence of a product. For example, the need for a high quality car was largely unrecognized by the American public until the Japanese set a new standard. Very often one cannot measure a need until a new product and its marketing have defined that need. Therefore, you need

not worry very much about "need" as you develop new products.

Too many cooks. The process of evolving a new product is one of integration and organization, of pulling seemingly disparate elements into an integrated, cohesive whole. Too many participants can doom this process to failure, especially in the early stages of a product's evolution. For example, involving advertising agencies, packaging designers, marketing consultants, etc., in the process too early can slow things down and diffuse the energy and focus of the project, as the various "experts" compete for influence and power.

A starting point. New products are not created in a vacuum. You don't go to the mountain top to await the inspiration of the gods to tell you what new products to develop. New product creation demands a starting point, a focal point. You must nail down one corner of the tent before you can determine where to put the remaining tent stakes. You must choose which product category to address (or which market segment or customer problem). Typically, this starting point is largely judgmental.

Close to home. Stay close to what you know. The most fertile soil to till for new products is the soil beneath

your feet. Every company has its own technology base, customer base and resource base. Build upon and extrapolate from these foundations. Avoid the "grass is greener" syndrome that might lead you into uncharted

Unlimited creativity leads to infinite new product possibilities—to an endless black hole—where ideas come to nothingness. Creativity must have rails to run on, a purpose, a focus, a concentration. Too much undisciplined creativity can doom a new product program to failure. Too many ideas can confuse and diffuse the new product effort.

and unknown waters.

The black hole. Unlimited creativity leads to infinite new product possibilities—to an endless black hole—

The screenshot shows a software interface for 'SNAP Professional'. On the left, a 3D bar chart displays data for 'Very good', 'Good', and 'Fair' categories. On the right, a table titled 'GRID TABLE' shows percentages and counts for these categories. A central text box provides information about the software, including contact details for Mercator Corporation. Below the text box, there are input fields for survey data.

	Good	Fair
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8%	25%	28%
16	55	87
6%	22%	35%
26	70	51
10%	28%	20%

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where ideas come to nothingness. Creativity must have rails to run on, a purpose, a focus, a concentration. Too much undisciplined creativity can doom a new product program to failure. Too many ideas can confuse and diffuse the new product effort.

Creative stimulants. If lack of creativity is impeding new product progress (and this often is more of a problem than too much creativity), then you might consider the use of sensitized focus groups or sensitized depth interviews (i.e., "sensitized" in that respondents are given a few days to think about the key issues before they are interviewed). The use of brainstorming groups of "creative" consumers, employees or industry experts can also be a stimulus to creativity. Typically, the research itself produces some good new product ideas and the interaction with actual consumers also tends to stimulate the creative juices of the new products staff.

A time for winnowing. There is a time for creating and a time for winnowing. Once a focal point is defined, create new product ideas without limits, without constraints. Then, the ideas must be winnowed to a manageable few. Once these ideas have been pared down, focus creativity upon fewer options, create more possibilities and winnow again. The win-

nowing function can be performed partially by judgment, but consumer feedback is essential at critical points. Screening new product ideas among consumers is not very expensive and is typically far better than the judgments of the new products staff or the president's wife.

A new product can be more than a product. Most of us think of new products in a narrow physical sense; we should think of new products in a more open, expansive way. A new product might be, or be stimulated by: a new method or new channel of distribution; a new way of advertising; a new way of marketing; a new way of packaging; a new manufacturing technology; a new ingredient or component technology; a new brand identity or image; a new method of selling; or a new pricing level, etc. None of the above necessarily creates a new product, but each variable has the potential to define, shape or influence the creation of a new product.


The test market. No matter how perfect the new product development system, no matter how clever the new products team, no matter how esoteric the research techniques and no matter how creative the advertising agency, the new product and its marketing elements are not likely to be perfect at the point of test market

entry. This means that success often depends upon how quickly and competently new products and marketing elements are modified and refined as the test market unfolds. The new product gains wings and momentum through this test market experimenting, tinkering and refining. That's what test marketing is all about.

Killer budget. One of the surest ways to kill a new product is an unrealistic introductory budget. New products tend to lose money at first. The first proposed test market budget, therefore, usually shows the new product will lose money. Upper management does not like projects that lose money. The new products team increases the size and number of test markets to increase sales volumes, to achieve economies of scale. The budget numbers now look better, but not good enough for upper management. So, the new products team increases the projected share of market until the budget is acceptable to upper management. Now, the new product is set for failure; it has virtually no chance of hitting the budget numbers. Even worse, the test market geographic area is now so large and so expensive that the normal tinkering and experimenting that's supposed to occur during test marketing is no longer possible or affordable. The Killer Budget kills many promising new products.

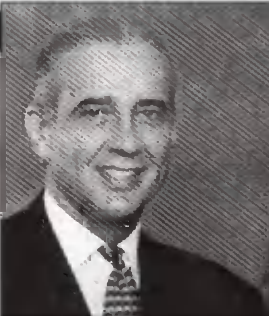

Management commitment. New products quickly die without management commitment and determination. New products are risky. Many will fail. It's all too easy to kill a new product — there's little risk associated with killing it and usually great risk in pursuing it. A managerial environment which permits freedom to fail is essential to the creation of new product successes.

In the final analysis, determination is probably the single most important predictor of new product success. The really successful new products companies don't give up easily. They keep trying and they keep experimenting until they find a success formula. Then they go to the bank and roll the dice again and again. □



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A research adventure in the Caribbean Islands

Is this any way to earn a living?

—By Jack Ross

Editor's note: Jack Ross is president of J. Ross Associates, Inc., a Port St. Lucie, Fla., research firm. The names of the people mentioned are fictitious, but the hotels and islands referred to are real.

Having been a professional marketing researcher for over 30 years, I've met and interacted with hundreds of people, as a colleague, superior, subordinate and client. My travels have taken me across the country and into some foreign lands. After thousands of research projects, both quantitative and qualitative, I thought there wasn't anything new I could experience, that I had been with so many different people that I had met "all types." I thought nothing could surprise me anymore.

The story begins with an unexpected phone call from a researcher at a client company. "How would you like to conduct a series of focus group sessions in the Caribbean Islands?" I said "Are you kidding?" My initial thoughts were, "Who wouldn't like to conduct any research in the Caribbean?" imagining, of course, the good times that could be had when work was through.

Most of the design details were

already decided upon so I submitted my cost and timing estimate and crossed my fingers. A few days later the good news came and we had about 10 days to get the necessary details squared away. The plans called for me to visit six islands over three weeks' time.

Week 1

At 7:30 a.m. on a Sunday I left my home for the uneventful drive to Miami Airport, not knowing that this would be one of the few smooth experiences of my venture. An American Airlines agent in a very crowded airport directed me to gate E35. With 90 minutes until departure, I went to the gate area and bought a cup of coffee. A little later, I decided to check the monitor, only to discover my flight was at gate D10. I hurriedly left, lugging three bags and a container of coffee, but arrived on time — hot and tired, but on time.

On the plane I met Sandy, a member of the client company. Our overbooked 727 departed 45 minutes late and we arrived at our first stop, Aruba, slightly behind schedule. Sandy introduced me to Axel Sanchez, another member of the client team, who was on our flight, but sitting too far away to talk with. His delightful per-

sonality and wonderful Jamaican accent convinced me he would be an interesting person to work with.

Upon arrival at our hotel in Aruba, La Cabana, an 800-room complex on the ocean, I joined Sandy and Axel while they helped set up the focus group room. This took about two hours and would prove to be representative of virtually all our stops. Nevertheless, we had time to enjoy a wonderful dinner at the Driftwood downtown. It was here that Axel started to tell us wonderful stories about his growing up in Jamaica and of the island personalities.

On Monday afternoon (after our session was completed), we left Aruba for Montego Bay, via Miami. We had to go all the way back to Miami, walk the entire terminal, pass through customs and come all the way back to get to our plane. We arrived at gate D2 and departed from gate D20, all the while lugging our baggage and fighting the crowds. We made it to the gate with about 10 minutes to spare. I was exhausted.

At the Half Moon Resort, we were greeted at a reception desk and were shown to magnificent accommodations in the Royal Suites section. It was now about 38 hours since I left home and I had only done one group.

With nine more to go, I began to wonder if I would make it. I did not join the others at room check or at dinner because I wanted to be fresh for the early morning session.

Early Tuesday morning, we went over some procedural changes to the moderator guide. Amazingly, one of the group participants, Connie, had lived in Brooklyn, N.Y., when I did and, before and after the session, we shared several wonderful stories of our younger lives. The rapport we developed proved especially valuable in a business sense, since she was the only respondent who could stay to the end of the session. Can there be a more phenomenal coincidence?

We left Montego Bay for Ocho Rios and then Kingston at about 12:30, with Axel driving us in a Toyota Camry (with air conditioning). For the 60+ mile ride along the northern coast of Jamaica, Axel proved to be a better guide than any tourist board member could have been. He named the towns and rivers we would pass before getting to them, showed us

several places where bauxite is mined on the island and explained how the sugar cane is harvested. He pointed out where Columbus landed on the island and even where the Pinta is rumored to be submerged. Our road was only one lane each way, with many people passing (including us) even when it seemed to me that they shouldn't be. We made it in one piece, ending our trip with a delightful lunch at the Ruins restaurant, which sat at the foot of a waterfall in Ocho Rios. We were only a few minutes from the Jamaica Renaissance Hotel where we would conduct our 4 p.m. group. (It started at 4:30 with only three of eight recruits and ended with a total of five.) After this group, we immediately left for Kingston for the night's stay at the Pegasus, a short drive from the airport.

The drive from Ocho Rios to Kingston was similar in length as Montego Bay to Ocho, but that was the only similarity. We had to drive south across the whole island and the only way to do that was to go through the mountains, along a winding, one-lane road (it reminded me of the Pacific Highway between L.A. and San Francisco) at night, sharing the road from time to time with large trucks. I didn't hide my concerns (the others did quite well), which Axel found somewhat amusing, but he assured me there was nothing to worry about as he had done it many times. As Axel predicted, we arrived safely almost two hours later at the Terranova Restaurant for a late dinner.

A going-away party for the Mexican Ambassador was being held at the restaurant, so we ate in the presence of dignitaries. My experience here with Chateaubriand and the Jamaican brand Red Stripe beer was wonderful and a good ending to another very long day of two groups, more than three hours in the car and several eating/discussion sessions. We arrived at our Kingston Hotel at 11 p.m. and went to bed.

On Wednesday, we left at about 8:30 a.m. for our trip to the Cayman Islands. One group was scheduled for

the afternoon, with the other for Thursday morning. I hoped that we would finally have time to relax at the beach or at poolside before going to dinner. We didn't. Our plane was about an hour late in arriving in Jamaica and after it was loaded, the captain told us the plane was too heavy. We waited another 30-45 minutes while they took out 600 gallons of gasoline. With a long customs wait (because of drug searches), we arrived at the hotel less than one hour before the group was scheduled. After the group was over, I had two hours for relaxation at the Clarion Grand Pavilion pool. I enjoyed a few refreshments and listened to a delightful lady guitar player sing some very relaxing songs. Dinner at the wharf was fairly expensive but quite good.

After our morning session, we were to head home. The group went well and I had lunch at the poolside bar before leaving for the airport. Finally, something went smoothly: an on-time departure, early arrival, a fairly quick trip through customs and home at 8 p.m., after an uneventful two-hour drive.

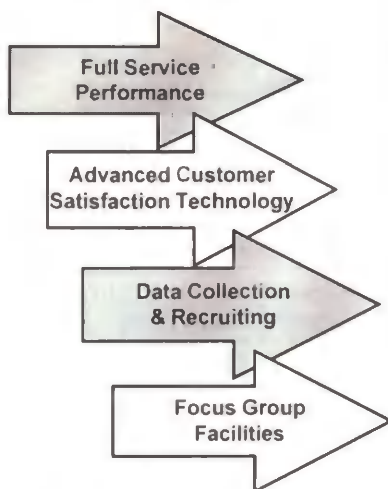
Week 2

The drive to the airport on Sunday was again uneventful but I had to park near the top of the next building's garage because of crowding. I went to the correct gate the first time and the plane departed on time.

We arrived at Tortola, British Virgin Islands. Customs was quick and a 30-minute car ride to Treasure Isle Hotel was interesting, to say the least. The one lane road through shanty towns showed me more examples of slum living. Goats in the road, a cow lying on a beach and speed bumps instead of traffic lights. The road wound around the mountains (with no guardrail), but I kept my nervousness to myself (shades of Jamaica again). We arrived at the hotel and had a very nice dinner on the veranda, overlooking the water. We were given a small suite because the hotel misunderstood our arrival date. The view in

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the morning was just spectacular.

Work went well: the group was informative and knowledgeable. However, only three showed up of the five recruited. The locals in Tortola indicated that we'd be lucky to get to Barbados four hours after leaving, saying that we wouldn't leave on time and could miss connections. I looked forward to the continuing "adventure" with some anxiety.

Departure for Antigua on Liat Airways was 10 minutes early and we landed five minutes earlier than predicted. We went through customs quickly and left Antigua for Barbados on time. Arrival in Barbados was exactly as expected and 30 minutes after touchdown, a cab had us at our hotel. (Happily, the Tortola people were not correct.) After checking the focus group room, which was already set up, we went to the Brown Sugar for dinner. The seafood platter had four varieties of fish, which were very tasty. The plan was to meet for breakfast at 7:30 a.m. since we had a 9:30 start.

The first session went well despite concerns that the group might be difficult and uncooperative. We fine-tuned some areas and, as a result, the last session was the best of all: a good way to end my moderator's function. Dinner at Pisces, a beautiful spot on the water, was excellent and not any more expensive than the others. A relaxation period at the bar before turning in for the night was an appropriate ending. It didn't make up for the inability to lie on the beautiful beach or wade in the blue waters of the Caribbean; maybe next time.

The flight back was wonderful. Sandy got us both on the American Airlines flight and used coupons to upgrade us to first class. Excellent breakfast and service and a good rest. I was in the office by 3:15 and caught up with everything before my last leg to Cancun the next weekend.

Week 3

On Saturday, I left home at 7:45 a.m. for an 11 a.m. flight to Cancun in first class (couldn't get on coach).

For 95 miles the trip was uneventful. Then, one mile from the Sunrise Blvd. exit, the traffic backed up. I decided to get off at the exit and find the turnpike. Twenty minutes later, I was on my way south again. I arrived at the parking garage 15 minutes behind schedule and was at the gate one hour before flight time. I don't know if I would have made it if I had stayed on Rt. 95. I guess that's why we leave plenty of extra time. I wondered if this was an ominous beginning to my last week.

The groups were scheduled for Monday, but I left on Saturday to take advantage of the beautiful beach. Sunday I spent an hour and a half briefing a Mexican moderator. The respondents did not speak English, so I could not moderate. Observing a Spanish speaking session and listening to a translator talk into a tape recorder proved to be okay, but it is hard to sense the flavor of the group. I took as many notes as I could.

During my three days in Cancun, I enjoyed the beach, the beautiful water and the in-the-pool bar of the Melia Tourquesa Hotel. The day after the last session (we couldn't leave at night because there were no flights), we left the hotel about noon for a two-hour flight back to Miami. The flight left on time, landed on time and I was

home about two and a half hours after touchdown. A good ending, but now came the detail work. In three weeks, I needed to have a final report to everyone. The bottom line of this whole experience is that if I'm asked to do this kind of thing again, I'll probably say no. It was just much too much of a hassle in so many ways.

Epilogue

During the two weeks after the last group, I received multiple phone calls from various client people, pushing me to complete this important project "early." It was difficult trying to respond to the requests from five or six different people. However, I did deliver the report on time and a week later, a summary conference call took place. The conference call lasted about an hour.

When I finished with the requested changes, I thought about everything that had occurred with this project, about how good it sounded in the beginning, the travel difficulties, the working with multiple "bosses," the poor show-up rate, the little bit of extra time I was able to spend in Cancun, and the underpricing of my costs (unintentional). I finally decided "never again." An old adage had once again come true: "You can't judge a book by its cover." □

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Cottonollo

continued from p. 11

Directions Consulting, by asking for their input on its attributes, advertising and packaging.

When consumers first arrive at the interviewing location, they are told what their task is and how their input will be used. During what is usually a two-hour process, respondents visit a series of stations, each focusing on a separate aspect of the product. There they respond to some kind of stimulus, such as a mock up of an ad or a potential package, noting their responses on a self-administered questionnaire.

After visiting all of the stations they are debriefed and their responses reexamined to allow them to shape their opinions into a cohesive product. Of course, they're also asked about purchase intent for the product they've created.

The Cottonelle tests included sta-

tions for positioning, products, aesthetics and brand imagery. At the brand imagery station, for example, respondents analyzed five photo montages presenting themes like "shower fresh" and "hygienic." Next they rated their initial response to each image and described the person who might find the images appealing. They then ranked the images in their own personal order based on how they fit with their choice of positioning and explained why they liked their favorite. Finally, using a list of words and phrases, they checked off those they felt best described the image they liked the most.

Clients learn firsthand

As part of the Building Blocks process, clients are asked to sit at each of the stations — along with a trained market researcher — to observe and talk to the respondents as they complete their questionnaires. This allows them to learn firsthand from consumers and probe for more information. For the Cottonelle project, people from marketing, marketing research, advertising, packaging and product development manned the stations.

This up close and personal learning was extremely helpful, Bassett says. "I have been in research for a number of years and I have to say it was an energizing experience to watch people who don't normally talk to consumers one-on-one get a chance to do so," Bassett says.

"People came away with a lot of good ideas, a real clear understanding of what the consumer was saying. It was a very powerful tool. It also allowed us to look at all of the elements of the bundle in relation to one another. We got consumer input on aesthetics, imagery, packaging, all at once, related to one another, as opposed to doing it sequentially."

"Sometimes when a new client is told that they'll have to talk directly to consumers, they kind of freeze," says Goldwasser. "But we have never failed to find that people do a good job and learn a lot more than just

sitting behind the mirror. In a lot of client organizations, the people on the team who are responsible for the advertising or packaging, for example, never get to talk to consumers. But this technique gives them an opportunity to get direct feedback."

Clients at first sit at the station that represents their particular area of interest or discipline. In later sessions, they are invited to sit at a different station, so a packaging person will move to the advertising station, for example. This helps build a team-like atmosphere, Goldwasser says. "At the end, the team owns the product. You

Within a week, after crosstabbing, Scott had actionable criteria to work with. "It provided a lot of information in a short period of time. I estimate that it shrank this phase of the project by 75 percent. That was really significant," Bassett says.

may be responsible for the advertising, but if you know more about the other aspects of it and how consumers feel about the other aspects, you'll do a better job."

A fringe benefit, is that consumers have fun, too, Goldwasser says. "They get empowered and involved. They work hard but they have a good time doing it. One respondent told us, 'This is the first research I've participated in that I felt that people cared about what I had to say.'"

Do something quickly

The technique was a time saver, Bassett says. The interviews were conducted over four days. Within a week, after crosstabbing, Scott had actionable criteria to work with. "It provided a lot of information in a short period of time. I estimate that it shrank

Attention

Additional information from advertisers can be found in the expanded index of advertisers section located on page 81.

Readers

this phase of the project by 75 percent. That was really significant because we delivered on our goal of speed-to-market for an improved Cottonelle."

All parties involved in the research stress that the information obtained from the Building Blocks sessions wasn't viewed as projectable. "We don't promise that the technique will find the perfect combination of elements. But out of the elements under consideration, it can identify the ones that work best together," says Hank Goldwasser, principal, New Directions Consulting.

Though Scott turned to several other methods to fine-tune the concept and its execution, the Building Blocks work served as an excellent starting point, Bassett says. "For an early stage development I think it was a key piece of the learning. Lots of tests have diagnostics but you don't get to probe why and in this case people really did get to do that."

Rob Wallace: "At a very early phase, it provided input for the product aesthetics and ultimately for the package

design and advertising. The Building Blocks study formed a basis for how Wallace Church went about developing the packaging, what colors would be meaningful, what kind of style, image, personality. It was the same with the

A fringe benefit, is that consumers have fun, too, Goldwasser says. "They get empowered and involved. They work hard but they have a good time doing it. One respondent told us, 'This is the first research I've participated in that I felt that people cared about what I had to say.'"

advertising. If you look at what's on the shelf today the bundle that was launched

was very much a result of what consumers told us in the Building Blocks study.

