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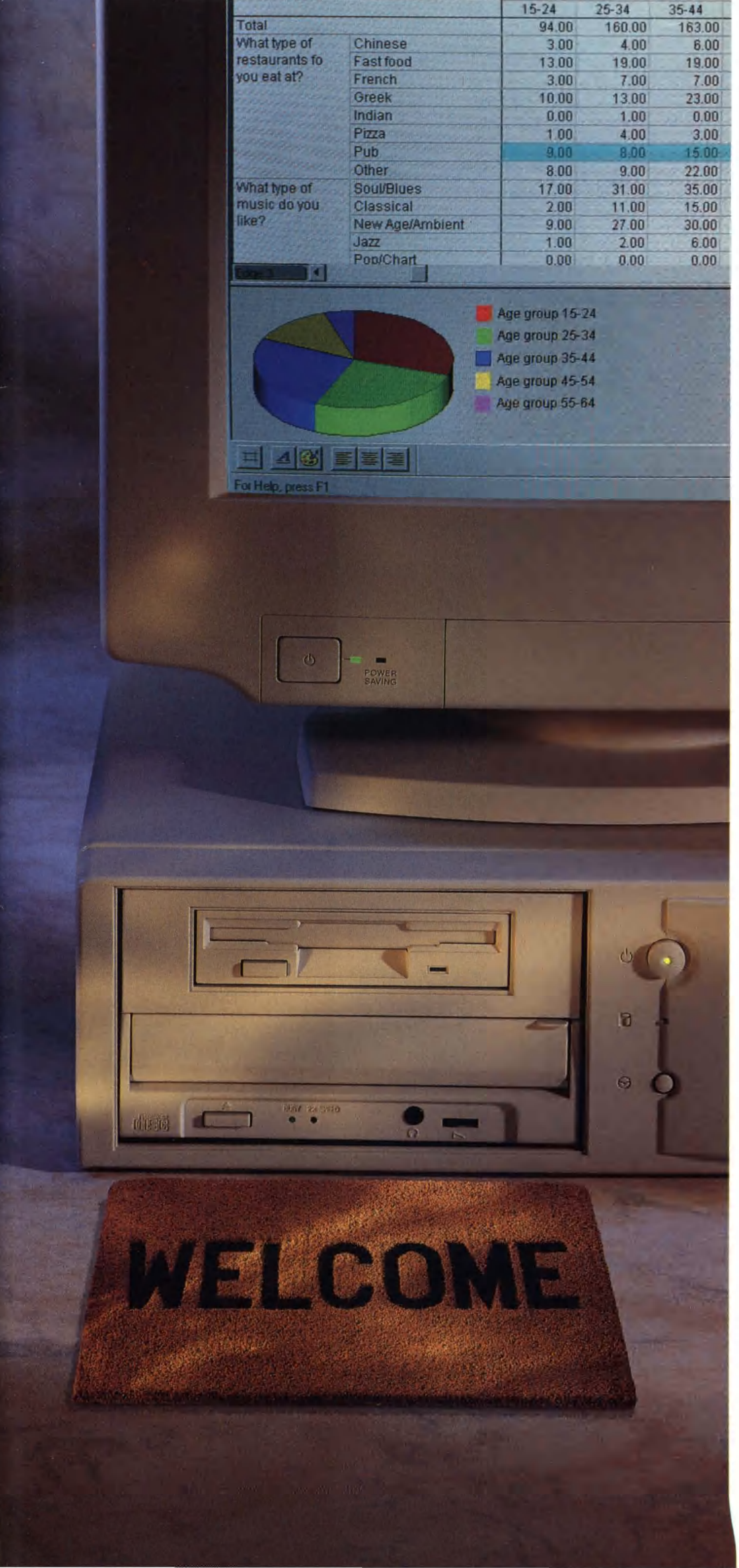
November 1997