"I don't think we could have gone this far from the base equity to where it is today without the research proving to us that that's how far it had to go in the consumers' mind. It was a great way to get a lot of information quickly and it provided us with the ammunition to go to top management and say this not just an evolutionary fix-it, this is a radical restructuring of your brand. This research approach gives you a good idea of where you are, where you can go and where you can evolve to beyond that."

Bassett says it was a lot of fun working on the Cottonelle project. Early indications—including what Bassett calls "phenomenal" acceptance from the trade—are quite promising. "It was one of the most energizing projects I've worked on in my career. We accomplished so much in such a short period of time while really keeping in touch with the consumers, which is a researcher's dream." □

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*Insights For Advtg., Positioning &
New Prod. Development.*

Research Data Services, Inc.
4830 W. Kennedy Blvd., Ste. 440
Tampa, FL 33609
Ph. 813-287-2975
Contact: Walter Klages, Ph.D.
*Full Service Qualitative & Quantita-
tive Market Research.*

Rockwood Research
1751 W. County Rd. B
St. Paul, MN 55113
Ph. 612-631-1977
Contact: Marilyn Rausch
*Full Srv./Focus Fac.: Agri-Bus., Con-
sumer, Customer Sat.*

Rodgers Marketing Research
4575 Edwin Drive, NW
Canton, OH 44718
Ph. 216-492-8880
Contact: Alice Rodgers
*Creative/Cost Effective: New Prod-
uct/Consumer, Etc.*

Pamela Rogers Research
2759 4th St.
Boulder, CO 80304
Ph. 303-443-3435
Contact: Pamela Rogers
*Consumer, Business, Youth Grps./
One-One's In Many Categories.*

Rudick Research
One Gorham Island, 3rd Floor
Westport, CT 06880
Ph. 203-226-5844
Contact: Mindy Rudick
*10+ yrs. Experience Utilizing
Innovative Techniques.*

**Rhoda Schild Focus Group
Recruiting/Marketing**
330 Third Ave.
New York, NY 10010
Ph. 212-505-5123
Contact: Rhoda Schild
*Excellent Medical, Consumer, Busi-
ness Recruiting.*

Paul Schneller - Qualitative
300 Bleecker St.
New York, NY 10014
Ph. 212-675-1631
Contact: Paul Schneller
*Full Array: Ads/Pkg Gds/Rx/B-to-B/
Ideation (14+ Years).*

**Jack M. Shapiro Healthcare Mktg.
Rsch. & Mgmt. Consulting, Inc.**
P.O. Box 900
West Nyack, NY 10994
Ph. 914-353-0396
Contact: Jack M. Shapiro
*Healthcare Market Research Special-
ists Since 1988.*

James Spanier Associates
120 East 75th St.
New York, NY 10021
Ph. 212-472-3766
Contact: Julie Horner
*Focus Groups And One-On-Ones
In Broad Range Of Categories.*

Dwight Spencer & Associates
1290 Grandview Avenue
Columbus, OH 43212
Ph. 614-488-3123
Contact: Betty Spencer
*4'x16' Mirror Viewing Rm. Seats 8-
12. In House Audio/Vid. Equip.*

Spier Research Group
1 Lookout Circle
Larchmont, NY 10538
Ph. 914-834-3749
Contact: Daisy Spier
*Advtg./Dir. Mktg./Prod. Dev./Cons./
Business/FGI's/1 on 1's.*

Strategic Focus, Inc.
6456 N. Magnolia Ave.
Chicago, IL 60626
Ph. 312-973-4729
Contact: Dona Vitale
*Creative Insights for Mktg./Advertis-
ing Strategy.*

Strategic Research
4600 Devonshire Common
Fremont, CA 94536
Ph. 510-797-5561
Contact: Sylvia Wessel
*400 Groups, Hi-Tech/Medical/Finan-
cial/Transportation Svces.*

Strategy Research Corporation
100 N.W. 37 Avenue
Miami, FL 33125
Ph. 305-649-5400
Contact: Jim Loretta
*Serving All U.S. Hispanic Mkts. &
Latin America.*

Sunbelt Research Associates, Inc.
1001 N. U.S. One, Ste. 310
Jupiter, FL 33477
Ph. 407-744-5662
Contact: Barbara L. Allan
*20+ Years Exp.; Business & Con-
sumer Studies; Nat'l. & Int'l. Exp.*

Sweeney International, Ltd.
One Park Place
621 N.W. 53rd St., Ste. 240
Boca Raton, FL 33487
Ph. 800-626-5421
Contact: Timm Sweeney
*Qualitative Research. Member:
QRCA/AMA/Adv. Club.*

Target Market Research Group, Inc.
5805 Blue Lagoon Dr., Ste. 185
Miami, FL 33126-2019
Ph. 800-500-1492
Contact: Martin Cerda
*Hispanic Qual./Quant. Research-Na-
tional Capability.*

Treistman & Stark Marketing, Inc.
Two University Plaza
Hackensack, NJ 07601
Ph. 201-996-0101
Contact: Joan Treistman
*ENVISION™, Other Approaches for
Creative Insight.*

Widener-Burrows & Associates, Inc.
130 Holiday Ct., Ste. 108
Annapolis, MD 21401
Ph. 410-266-5343
Contact: Dawne Widener-Burrows
*Four Moderators on Staff Spec. in
Health Care, Fin. Svcs., Adv. Rsch.*

Dan Wiese Marketing Research
2108 Greenwood Dr., S.E.
Cedar Rapids, IA 52403
Ph. 319-364-2866
Contact: Dan Wiese
*Highly Experienced: Farmers, Con-
sumers, Business.*

Yarnell Inc.
147 Columbia Tpke., #302
Florham Park, NJ 07932
Ph. 201-593-0050
Contact: Steven M. Yarnell
*New Product Development & Posi-
tioning. HW/SW Cos.*

STATE CROSS INDEX OF MODERATORS

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

California

Asian Marketing
Auto Pacific Group, Inc.
Erich Transcultural Consultants
Grieco Research Group, Inc.
Heffernan Marketing Research Services
Hispanic Market Connections
Hispanic Marketing
Lachman Research & Marketing Svcs.
Market Development, Inc.
Marketing Matrix, Inc.
Phoenix Consultants
Strategic Research, Inc.

Colorado

Cambridge Associates, Ltd.
Market Access Partners
Pamela Rogers Research

Connecticut

Access Research, Inc.
The Clowes Partnership
POV
Rudick Research

Florida

Carlson Marketing Consultants
Cunninghis Associates
The Deutsch Consultancy
Research Data Services, Inc.
Strategy Research Corporation
Sunbelt Research Associates, Inc.
Sweeney International, Ltd.

Target Market Research Group, Inc.

Georgia

Elrick and Lavidge
Michelson & Associates, Inc.

Illinois

George I. Balch
Communications Workshop, Inc.
Creative & Response Rsch. Svcs.
Doyle Research Associates
Irvine Consulting, Inc.
Marketing Advantage Research
Strategic Focus, Inc.

Iowa

Dan Wiese Marketing Research

Kansas

Delta³ Research

Maryland

Hammer Marketing Resources
Nancy Low & Associates, Inc.
Widener-Burrows & Associates, Inc.

Massachusetts

Daniel Associates
Dolobowsky Qual. Svcs., Inc.
First Market Rsch. (L. Lynch)
Greenleaf Associates, Inc.

Michigan

KidFacts Research

Nordhaus Research, Inc.

Minnesota

Cambridge Research, Inc.
Graff Works Marketing Research
MedProbe Medical Mktg. Rsch.
Outsmart Marketing
Rockwood Research

Missouri

P

New Jersey

Treistman & Stark Marketing, Inc.
Yarnell Inc.

New York

Asian Perspective, Inc.
BAI
Ebony Marketing Research, Inc.
Fader & Associates
Focus On Hudson
Focus Plus, Inc.
Horowitz Associates, Inc.
Leichliter Associates
Market Navigation, Inc.
Rhoda Schild Focus Grp. Recruiting/Mktg.
Paul Schneller - Qualitative
Jack M. Shapiro Healthcare Rsch. & Mgmt. Cnsltg.
James Spanier Associates
Spier Research Group

North Carolina

CB&A Market Research

The Customer Center, Inc.
D/R/S HealthCare Consultants
FacFind, Inc.
Medical Marketing Research, Inc.

Ohio

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

Pennsylvania

Campos Market Research
Michael Carraher Discovery Rsch.
Consumer/Industrial Research (C/IR)
Data & Management Counsel, Inc.

Texas

Decision Analyst, Inc.
First Market Rsch. (J. Heiman)

Utah

Focused Solutions

Virginia

Bannon Moderating Services
Franklin Associates, Inc.
Fuller Research Services, Inc.

Washington

Consumer Opinion Services
Monitor Research Corp.

SPECIALTY CROSS INDEX OF MODERATORS

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

ADVERTISING

Bannon Moderating Services
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Creative & Response Rsch. Svcs.
The Customer Center, Inc.
Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
Erich Transcultural Consultants
Fader & Associates
First Market Research (L. Lynch)
POV
Paul Schneller - Qualitative
Spier Research Group
Strategy Research Corporation
Sweeney International, Ltd.
Treistman & Stark Marketing, Inc.
Widener-Burrows & Associates, Inc.
Dan Wiese Marketing Research

AFRICAN-AMERICAN

Ebony Marketing Research, Inc.
Phoenix Consultants

AGRICULTURE

Cambridge Associates, Ltd.
Cambridge Research, Inc.
Consumer/Industrial Research (C/IR)
The Customer Center, Inc.
Rockwood Research
Market Navigation, Inc.
Dan Wiese Marketing Research

ALCOHOLIC BEV.

Creative & Response Rsch. Svcs.
POV
Strategy Research Corporation

APPAREL/FOOTWEAR

The Customer Center, Inc.

ASIAN

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

ASSOCIATIONS

Nancy Low & Associates, Inc.

AUTOMOTIVE

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

BIO-TECH

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

BUS.-TO-BUS.

Access Research, Inc.
BAI
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Michael Carraher Discovery Rsch.
Consumer/Industrial Research (C/IR)
Consumer Opinion Services
Creative & Response Rsch. Svcs.

Data & Management Counsel, Inc.
The Deutsch Consultancy
Fader & Associates
First Market Research (J. Heiman)
Pat Henry Market Research, Inc.
Monitor Research Corp.
Paul Schneller - Qualitative
James Spanier Associates
Spier Research Group
Sunbelt Research Associates, Inc.
Sweeney International, Ltd.
Yarnell Inc.

CABLE

Creative & Response Svcs., Inc.

CHILDREN

Carlson Marketing Consultants
Creative & Response Rsch. Svcs.
Doyle Research Associates
Fader & Associates
Greenleaf Associates, Inc.
KidFacts Research
Matrixx Marketing-Research Div.
Outsmart Marketing
Pamela Rogers Research
Paul Schneller - Qualitative

CHURCH & RELIGIOUS ORG.

Heffernan Marketing Rsch. Svcs.

COMMUNICATIONS RESEARCH

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

COMPUTERS/MIS

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

CONSUMERS

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

CUSTOMER SATISFACTION

The Answer Group
BAI
Michael Carraher Discovery Rsch.
Elrick and Lavidge
Fader & Associates
Nancy Low & Associates, Inc.
Research Data Services, Inc.
Rockwood Research
Strategic Research, Inc.
Sunbelt Research Associates, Inc.

DIRECT MARKETING

BAI
Greenleaf Associates, Inc.
Spier Research Group

DISTRIBUTION

Graff Works Marketing Research

EDUCATION

Cambridge Associates, Ltd.
Greenleaf Associates, Inc.
Marketing Advantage Research

ENTERTAINMENT

Bannon Moderating Services
Sweeney International, Ltd.

EXECUTIVES

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

FINANCIAL SERVICES

Access Research, Inc.
BAI
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Michael Carraher Discovery Rsch.
Creative & Response Rsch. Svcs.
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Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Fader & Associates
Nancy Low & Associates, Inc.
Marketing Matrix, Inc.
Matrixx Marketing-Research Div.
Monitor Research Corp.
Nordhaus Research, Inc.
The Research Center
James Spanier Associates
Sweeney Int'l. Ltd.
Widener-Burrows & Associates, Inc.

FOODS/NUTRITION

Leichliter Associates

FOOD PRODUCTS

The Answer Group
BAI
Creative & Response Rsch. Svcs.
Doyle Research Associates
Greenleaf Associates, Inc.
KidFacts Research
Dutsmart Marketing
POV
Paul Schneller - Qualitative
James Spanier Associates

HEALTH & BEAUTY PRODUCTS

The Answer Group
BAI
Paul Schneller - Qualitative
Jack M. Shapiro Healthcare Rsch. &
Mgmt. Cnsltg.

HEALTH CARE

Access Research, Inc.
The Answer Group
Consumer/Industrial Research (C/IR)
Dolobowsky Qual. Svcs., Inc.
D/R/S HealthCare Consultants
Elrick and Lavidge
Erlich Transcultural Consultants
First Market Research (L. Lynch)
Irvine Consulting, Inc.
Nancy Low & Associates, Inc.
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Rockwood Research
Paul Schneller - Qualitative
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Widener-Burrows & Associates, Inc.

HISPANIC

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Ebony Marketing Research, Inc.
Erlich Transcultural Consultants
Hispanic Market Connections, Inc.
Hispanic Marketing
Communication Research
Market Development, Inc.
Phoenix Consultants
Strategy Research Corporation
Target Market Research Group, Inc.

HOUSEHOLD PRODUCTS/CHORES

Paul Schneller - Qualitative

IDEA GENERATION

Analysis Research Ltd.
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Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Leichliter Associates
Matrixx Marketing-Research Div.
Monitor Research Corp.
Outsmart Marketing
POV
Rockwood Research
Paul Schneller - Qualitative
Sweeney International, Ltd.

IMAGE STUDIES

Cambridge Associates, Ltd.
Paul Schneller - Qualitative

INDUSTRIAL

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

INSURANCE

Nancy Low & Associates, Inc.
Marketing Advantage Research

INTERACTIVE PROD/ SERVICES/RETAILING

Leichliter Associates

INVESTMENTS

The Deutsch Consultancy

LATIN AMERICA

Market Development, Inc.

MEDICAL PROFESSION

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

MODERATOR TRAINING

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

MULTIMEDIA

Marketing Advantage Research

NATURAL HEALTH CARE/REMEDIES

Focused Solutions

NEW PRODUCT DEV.

The Answer Group
BAI

Bannon Moderating Services
Cambridge Associates, Ltd.
Carlson Marketing Consultants
Creative & Response Rsch. Svcs.
Daniel Associates
Data & Management Counsel, Inc.
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Fader & Associates
First Market Research (J. Heiman)
First Market Research (L. Lynch)
Graff Works Marketing Research
Greenleaf Associates, Inc.
KidFacts Research
Leichliter Associates
Market Access Partners
Marketing Advantage Research
Outsmart Marketing
POV
Rockwood Research
Paul Schneller - Qualitative
James Spanier Associates

NON-PROFIT

Doyle Research Associates

PACKAGE DESIGN RESEARCH

Treisman & Stark Marketing, Inc.

PACKAGED GOODS

The Answer Group
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Bannon Moderating Services
Creative & Response Rsch. Svcs.
Doyle Research Associates
Paul Schneller - Qualitative

PARENTS

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

PET PRODUCTS

Cambridge Research, Inc.
The Customer Center, Inc.
Marketing Advantage Research

PHARMACEUTICALS

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

POLITICAL RESEARCH

Cambridge Associates, Ltd.

PUBLIC POLICY RSCH.

Cambridge Associates, Ltd.
CJI Research Corporation

PUBLISHING

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

RETAIL

First Market Research (L. Lynch)
Pat Henry Market Research, Inc.
Paul Schneller - Qualitative

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Erlich Transcultural Consultants
Fader & Associates
Marketing Advantage Research
Paul Schneller - Qualitative
Sunbelt Research Associates, Inc.

SERVICES

Spier Research Group

SMALL BUSINESS/ENTREPRENEURS

Leichliter Associates

Strategy Research Corporation
Yarnell Inc.

SOFT DRINKS, BEER, WINE

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

TEACHERS

Greenleaf Associates, Inc.
Marketing Advantage Research

TEENAGERS

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

TELECOMMUNICATIONS

BAI
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Horowitz Associates Inc.
Marketing Advantage Research
POV
Rockwood Research
Pamela Rogers Research
Strategy Research Corporation

TELECONFERENCING

Cambridge Research, Inc.

TELEPHONE FOCUS GROUPS

Cambridge Associates, Ltd.
Consumer/Industrial Research (C/IR)
Creative & Response Rsch. Svcs.
The Customer Center, Inc.

Market Navigation, Inc.
Medical Marketing Research, Inc.
MedProbe Medical Mktg. Rsch.

TOURISM/HOSPITALITY

Research Data Services, Inc.

TOYS/GAMES

Carlson Marketing Consultants
Fader & Associates
Greenleaf Associates, Inc.
KidFacts Research

TRANSPORTATION SERVICES

CJI Research Corporation
Strategic Focus, Inc.
Sweeney International, Ltd.

TRAVEL

Cambridge Associates, Ltd.
Michael Carraher Discovery Rsch.
Greenleaf Associates, Inc.
Research Data Services, Inc.
Paul Schneller - Qualitative
James Spanier Associates
Sweeney International, Ltd.

UTILITIES

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

VIDEO

TELECONFERENCING

The Answer Group

WEALTHY

The Deutsch Consultancy
Strategy Research Corporation

YOUTH

Fader & Associates
Outsmart Marketing
POV

Research Company News

continued from p. 21

365-7979. Fax 516-365-9351.

ESRI has opened an office in Europe at Groothandelsgebouw, P.O. Box 29099 (3001 GB), Stationsplein 45, 3013 AK Rotterdam, The Netherlands. Phone 31-10-217-0690. Fax 31-10-217-0691.

MapInfo Corp., a Troy, N.Y., maker of desktop mapping equipment, has opened offices in Japan, China, Hong Kong and Australia to serve the growing

Asia Pacific markets.

The Merchandising Group, Inc. (TMG) has moved to new offices at 79 Fifth Ave., 17th fl., New York, N.Y., 10003-3034. Phone 212-462-0700.

Reyes Research has opened a new mall location at The Esplanade Mall in Oxnard, Calif. The mall features more than 80 stores, including Sears, Robinsons-May and American Family Theatres. For more information, call Michele Reyes at 805-278-1444.

JRA (J. Reckner Associates) Marketing Research, Montgomeryville, Pa., has opened a new focus group center at 1600 Market St., Philadelphia. For more information, call 215-822-6220.

A new research company, Database Marketing Company (DBM), has opened in Moscow to compile a database of information on Russian consumers. For more information, contact Fedor Troubetsky at HOD 346, 208 E. 51st St., Suite 295, New York, N.Y., 10092-6501. E-mail: fedia@mira.com

Editorial Calendar

January	Ethnic Research*  Mystery Shopping* <ul style="list-style-type: none"> • Directory of ethnic research providers. Directory of mystery shopping. • Editorial emphasis on ethnic research and on mystery shopping.
February	Data Processing/Software* <ul style="list-style-type: none"> • Annual directory of firms providing data processing services and software products for the marketing research industry. • Research case histories and technique discussions.
March	Advertising Research <ul style="list-style-type: none"> • Articles and case histories about advertising research. • Spring Researcher Card Deck (mailed separately).
April	Business-to-Business Research <ul style="list-style-type: none"> • Articles and case histories about business-to-business research.
May	Telephone Interviewing* <ul style="list-style-type: none"> • Annual directory of telephone interviewing facilities. • Research case histories and technique discussions.
June/July	Syndicated & Omnibus Studies*/Health Care Research <ul style="list-style-type: none"> • Annual directory of firms that conduct syndicated and/or omnibus research. • Articles on health care research.
Aug./Sept.	Researcher Sourcebook* <ul style="list-style-type: none"> • Annual nationwide directory listing over 3000 providers of research products and services. No editorial content.
October	Customer Satisfaction* <ul style="list-style-type: none"> • Annual directory of firms specializing in customer satisfaction and service quality research. • Articles and case histories about customer satisfaction research.
November	Mall Research*/ Packaging Research <ul style="list-style-type: none"> • Annual directory of permanent mall research facilities. • Articles and case histories about packaging research. • Fall Researcher Card Deck (mailed separately).
December	Qualitative Research/ Focus Groups* <ul style="list-style-type: none"> • Annual directory of focus group facilities. • Articles and case histories on focus group research.