Quirk's MARKETING RESEARCH Review

Practical applications in marketing research

International research issue

1997 Mall Research Facilities Directory


15-24 25-34 35-44
Total 94.00 160.00 163.00
What type of restaurants to you eat at?
Chinese 3.00 4.00 6.00
Fast food 13.00 19.00 19.00
French 3.00 7.00 7.00
Greek 10.00 13.00 23.00
Indian 0.00 1.00 0.00
Pizza 1.00 4.00 3.00
Pub 9.00 8.00 15.00
Other 8.00 9.00 22.00
What type of music do you like?
Soul/Blues 17.00 31.00 35.00
Classical 2.00 11.00 15.00
New Age/Ambient 9.00 27.00 30.00
Jazz 1.00 2.00 6.00
Pop/Chart 0.00 0.00 0.00
Age group 15-24
Age group 25-34
Age group 35-44
Age group 45-54
Age group 55-64
For Help, press F1
POWER SAVING
WELCOME

Quirk's
MARKETING RESEARCH
Review

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Volume XI, Number 9 November 1997

Our annual international research issue features case histories on global research projects conducted by IBM and Carrier Corporation.

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The 20-something lifestyle: hot tubs, wine & AOL

"Resplurgence," "sports" and "mellow moods" are three defining trends for 20-somethings as we enter the later 1990s, according to Irma Zandl, whose firm, The Zandl Group, is a New York City-based marketing consulting firm specializing in the under-30 consumer. Zandl recently surveyed her proprietary consumer panel of 20- to 29-year-olds to determine what activities (on a scale of 1 to 5) are becoming more cool and which are losing their cool status.

"Resplurgence" — Hedonistic activities, like gambling in Las Vegas, drinking a bottle of good wine and dining in fine restaurants are captivating 20-somethings. With the economy strong and jobs plentiful, they want to enjoy their early adulthood by spending their freshly-earned money from their first jobs. Shopping is getting more popular as they indulge themselves on bigger ticket items. While they're out having fun, they are doing it in a classy way — sipping cocktails before attending a live theater performance holds lots of appeal. Marketers of big-ticket items, especially high-tech electronics, should reap benefits from this movement. Designer and premium products are also likely to benefit from this willingness to spend and indulge.

Favorite sports — Sports are going more upscale and individualistic. Golf heads the list of sports that are getting cooler, followed by mountain biking and snowboarding. All these sports share the requirement of purchasing at least one pricey piece of equipment and access to very specific (and often exclusive) venues of play. Women are the most likely to say the WNBA and MLS are getting more cool, so it is clear that the success of new professional sports leagues is increasingly dependent on female fans. NASCAR's recent rise in popularity, however, seems fueled by males and their traditional love of motor sports.

"Mellow Moods" — 20-somethings also like to chill and de-stress. Spending time with their honeys, cooking at home, picnics, and days spent in nature are getting more popular. Unlike the yuppies of the '80s, 20-somethings today don't want to sacrifice spiritual and mental well-being for material success. With more young adults cooking at home, supermarkets stand to gain more young customers and home furnishing and appliance companies should also benefit. Stress-relief products, e.g., home massage equipment, candles, aromatherapy products, could also see increases in sales. For more information call 212-274-1222.

What's Getting Cooler

"Resplurgence" %	"Sports" %	"Mellow Moods" %
Trip to Las Vegas 73	Golf 76	Time with Honey 74
Live Theater 68	Mountain Biking 67	Going On-line 73
Drinking Wine 61	Snowboarding 58	Cooking 70
4-Star Restaurants 60	WNBA 57	Going to Mntns. 64
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Microbrews 53	Miniature Golf 32	Praying 39
Cocktails 50	Bowling 30	Playing Cards 37
Dance Clubs 49	Fencing 11	Yoga 20

Latin consumers love fast food

Eating out is both a nutritional and socioeconomic occasion in Latin America. Typically, Latin quick-service restaurants, or QSRs, compete not only with other QSRs, but with street stands, cafeteria-style fast meal outlets and sit-down restaurants. About one in five Latins who buy/eat a meal away from home does so at QSRs, according to research findings reported in *Latin America Perspective*, a newsletter published by Market Development, Inc., a San Diego, Calif., research firm.