* includes directory

1995

**Directory of
mall research
facilities**

CODES:

Mall description

- H.....est.% of mall customers in high income bracket (+\$60,000)
- M.....middle income (\$30,000-60,000)
- L.....low income (under \$30,000)
- N.A.....not available

Facility description

- Stat.....no. of interviewing stations
- 1.....facility has computer-aided stations
- 2.....kitchen facilities
- 3.....private display room
- 4.....one-way mirror for viewing of stations

ALABAMA

Birmingham

Consumer Pulse of Birmingham

Brookwood Village, #612A
 Shades Creek Pkwy.
 Birmingham, AL 35209
 Ph. 205-819-0268
 Fax 205-819-1058
 H-30% M-50% L-20%
 Stat.-8 1,2,3,4
 (See advertisement on p. 57)

Polly Graham & Associates
 Eastwood Mall
 7703 Crestwood Blvd., B400
 Birmingham, AL 35210
 Ph. 205-592-4570
 Fax 205-592-4626
 Susan Burnett, Supervisor
 H-20% M-50% L-30%
 Stat.-6 1,2,3,4

Gadsden

Polly Graham & Associates
 Gadsden Mall
 1001 Rainbow Dr.
 Gadsden, AL 35901
 Ph. 205-546-6270
 Fax 205-546-1796
 Kay Ford, Supervisor
 H-25% M-50% L-25%
 Stat.-5 1,2

Huntsville

Polly Graham & Associates
 Madison Square Mall
 5901 University Dr., #111
 Huntsville, AL 35806
 Ph. 205-830-0146
 Fax 205-830-0146
 Terry Wood, Supervisor
 H-50% M-30 L-20%
 Stat.-5 1,2,4

Mobile

Polly Graham & Associates
 Bel Air Mall
 3289 Bel Air Mall
 Mobile, AL 36606
 Ph. 334-471-0059
 Fax 334-478-0015
 Martha Bowers, Supervisor
 H-30% M-35% L-35%
 Stat.-6 1,2,3,4

Montgomery

Nolan Research
 Lecroy Shopping Village
 3661 Debby Dr.
 Montgomery, AL 36111
 Ph. 334-284-4164
 Deidra K. Nolan
 H-20% M-70% L-10%
 Stat.-2

ARIZONA

Phoenix

Cunningham Field & Research Services, Inc.
 Valley West Mall
 5708 W. Hayward, Ste. 176
 Glendale, AZ 85301
 Ph. 602-937-5510
 Fax 602-937-0079
 Chad Klass, Manager
 H-30% M-50% L-20%
 Stat.-7 1,2,3,4

Friedman Marketing Services
 Consumer Opinion Center
 Paradise Valley Mall
 4550 E. Cactus
 Phoenix, AZ 85032
 Ph. 602-494-7813
 Fax 602-996-7465
 H-50% M-25% L-25%
 Stat.-10 1,2,3,4

Friedman Marketing Services
 Consumer Opinion Center
 Westridge Mall
 7611-118 W. Thomas Rd.
 Phoenix, AZ 85033
 Ph. 602-849-8080
 Fax 602-849-8083
 H-25% M-50% L-25%
 Stat.-14 1,2,3,4

Friedman Marketing Services
 Phoenix Research
 Christown Mall
 1739 W. Bethany Home Rd.
 Phoenix, AZ 85015
 Ph. 602-242-4868
 Fax 602-242-4910
 H-30% M-50% L-20%
 Stat.-11 1,2,3,4

Ruth Nelson Research Services/
 Arizona Market Research
 Metrocenter Mall
 9606 Metro Pkwy. E.
 Phoenix, AZ 85051
 Ph. 602-997-7221
 Fax 602-678-7017
 Lincoln Anderson, Manager
 H-40% M-40% L-20%
 Stat.-8 1,2,3,4

Quick Test

Superstition Springs Center
 6555-1004 E. Southern Ave.
 Mesa, AZ 85206
 Ph. 602-985-2866
 Fax 602-985-6321
 Ali Arastu, Manager
 H-3% M-37% L-60%
 Stat.-7 1,2,3,4
 (See advertisement on p. 25)

Valleywide Research, Inc.
 Santa Fe Square Mall
 1107 S. Gilbert Rd., #110
 Mesa, AZ 85204
 Ph. 602-892-5583
 Fax 602-497-3272
 DeAnn Corey, Manager
 H-20% M-60% L-20%
 Stat.-4 2,4

Tucson

Quality Controlled Services
 Tucson Mall, Space 183
 4500 N. Oracle, Box #360
 Tucson, AZ 85705
 Ph. 602-887-3502
 Fax 602-887-4480
 Annette Idso
 H-24% M-48% L-28%
 Stat.-8 1,2,3
 (See advertisement on p. 5)

ARKANSAS

Fort Smith

C&C Market Research
 Central Mall
 Ft. Smith, AR 72903
 Ph. 501-484-5637
 Income-NA
 Stat.-8 1,2,3,4

Pine Bluff

Friedman Marketing Services
 Consumer Opinion Center
 The Pines Mall
 2901 Pines Mall Dr.
 Pine Bluff, AR 71601
 Ph. 501-535-1688
 Fax 501-535-1754
 H-25% M-50% L-25%
 Stat.-15 1,2,3,4

CALIFORNIA

Fresno

Bartels Research
145 Shaw
Clovis, CA 93612
Ph. 209-298-7557
Fax 209-298-5226
Joellen Bartels, Owner
H-10% M-75% L-15%
Stat.-6 1,2,3,4

Nichols Research

Fashion Fair
557 E. Shaw
Fresno, CA 93710
Ph. 209-226-3100
Fax 209-226-9354
Amy Shields, Branch Manager
H-20% M-70% L-10%
Stat.-6 1,2,3,4
(See advertisement on the back cover)

Los Angeles

Adept Research, Inc.
Sherman Oaks Fashion Sq.
14006 Riverside Dr., #235
Sherman Oaks, CA 91423
Ph. 818-727-7494
Fax 818-727-7351
Iris Gross, Owner
H-60% M-35% L-5%
Stat.-NA 2

Adept Research, Inc.
Hawthorne Plaza
12270 Hawthorne Blvd.
Hawthorne, CA 90250
Ph. 818-727-7494
Fax 818-727-7351
Iris Gross, Owner
H-10% M-80% L-10%
Stat.-8 2,3,4

Car-Lene Research, Inc.
Santa Fe Springs Mall
Santa Fe Springs, CA 90670
Ph. 310-946-2176
Fax 310-944-4167
Danella Hawkins, Manager
H-10% M-60% L-30%
Stat.-7 1,2,3,4

Car-Lene Research, Inc.
Puente Hills Mall
City of Industry, CA 91748
Ph. 818-964-4589
Tracy Nuno, Manager
H-20% M-50% L-30%
Stat.-7 2,3,4

Consumer Pulse of Los Angeles

Galleria at South Bay, #269
1815 Hawthorne Blvd.
Redondo Beach, CA 90278
Ph. 310-371-5578
Fax 310-542-2669
Angie Abell
H-25% M-50% L-25%
Stat.-9 1,2,3,4
(See advertisement on p. 57)

Facts 'n Figures
Antelope Valley Mall
1233 W. Ave. P. Ste. 701
Palmdale, CA 93551
Ph. 805-272-4888
Fax 805-272-5676
Renee Stapleton, Manager
H-20% M-70% L-10%
Stat.-8 1,2,3,4

Facts 'n Figures
Panorama Mall
14550 Chase St., Ste. 78B
Panorama City, CA 91402
Ph. 818-891-6779
Fax 818-891-6119
H-30% M-50% L-20%
Stat.-12 1,2,3,4

Facts 'n Figures
Valencia Town Center Mall
24201 Valencia Blvd., Ste. 2317
Valencia, CA 91355
Ph. 805-222-2278
Fax 805-222-2287
Tammy Tallent, Manager
H-25% M-70% L-5%
Stat.-20 1,2,3,4

Friedman Marketing Services
Consumer Opinion Forum
Buena Park Mall
8623 On The Mall
Buena Park, CA 90620
Ph. 714-995-6000
Fax 714-995-0637
H-40% M-40% L-20%
Stat.-14 1,2,3,4

Heakin Research, Inc.
Fallbrook Mall, Ste. 304
6633 Fallbrook Ave.
Canoga Park, CA 91307
Ph. 818-712-0660
Fax 818-712-9229
Gail Stutz, Manager
H-50% M-40% L-10%
Stat.-14 1,2,3,4

Los Angeles Mktg. Rsch. Associates
Laurel Plaza Mall
Laurel Canyon & Oxnard
N. Hollywood, CA 91602
Ph. 818-506-5544
Fax 818-762-5144
William Bilkiss, Sr. Vice President
H-20% M-65% L-15%
Stat.-8 2,3,4

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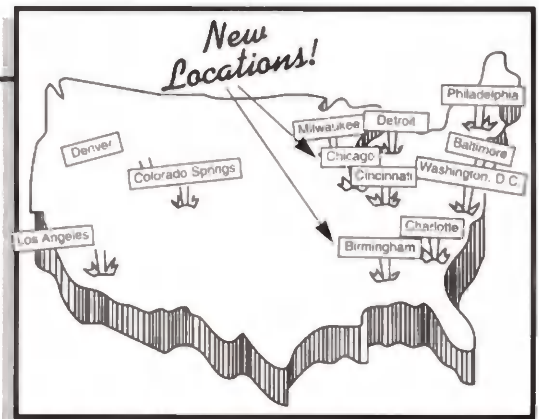
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- Experienced Corporate field management of CPI and other selected nationwide markets
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CODES:

Mall description

- H.....est. % of mall customers in high income bracket (+\$60,000)
 M.....middle income (\$30,000-60,000)
 L.....low income (under \$30,000)
 N.A.....not available

Facility description

- Stat.....no. of interviewing stations
 1.....facility has computer-aided stations
 2.....kitchen facilities
 3.....private display room
 4.....one-way mirror for viewing of stations

L.A. Research, Inc.
 9010 Office Plaza, #109
 9010 Reseda Blvd.
 Northridge, CA 91324
 Adrienne Goldbaum, President
 Ph. 818-993-5500
 Fax 818-993-5664
 H-30% M-50% L-20%
 Stat.-7 1,3

Mid-America Research, Inc.
 Santa Monica Place
 301 Santa Monica Pl.
 Santa Monica, CA 90104
 David Ottenfeld, Manager
 Ph. 310-260-3237
 Fax 310-260-3241
 H-25% M-70% L-5%
 Stat.-25 1,2,3,4

P.K.M. Mktg. Research Svcs.
 Whitwood Mall
 15618-B Whitwood Ln.
 Whittier, CA 90603
 Ph. 310-943-7137
 Fax 310-947-6261
 Robin Koerner, Manager
 H-20% M-45% L-35%
 Stat.-11 1,2,3,4

P.K.M. Mktg. Research Svcs.
 The Plaza at West Covina
 1200 W. Covina Pkwy.
 West Covina, CA 91793
 Ph. 818-856-3883
 Fax 818-856-3886
 Jane Diedrich, Manager
 H-20% M-45% L-35%
 Stat.-6 1,3,4

Quality Controlled Services

Lakewood Center Mall, Space 25
 Lakewood, CA 90712
 Ph. 310-633-7344
 Fax 310-633-3791
 Margaret Lien
 H-42% M-26% L-32%
 Stat.-NA 1,2,3
 (See advertisement on p. 5)

Quick Test

Westminster Mall
 2009 Westminster Mall
 Westminster, CA 92683
 Ph. 714-891-2111
 Fax 714-891-8985
 Linda Green, Manager
 H-20% M-60% L-20%
 Stat.-9 1,2,3
 (See advertisement on p. 25)

Reyes Research
 The Esplanade Mall
 253A Esplanade Dr.
 Oxnard, CA 93030
 Ph. 805-278-1444
 Fax 805-278-1447
 Arvind Datta, Manager
 H-25% M-40% L-35%
 Stat.-6 1,2

Southern California Interviewing Service
 Encino Center
 17277 Ventura Blvd.
 Encino, CA 91316
 Ph. 818-783-7700
 Fax 818-783-8626
 Margie Evans, Operations Manager
 H-40% M-45% L-15%
 Stat.-4 1,2,3,4

Southern California Interviewing Service
 Golden Mall
 148 N. San Fernando Blvd.
 Burbank, CA 91502
 Ph. 818-843-6166
 Fax 818-954-8261
 Anne Moiseyev, Partner
 H-22% M-60% L-18%
 Stat.-3 1,2,3

Suburban Associates
 Sherman Oaks Galleria
 15301 Ventura Blvd., Ste. 386
 Sherman Oaks, CA 91403
 Ph. 818-906-8036
 Fax 818-906-2539
 Don Smith, Manager
 H-20% M-60% L-20%
 Stat.-10 1,3,4

U.S. Research Company
 2157 Montclair Plaza Ln.
 Montclair, CA 91763
 Ph. 909-624-1244
 Fax 909-626-5183
 Income-Middle
 Stat.-NA 1,2,3,4

Orange County

AIM:LA
 Huntington Center Mall
 7777 Edinger Ave.
 Huntington Beach, CA 92647
 Ph. 714-891-2440
 Fax 714-898-1126
 Cindi Reves, Manager
 H-60% M-30% L-10%
 Stat.-8 1,2,3,4

The Question Shop, Inc.
 Nohl Plaza
 2860 N. Santiago Blvd., Ste. 100
 Orange, CA 92667
 Ph. 714-974-8020
 Fax 714-974-6968
 Ryan Reasor, President
 H-50% M-40% L-10%
 Stat.-NA 1,2,3,4

U.S. Research Company
 Mission Viejo Mall, Store #104
 27000 Crown Valley Pkwy.
 Mission Viejo, CA 92691
 Ph. 714-364-1872
 Fax 714-364-1342
 Income-High
 Stat.-NA 1,2,3

Riverside/San Bernardino

Field Management Associates
 Riverside Plaza, #3601
 Riverside, CA 92506
 Ph. 909-369-0800
 Fax 909-369-0957
 Robert Hellman, President
 H-30% M-60% L-10%
 Stat.-7 2,3,4

L.A. Research, Inc.
 Hardman Center
 5222 Arlington Ave., #E
 Riverside, CA 92504
 Ph. 909-358-0300
 Fax 909-358-0309
 Jackie Kincaid, Manager
 H-20% M-70% L-10%
 Stat.-5 1,3

Sacramento

American River Field & Service
 Cable Park Mall
 Orangevale, CA 95662
 Ph. 916-989-0961
 Charlotte Banks, Manager
 Income-Middle
 Stat.-8 1,2,3,4

Heakin Research, Inc.
 Arden Fair Mall
 1689 Arden Way, #1281
 Sacramento, CA 95815
 Ph. 916-920-1361
 Fax 916-920-1371
 Nancy Cunningham, Manager
 H-19% M-56% L-25%
 Stat.-13 1,2,3,4

Salinas

Friedman Marketing Services
 Consumer Opinion Center
 Northridge Mall
 Hwy. 101 & Boronda Rd.
 Salinas, CA 93906
 Ph. 408-449-7921
 Fax 408-449-0187
 H-30% M-50% L-20%
 Stat.-8 1,2,3,4

San Diego

Jagorda Interviewing Svcs., Inc.
Plaza Bonita Mall
3030 Plaza Bonita Rd., #111
National City, CA 92123
Ph. 619-573-0330
Fax 619-573-0538
H-23% M-33% L-44%
Stat.-8 1,2

Luth Research
Mission Valley Center
1640 Camino Del Rio N., Ste. 328
San Diego, CA 92108
Ph. 619-299-7487
Fax 619-299-0513
Beth Price, Manager
H-30% M-50% L-20%
Stat.-8 1,2,3,4
(See advertisement on p. 23)

Novick Ayres Corp.
El Camino North
2657 Vista Way, #5
Oceanside, CA 92054
Ph. 619-967-1307
Fax 619-967-4143
Suzette Novick, Owner
H-20% M-60% L-10%
Stat.-3 1,2,3,4

San Diego Surveys
Point Loma Mall
3689 Midway Dr., #D
Point Loma, CA 92110
Ph. 619-224-3113
Fax 619-224-0301
Nancy Bedoe
H-25% M-65% L-10%
Stat.-6 1,2,3,4

San Francisco

Car-Lene Research, Inc.
Stonestown Galleria
32511 20th Ave.
San Francisco, CA 94132
Ph. 415-566-9925
Fax 415-566-9929
Jeanne Coddington, Manager
H-25% M-50% L-25%
Stat.-6 1,2,3,4

Friedman Marketing Services
Consumer Opinion Center
5820 Northgate Mall
San Raphael, CA 94903
Ph. 415-472-5394
Fax 415-472-5477
H-50% M-40% L-10%
Stat.-13 1,2,3,4

Field Management Associates
217 A Torloran Park Mall
San Bruno, CA 94066
Ph. 415-588-9500
Fax 415-588-9758
Hal Berke, President
Income-Middle to High
Stat.-7 1,2,3,4

Heakin Research, Inc.
262 Bay Fair Mall
San Leandro, CA 94578
Ph. 510-278-2200
Fax 510-278-6736
Steve Teichner, Manager
H-20% M-60% L-20%
Stat.-30 1,2,3,4

MSI Hillsdale
Hillsdale Mall, #14
San Mateo, CA 94403
Ph. 415-574-9044
Fax 415-574-0385
Liane Farber, Manager
H-50% M-40% L-10%
Stat.-10 1,2,3,4

Nichols Research, Inc.
County East Mall
2550 Somersville Rd., Ste. 78
Antioch, CA 94509
Ph. 510-757-4206
Fax 510-757-5744
Beverly Trute, Branch Manager
H-20% M-70% L-10%
Stat.-4 1,2,3,4
(See advertisement on the back cover)

Nichols Research, Inc.
Newpark Mall
1155 New Park Mall
Newark, CA 94560
Ph. 510-794-2990
Fax 510-794-3471
Cheryl Blumenthal Olvera, Branch Mgr.
H-20% M-70% L-10%
Stat.-8 1,2,3,4
(See advertisement on the back cover)

Quick Test
Southland Mall
203 Southland Mall
Hayward, CA 94545
Ph. 510-785-4650
Fax 510-785-0641
Sueann Gomez, Manager
H-5% M-20% L-75%
Stat.-9 1,2,3,4
(See advertisement on p. 25)

Margaret Yarbrough & Associates
South Shore Center
415 Otis Dr.
Alameda, CA 94501
Ph. 510-522-8600
Fax 510-522-8600
Diane Kientz, Manager
H-40% M-50% L-10%
Stat.-7 1,2,3

San Jose

Consumer Opinion Services, Inc.
Great Mall of the Bay Area
500 Great Mall Dr.
Milpitas, CA 95035
Ph. 408-934-9036
Fax 408-934-9038
Maxine Barbee, Manager
H-25% M-55% L-20%
Stat.-9 1,2,3,4
(See advertisements on pp. 63, back cover)

Heakin Research, Inc.
Vallico Fashion Park, Ste. 2031
10123 N. Wolfe Rd.
Cupertino, CA 95014
Ph. 408-253-4690
Fax 408-253-6647
Ann Pollard, Manager
H-50% M-37% L-13%
Stat.-6 1,2,3,4

COLORADO

Colorado Springs

Brewer Research/The Springs Research
Citadel Mall
750 Citadel Dr. E.
Colorado Springs, CO 80909
Ph. 719-597-9869
Fax 719-597-9869
Esther Brewer, Owner
Income-N.A.
Stat.-8 1,2,3,4

Consumer Pulse of Colorado Springs
The Citadel Mall
750 Citadel Dr. E., #1084
Colorado Springs, CO 80909
Ph. 719-596-6933
Fax 719-596-6935
Mary Schneider
H-20% M-60% L-20%
Stat.-9 1,2,3
(See advertisement on p. 57)

Barbara Prince Associates, Inc.
Mall of the Bluffs
3650 Austin Bluff Pkwy.
Colorado Springs, CO 80918
Ph. 516-561-1723
Fax 516-561-2523
Barbara Prince, President
H-15% M-60% L-25%
Stat.-10 2,3,4

U.S. Research Company
Chapel Hills Mall
1710 Briargate Blvd., Ste. 315
Colorado Springs, CO 80920
Ph. 719-598-8070
Fax 719-598-1376
Income-Middle
Stat.-NA 1,2,3,4

Denver

Car-Lene Research, Inc.
Twin Peaks Mall
1250 S. Hoover Rd., Ste. 51
Longmont, CO 80501
Ph. 501-484-5637
Phil Zvala, Manager
Income-NA
Stat.-6 1,2,3,4

CODES:

Mall description

- H.....est.% of mall customers in high income bracket (+\$60,000)
 M.....middle income (\$30,000-60,000)
 L.....low income (under \$30,000)
 N.A.....not available