Their wide variety of menus and prices and their emphasis on providing quality service to the customer have helped major American franchise QSRs take share from the local alternatives. QSRs in Latin America have been successful in taking market share from street vendors by offering a more reliable and hygienic meal, and from sit-down restaurants by offering a less expensive meal.

The predominant variables driving QSR use in Latin America are age, gender, socioeconomic status and certain unique regional attitude dimensions. Stabilized economies have increased disposable income, making it affordable for more people to buy at QSRs.

About twice as many Latin men use QSRs as Latin women, primarily because there are more working men than women on the road and in a greater variety of circumstances where a quick meal is an acceptable alternative to home-cooked meals.

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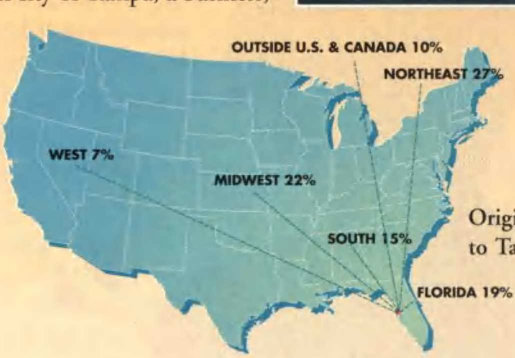

Origin of newcomers to Tampa

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Product & Service Update

Study focuses on mainland China

A single-source media and marketing survey of the China mainland will be conducted by Sinomonitor Inc., a commercial research company related to CEMAC, a non-profit organization jointly initiated and established by the State Statistical Bureau of China and another Chinese government agency. The 1997 China Marketing and Media Study, based on 50,000 interviews with consumers across the country, will include information on demographics, product and brand usage, and media audience information for magazines, newspapers, television and radio. Sinomonitor will conduct the survey in conjunction with BMRB International and Telmar International. For more information call Stanley Federman at 212-725-3000.

New Las Vegas poll, gaming industry model from MRCGroup

The MRCGroup, Las Vegas, has announced the MRCVegasPoll, a monthly omnibus survey of the adult resident population of Las Vegas. Questions can be on any subject, including brand awareness, customer satisfaction, attitude and usage, media usage, concept screening and testing, and positioning. The telephone survey uses a sample of 900 adults. The company has also introduced MarketForecast, a research model capable of predicting a gaming market's revenue potential. The product integrates primary and secondary research with multivariate modeling to forecast demand and opportunity, based on a specific area's unique population characteristics (demographics and market behavior) and industry dynamics. For more information call Jim Medick at 702-734-7511.

Qscan scans questionnaires

Quantime Corp., New York, has introduced Qscan, its new system for scanning paper questionnaires. Qscan integrates ReadSoft's Eyes & Hands scanning software into the Quantime System of survey research software. Qscan uses an enhanced version of Quanquest to design questionnaires and convert them into Microsoft Word format. The questionnaires contain the correct routing instructions and tick boxes and can be formatted to suit any user's house style. A Word macro then generates the instructions for scanning. At the end of the survey, Qscan generates a Quantum data file for tabulation. For more information call Anastasia Schleck at 212-447-5300 or visit the company's Web site at http://