Facility description

- Stat.....no. of interviewing stations
 1.....facility has computer-aided stations
 2.....kitchen facilities
 3.....private display room
 4.....one-way mirror for viewing of stations

Consumer Pulse of Denver

Aurora Mall
 14200 Alameda Ave.
 Aurora, CO 80012
 Ph. 303-341-1211
 Fax 303-341-4469
 Steve Ansel
 H-20% M-50% L-30%
 Stat.-9 1,2,3,4
 (See advertisement on p. 53)

Friedman Marketing Services
 Consumer Market Research
 Westminster Mall, Space 65A
 5513 W. 88th Ave.
 Westminster, CO 80030
 Ph. 303-428-6117
 Fax 303-428-6513
 H-20% M-60% L-20%
 Stat.-N/A 1,2,3,4

Friedman Marketing Services
 Consumer Opinion Center
 Southwest Plaza
 8501 W. Bowles Ave.
 Littleton, CO 80123
 Ph. 303-972-8734
 Fax 303-933-0476
 H-20% M-60% L-20%
 Stat.-14 1,2,3,4

Ruth Nelson Research Services/
 Colorado Market Research
 Buckingham Square
 1335 S. Joliet
 Aurora, CO 80012
 Ph. 303-750-0290
 Fax 303-750-9573
 Sally Phelps, Manager
 H-20% M-50% L-30%
 Stat.-8 1,2,3,4

Quick Test

Villa Italia Mall
 7200 W. Alameda, Ste. 203
 Lakewood, CO 80226
 Ph. 303-937-0144
 Fax 303-937-0502
 Jackie Stepanich, Manager
 H-2% M-80% L-18%
 Stat.-4 1,2,3,4
 (See advertisement on p. 25)

CONNECTICUT

Bridgeport

Shapiro Research Services, Inc.
 Trumbull Shopping Park
 5065 Main St.
 Trumbull, CT 06611
 Ph. 203-373-9391
 Fax 203-371-4257
 Sandy Shapiro, President
 H-20% M-60% L-20%
 Stat.-6 1,2,3,4

Danbury

Performance Plus, Inc.
 Danbury Fair Mall
 7 Backus Ave.
 Danbury, CT 06810
 Ph. 508-872-1287
 Fax 508-879-7108 x112
 Shirley Shames, President
 H-60% M-30% L-10%
 Stat.-10 1,2,3,4
 (See advertisements on pp. 23, back cover)

Waterbury

Firm Facts Interviewing Service
 Naugatuck Valley Mall
 920 Wolcott St.
 Ph. 203-759-1142
 Fax 203-759-5822
 Sydell Lefcort or Harriet Quint
 H-25% M-60% L-15%
 Stat.-6 1,2,3

DISTRICT OF COLUMBIA

Consumer Pulse of Washington

The Mall at Manassas
 8300 Sudley Rd.
 Manassas, VA 22110
 Ph. 703-368-5544
 Fax 703-368-7709
 Jeff Davis
 H-20% M-60% L-20%
 Stat.-8 1,2,3,4
 (See advertisement on p. 57)

Facts in Focus, Inc.
 St. Charles Towne Center
 5000 Rte. 301, Ste. 2006
 Waldorf, MD 20603
 Ph. 301-870-7799
 Fax 301-705-8348
 Anne O'Connor, Manager
 H-40% M-35% L-25%
 Stat.-15 1,2,3,4

Jackson Associates, Inc.

Springfield Mall
 6691 B Springfield Mall
 Springfield, VA 22150
 Ph. 770-394-8700
 Fax 770-394-2747
 Lyn Tomlin, Dir. Mall Ops.
 H-40% M-40% L-20%
 Stat.-6 1,2,3,4
 (See advertisements on pp. 23, back cover)

Shugoll Research

Ballston Common
 4238 Wilson Blvd.
 Arlington, VA 22203
 Ph. 703-841-2414
 Fax 703-841-2422
 Luda Sunderland, Manager
 H-20% M-60% L-20%
 Stat.-4 1
 (See advertisement on the back cover)

T.I.M.E. Market Research

425 Spotsylvania Mall
 Fredricksburg, VA 22407
 Ph. 703-786-3376
 Fax 703-786-3925
 Debbie Nistle, Manager
 H-25% M-60% L-15%
 Stat.-12 1,2,3,4

FLORIDA

Bradenton

Mid-America Research, Inc.
 De Soto Square Mall
 303 US 301 Blvd. W., #811
 Bradenton, FL 34205
 Ph. 813-746-1849
 Fax 813-746-6157
 Margaret Wilde
 H-12% M-78% L-10%
 Stat.-12 1,2,3,4

Fort Lauderdale

Cunningham Field & Research Services, Inc.
 Pembroke Pines Mall
 11401 Pines Blvd., Ste. 702
 Pembroke Pines, FL 33026
 Ph. 305-438-9315
 Fax 305-438-9367
 H-30% M-50% L-20%
 Stat.-8 1,2,3,4

Heakin Research, Inc.

Coral Square Mall
 9569 W. Atlantic Blvd.
 Coral Springs, FL 33071
 Ph. 305-753-4466
 Fax 305-753-4981
 Linda Boneville
 H-30% M-60% L-10%
 Stat.-14 2,3,4

1995 MALL FACILITY DIRECTORY

Mar's Surveys, Inc.
Pompano Square Mall
One Pompano Square, #D-1
Pompano Beach, FL 33062
Ph. 954-783-8309
Fax 954-783-8308
Paula Fuchs, Supervisor
H-25% M-55% L-20%
Stat.-8 1,2,3,4

Barbara Prince Associates, Inc.
Coral Ridge Mall
3200 N. Federal Hwy.
Ft. Lauderdale, FL 33306
Ph. 516-561-1723
Fax 516-561-2523
Barbara Prince, President
H-10% M-50% L-40%
Stat.-6 2,3,4

South Florida Market Research
(Formerly Alenik Field Services)
The Festival Mall
2900 W. Sample Rd.
Ft. Lauderdale, FL 33060
Ph. 954-975-5982
Fax 954-984-8963
Lester or Beatrice Alenik
Income-High
Stat.-3 3

Weitzman & Philip, Inc.
Hollywood Mall
3251 Hollywood Blvd.
Hollywood, FL 33021
Ph. 305-985-5600
Fax 305-965-5600
Dan Philip, President
H-20% M-40% L-40%
Stat.-7 2,3,4

Fort Myers

Bernett Research Services, Inc.
Edison Mall
4125 Cleveland Ave.
Fort Myers, FL 33901
Ph. 813-939-1200
Fax 813-939-1413
H-20% M-60% L-20%
Stat.-10 1,2,3,4
(See advertisement on p. 40)

T.I.M.E. Market Research
505 Pt. Charlotte Mall
1441 Tamiami Trail
Pt. Charlotte, FL 33948
Ph. 813-625-5111
Fax 813-625-6416
Sharon People, Manager
H-25% M-60% L-15%
Stat.-10 1,2,3,4

Jacksonville

Cunningham Field & Research Services, Inc.
Orange Park Mall
1910 Wells Rd., Ste. 1002
Orange Park, FL 32073
Ph. 904-264-2814
Fax 904-264-3619
Income-NA
Stat.-NA

Kirk Research Services, Inc.
Roosevelt Mall
4525 Roosevelt Blvd.
Jacksonville, FL 32210
Ph. 904-387-0883
Fax 904-387-0268
Rebecca Kirk, Vice President
H-25% M-50% L-25%
Stat.-4 1,3

Irwin Research Services, Inc.
The Avenues Mall
10300 Southside Blvd., #168
Jacksonville, FL 32256
Ph. 904-363-1480
Fax 904-363-1682
Kathy Paddock
H-30% M-60% L-10%
Stat.-10 1,2,3
(See advertisement on p. 23)

Irwin Research Services, Inc.
Regency Square Mall
9501 Arlington Expy., Ste. 310A
Jacksonville, FL 32225
Ph. 904-725-3999
Fax 904-725-9005
Barbara Bullard
H-34% M-53% L-13%
Stat.-12 1,2,3
(See advertisement on p. 23)

Melbourne

Quick Test
Melbourne Square Mall
1700 W. Newhaven Ave., Ste. 577
Melbourne, FL 32904
Ph. 407-729-9809
Fax 407-729-9551
Lori Weingarten, Manager
H-30% M-50% L-20%
Stat.-10 3
(See advertisement on p. 25)

Miami

Jean M. Light Interviewing Service
163rd. St. Mall
N.E. 163rd St.
Miami, FL 33162
Ph. 305-264-5780
Fax 305-264-6419
Jean Light, President
H-1% M-85% L-14%
Stat.-8 1,2,3

Jean M. Light Interviewing Service
Westchester Mall
S.W. 24 St.
Miami, FL 33155
Ph. 305-264-5780
Fax 305-264-6419
Jean Light, President
H-5% M-70% L-25%
Stat.-4 1,2,3,4

National Opinion Research Services
Miami International Mall
1455 N.W. 107th Ave., #687
Miami, FL 33172
Ph. 305-591-1388
Fax 305-592-1188
Daniel Clapp, President
H-30% M-60% L-10%
Stat.-11 1,2,3,4

Rife Market Research, Inc.
Skylake Mall
1688 N.E. Miami Gardens Dr.
Miami, FL 33179
Ph. 305-944-0076
Fax 305-944-8102
Sandy Palmer
H-15% M-74% L-11%
Stat.-8 1,2,3,4
(See advertisement on p. 14)

Weitzman & Philip, Inc.
California Club Mall
850 Ives Dairy Rd.
Miami, FL 33179
Ph. 305-653-6323
Fax 305-653-4016
Dan Philip, President
H-25% M-45% L-30%
Stat.-10 2,3,4

Orlando

Quick Test
Lake Square Mall
10401-082 U.S. Hwy. 441
Leesburg, FL 34788
Ph. 904-365-0505
Fax 904-365-2005
Tracey Seitz
H-9% M-28% L-63%
Stat.-6 3
(See advertisement on p. 25)

U.S. Research Company
Altamonte Mall
521 Altamonte Ave.
Altamonte Springs, FL 32701
Ph. 407-332-9260
Fax 407-332-0718
H-35% M-55% L-10%
Stat.-10 1,2,3,4

U.S. Research Company
Florida Mall, Rm. 422
8001 S. Orange Blossom Tr.
Orlando, FL 32809
Ph. 407-851-7114
Fax 407-851-7115
H-30% M-55% L-15%
Stat.-10 1,2,3,4

Sarasota

Starr Research
Sarasota Square Mall
8201 S. Tamiami Trail, #54
Sarasota, FL 34238
Ph. 941-925-7827
Fax 914-922-3289
Jim Pobicki, Vice President
H-60% M-30% L-10%
Stat.-6 1,2,3,4

CODES:

Mall description

- H.....est.% of mall customers in high income bracket (+\$60,000)
 M.....middle income (\$30,000-60,000)
 L.....low income (under \$30,000)
 N.A.....not available

Facility description

- Stat.....no. of interviewing stations
 1.....facility has computer-aided stations
 2.....kitchen facilities
 3.....private display room
 4.....one-way mirror for viewing of stations

Tallahassee

Friedman Marketing Services
 Consumer Opinion Center
 Tallahassee Mall
 2415 N. Monroe
 Tallahassee, FL 32303
 Ph. 904-385-4399
 Fax 904-385-3481
 H-25% M-50% L-25%
 Stat.-9 1,2,3,4

Tampa/ St. Petersburg

Adam Market Research, Inc.
 University Mall
 2200 E. Fowler Ave.
 Tampa, FL 33612
 Ph. 813-875-4005
 Fax 813-875-4055
 Mark Siegel, Director
 H-25% M-40% L-35%
 Stat.-7 2,3

Car-Lene Research, Inc.
 Pinellas Square Mall
 7200 U.S. Hwy. 19
 Pinellas Park, FL 34665
 Ph. 813-527-0113
 Sharon Brandy, Manager
 H-14% M-36% L-50%
 Stat.-8 1,2,3,4

Cunningham Field & Research Services, Inc.
 Countryside Mall
 27001 U.S. Hwy. 19 N., #2074
 Clearwater, FL 34621
 Ph. 813-796-8944
 Fax 813-796-7199
 Suzy Adams
 Income-NA
 Stat.-NA

IDD Market Research, Inc.
 Eastlake Square Mall
 5701 E. Hillsborough Ave.
 Tampa, FL 33610
 Ph. 813-884-0088
 Isabel Dunn, President
 H-31% M-57% L-12%
 Stat.-12 1,2,3

Barbara Nolan Market Research
 Tyron Square Mall
 6901 22nd Ave. S.
 St. Petersburg, FL 33710
 Ph. 813-345-5444
 Fax 813-347-0979
 Income-Low to Middle
 Stat.-NA 1,2,3,4

Quick Test

Gulf View Square Mall
 9409 U.S. Hwy. 19 N., Ste. 709
 Port Richey, FL 34668
 Ph. 813-847-2222
 Fax 813-842-8541
 Randy Carson, Manager
 H-10% M-30% L-60%
 Stat.-6 3
 (See advertisement on p. 25)

Suburban Associates
 Tampa Bay Center Mall
 4302 W. Martin Luther King Hwy., #1037A
 Tampa, FL 33607
 Ph. 813-871-2516
 Fax 813-874-0792
 Alma Stillley, Manager
 H-20% M-50% L-30%
 Stat.-5 1,2,3,4

U.S. Research Company
 Tyrone Square Mall
 6901 22nd Ave. N., #698
 St. Petersburg, FL 33710
 Ph. 813-345-5444
 Fax 813-347-0979
 Income-Middle
 Stat.-NA 1,2,3,4

GEORGIA

Athens

Jackson Associates, Inc.
 Georgia Square Mall
 3600 Atlanta Hwy.
 Athens, GA 30610
 Ph. 770-394-8700
 Fax 770-394-2747
 Lyn Tomlin, Dir. Mall Ops.
 H-10% M-40% L-50%
 Stat.-6 1,2,3
 (See advertisements on pp. 23, back cover)

Atlanta

Car-Lene Research, Inc.
 Market Square Mall
 2050 Lawrenceville Hwy.
 Decatur, GA 30033
 Ph. 404-728-8810
 Fax 404-633-9841
 Cassandra McClain, Manager
 H-30% M-60% L-10%
 Stat.-4 1,2,3,4

Cunningham Field & Research Services, Inc.
 North Point Mall
 1000 N. Point Circle, Ste. 1002
 Alpharetta, GA 30202
 Ph. 404-475-3880
 Ryan Althaus, Manager
 H-35% M-55% L-10%
 Stat.-8 1,2,3,4

Heakin Research, Inc.
 Gwinett Place Mall
 2100 Pleasant Hill Rd.
 Duluth, GA 30136
 Ph. 404-476-0714
 Fax 404-476-3194
 Terri Clark, Manager
 Income-N.A.
 Stat.-10 1,2,3,4

Jackson Associates, Inc.
 Southlake Mall
 2443 Southlake Mall
 Morrow, GA 30260
 Ph. 770-394-8700
 Fax 770-394-2747
 Lynn Tomlin
 H-40% M-40% L-20%
 Stat.-4 1,4
 (See advertisements on pp. 23, back cover)

MacConnell Research Services, Inc.
 Greenbrier Mall
 2841 Greenbrier Pkwy. S.W.
 Atlanta, GA 30331
 Ph. 404-451-6236
 Fax 404-451-6184
 Joy M. MacConnell, President
 H-30% M-40% L-30%
 Stat.-10 1,2,3

MacConnell Research Services, Inc.
 Avondale Mall
 3588-E Memorial Dr.
 Decatur, GA 30032
 Ph. 404-451-6236
 Fax 404-451-6184
 Joy M. MacConnell, President
 H-30% M-50% L-20%
 Stat.-10 1,2,3,4

MacConnell Research Services, Inc.
 Roswell Mall
 608 Holcomb Bridge Rd.
 Roswell, GA 30076
 Ph. 404-451-6236
 Fax 404-451-6184
 Joy M. MacConnell, President
 H-30% M-50% L-20%
 Stat.-8 1,3

MacConnell Research Services, Inc.
 Beaumont Hills Mall
 2486 N. Atlanta St.
 Smyrna, GA 30080
 Ph. 404-451-6236
 Fax 404-451-6184
 Joy M. MacConnell, President
 H-10% M-60% L-30%
 Stat.-6 1,3

1995 MALL FACILITY DIRECTORY

Mid-America Research, Inc.
Lenox Square Mall
3393 Peachtree Rd.
Atlanta, GA 30326
Ph. 404-261-8011
Fax 404-261-5576
Deborah Wilson, Manager
H-26% M-60% L-14%
Stat.-24 1,2,3,4

Mid-America Research, Inc.
Northlake Mall
4800 Briarcliff Rd.
Atlanta, GA 30345
Ph. 404-493-1403
Fax 404-493-9050
Bettie Hutchinson, Manager
H-19% M-76% L-5%
Stat.-12 1,2,3,4

Quick Test

Town Center at Cobb
400 Ernest Barret Pkwy., Ste. 272
Kennesaw, GA 30144
Ph. 404-423-0884
Fax 404-424-5354
Lucille Slowey
H-55% M-35% L-10%
Stat.-10 1,2,3,4
(See advertisement on p. 25)

John Stolzberg Market Research
Outlets Limited Mall
3750 Venture Dr.
Duluth, GA 30136
Ph. 404-497-8656
Fax 404-497-8656
John Stolzberg
H-30% M-60% L-10%
Stat.-4 1,3

Tannenbaum Research Services
South DeKalb Mall, #80
Atlanta, GA 30034
Ph. 404-321-1770
Fax 404-636-3037
Judy Tannenbaum
H-30% M-50% L-20%
Stat.-8 2,3,4

Tannenbaum Research Services
Outlet Square Mall
4166 Buford Hwy.
Atlanta, GA 30345
Ph. 404-321-1770
Fax 404-636-3037
Judy Tannenbaum
H-50% M-40% L-10%
Stat.-7 2,3

Gainesville

Jackson Associates, Inc.
Lakeshore Mall
1285 W. Washington St.
Gainesville, GA 30501
Ph. 770-394-8700
Fax 770-394-2747
Lyn Tomlin, Dir. Mall Ops.
H-20% M-50% L-30%
Stat.-6 1,2,3,4
(See advertisements on pp. 23, back cover)

IDAHO

Boise

Consumer Opinion Services, Inc.
Boise Towne Square
350 N. Milwaukee St.
Boise, ID 83788
Ph. 208-323-8584
Fax 208-323-8593
Robert Corbin, Manager
H-15% M-60% L-25%
Stat.-9 1,2,3
(See advertisement on pp. 63, back cover)

ILLINOIS

Chicago

Bryles Survey Service
Bremontown Mall
6847 159th St.
Tinley Park, IL 60477
Ph. 708-532-6800
Fax 708-532-1880
Robert Bryles, President
Income-NA
Stat.-6 1,2,3

Bryles Survey Service
Northfield Mall
Bradley, IL 60915
Ph. 708-532-6800
Robert Bryles, President
Income-NA
Stat.-NA

Bryles Survey Service
Century Mall
8275 Broadway
Merrillville, IN 46410
Ph. 708-532-6800
Robert Bryles, President
Income-NA
Stat.-6 1,2

Car-Lene Research, Inc.
Northbrook Court, #1187
Northbrook, IL 60062
Ph. 708-498-1305
H-40% M-60% L-0%
Stat.-8 2,3,4

Car-Lene Research, Inc.
Deerbrook Mall
188 S. Waukegan Rd.
Deerfield, IL 60015
Ph. 708-564-1454
Fax 708-564-3113
Karen Canzoneri, President
H-10% M-80% L-10%
Stat.-8 2,3,4

Seattle

Portland

Spokane

Boise

San Jose

Mall Intercepts
Focus Groups
Central Telephone
Pre-Recruits
Audits
Distribution Checks
CRT Interviews
Product Purchases
Mystery Shopping
Medical
Executive
Video Conferencing



The most fundamental part of research is the question. We believe that your questions are the very heart of what should matter, and those we leave in your capable hands. **The answers** however are where we specialize. Call us for your next data collection assignment.