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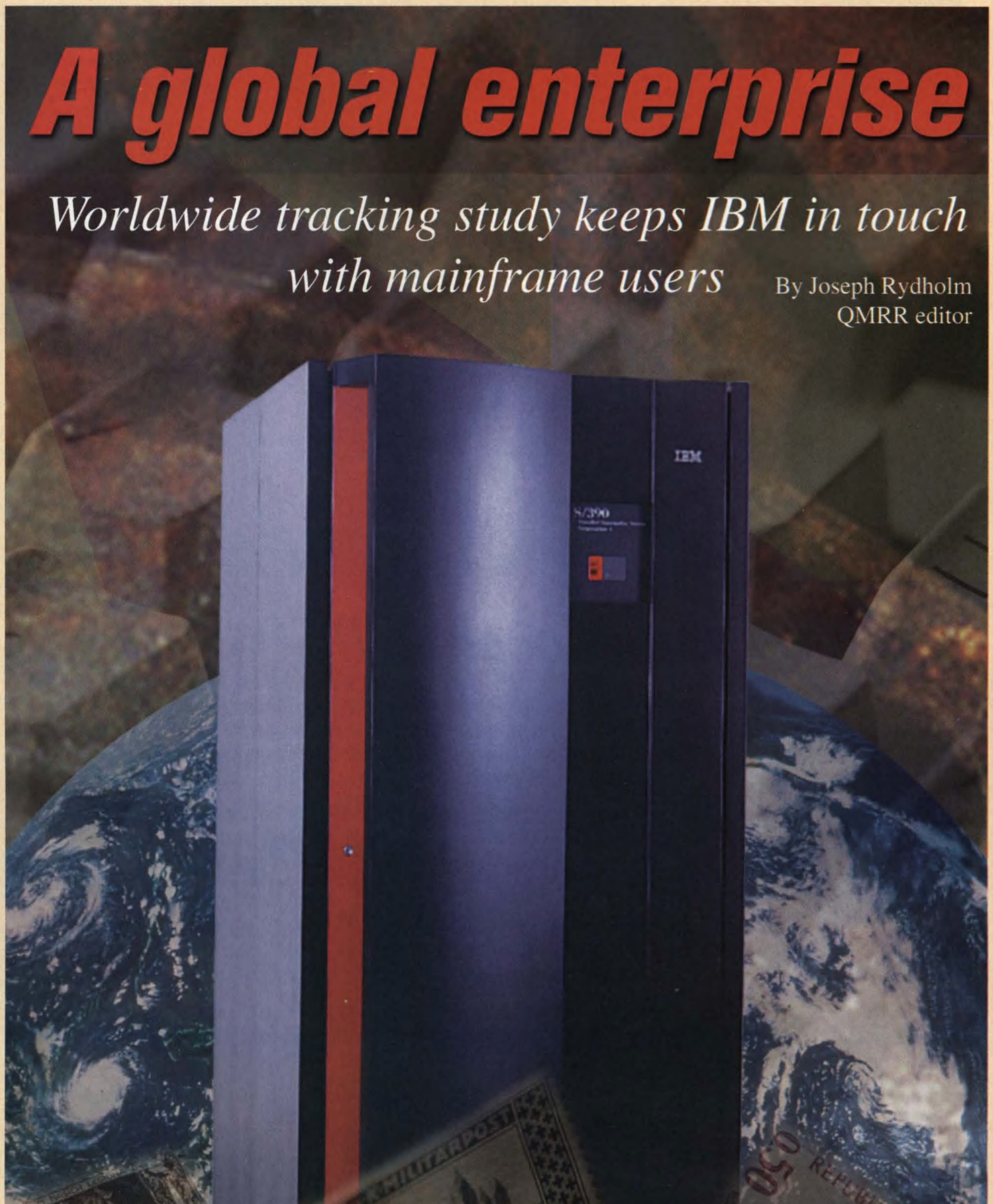
Research Calendar

SAWTOOTH TECHNOLOGIES SEMINARS: Sawtooth Technologies will hold the following seminars near the company's offices in Evanston, Ill.: perceptual mapping: theory and practice, December 8; conjoint analysis: theory and practice, December 9-10; introduction to ACA & Sensus TradeOff, December 11. The seminars are designed for researchers who have had little or no practical exposure to the techniques. With the exception of the one-day introduction to ACA/ Sensus TradeOff, the classes are not training classes for Sawtooth Technologies products. For information on fees and registration call Nicole Garneau at 847-866-0870 or visit the company's Web site at http://www.sawtooth.com.