Consumer Opinion Services

We answer to you
12825 1st Avenue South
Seattle, WA 98168 206/241-6050
Ask for Jerry or Greg Carter

1995 MALL FACILITY DIRECTORY

CODES:

Mall description

H.....est.% of mall customers in high income bracket (+\$60,000)
M.....middle income (\$30,000-60,000)
L.....low income (under \$30,000)
N.A.....not available

Facility description

Stat.....no. of interviewing stations
1.....facility has computer-aided stations
2.....kitchen facilities
3.....private display room
4.....one-way mirror for viewing of stations

Consumer Pulse of Chicago

Springhill Mall
West Dundee, IL 60118
Ph. 708-428-0885
Fax 708-428-4554
Doria Kramer
H-30% M-50% L-20%
Stat.-8 1,2,3,4
(See advertisement on p. 57)

Consumer Surveys Company

Northpoint Shopping Center
304 E. Rand Rd.
Arlington Heights, IL 60004
Ph. 847-394-9411
Fax 847-394-0001
Deanna Kohn, Nat'l. Field Dir.
H-44% M-38% L-18%
Stat.-10 1,2,3,4
(See advertisement on p. 23)

Consumer Surveys Company

Chicago Ridge Mall
730 Chicago Ridge Mall
Chicago Ridge, IL 60415
Ph. 847-394-9411
Fax 847-394-0061
Deanna Kohn, Nat'l. Field Dir.
H-32% M-48% L-32%
Stat.-5 1,2,3,4
(See advertisement on p. 23)

Facts In Focus, Inc.

Fox Valley Center
2260 Fox Valley Center
Aurora, IL 60504
Ph. 708-898-2166
Fax 708-898-2172
Matt Johnson, Manager
H-40% M-40% L-20%
Stat.-12 1,2,3,4

Friedman Marketing Services

Consumer Opinion Center
Harlem-Irving Plaza
4192 Harlem Ave.
Norridge, IL 60634
Ph. 708-452-7660
Fax 708-452-9865
H-25% M-50% L-25%
Stat.-NA 1,2,4

Heakin Research, Inc.
North Riverside Mall
7501 W. Cermak Rd.
N. Riverside, IL 60546
Ph. 708-447-9208
Fax 708-447-9268
Bridget Adell, Manager
H-28% M-45% L-27%
Stat.-8 2,3

Heakin Research, Inc.

Louis Joliet Mall
1166 Mall Loop Dr.
Joliet, IL 60435
Ph. 815-439-2053
Fax 815-439-2162
Molly Vaught, Manager
H-34% M-28% L-38%
Stat.-8 1,2,3,4

Mid-America Research, Inc.

Randhurst Shopping Center
999 N. Elmhurst Rd., #17
Mt. Prospect, IL 60056
Ph. 708-392-0800
Fax 708-259-7259
H-33% M-52% L-15%
Stat.-20 1,2,3,4

Mid-America Research, Inc.

Orland Square Mall, #280
Orland Park, IL 60462
Ph. 708-349-0888
Fax 708-349-9407
Irene Kasten
H-24% M-63% L-14%
Stat.-12 1,2,3,4

Precision Field Services, Inc.

Gurnee Mills Mall
6170 W. Grand Ave., Ste. 588
Gurnee, IL 60031
Ph. 708-855-1115
Fax 708-855-1116
Scott Adleman, Vice President
H-40% M-40% L-20%
Stat.-14 1,2,3,4

Quality Controlled Services

Stratford Square Mall
424 Stratford Square
Bloomington, IL 60108
Ph. 708-924-0285
Fax 708-924-7442
Marge McMahon
H-32% M-63% L-5%
Stat.-4 1,2,3,4
(See advertisement on p. 5)

Quick Test

Ford City Mall
760 S. Cicero Ave.
Chicago, IL 60652
Ph. 312-581-9400
Fax 312-581-9758
Jim Dague, Manager
H-9% M-44% L-47%
Stat.-12 1,2,3,4
(See advertisement on p. 25)

Quick Test

Hawthorn Center
429 Hawthorn Center
Vernon Hills, IL 60061
Ph. 708-367-0036
Fax 708-367-4863
Marlene Benjamin, Manager
H-60% M-30% L-10%
Stat.-11 1,2,4
(See advertisement on p. 25)

Survey Center

Hickory Palos Square
9638 S. Roberts Rd.
Hickory Hills, IL 60457
Ph. 708-430-6400
Fax 708-430-6489
H-20% M-50% L-30%
Matthew Smith, Director
Stat.-15 1

Survey Center

North Pier Mall
455 E. Illinois St.
Chicago, IL 60611
Ph. 312-321-8100
Fax 312-321-0607
Matthew Smith, Director
H-40% M-50% L-10%
Stat.-5 1,2,3,4

U.S. Research Company

Charlestowne Centre Mall, #C221
St. Charles, IL 60174
Ph. 708-377-7020
Fax 708-377-7252
Income-NA
Stat.-NA

Peoria

Scotti Research, Inc.

Northwoods Mall
4501 War Memorial
Peoria, IL 61613
Ph. 309-682-4254
Fax 309-673-5942
Becky Burroughs, Supervisor
H-25% M-50% L-25%
Stat.-6 1,2,3

INDIANA

Fort Wayne

Dennis Research
Glenbrook Square
4201 Coldwater Rd.
Fort Wayne, IN 46805
Ph. 219-483-2884
Fax 219-482-5503
Linda Hammer, Mall Supervisor
H-30% M-60% L-10%
Stat.-5 1,2,3,4

Indianapolis

Herron Associates, Inc.
Greenwood Park, #C-26
1251 U.S. 31 N.
Greenwood, IN 46142
Ph. 317-882-3800
Fax 317-887-8304
Paul Jorgensen
H-20% M-50% L-30%
Stat.-12 1,2,3,4
(See advertisements on pp. 65, back cover)

Herron Associates, Inc.
Washington Square
10202 E. Washington St.
Indianapolis, IN 46229
Ph. 317-882-3800
Fax 317-897-8265
Paul Jorgensen
H-10% M-40% L-50%
Stat.-13 1,2,3,4
(See advertisements on pp. 65, back cover)

Jackson & Jackson Research, Inc.
Fair Oaks Mall
5144 Madison Ave., Ste. 9
Indianapolis, IN 46227
Ph. 317-782-3066
Janet Jackson, President
H-15% M-71% L-14%
Stat.-6 1,2,3,4

IOWA

Council Bluffs
(See Omaha, NE)

Des Moines

T.L. Grantham & Associates
Park Fair Mall
100 E. Euclid Ave., Ste. 157
Des Moines, IA 50313
Ph. 515-288-7156
Fax 515-288-0661
Vada Grantham, CEO
H-15% M-65% L-20%
Stat.-2 1,2,3,4

Mid-Iowa Interviewing
Valley West Mall
1551 35th St., Ste. 157A
West Des Moines, IA 50266
Ph. 515-225-6232
Fax 515-225-1184
Debbie Gudehus, General Manager
H-30% M-40% L-30%
Stat.-6 1,2,3,4

Mid-Iowa Interviewing
Southridge Mall
1111 E. Army Post Rd. Ste. 152
Des Moines, IA 50315
Ph. 515-225-6232
Fax 515-225-1184
Debbie Gudehus, General Manager
H-35% M-45% L-20%
Stat.-12 1,2,3,4

PMR-Personal Marketing Research
200 Merle Hay Mall
3800 Merle Hay Rd.
Des Moines, IA 50310
Ph. 515-270-1703
Fax 515-270-9070
Bonnie Howard, Manager
H-17% M-88% L-15
Stat.-6 1,2,3,4

KANSAS

Kansas City
(See Kansas City, MO)

Topeka

Quality Controlled Services
Westridge Mall
1801 Southwest Wanamaker
Topeka, KS 66604
Ph. 913-273-0091
Fax 913-273-0554
Debbie Bruce
H-30% M-50% L-20%
Stat.-6 1,2,3
(See advertisement on p. 5)

Wichita

Data Net, Inc.
Towne East Square
7700 E. Kellogg, #231
Wichita, KS 67207
Ph. 316-682-6655
Fax 316-682-6664
Janet Brown, Manager
H-20% M-70% L-10%
Stat.-9 1,2,3

U.S. Research Company
Towne West Square, Store #804
Wichita, KS 67209
Ph. 316-943-1153
Fax 316-943-4435
Income-Middle
Stat.-NA 1,2,3,4

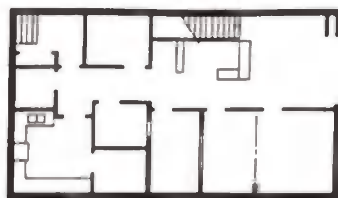
KENTUCKY

Louisville

Fangman Research, Inc.
Greentree Mall
1941 Bishop Lane, Ste.806
Louisville, KY 40218
Ph. 502-456-5300
Fax 502-456-2404
Allen B. Fangman, Vice President
H-25% M-50% L-25%
Stat.-6 1,2,3,4

MRK, Inc.
Mid City Mall
1250 Bardstown Rd
Louisville, KY 40204
Ph. 502-458-4159
Fax 502-456-5776
Connie Pearl, President
H-1% M-79% L-20%
Stat.-7 1,2,3,4

THE MALL DIFFERENCE



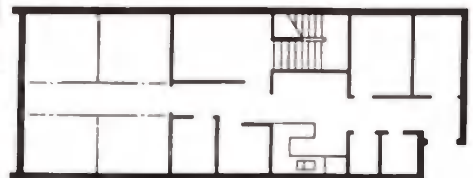
GREENWOOD PARK MALL, INDIANAPOLIS

- ◆ Large Test Kitchen with commercial wiring
- ◆ Enclosed interviewing rooms
- ◆ Balcony level of 900 sq. ft. open space



HERRON ASSOCIATES, INC.
(317)882-3800 Phone
(317)882-4716 Fax

- ◆ Quality...
- ◆ Experience...
- ◆ Dedication...



WASHINGTON SQUARE MALL INDIANAPOLIS

- ◆ Test Kitchen
- ◆ Enclosed interviewing rooms with flexible room sizes
- ◆ Mezzanine level of 1040 sq. ft. of enclosed space

CODES:

Mall description

- H.....est.% of mall customers in high income bracket (+\$60,000)
 M.....middle income (\$30,000-60,000)
 L.....low income (under \$30,000)
 N.A.....not available

Facility description

- Stat.....no. of interviewing stations
 1.....facility has computer-aided stations
 2.....kitchen facilities
 3.....private display room
 4.....one-way mirror for viewing of stations

Personal Opinion, Inc.
 Bashford Manor Mall
 Louisville, KY 40207
 Ph. 502-899-2400
 Fax 502-899-2404
 Linda Schulz, Dir. Mktg. Rsch.
 H-20% M-60% L-20%
 Stat.-6 1,2,3

Personal Opinion, Inc.
 River Falls Mall
 Clarksville, IN
 Ph. 502-899-2400
 Fax 502-899-2404
 Linda Schulz, Dir. Mktg. Rsch.
 H-20% M-55% L-25%
 Stat.-9 1,2,3,4

LOUISIANA

Baton Rouge

Gulf States Research Center
 Bon Marche Mall
 7361 Florida Blvd.
 Baton Rouge, LA 70806
 Ph. 800-848-2555
 Fax 504-925-9900
 Robert Landsberger, President
 H-20% M-70% L-10%
 Stat.-6 1,2,3,4

New Orleans

Friedman Marketing Services
 Consumer Opinion Center
 Belle Promenade Mall
 1701 Baratavia Blvd.
 Marrero, LA 70072
 Ph. 504-340-0972
 Fax 504-341-4264
 H-25% M-50% L-25%
 Stat.-14 1,2,3,4

Gulf States Research Center
 Clearview Shopping Mall
 4426 Veterans Memorial Hwy.
 Metairie, LA 70006
 Ph. 504-454-1737
 Fax 504-454-2461
 Tim Villar
 H-30% M-50% L-20%
 Stat.-6 1,2,3

Heakin Research, Inc.
 Esplanade Mall, Ste. 118
 1401 W. Esplanade
 Kenner, LA 70065
 Ph. 504-404-9188
 Fax 504-464-9936
 H-21% M-45% L-34%
 Stat.-12 2,3,4

Linden Research Services, Inc.
 Oakwood Mall
 197-36 Westbank Expy.
 Gretna, LA 70053
 Ph. 504-368-9825
 Fax 504-368-9866
 Marty Olson, Dir. of Ops.
 H-28% M-51% L-21%
 Stat.-6 1,2,3,4

Linden Research Services, Inc.
 Lakeside Mall
 3301 Veterans Blvd.
 Metairie, LA 70002
 Ph. 504-837-0013
 Fax 504-837-0012
 Marty Olson, Dir. of Ops.
 H-37% M-43% L-20%
 Stat.-6 1,2,3,4

NGL Research Services - New Orleans
 North Shore Square
 150 N. Shore Square Blvd., Ste. 4001
 Slidell, LA 70460
 Ph. 504-456-9025
 Fax 504-456-9072
 Lena G. Webre, Proj. Dir.
 H-40% M-40% L-20%
 Stat.-8 1,2,3,4

MARYLAND

Baltimore

AIM/Baltimore
 Golden Ring Mall
 6400 Rossville Blvd.
 Baltimore, MD 21237
 Ph. 410-391-7750
 Fax 410-391-7850
 Sue Roberts, Manager
 H-40% M-40% L-20%
 Stat.-6 1,2,3,4

AIM/Baltimore
 Security Square Mall
 6901 Security Blvd.
 Baltimore, MD 21207
 Ph. 410-597-9904
 Fax 410-597-9008
 Debbie Michocki, Manager
 H-40% M-40% L-20%
 Stat.-6 1,2,3,4

Consumer Pulse of Baltimore
 Westview Mall
 5748 Baltimore National Pike. #B102
 Baltimore, MD 21228
 Ph. 410-744-7017
 Fax 410-744-7196
 Alice Matheny
 H-20% M-50% L-30%
 Stat.-6 1,2,3,4
 (See advertisement on p. 57)

Heakin Research, Inc.
 Eastpoint Mall
 7839 Eastpoint Mall
 Baltimore, MD 21224
 Ph. 410-282-3133
 Fax 410-282-5782
 Lorraine Church, Manager
 H-6% M-30% L-64%
 Stat.-6 2,3,4

Heakin Research, Inc.
 Owings Mills Town Center
 10300 Mill Run Cir.
 Owings Mills, MD 21117
 Ph. 410-998-3939
 Randi Stone, Manager
 H-23% M-43% L-34%
 Stat.-6 1,2,3,4

MASSACHUSETTS

Boston

Bernett Research Services, Inc.
 South Shore Plaza
 250 Granite St.
 Braintree, MA 02184
 Ph. 617-849-1692
 Fax 617-843-5276
 H-50% M-50% L-0%
 Stat.-15 1,2,3
 (See advertisement on p. 40)

Northeast Data Collection, Inc.
 Assembly Square Mall
 133 Middlesex Ave.
 Somerville, MA 02145
 Ph. 203-797-0666
 Fax 203-748-1735
 Karen M. Forcade, President
 H-60% M-30% L-10%
 Stat.-6 1,2,3,4

Performance Plus, Inc.
 Faneuil Hall Marketplace
 2 Faneuil Hall Marketplace, 4th fl.
 Boston, MA 02109
 Ph. 508-872-1287 ext. 112
 Fax 508-879-7108
 Shirley Shames, President
 H-60% M-30% L-10%
 Stat.-10 1,2,3
 (See advertisements on pp. 23, back cover)

Performance Plus, Inc.
 Westgate Mall
 200 Westgate Rd.
 Brockton, MA 02401
 Ph. 508-872-1287 x112
 Fax 508-879-7108
 Shirley Shames, President
 H-10% M-70% L-20%
 Stat.-10 1,2,3
 (See advertisements on pp. 23, back cover)

Performance Plus, Inc.

Woburn Mall
300 Mishawam Rd.
Woburn, MA 01801
Ph. 508-872-1287 x112
Fax 508-879-7108
Shirley Shames, President
H-30% M-60% L-10%
Stat.-10 1,2,3

(See advertisements on pp. 23, back cover)

Quick Test

Watertown Mall
550 Arsenal St.
Watertown, MA 02172
Ph. 617-924-8486
Fax 617-923-0261
Bonnie MacDonald, Manager
H-20% M-50% L-30%
Stat.-9 1,2,3,4

(See advertisement on p. 25)

U.S. Research Company

Independence Mall, Space 123
Kingston, MA 02364
Ph. 617-585-1653
Fax 617-585-9504
Income-Middle
Stat.-NA 1,2,3,4

Springfield

Friedman Marketing Services

Consumer Opinion Center
Eastfield Mall
1655 Boston Rd.
Springfield, MA 01129
Ph. 413-543-8515
Fax 413-543-8430
H-30% M-50% L-20%
Stat.-6 1,2,3,4

Performance Plus, Inc.

Fairfield Mall
591 Memorial Dr.
Chicopee, MA 01020
Ph. 508-872-1287 x112
Fax 508-879-7108
Shirley Shames, President
H-10% M-70% L-20%
Stat.-10 1,2,3,4
(See advertisements on pp. 23, back cover)

Quality Controlled Services

Holyoke Mall at Ingleside
50 Holyoke St.
Holyoke, MA 01040
Ph. 413-533-6180
Fax 413-532-6855
Ivy Ward
H-20% M-70% L-10%
Stat.-NA 1,2,3,4

(See advertisement on p. 5)

U.S. Research Company

Hampshire Mall
Hadley, MA 01035
Ph. 413-586-3090
Income: Middle
Stat.-NA 1,2,3

Taunton

(See Providence, RI)

MICHIGAN

Detroit

Consumer Pulse of Detroit

Universal Mall
28488 Dequindre Rd.
Warren, MI 48092
Ph. 810-751-1590
Fax 810-751-3019
Sheila Smith
H-10% M-65% L-25%
Stat.-30 1,2,3,4
(See advertisement on p. 57)

Crimmins-Forman Market Research

Wonderland Mall
29755 Plymouth Rd.
Livonia, MI 48150
Ph. 810-569-7095
Fax 810-569-8927
Paula Crimmins, Partner
H-25% M-45% L-30%
Stat.-7 1,2,3,4

Crimmins-Forman Market Research/ Consumer Research Center

Westland Mall
35000 W. Warren
Westland, MI 48185
Ph. 313-513-5040
Fax 313-513-8966
Lois Forman, Partner
H-25% M-45% L-30%
Stat.-12 1,2,3,4

Friedman Marketing Services

Consumer Testing Center
Oakland Mall
350 B W. 14 Mile Rd.
Troy, MI 48083
Ph. 810-589-0950
Fax 810-589-0271
H-30% M-50% L-20%
Stat.-15 1,2,3,4

Friedman Marketing Services

Frenchtown Square Mall
2121 N. Monroe St., #105
Monroe, MI 48161
Ph. 313-241-1610
Fax 313-241-6804
H-25% M-50% L-25%
Stat.-13 1,2,3,4

Heakin Research, Inc.

Eastland Mall, Ste. 731
1800 Bernier Rd.
Harper Woods, MI 48225
Ph. 313-521-8811
Fax 313-521-9152
Clyde Mayberry, Manager
H-60% M-25% L-15%
Stat.-9 1,2,3,4

Heakin Research, Inc.

Macomb Mall
32441 Gariot, Ste. 440
Roseville, MI 48066
Ph. 810-294-3232
Fax 810-294-3759
Janet Baker
H-41% M-41% L-18%
Stat.-8 2,3,4

Quick Test

Southland Center Mall
23000 Eureka Rd.
Taylor, MI 48180
Ph. 313-287-3600
Fax 313-287-3840
Donna Wizinsky, Manager
H-25% M-50% L-25%
Stat.-11 1,2,3,4
(See advertisement on p. 25)

Grand Rapids

Barnes Research, Inc.

Rogers Plaza
1110 28th St. S.W.
Wyoming, MI 49509
Ph. 616-363-7643
Fax 616-363-8227
Howard Rozema, Vice President
H-25% M-50% L-25%
Stat.-10 1,2,3

Datatrack, Inc.

Eastbrook Mall
Grand Rapids, MI 49503
Ph. 616-954-0303
Fax 616-954-0001
Kevin Schepman, Field Dir.
H-35% M-50% L-15%
Stat.-7 1,2,3,4

MINNESOTA

Duluth

Bryles Survey Service

Miller Hill Mall
1600 Miller Trunk Hwy.
Duluth, MN 55811
Ph. 218-722-9274
Fax 218-722-9327
Ann Hendrickson
Income-NA
Stat.-12 1,2,4

Minneapolis/St. Paul

Comprehensive Research Group, Inc.

Har Mar Mall
2100 Snelling Ave. N.
Roseville, MN 55113
Ph. 612-635-0204
Fax 612-635-9013
Kathleen Dutcher
H-60% M-30% L-10%
Stat.-8 3,4

CODES:

Mall description

- H.....est.% of mall customers in high income bracket (+\$60,000)
 M.....middle income (\$30,000-60,000)
 L.....low income (under \$30,000)
 N.A.....not available

Facility description

- Stat.....no. of interviewing stations
 1.....facility has computer-aided stations
 2.....kitchen facilities
 3.....private display room
 4.....one-way mirror for viewing of stations

N.K. Friedrichs & Associates, Inc.

Northtown Mall
 117 Northtown Dr.
 Blaine, MN 55434
 Ph. 612-784-7332
 Fax 612-783-9314
 Judy Lestina, Manager
 H-15% M-60% L-25%
 Stat.-8 1,2,3,4

Heakin Research, Inc.

Mall of America
 300 E. Broadway
 Bloomington, MN 55425
 Ph. 612-854-3535
 Fax 612-854-4375
 Income-Middle
 Stat.-NA

Heakin Research, Inc.

Knollwood Mall
 8332 Hwy. 7
 St. Louis Park, MN 55426
 Ph. 612-936-0940
 Fax 612-936-9078
 Bruce Bale, Manager
 H-26% M-41% L-33%
 Stat.-12 2,3,4

Quality Controlled Services

Maplewood Mall, #2013
 Maplewood, MN 55109
 Ph. 612-770-5636
 Fax 612-770-7693
 Sandra Hayes
 H-30% M-46% L-24%
 Stat.-NA 1,2,3,4
 (See advertisement on p. 5)

MISSISSIPPI

Jackson

Friedman Marketing Services

Consumer Opinion Center
 1275 Metrocenter
 Hwy. 80 & Robinson Rd.
 Jackson, MS 39209
 Ph. 601-352-9340
 Fax 601-355-3530
 H-20% M-60% L-20%
 Stat.-13 1,2,3,4

MISSOURI

Kansas City

Comprehensive Research Group

Metro North Mall, #206
 400 N.W. Barry Rd.
 Kansas City, MO 64155
 Ph. 816-468-0303
 Fax 816-468-0399
 Lois Younman, Manager
 H-35% M-45% L-20%
 Stat.-10 1,2,3

The Field House, Inc.

Oak Park Mall
 11479 W. 95th St.
 Overland Park, KS 66214
 Ph. 913-492-1506
 Fax 913-492-1654
 Delores Jirovec, Manager
 H-50% M-40% L-10%
 Stat.-8 1,2,3,4
 (See advertisement on back cover)

Heakin Research, Inc.

Blue Ridge Mall
 4200 Blue Ridge Blvd.
 Kansas City, MO 64133
 Ph. 816-737-1130
 Fax 816-737-0530
 Debbie Culver
 H-23% M-41% L-34%
 Stat.-10 2,3,4

Heakin Research, Inc.

Independence Center, #116
 Independence, MO 64057
 Ph. 816-795-0706
 Fax 816-795-1416
 Jackie Clark, Manager
 H-33% M-43% L-24%
 Stat.-10 2,3,4

Quality Controlled Services

Ward Parkway Mall
 8600 Ward Pkwy.
 Kansas City, MO 64114
 Ph. 800-628-3428
 Fax 816-361-3580
 Iva Schlatter
 H-40% M-50% L-10%
 Stat.-NA 1,2,3,4
 (See advertisement on p. 5)

St. Louis

Consumer Opinion

Mid Rivers Mall
 1720 Mid Rivers Mall
 St. Peters, MO 63376
 Ph. 314-397-8473
 Fax 314-965-8042
 Mark Holloway, Manager
 H-40% M-50% L-10%
 Stat.-12 1,2,3,4

Cunningham Field & Research Services, Inc.

St. Louis Centre
 515 N. 6th St., Ste. 374
 St. Louis, MO 63101
 Ph. 314-231-1044
 Fax 314-231-3625
 Maureen Taylor
 Income-NA
 Stat.-NA

Friedman Marketing Services

Consumer Opinion Center
 St. Louis Union Station Mall
 1820 Market St.
 St. Louis, MO 63103
 Ph. 314-241-4559
 Fax 314-241-6058
 H-30% M-50% L-20%

Quick Test

Northwest Plaza
 505 Northwest Plaza
 St. Louis, MO 63074
 Ph. 314-291-8888
 Fax 314-291-8581
 Fletcher Peacock, Manager
 H-2% M-55% L-43%
 Stat.-10 1,2,3,4
 (See advertisement on p. 25)

Superior Surveys of St. Louis

Mid Rivers Mall
 1720 Mid Rivers Mall
 St. Peters, MO 63376
 Ph. 314-397-8463
 H-40% M-50% L-10%
 Stat.-12 1,2,3,4
 (See advertisement on p. 23)

U.S. Research Company

338 Jamestown Mall
 Florissant, MO 63034
 Ph. 314-741-0284
 Fax 314-741-6971
 Income-Middle
 Stat.-NA 1,2,3,4

Springfield

Bryles Survey Service

Battlefield Mall, #227
 Springfield, MO 65804
 Ph. 417-887-1035
 Fax 417-887-0209
 Melissa Turner, Manager
 Income-NA
 Stat.-10 1,2,4

NEBRASKA

Omaha

Midwest Survey & Marketing

Crossroads Mall
 7300 Dodge St., Ste. 20
 Omaha, NE 68114
 Ph. 402-399-9346
 Fax 402-399-9346
 Eloise O'Connor, Manager
 H-12% M-68% L-20%
 Stat.-12 1,2,3,4

NEVADA

Las Vegas

Consumer Research Center
Mission Center Mall
1370 E. Flamingo, Ste. J
Las Vegas, NV 89119
Ph. 702-737-3272
Fax 702-737-1023
Buddy Goldbaum, President
H-15% M-50% L-35%
Stat.-7 1,2,3,4

NEW HAMPSHIRE

Manchester

New England Interviewing, Inc.
Bedford Mall
South River Rd.
Bedford, NH 03110
Ph. 603-641-1222
Fax 603-883-1119
Heidi B., Mall Manager
H-27% M-61% L-12%
Stat.-5 2,3

Nashua

New England Interviewing, Inc.
Nashua Mall
Broad St. & Rte. 3
Nashua, NH 03063
Ph. 603-889-6100
Fax 603-883-1119
Tina, Mall Coord.
H-14% M-68% L-18%
Stat.-4 1,2,3

NEW JERSEY

North Jersey

(See New York City)

South Jersey

(See Philadelphia)

NEW MEXICO

Santa Fe

Quick Test

Villa Linda Mall
1124 Villa Linda Mall
Santa Fe, NM 87505
Ph. 505-471-1699
Fax 505-438-3848
Scott Solis, Manager
H-20% M-50% L-30%
Stat-7 1,2,3,4
(See advertisement on p. 25)

NEW YORK

Albany

Markette Research, Inc.
Clifton Country Mall,
Clifton Park, NY 12065
Ph. 518-383-1661
Fax 518-371-0791
Dawn Whalen, Vice President
H-60% M-30% L-10%
Stat.-4 1,2,3

Quick Test

Crossgates Mall
1 Crossgates Mall Rd.
Albany, NY 12203
Ph. 518-456-8641
Fax 518-456-8842
Pat Figler, Manager
H-25% M-50% L-25%
Stat.-6 1,2,3,4
(See advertisement on p. 25)

Buffalo

Buffalo Survey & Research, Inc.
Main Place Mall, 2nd level
Buffalo, NY 14202
Ph. 716-645-6262
Fax 716-834-0372
Jeanette Levin, President
H-10% M-50% L-40%
Stat.-4 2,3

Ruth Diamond Market Research
Boulevard Mall
770 Alberta Dr.
Buffalo, NY 14226
Ph. 716-836-1110
Fax 716-836-1114
Harvey Podolsky, President
H-22% M-49% L-29%
Stat.-6 1,2,3,4

Marion Simon Research Service
Walden Galleria, C103
Buffalo, NY 14225
Ph. 716-684-8025
Fax 716-684-3009
H-35% M-35% L-30%
Stat.-NA 1,2,3,4

Survey Service, Inc.
Eastern Hills Mall
4545 Transit Rd.
Williamsville, NY 14221
Ph. 716-876-8450
Fax 716-876-0430
Susan R. Adelman, President
H-25% M-50% L-25%
Stat.-8 1,2,3,4

Survey Service, Inc.
McKinley Mall
3701 McKinley Pkwy.

Blasdel, NY 14219
Ph. 716-876-6450
Fax 716-876-0430
Susan R. Adelman, President
H-25% M-50% L-25%
Stat.-8 1,2,3,4

New York

Answers to Questions, Inc.
South Shore Mall
1701 Sunrise Hwy.
Bay Shore, NY 11706
Ph. 516-666-9705
Fax 516-666-4596
Mary, Managing Director
H-20% M-60% L-20%
Stat.-7 1,2,3,4

Bernett Research Services, Inc.

Menlo Park Mall
312 Menlo Park
Edison, NJ 08837
Ph. 908-548-2900
Fax 908-549-0026
H-50% M-50% L-0%
Stat.-10 1,2,3,4
(See advertisements on p. 40)

Cunningham Field Services

Freehold Raceway Mall
3710 Rte. 9, Ste. B2201
Freehold, NJ 07728
Ph. 908-308-9889
Fax 908-303-0428
Carol Klein, Manager
H-50% M-40% L-10%
Stat.-6 1,2,3,4

Ebony Marketing Research, Inc.

Newport Shopping Mall
30 Mall Dr. W.
Jersey City, NJ 07310
Ph. 201-714-9455
Fax 201-714-9396
Diedre Springer, Mall Manager
H-10% M-90% L-0%
Stat.-8 3,4
(See advertisement on p. 71)

Ebony Marketing Research, Inc.

Jamaica Mall
162-10 Jamaica Ave.
Jamaica, NY 11434
Ph. 718-526-3204
Fax 718-526-3312
Christy Campos, Mall Manager
H-0% M-55% L-45%
Stat.-6 2
(See advertisement on p. 71)

Ebony Marketing Research, Inc.

Bay Plaza Mall
2100 Bartow Ave., #243
Bronx, NY 10475
Ph. 718-217-0842
Fax 718-320-3996
Sharon Allen, Mall Manager
H-5% M-95% L-0%
Stat.-8 2,3,4
(See advertisement on p. 71)

CODES:

Mall description

- H.....est.% of mall customers in high income bracket (+\$60,000)
- M.....middle income (\$30,000-60,000)
- L.....low income (under \$30,000)
- N.A.....not available

Facility description

- Stat.....no. of interviewing stations
- 1.....facility has computer-aided stations
- 2.....kitchen facilities
- 3.....private display room
- 4.....one-way mirror for viewing of stations

Focus World International, Inc.
Seaview Square Mall
Ocean, NJ 07712
Ph. 908-918-0100
Fax 908-918-7070
Income-NA
Stat.-NA 1,2,4

Friedman Marketing Services
Consumer Opinion Center
Jefferson Valley Mall
650 Lee Blvd.
Yorktown Heights, NY 10598
Ph. 914-962-9400
Fax 914-962-1067
H-30% M-50% L-20%
Stat.-18 1,2,3,4

J & R Research, Inc.
East Meadow Mall
1917 Front St.
East Meadow, NY 11554
Ph. 516-542-0081
Fax 516-542-6314
H-10% M-55% L-35%
Stat.-42 1

J & R Research, Inc.
Shirley Mall
800 Montauk Hwy.
Shirley, NY 11967
Ph. 516-399-0200
Fax 516-399-0205
H-15% M-45% L-40%
Stat.-4 1,2,3,4

Mid-America Research, Inc.
131 Livingston Mall
Livingston, NJ 07039
Ph. 201-740-1566
Fax 201-740-0569
H-15% M-80% L-5%
Stat.-12 1,2,3,4

N.D.C. - I.D.I.
Wayne Towne Center
Rte. 23 S.
Wayne, NJ 07470
Ph. 203-797-0666
Fax 203-748-1735
Karen M. Forcade, President
H-70% M-25% L-5%
Stat.-10 1,2,3,4

Barbara Prince Associates
Green Acres Mall
1063 Green Acres Mall
Valley Stream, NY 11581
Ph. 516-561-1723
Fax 516-561-2523
Barbara Prince, President
H-20% M-60% L-20%
Stat.-8 2,3,4

Quick Test

Kings Plaza Mall
5102 Kings Plaza
Brooklyn, NY 11234
Ph. 718-338-3388
Fax 718-692-4385
NancyAnne Frangipani, Manager
H-20% M-45% L-35%
Stat.-15 1,2,3
(See advertisement on p. 25)

Quick Test

855 Sunrise Mall
Massapequa, NY 11758
Ph. 516-541-5100
Fax 516-541-1099
Sina Ehrenfreund, Manager
H-15% M-80% L-5%
Stat.-12 1,2,3,4
(See advertisement on p. 25)

Audrey Schiller Market Research
Nassau Mall
3601 Hempstead Tpke.
Levittown, NY 11756
Ph. 516-731-1500
Fax 516-731-4235
Audrey Schiller, President
H-35% M-50% L-15%
Stat.-8 1,2,3,4

Seaport Surveys, Inc.
South Street Seaport
34 Cliff St.
New York, NY 10038
Ph. 212-608-3100
Fax 212-608-4966
Andrea Waller, President
H-25% M-60% L-15%
Stat.-10 1,2,3,4

Sight Line Research Ltd.
Big H Mall
839-114 New York Ave.
Huntington, NY 11743
Ph. 516-424-2444
Helen Schnee, President
H-33% M-34% L-33%
Stat.-7 1,2,3,4

Suburban Associates
Monmouth Mall
1230 Monmouth Mall-Rte. 35
Eatontown, NJ 07724
Ph. 908-542-5554
Fax 908-389-3921
Madeline Smith, Manager
H-10% M-60% L-30%
Stat.-8 1,2,3,4

Suburban Associates
Willowbrook Mall
1230 Willowbrook Mall- Rte. 46
Wayne, NJ 07470
Ph. 201-785-0770
Fax 201-785-0771
Nancy Braynack, Manager
H-25% M-55% L-20%
Stat.-10 1,2,3,4

Suburban Associates
East Meadow Plaza
1966 Hempstead Tpke.
East Meadow, NY 11554
Ph. 516-794-3030
Fax 516-794-3519
Sherry Salus, Manager
H-10% M-70% L-20%
Stat.-6 1,2,3,4

Poughkeepsie

U.S. Research Company
Poughkeepsie Galleria
790 South Rd., #F114
Poughkeepsie, NY 12601
Ph. 914-297-1793
Fax 914-297-1620
Income-High
Stat.-NA 1,2,3

Rochester

Car-Lene Research, Inc.
The Marketplace Mall
3400 W. Henrietta Rd.
Rochester, NY 14623
Ph. 716-424-3203
Anne Hossenlopp, Manager
H-46% M-40% L-14%
Stat.-6 1,2,3,4

Car-Lene Research, Inc.
Greece Ridge Center Mall
150 Ridge Center
Rochester, NY 14626
Ph. 716-225-3100
Barbara White, Manager
H-38% M-44% L-18%
Stat.-6 1,2,3,4

Car-Lene Research, Inc.
Irondequoit Mall
54 Irondequoit Dr.
Rochester, NY 14622
Ph. 716-342-7630
H-10% M-55% L-35%
Stat.-NA 3,4

Syracuse

KS&R Consumer Testing Center
Shoppingtown Mall
DeWitt, NY 13214
Ph. 800-645-5469
Fax 315-446-6719
Nancy Gold, Supervisor
H-50% M-30% L-20%
Stat.-30 1,2,3,4

1995 MALL FACILITY DIRECTORY

LaValle Research Services
Carousel Center Mall
9763 Carousel Center Dr.
Syracuse, NY 13290
Ph. 315-466-1609
Fax 315-466-7101
Maureen Colson, Manager
H-20% M-65% L-15%
Stat-8 1,2,3,4

QrA, Inc. Market Research
Fayetteville Mall
N. Burdick St.
Syracuse, NY 13066
Ph. 315-637-3169
Fax 315-637-8068
Jean Queri, President
H-30% M-60% L-10%
Stat.-7 1,2,3,4

Marion Simon Research Service
Northern Lights Mall
Routes 81 & 11
Syracuse, NY 13212
Ph. 315-455-5952
Fax 315-455-1826
Angie Marci, Manager
H-30% M-50% L-20%
Stat.-NA 1,2,3,4

Marion Simon Research Service
Great Northern Mall
4081 Rte. 31
Clay, NY 13041
Ph. 315-455-5952
Angie Marci, Manager
H-35% M-35% L-30%
Stat.-NA 1,2,3,4

NORTH CAROLINA

Charlotte

AOC Research
The Galleria Mall
2301 Dave Lyle Blvd., #183
Rock Hill, NC 29730
Ph. 803-324-7596
Fax 803-324-7598
Betty Collins, Owner
H-25% M-50% L-25%
Stat.-6 1,2,3,4

Consumer Pulse of Charlotte

Eastland Mall
5625 Central Ave.
Charlotte, NC 28212
Ph. 704-536-6067
Fax 704-536-2238
John Crowell
H-20% M-60% L-20%
Stat.-8 1,2,3,4
(See advertisement on p. 57)

Jackson Associates, Inc.
Carolina Place
11025 Carolina Place Pkwy.
Pineville, NC 28134
Ph. 770-394-8700
Fax 770-394-2747
Lyn Tomlin, Dir. Mall Ops.
H-40% M-45% L-15%
Stat.-5 1,2,3,4
(See advertisements on pp. 23, back cover)

Greensboro

Homer Market Research Assoc. Inc.
333 Four Seasons Town Centre
Greensboro, NC 27407
Ph. 910-294-9415
Fax 910-294-6116
Jan Homer, Exec. V.P.
H-25% M-45% L-30%
Stat.-10 1,2,3,4

Jackson Associates, Inc.
Oak Hollow Mall
921 E. Chester Dr., #1130
High Point, NC 27262
Ph. 770-394-8700
Fax 770-394-2747
Lyn Tomlin, Dir. Mall Ops.
H-15% M-50% L-35%
Stat.-4 1,3
(See advertisements on pp. 23, back cover)

Triangulate the most comprehensive market in America FROM OUR THREE PRIME LOCATIONS

Dense, diverse and enormously rich, metropolitan New York is like no other market in America. But, to penetrate it, you've got to know the angles. And how to make them work for you.

That's where EMK can help

From our three full-service mall facilities in Jersey City, Queens, the Bronx, we can help you evaluate virtually any ethnic, specialized or mainstream market segment.

Whether your focus is inward toward the city or outward toward the suburbs, call EMR. We've got the reach, the range and the rapport to give you fresh new perspectives on this vital region.

From any angle you could ask for.

Ebony Marketing Research, Inc.
2100 Bartow Avenue
Baychester, NY 10475



Your Key to Ethnic Marketing

Phone: 718-217-0842 Fax: 718-320-3996

CODES:

Mall description

H.....est.% of mall customers in high income bracket (+\$60,000)
 M.....middle income (\$30,000-60,000)
 L.....low income (under \$30,000)
 N.A.....not available

Facility description

Stat.....no. of interviewing stations
 1.....facility has computer-aided stations
 2.....kitchen facilities
 3.....private display room
 4.....one-way mirror for viewing of stations

W.H. Long Marketing, Inc.
 Golden Gate Shopping Center
 2240 Golden Gate Dr.
 Greensboro, NC 27405
 Ph. 910-292-4146
 Fax 910-299-6165
 John Voss, Vice President
 H-33% M-34% L-33%
 Stat.-8 2,3,4

Raleigh

Cunningham Field & Research Services, Inc.
 Cary Towne Center
 1105 Walnut St., Ste. E103A
 Cary, NC 27511
 Ph. 919-469-5221
 Fax 919-319-6067
 Debbi Faries, Manager
 Income-NA
 Stat.-NA

Quick Test

South Square Mall
 4001 Chapel Hill Blvd.
 Durham, NC 27707
 Ph. 919-489-3104
 Fax 919-489-8316
 Brian O'Neil, Manager
 H-26% M-33% L-41%
 Stat.-7 3
 (See advertisement on p. 25)

OHIO

Akron

Cunningham Field & Research Services, Inc.
 Chapel Hill Mall
 2000 Brittain Rd., Ste. 465
 Akron, OH 44310
 Ph. 216-630-1627
 Fax 216-630-1629
 Income-NA
 Stat.-NA

Rosen Research
 Rolling Acres Mall
 2400 Romig Rd.
 Akron, OH 44322
 Ph. 216-745-8883
 Fax 216-745-8883
 Evelyn Carlson, Supervisor
 H-10% M-70% L-20%
 Stat.-6 2

Cincinnati

Assistance In Marketing, Inc.
 Northgate Mall
 9633A Coleraiin Ave.
 Cincinnati, OH 45251
 Ph. 513-385-8228
 Fax 513-385-2140
 Susan Odom, Manager
 H-50% M-30% L-20%
 Stat.-12 1,2,3,4

B & B Research, Inc.
 Eastgate Mall
 4601 Eastgate Ave.
 Cincinnati, OH 45245
 Ph. 513-793-4223
 Fax 513-793-9117
 Lynn Caudill, Proj. Dir.
 H-20% M-25% L-55%
 Stat.-8 1,2,3,4

Consumer Pulse of Cincinnati

Forest Fair Mall
 514 Forest Fair Dr.
 Cincinnati, OH 45240
 Ph. 513-671-1211
 Fax 513-346-4244
 Susan Lake-Carpenter
 H-20% M-00% L-20%
 Stat.-8 1,2,3,4
 (See advertisement on p. 57)

Cleveland

Focus Groups of Cleveland Survey Center

Richmond Mall
 691 Richmond Rd.
 Cleveland, OH 44143
 Ph. 216-461-6898
 Fax 216-461-9525
 Betty Perry
 H-10% M-75% L-15%
 Stat.-8 1,2,3,4
 (See advertisement on p. 73)

Heakin Research, Inc.
 Severance Town Center
 3542 Mayfield Rd.
 Cleveland Heights, OH 44118
 Ph. 216-381-6115
 Fax 216-381-4134
 Eric Silver, Manager
 H-20% M-60% L-20%
 Stat.-14 2,3,4

Pat Henry Market Research, Inc.

The Avenue at Tower City Center
 230 Huron Rd. N.W.
 Cleveland, OH 44113
 Ph. 216-621-3831
 Fax 216-621-8455
 Mark Kikel, Vice President
 H-30% M-60% L-10%
 Stat.-11 1,2,3,4
 (See advertisements on pp. 23, 30)

Opinion Centers America
 Great Northern Mall
 924 Great Northern Mall
 North Olmsted, OH 44070
 Ph. 216-779-3050
 Fax 216-779-3060
 Karen Cunningham, Manager
 H-23% M-45% L-32%
 Stat.-12 1,2,3,4

Questions, Inc.
 7850 Mentor Rd.
 Mentor, OH 44060
 Ph. 216-255-9940
 Goldie Schkolnik, President
 H-20% M-60% L-20%
 Stat.-7 1,2,3

Rosen Research
 Great Lakes Mall
 7850 Mentor Ave.
 Mentor, OH 44060
 Ph. 216-974-0001
 Fax 216-974-0001
 Margaret Bennloff, Supervisor
 H-20% M-65% L-20%
 Stat.-6 1,2,3

Columbus

B & B Research, Inc.
 Brice Outlet Mall
 5891 Scarborough Blvd.
 Columbus, OH 43232
 Ph. 614-486-6746
 Fax 614-486-9958
 Judy Fredericks, Proj. Dir.
 H-20% M-25% L-55%
 Stat.-4 1,3

T.I.M.E. Market Research
 667 Indian Mound Mall
 Heath, OH 43056
 Ph. 614-788-8808
 Fax 614-788-8809
 Mike Ingalls, Manager
 H-10% M-60% L-30%
 Stat.-8 1,2,3

Dayton

T.I.M.E. Market Research
 560 Dayton Mall
 2700 Miamisburg-Centerville Rd.
 Dayton, OH 45459
 Ph. 513-433-6296
 Fax 513-433-5954
 Laurette Lockwood, Manager
 H-25% M-60% L-15%
 Stat.-6 1,2,3,4

Toledo

U.S. Research Company
 Woodville Mall
 3725 Williston Rd.
 Northwood, OH 43619
 Ph. 419-691-5876
 Fax 419-691-4547
 Income-Middle
 Stat.-NA 1,2,3,4

OKLAHOMA

Oklahoma City

Ruth Nelson Research Services/
Oklahoma City Research
Quail Springs Mall
2501 W. Memorial Dr.
Oklahoma City, OK 73134
Ph. 405-752-4710
Fax 405-752-2344
H-30% M-50% L-20%
Stat.-6 1,2,3,4

Oklahoma Market Research/Data Net
Heritage Park Mall
6749-B E. Reno
Midwest City, OK 73110
Ph. 405-733-4266
Fax 405-733-0550
H-15% M-70% L-15%
Stat.-6 1,2,3,4

Oklahoma Market Research/Data Net
Sooner Fashion Mall
34 W. Main
Norman, OK 73072
Ph. 405-329-9779
Fax 405-329-6766
Rita Price
H-20% M-70% L-10%
Stat.-8 1,2,3,4

Quick Test

Cross Roads Mall
1153 Cross Roads Mall
Oklahoma City, OK 73149
Ph. 405-631-9738
Fax 405-632-0750
Jaime Rodriguez, Manager
H-4% M-25% L-61%
Stat.-6 1,2,3,4
(See advertisement on p. 25)

Tulsa

Cunningham Field Services
Promenade Mall
4107 S. Yale, Ste. LA 107
Tulsa, OK 74135
Ph. 918-664-7485
Fax 918-664-4122
Roberta Cunningham, Owner
H-30% M-60% L-10%
Stat.-6 1,2,3

OREGON

Portland

Consumer Opinion Services, Inc.
Vancouver Mall
8700 NE Vancouver Mall Dr.
Vancouver, WA 98662
Ph. 360-254-5650
Fax 360-254-6588
Alice Hilby, Manager
H-15% M-45% L-40%
Stat.-7 1,2,3
(See advertisements on pp. 63, back cover)

Consumer Opinion Services, Inc.
Three Rivers Mall
351 Three Rivers Dr.
Kelso, WA 98626
Ph. 360-425-8815
Fax 360-425-3143
Yvonne Pecha/Diana Parsons, Mgrs.
H-10% M-60% L-30%
Stat.-12 1,2,3,4
(See advertisements on pp. 63, back cover)

Consumer Opinion Services, Inc.
Lloyd Center Mall
991 Lloyd Center
Portland, OR 97232
Ph. 503-281-1278
Fax 503-281-1017
Ann Kane, Manager
H-15% M-55% L-30%
Stat.-9 1,2,3,4
(See advertisements on pp. 63, back cover)

Consumer Opinion Services, Inc.
Janzen Beach Center
1206 Janzen Beach Center
Portland, OR 97217
Ph. 503-240-8159
Fax 503-240-8161
Kelly Pye, Manager
H-5% M-50% L-45%
Stat.-8 1,2,3
(See advertisements on pp. 63, back cover)

Data Unltd., Inc.
Mall 205
9900-A S.E. Washington
Portland, OR 97216
Ph. 503-256-0987
Fax 503-253-4442
Cheryl Edwards, Manager
Income-NA
Stat.-8 1,2,3,4

PENNSYLVANIA

Erie

Moore Research Services
Millcreek Mall
340 Mill Creek Mall
Erie, PA 16508
Ph. 814-868-0873
Fax 814-864-7012
Pam Kowalewski, Manager
H-25% M-50% L-25%
Stat.-8 1,2,3,4

Philadelphia

Car-Lene Research, Inc.
Moorestown Mall
Rte. 38 & Lenola
Moorestown, NJ 08057
Ph. 609-231-0600
Fax 609-231-9575
Evan Celwyn, Manager
Income- Middle
Stat.-7 1,2,3,4

Consumer Pulse of Philadelphia

Plymouth Meeting Mall, #2203
Plymouth Meeting, PA 19462
Ph. 610-825-6636
Fax 610-825-6805
Eleanor Yates
H-20% M-60% L-20%
Stat.-15 1,2,3,4
(See advertisement on p. 57)

Window On The World

Over 25 Years Of Consumer Data Collection Experience

Professional Consumer Research Services For
Planning Direction And Minimized Risk
In Business Decisions

Call 800-950-9010

CLEVELAND SURVEY CENTER

Richmond Mall • 691 Richmond Rd. • 2nd Floor • Cleveland, OH 44143

valuable partner

problem solving

creative solutions

We're Flattered but not surprised

on time, on budget

We appreciate all the good things our clients have to say about us, but when you work as hard as we do, compliments are not a surprise. It's our business to work with you to ensure accurate and reliable research results.

Complete Data Collection Services

for National and Philadelphia MSA studies

- Field Management
- Medical, Business, Consumer
- 30 Telephone Stations
- CfMC Interviewing and Tab Software
- Downtown and Suburban Focus Group Facilities, Permanent Regional Mall Pre Recruit Center



587 Bethlehem Pike, Suite 800
Montgomeryville, PA 18936
(215) 822-6220 FAX: (215) 822-2238

CODES:

Mall description

H.....est.% of mall customers in high income bracket (+\$60,000)
M.....middle income (\$30,000-60,000)
L.....low income (under \$30,000)
N.A.....not available

Facility description

Stat.....no. of interviewing stations
1.....facility has computer-aided stations
2.....kitchen facilities
3.....private display room
4.....one-way mirror for viewing of stations

J.J. & L. Research Co.

Northeast Market Place
2500 Grant Ave.

Philadelphia, PA 19114

Ph. 215-332-7040

Fax 215-671-1881

Dena Britton, Manager

H-33% M-34% L-33%

Stat.-10 2,3,4

JRA Marketing Research

Montgomery Mall, Store 152

N. Wales, PA 19454-3909

Ph. 215-822-6220

Fax 215-822-2238

Frances Grubb, President

H-48% M-28% L-24%

Stat.-15 1,2,3,4

(See advertisements on pp. 23, 74)

JRP Marketing Research Services

Granite Run Mall, Store #279

1067 W. Baltimore Pike

Media, PA 19063

Ph. 610-565-7821

Fax 610-565-4403

Kathleen McCarty, V.P. Field Svcs.

H-30% M-40% L-30%

Stat.-10 1,2,3,4

(See advertisement on p. 75)

JRP Marketing Research Services

King of Prussia Plaza

Rte. 202 & 363

King of Prussia, PA 19406

Ph. 610-265-4442

Fax 610-354-9186

Kathleen McCarty, V.P. Field Svcs.

H-40% M-40% L-20%

Stat.-4 1,3

(See advertisement on p. 75)

Mar's Surveys, Inc.

Cinnaminson Mall

Rte. 130

Cinnaminson, NJ 08077

Ph. 609-786-6514

Fax 609-786-0480

Marlene Teblum, Owner

H-20% M-60% L-20%

Stat.-4 2,3,4

Quality In Field

Leo Mall

11725 Bustleton Ave.

Philadelphia, PA 19116

Ph. 215-698-0600

Fax 215-676-4055

Arlene Frieze, Owner

H-20% M-70% L-10%

Stat.-4 2

Quick Test

Neshaminy Mall

109 Neshaminy Mall

Bensalem, PA 19020

Ph. 215-322-0400

Fax 215-322-5412

Alice Osborne, Manager

H-5% M-80% L-15%

Stat.-11 1,2,3,4

(See advertisement on p. 25)

Quick Test

Franklin Mills Mall

1749 Franklin Mills Cir.

Philadelphia, PA 19154

Ph. 215-281-9304

Fax 215-281-9362

Chris Wilson, Manager

H-15% M-55% L-30%

Stat.-12 1,2,3,4

(See advertisement on p. 25)

TMR, Inc.

Springfield Mall

1200 Baltimore Pike

Springfield, PA 19064

Ph. 610-328-1147

Fax 610-328-0678

Elizabeth Wilson, Manager

H-60% M-30% L-10%

Stat.-14 1,2,3,4

U.S. Research Company

224 Echelon Mall

Voorhees, NJ 08043

Ph. 609-772-2220

Fax 609-772-2014

Income-Middle

Stat.-NA 1,2,3,4

Pittsburgh

Car-Lene Research, Inc.

Monroeville Mall

Monroeville, PA 15146

Ph. 412-373-3670

Stacey Stanford, Manager

H-50% M-40% L-10%

Stat.-4 2,4

Data Information, Inc.

Century III Mall

3075 Clairton Rd., Rm. 934

Pittsburgh, PA 15123

Ph. 412-655-8690

Fax 412-655-8693

Nancy Palyo, President

H-40% M-49% L-11%

Stat.-11 1,2,3,4

Heakin Research, Inc.
Ross Park Mall
1000 Ross Park Mall Rd
Pittsburgh, PA 15237
Ph. 412-369-4545
Fax 412-369-4473
Sandy Tuttle
H-30% M-45% L-25%
Stat.-13 2,3,4

Noble Interviewing Service, Inc.
North Hills Village Mall
4801 McKnight Rd.
Pittsburgh, PA 15237
Ph. 412-343-6455
Fax 412-343-3288
Dorothy Tomassi, Manager
Income-Middle
Stat.-6 2,3,4

T.I.M.E. Market Research
336 Beaver Valley Mall
Monaca, PA 15061
Ph. 412-728-8463
Fax 412-728-9806
Shawn Bishop, Manager
H-20% M-55% L-25%
Stat.-10 1,2,3,4

C. Truxell Research
Parkway Center Mall
1165 McKinney Ln.
Pittsburgh, PA 15220
Ph. 412-921-0550
Fax 412-921-1922
Christine Truxell, Owner/Manager
Income-Middle
Stat.-6 2,3,4

RHODE ISLAND

Providence

Car-Lene Research, Inc.
Silver City Mall
Taunton, MA 02780
Ph. 508-880-0087
Steve Martin, Manager
H-20% M-60% L-20%
Stat.-5 2,3,4

MacIntosh Survey Center
Warwick Mall
Route 2
Warwick, RI 02886
Ph. 401-438-8330
Fax 401-434-9219
Ann MacIntosh, Owner
H-10% M-85% L-5%
Stat.-4

Quick Test
Silver City Galleria
2 Galleria Mall Dr., Ste. 248
Taunton, MA 02780
Ph. 508-822-0333
Fax 508-822-9025
Anthony Badway, Manager
H-60% M-30% L-10%
Stat.-5 1,2,3,4
(See advertisement on p. 25)



JRP Marketing Research

CAPABILITIES
FACILITIES
SOLID EXPERIENCE

All the Ingredients to Get the Job Done Right!

- **Solid Experience**
JRP's management team has considerable marketing research experience at the supplier, advertiser and advertising agency levels, enabling us to understand the importance of designing studies that meet objectives and produce actionable data and presentations.
- **Capabilities**
We know how to talk to all types of business people and consumers, and we're adept at designing and implementing the whole gamut of research studies. We also can provide multi-variate data analyses as well as conventional. Whether the study requires nationwide or local interviewing, the emphasis is always on quality and cost efficiency.
- **Facilities**
We have exclusive access to three key Malls in the Philadelphia area and one in the Dallas area. These, plus the JRP WATS Line Telephone Center, are all staffed by JRP trained interviewers.
In addition, the new JRP Research Center houses two state-of-the-art focus group rooms, two viewing rooms, three one-on-one rooms and a fully equipped kitchen.

STRUGGLING WITH A COMPLEX MARKETING PROBLEM? LET JRP HELP YOU FIND THE SOLUTION. CALL (610) 565-8840.

JRP—Research With Confidence

JRP MARKETING RESEARCH SERVICES, INC.
100 GRANITE DRIVE, TERRACE LEVEL, MEDIA, PA 19063

CODES:

Mall description

- H.....est.% of mall customers in high income bracket (+\$60,000)
 M.....middle income (\$30,000-60,000)
 L.....low income (under \$30,000)
 N.A.....not available

Facility description

- Stat.....no. of interviewing stations
 1.....facility has computer-aided stations
 2.....kitchen facilities
 3.....private display room
 4.....one-way mirror for viewing of stations

SOUTH CAROLINA

Charleston

Bernett Research Services, Inc.

Northwoods Mall, E1B
 2150 Northwoods Blvd.
 Charleston, SC 29418
 Ph. 803-553-0030
 Fax 803-553-0526
 H-50% M-50% L-0%
 Stat.-10 1,2,3,4
 (See advertisementson p. 40)

G & G Market Research, Inc.

CharlesTowne Square Mall
 2401 Mall Dr.
 N. Charleston, SC 29406
 Ph. 803-744-9807
 Fax 803-571-5785
 Sissy Goldberg, President
 H-20% M-45% L-35%
 Stat.-8

TENNESSEE

Knoxville

H.M.R., Associates
 Foothills Mall
 133 Foothills Dr.
 Maryville, TN 37801
 Ph. 423-984-1802
 Fax 423-984-1802
 Sylvia Hill, Office Mgr.
 H-30% M-55% L-15%
 Stat.-3 1,2

Memphis

Friedman Marketing Services
 Consumer Opinion Center
 Lakeland Mall
 3536 Canada Rd.
 Arlington, TN 38002
 Ph. 901-377-6774
 Fax 901-377-9287
 H-30% M-50% L-20%
 Stat.-11 1,2,3,4

Friedman Marketing Services

Consumer Opinion Center
 Southland Mall
 1285 Southland Mall
 Memphis, TN 38116
 Ph. 901-398-9116
 Fax 901-398-9107
 H-20% M-60% L-20%
 Stat.-NA 1,2

Heakin Research, Inc.

Hickory Ridge Mall
 Memphis, TN 38115
 Ph. 901-360-0400
 Katy Hagen, Manager
 Income-NA
 Stat.-NA

Nashville

Bernett Research Services, Inc.

Rivergate Mall
 1000 Two Mile Pkwy.
 Nashville, TN 37072
 Ph. 615-859-4484
 Fax 615-851-0717
 H-40% M-50% L-10%
 Stat.-8 1,2,3
 (See advertisement on p. 40)

Jackson Associates, Inc.

Cool Springs Galleria
 1800 Galleria Blvd.
 Franklin, TN 37064
 Ph. 770-394-8700
 Fax 770-394-2747
 Lyn Tomlin, Dir. Mall Ops.
 H-50% M-40% L-10%
 Stat.-5 1,2,3,4
 (See advertisements on pp. 23, back cover)

Quick Test

Hickory Hollow Mall
 1123 Hickory Hollow Mall
 Antioch, TN 37013
 Ph. 615-731-0900
 Fax 615-731-2022
 Kathleen Love
 H-25% M-60% L-15%
 Stat.-7 1,2,3,4
 (See advertisement on p. 25)

TEXAS

Amarillo

Opinions Unlimited, Inc.

Westgate Mall
 7701 W. I-40
 Amarillo, TX 79160
 Ph. 800-658-2656
 Fax 800-353-4718
 Neil Norwood
 H-40% M-40% L-20%
 Stat.-8 1,2,3,4
 (See advertisement on back cover)

Austin

Quick Test

Barton Creek Square
 2901 Capitol Texas Hwy., B-11
 Austin, TX 78746
 Ph. 512-327-8787
 Fax 512-327-7460
 Patty Franchina, Manager
 H-20% M-40% L-40%
 Stat.-10 1,2,3,4
 (See advertisement on p. 25)

Corpus Christi

Quick Test

Sunrise Mall
 5858 S. Padre Island Dr., Ste. #37C
 Corpus Christi, TX 78412
 Ph. 512-993-6200
 Fax 512-991-7380
 Lorna Turner, Manager
 H-20% M-50% L-30%
 Stat.-6 1,2,3,4
 (See advertisement on p. 25)

Dallas/Ft. Worth

Car-Lene Research, Inc.

Richardson Square Mall
 Richardson, TX 75081
 Ph. 214-783-1935
 Joan Florio, Manager
 H-20% M-60% L-20%
 Stat.-5 1,2,3,4

Heakin Research, Inc.

Ft. Worth Town Center, Ste. B31
 4200 South Fwy.
 Ft. Worth, TX 76115
 Ph. 817-926-7995
 Fax 817-927-2387
 Vivian Taylor, Manager
 Income-NA
 Stat.-12 1,2,3,4

Heakin Research, Inc.

Vista Ridge Mall
 2400 S. Stemmons Fwy., Ste. 1420
 Lewisville, TX 75067
 Ph. 214-315-3555
 Fax 214-315-8926
 Rhoda Ouerner, Manager
 H-20% M-60% L-20%
 Stat.-7 1,2,3,4

Probe Research Inc.

Golden Triangle Mall
 I-35 & Loop 288
 Denton, TX 75137
 Ph. 214-241-6696
 Fax 817-566-6671
 Richard Harris, Vice President
 H-0% M-50% L-50%
 Stat.-11 2,3,4
 (See advertisement on p. 23)

Probe Research, Inc.

Northeast Mall
 Rte. 820 & 183
 Hurst, TX 76053
 Ph. 214-241-6696
 Fax 817-589-0547
 Richard Harris, Vice President
 H-50% M-50% L-0%
 Stat.-9 1,2,3
 (See advertisement on p. 23)

1995 MALL FACILITY DIRECTORY

Probe Research, Inc.
Red Bird Mall
3662 Camp Wisdom Rd.
Dallas, TX 75237
Ph. 214-241-6696
Fax 214-709-0317
Richard Harris, Vice President
H-25% M-50% L-25%
Stat.-6 3
(See advertisement on p. 23)

Probe Research, Inc.
1036 Town East Mall
Mesquite, TX 75150
Ph. 214-241-6696
Fax 214-881-9419
Richard Harris, Vice President
Income-Middle
Stat.-11 1,2,3,4
(See advertisement on p. 23)

Probe Research, Inc.
Irving Mall
Hwy 183 & Beltline Rd.
Irving, TX 75062
Ph. 214-241-6696
Fax 214-257-0487
Richard Harris, Vice President
H-21% M-53% L-26%
Stat.-6 1,2,3,4
(See advertisement on p. 23)

Quality Controlled Services
Ridgmar Mall
1736 Green Oaks Rd.
Ft. Worth, TX 76116
Ph. 817-738-5453
Fax 817-763-8600
Kitty Case
H-17% M-45% L-38%
Stat.-8 1,2,3
(See advertisement on p. 5)

Savitz Research Center
The Parks at Arlington Mall
3811 S. Cooper, Ste. 2053
Arlington, TX 76015
Ph. 817-467-6437
Fax 817-467-6552
Barbara Brodie, Manager
H-30% M-50% L-20%
Stat.-6 1,2,3,4

El Paso

Aim Research
Cielo Vista Mall
8401 Gateway W.
El Paso, TX 79925
Ph. 915-778-7110
Fax 915-595-6305
Bob Adams, Owner
H-45% M-50% L-5%
Stat.-5 1,2,3

Houston

Creative Consumer Research, Inc.
Westwood Mall
9000 Bissonnet
Houston, TX 77036
Ph. 713-779-5210
Fax 713-240-3497
Patricia Pratt, Field Dir.
H-30% M-40% L-30%
Stat.-8 2

Creative Consumer Research, Inc.
Deerbrook Mall, #1122
20131 Hwy. 59
Humble, TX 77338
Ph. 713-446-9730 or 779-5210
Fax 713-240-3497
Patricia Pratt, Field Dir.
H-65% M-20% L-15%
Stat.-10 1,2,3,4

Cunningham Field & Research Services, Inc.
The Woodlands Mall
1201 Lake Woodlands Dr.
Woodlands, TX 77380
Ph. 713-363-9112
Bonnie Hanna, Manager
Income-NA
Stat.-NA

Heakin Research, Inc.
Galleria II, Ste. 3897
5085 Westheimer
Houston, TX 77056
Ph. 713-871-8542
Fax 713-871-8549
Laurie DeRoberts, Manager
H-23% M-43% L-34%
Stat.-12 2,3,4

Heakin Research, Inc.
1670 San Jacinto Mall
Baytown, TX 77521
Ph. 713-421-2584
Fax 713-421-2514
Catherine Sweeney, Manager
H-10% M-60% L-30%
Stat.-14 2,3,4

Heakin Research, Inc.
247 Greenspoint Shopping Mall
Houston, TX 77060
Ph. 713-872-4164
Valerie Owens, Manager
H-30% M-50% L-20%
Stat.-12 2,3,4

Houston Consumer Research, Inc.
Almeda Mall
730 Almeda Mall
Houston, TX 77075
Ph. 713-944-1431
Fax 713-944-3527
Pat Williams, Manager
H-38% M-52% L-10%
Stat.-8 1,3,4

Quality Controlled Services
1088 Baybrook Mall
Friendswood, TX 77546
Ph. 713-488-8247
Fax 713-486-3828
Brenda Bryant
H-30% M-60% L-10%
Stat.-NA 1,2,3,4
(See advertisement on p. 5)

Quick Test
762 Sharpstown Center
7500 Bellaire Blvd.
Houston, TX 77036
Ph. 713-988-8988
Fax 713-988-1781
Melodie Henderson, Manager
H-15% M-65% L-20%
Stat.-8 1,2,3,4
(See advertisement on p. 25)

San Antonio

Creative Consumer Research
Central Park Mall
622 Loop 410 W., Ste. 292
San Antonio, TX 78216
Ph. 210-308-0231
Fax 210-680-9906
Richard Weinhold
H-40% M-50% L-10%
Stat.-8 1,2,3

Creative Consumer Research
Westlakes Mercado
1401 S.W. Loop 410
San Antonio, TX 78227
Ph. 210-673-0802
Fax 210-680-9906
Richard Weinhold
H-20% M-60% L-20%
Stat.-6 1,2,3

Creative Consumer Research
South Park Mall
2310 S.W. Military Dr.
San Antonio, TX 78224
Ph. 210-921-9500
Fax 210-680-9906
Richard Weinhold
H-10% M-40% L-50%
Stat.-7 1,2,3

Galloway Research Service
Ingram Park
6301 N.W. Loop 410
San Antonio, TX 78238
Ph. 210-681-0642
Fax 210-681-8414
Mary Ann Olsen, Manager
H-10% M-80% L-10%
Stat.-8 1,2,3

Galloway Research Service
Crossroads Mall
4522 Fredricksburg Rd., #A3
San Antonio, TX 78201
Ph. 210-737-1019
Fax 210-737-1476
Janet Ayers, Manager
H-5% M-80% L-15%
Stat.-9 1,2,3

Quick Test
Windsor Park Mall
14B Windsor Park Mall
San Antonio, TX 78218
Ph. 210-657-9424
Fax 210-657-9432
Ernest Suhler, Manager
H-5% M-50% L-45%
Stat.-6 1,2,3,4
(See advertisement on p. 25)

CODES:

Mall description

H.....est.% of mall customers in high income bracket (+\$60,000)
 M.....middle income (\$30,000-60,000)
 L.....low income (under \$30,000)
 N.A.....not available

Facility description

Stat.....no. of interviewing stations
 1.....facility has computer-aided stations
 2.....kitchen facilities
 3.....private display room
 4.....one-way mirror for viewing of stations

UTAH

Salt Lake City

Gay Hill Field Service
 Cottonwood Mall
 4835 Highland Dr.
 Salt Lake City, UT 84107
 Ph. 801-262-1960
 Fax 801-268-0247
 Income-Middle to High
 Stat.-8 3,4

Ruth Nelson Research Services/
 Utah Market Research
 Crossroads Plaza Mall
 50 S. Main St.
 Salt Lake City, UT 84144
 Ph. 801-363-8726
 Fax 801-321-4904
 H-40% M-40% L-20%
 Stat.-3 1,2,3,4

VIRGINIA

Norfolk/Virginia Beach

Quick Test
 Coliseum Mall
 1800 W. Mercury Blvd.
 Hampton, VA 23666
 Ph. 804-826-0299
 Fax 804-826-1330
 Carolyn Campbell, Manager
 H-5% M-50% L-45%
 Stat.-6 1,2,3,4
 (See advertisement on p. 25)

WASHINGTON

Seattle/Tacoma

Consumer Opinion Services, Inc.
 Everett Mall
 1402 S.E. Everett Mall Way
 Everett, WA 98208
 Ph. 206-347-2424
 Fax 206-742-4100
 Maureen Barbee, Manager
 H-10% M-65% L-25%
 Stat.-10 1,2,3
 (See advertisements on pp. 63, back cover)

Consumer Opinion Services, Inc.
 Lakewood Mall
 10509 Gravelly Lake Dr. S.W.
 Tacoma, WA 98499
 Ph. 206-588-0276
 Fax 206-588-1029
 Judy Reha, Manager
 H-10% M-50% L-40%
 Stat.-9 1,2,3
 (See advertisement on pp. 63, back cover)

Consumer Opinion Services, Inc.
 South Sound Center
 651 Sleater-Kinney Rd. S.E.
 Lacey, WA 98503
 Ph. 360-438-9660
 Fax 360-438-9660
 Judy Eaton, Manager
 H-10% M-65% L-25%
 Stat.-4 2,3
 (See advertisement on pp. 63, back cover)

Friedman Marketing Services
 Consumer Opinion Center
 South Hill Mall
 3500 Meridian S.
 Puyallup, WA 98373
 Ph. 206-840-0112
 Fax 206-840-0517
 H-30% M-50% L-20%
 Stat.-11 1,2,3,4

Quick Test
 Tacoma Mall Shopping Center
 4502 S. Steele St., Rm. 699
 Tacoma, WA 98409
 Ph. 206-474-9980
 Fax 206-473-1931
 David Kubista, Manager
 H-10% M-40% L-50%
 Stat.-7 1,2,3,4
 (See advertisement on p. 25)

U.S. Research Company
 Alderwood Mall, Store #374
 3000 184th St. S.W.
 Lynnwood, WA 98036
 Ph. 206-774-2151
 Fax 206-771-4089
 Income-Middle
 Stat.-NA 1,2,3

Spokane

Consumer Opinion Services, Inc.
 Northtown Mall
 4750 N. Division St.
 Spokane, WA 99207
 Ph. 509-487-6173
 Fax 509-482-7205
 Ruth Rivers, Manager
 H-9% M-61% L-30%
 Stat.-8 1,2,3,4
 (See advertisement on pp. 63, back cover)

WEST VIRGINIA

Charleston

McMillion Research Service
 Charleston Town Center
 Charleston, WV 25389
 Ph. 304-343-1578
 Fax 304-343-1570
 Barbara Kiddy, Manager
 Income-Middle to High
 Stat.-7 1,2,3,4
 (See advertisement on p. 23)

Huntington

McMillion Research Service
 Huntington Mall
 290 Mall Rd.
 Barboursville, WV 25504
 Ph. 304-733-1643
 Fax 304-733-0472
 Kathleen Dixon, Manager
 H-33% M-48% L-19%
 Stat.-7 1,2,3,4
 (See advertisement on p. 23)

Wheeling

T.I.M.E. Market Research
 280 Ohio Valley Mall
 St. Clairsville, OH 43950
 Ph. 614-695-6288
 Fax 614-695-5163
 Tim Aspenwall, Manager
 H-10% M-75% L-15%
 Stat.-12 1,2,3,4

WISCONSIN

Appleton

Friedman Marketing Services
 Consumer Opinion Center
 Fox River Mall
 4301 W. Wisconsin
 Appleton, WI 54913
 Ph. 414-730-2240
 Fax 414-730-2247
 H-30% M-55% L-15%
 Stat.-11 1,2,3,4

Eau Claire

Friedman Marketing Services
 Consumer Opinion Center
 Oakwood Mall
 4800 Golf Rd.
 Eau Claire, WI 54701
 Ph. 715-836-6580
 Fax 715-836-6584
 H-25% M-55% L-20%
 Stat.-11 1,2,3,4

Green Bay

Wisconsin Research Inc.
Bay Park Shopping Center
2481 Oneida St., Rm. 693
Green Bay, WI 54304
Ph. 414-436-4646
Fax 414-436-4651
Nancy Leurquin, Mall Supervisor
H-35% M-50% L-15%
Stat.-10 1,2,3,4

Madison

Wisconsin Interviewing Services
South Towne Mall
2303 W. Broadway
Madison, WI 53713
Ph. 608-222-6758
Fax 608-222-6761
Stacy Deming, Field Dir.
H-27% M-52% L-21%
Stat.-4 2,3

Milwaukee

Consumer Pulse of Milwaukee
The Grand Avenue Mall, #2004A
275 W. Wisconsin Ave.
Milwaukee, WI 53203
Ph. 414-274-6060
Fax 414-274-6068
Esther Young
H-25% M-55% L-20%
Stat.-8 1,2,3,4
(See advertisement on p. 57)

Lein/Spiegelhoff, Inc.
Southridge Mall
5300 S. 76th St.
Greendale, WI 53129
Ph. 414-421-9048
Fax 414-421-5163
Lois Opine, Mall Manager
H-30% M-50% L-30%
Stat.-10 1,2,3,4

Mazur/Zachow Inc.
Bay Shore Mall
5900 N. Port Washington Rd.
Milwaukee, WI 53217
Ph. 414-962-9926
Fax 414-962-3952
Melissa Butson, Manager
H-25% M-55% L-20%
Stat.-6 1,2

CANADA

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Research House, Inc.
Metrotown Centre
4800 Kingsway
Vancouver, BC V5H 4J2
Ph. 604-433-2696
Fax 604-433-2640
Tammy Anderson, Manager
H-35% M-50% L-15%
Stat.-5 1,2,3,4

ONTARIO

Cantest Research Services
Bayfield Mall
320 Bayfield St.
Barrie, ON L4M 3C1
Ph. 416-928-9122
Fax 416-928-2163
Peter Steyn, General Manager
H-30% M-40% L-30%
Stat.-5 3

Cantest Research Services
Lawrence Square
700 Lawrence Ave. W.
Toronto, ON M6A 1B6
Ph. 416-928-9122
Fax 416-928-2163
Peter Steyn, General Manager
H-30% M-40% L-30%
Stat.-5 3

CSU Marketing/Canadian Viewpoint
Eastgate Mall
75 Centennial Pkwy. N.
Hamilton, ON L8E 2P2
Ph. 905-770-1770
Carol Udell
Income-NA
Stat.-NA 1,2,3,4

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Meadowdale Town Centre
6677 Battleford Rd.
Mississauga, ON L5N 3R8
Ph. 905-770-1770
Carol Udell
H-20% M-70% L-10%
Stat.-4 1,3

CSU Marketing/Canadian Viewpoint
Hillcrest Mall
9350 Yonge St., Ste. 009
Richmond Hill, ON L4C 5G2
Ph. 905-770-1770
Carol Udell
Income-Middle
Stat.-3 1,2,3,4

CSU Marketing/Canadian Viewpoint
Centrepoint Mall
6464 Yonge St., Ste. N5
Toronto, ON M2M 3X4
Ph. 905-770-1770
Carol Udell
H-30% M-60% L-10%
Stat.-3 1,2,3,4

Research House, Inc.
Woodbine Centre
500 Rexdale Blvd., Ste. C1A
Rexdale (Toronto), ON M9W 6K5
Ph. 416-488-2328
Fax 416-488-2391
Suzanne Lefebvre, President
H-35% M-50% L-15%
Stat.-5 1,2,3,4

Research House, Inc.
Portage Place Mall
1154 Chemong Rd., Store 50B
Peterborough (Toronto), ON K9H 7J6
Ph. 416-488-2328
Fax 416-488-2391
Suzanne Lefebvre, President
H-35% M-50% L-15%
Stat.-3 1,2,3,4

Research House, Inc.
Don Mills Centre
939 Lawrence Ave. E.
Toronto, ON M3C 1P8
Ph. 416-488-2328
Fax 416-488-2391
Suzanne Lefebvre, President
H-35% M-50% L-15%
Stat.-3 1,2,3,4

Thompson Lightstone & Co. Ltd.
Bramalea City Centre
25 Peele Centre Dr., Unit 260
Bramalea, ON L6T 3R5
Ph. 416-922-1140
Fax 416-926-8014
Anne Termaten, Vice President
H-30% M-40% L-30%
Stat.-5 1,2,3,4

Thompson Lightstone & Co. Ltd.
Eaton Centre
220 Yonge St., Ste. 105
Toronto, ON M5B 2H1
Ph. 416-922-1140
Fax 416-922-8014
Anne Termaten, Vice President
H-50% M-35% L-15%
Stat.-6 1,2,3,4

QUEBEC

Research House, Inc.
Le Boulevard
4270 rue-Jean-Talon est., Ste. 102
Montreal, Quebec H1S 1J7
Ph. 514-725-0306
Fax 514-725-0308
Nancy Lefebvre, Manager
H-25% M-65% L-25%
Stat.-4 1,2,3,4

Research House, Inc.
St. Bruno
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St. Bruno (Montreal), Quebec J3V 5J5
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Fax 514-725-0308
Nancy Lefebvre, Manager
H-35% M-50% L-15%
Stat.-4 1,2,3,4

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 Fax 207-772-4842
 Nancy Drapeau, Dir. of Research
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 Jan Misovic

Please note the following corrections to the 1995-96 Researcher SourceBook (corrected text shown in bold):

On p. 137, the fax number for Dolobowsky Qualitative Services should read 617-647-0264.
 On p. 214, the phone number for Braintree Research should read 215-635-2982.

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Trade Talk

continued from p. 82

marketing plan that was provided. If that marketing plan looks strange to me then I will bring that to the client's attention."

Diagnostic insights

In addition, Clancy says, too many firms use an STM just to get a forecast, a "magic number," instead of using it as a way to diagnose problems. "It can provide the magic number, a sales forecast, given that the plan that you execute is the plan that is tested in the STM and given that the competition responds in the real world the way that you assumed they would. But using the STM to produce only the forecast is a serious mistake.

"The real value in STMs today is in providing marketers with diagnostic

insights into how to improve the plan. We, for example, routinely run, after providing the forecast, many differing marketing plans, varying levels of advertising, distribution, advertising impacts, media schedules, etc., to get a sense of what the financially optimal marketing plan might look like. Rarely is the plan that you recommend the one that the client started with in the first place."

More sophisticated

In the future, Clancy sees companies other than packaged goods makers using STMs to test products. He also sees STMs becoming more sophisticated, as the technological capabilities grow and as the STM companies become more experienced.

"The mathematical models that represent the underpinnings for the forecasts and for the diagnosis are more

sophisticated and increasingly better informed by actual real world experience. The companies that provide this service have done thousands of STMs where they have had the opportunity to compare the forecasts to the real world, and they are hopefully improving models to reduce the error and to offer more diagnostics," Clancy says.

"The key to success is not in the magic number. The key to success is in having diagnostic capabilities which provide you with insights into what made for success as opposed to what contributed to failure."

"Simulated Test Marketing" (\$39.95, hardcover, 306 pages) by Kevin J. Clancy, Robert S. Shulman and Marianne Wolf, is published by Lexington Books, an imprint of Macmillan, Inc., New York. For more information, call 800-223-2336.

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Trade Talk

by Joseph Rydholm
QMRR editor

Improving the odds with STMs

With the odds stacked heavily against a new product or line extension — estimates say that less than 10 percent of them survive two years on the shelves — it's no wonder that research is done to gauge whether the product has a snowball's chance of making it.

One part of that process is the test market. By marketing the product in a carefully selected region the company can test advertising, in-store promotions, retailer and consumer response and other critical marketing aspects before taking the product national.

But test markets can be expensive, time-consuming, misleading and perhaps worst of all, they may give ideas away to competitors and even be subject to competitor sabotage. There's a better option, argues a new book, "Simulated Test Marketing."

The book's authors make the case that by harnessing the power of computers to do the number crunching, simulated test markets (STMs) can be a cheaper, quicker and more private way to find the marketing mix that offers a product the best chance of survival.

In most STMs, consumers go through purchasing exercises in a simulated store environment and are exposed to advertising for a new product. Their responses are plugged into a proprietary system that calculates how the product would perform given specified levels of advertising, distribution and promotion.

Authors Kevin J. Clancy, Robert S. Shulman and Marianne Wolf supplement their own knowledge as developers and users of STM systems with information about the major STM models from journal articles and promotional literature. Clancy is chairman, and Shulman CEO, respectively, of Copernicus, a Westport, Conn., marketing consulting firm. They previously held the same positions at Yankelovich Clancy Shulman, now Yankelovich Partners. Wolf is manager, Yankelovich Partners, Norwalk, Conn., and adjunct professor of marketing at California Polytechnic State Uni-

versity.

The book covers all the aspects of STMs, a short history, a comparison of the major STM models — ASSESSOR, BASES, DESIGNOR, LITMUS and Simulator ESP — and the companies that administer them and how each of the steps of the STM is performed, from the recruiting of the respondents to the follow-up interview. It also contains sections on the design of each system's "shopping environment," how respondents are exposed to advertising, etc., and what materials and information clients are expected to provide.

Don't match real numbers

In an interview, Clancy talked about one of the most common ways that STMs are misused. It happens when the clients provide the STM consulting firm inputs for the simulation that don't match real-world numbers. "Typically in the company there is a champion for the new product who really wants to see it launched. So they give [the STM firm] marketing plans that assume a higher level of ad spending than they'd ever use in the real world and a higher level of distribution than they've achieved on their last 17 new product introductions," he says.

"But the client is the boss, so you give them the forecast and the forecast looks good and they run the national plan, which is a scaled back version of what they ran in the STM. Then they ask the STM provider, what's wrong with your model? 'We didn't perform as well as you said we were going to.' So you run an autopsy, which more often than not reveals that it's not the STM models, it's the gulf between what the company said it would do and what it actually did when it took the product into the real world.

"As I get older and more cranky I not only plead with them to be realistic when providing the inputs but I also make sure to inform them that the results are based in large part on the

continued on p. 81

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