A global enterprise

Worldwide tracking study keeps IBM in touch with mainframe users

By Joseph Rydholm
QMRR editor



International research

Twice a year, during the spring and fall, IBM conducts a tracking study in 14 languages in 27 countries throughout Europe, North and South America, and Asia. One of every six sites where an IBM S/390 Parallel Enterprise Server is in use is sampled. With the basic purpose of capturing trend data on enterprise server, or mainframe, computing, the study tracks information on a variety of topics, including perceptions of IBM and competitive products, product demand, future acquisition plans, preferred marketing channels and preferred product information sources.

Respondents are asked about the computing equipment they have installed, their future acquisition plans, and their impressions of the various vendors. "This study is the most extensive sampling of the view of large customers inside or outside IBM," says Ed Hogarty, manager of market research and business support, System 390 brand marketing, IBM, Poughkeepsie, N.Y. "We track how we're doing on an ongoing basis, anything from sales and service to product capabilities, announcement effectiveness, and awareness and purchase intent. We keep it broad because the primary purpose is to track trends, not to get a deeper understanding of customer wants and needs."

The study helps IBM see how successful it is in penetrating key industries and also gives an idea of how IBM and competitive equipment is used at both large and small businesses. "The survey represents solid, quantitatively supported data points. We analyze it and then review it with the sales force in each of the countries and get their interpretations, and come back with a set of the top 10 issues that the field is wrestling with, to which we then respond," Hogarty says.

The respondents, both IBM customers and non-customers, have responsibility for making computer system acquisition decisions at their respective companies. For the most part, the interviews are conducted by telephone, but some respondents are also given the option to complete the survey via diskette. IBM is exploring the Internet as another option.

Interviews are conducted by Princeton, N.J.-based research firm RONIN Corp., at its international Call Centre in London and by another research supplier. RONIN conducts the European and Asian interviews using Results for Research, a RONIN-developed project management research tool and CATI package. The software simplifies the navigation of complex questionnaires through a database driven system, allowing interviewers to select items from extensive lists. For example, interviewers working on the IBM project are required to select a computer model from a list of 4,000 brands and models.

To make sure results are consistent and applicable across each geography, the questionnaires are kept identical, with country-specific responses displayed only for the countries where they apply. The CATI package allows for questions and responses to be filtered on a country basis, which simplifies the cleaning, coding, and analysis processes, says Elizabeth McNair, senior project manager, RONIN Corporation.

"We track how we're doing on an ongoing basis, anything from sales and service to product capabilities, announcement effectiveness, and awareness and purchase intent. We keep it broad because the primary purpose is to track trends, not to get a deeper understanding of customer wants and needs."

Accurate translations

With so many languages to work in, accurate translation is a major component of successfully conducting IBM's tracking study. For consistency purposes, RONIN uses two translation firms, one for European languages and another for Asian languages. In addition, IBM personnel in the respective countries review the questionnaire to ensure proper translation of technical terms.

Large-scale global or international studies require a

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A breath of fresh air

First-time use of Kano method helps Carrier Corp. research buyers of its air conditioning units

By Joseph Rydholm
QMRR editor

As the world's largest maker of air conditioning, heating and refrigeration equipment, Carrier Corporation is no stranger to global commerce. The Farmington, Conn.-based company does business in 167 countries. Its products are designed and manufactured in sites around the world.

Carrier had conducted trade-off research on its line of hi-wall ductfree split air conditioning units, which are used in commercial and residential settings, but that research had focused on issues like efficiency, sound level, size, etc. As designers readied new models, the company wanted to find out which control features (things like timing functions and air distribution options) would be most desirable and feasible, given the amount of money budgeted for control features during product development. In addition, was there an opportunity to make Carrier's products stand out in the individual foreign markets by offering features customized to those markets?

"Our products and those of our competitors offer a menu of features. We wanted to look at those features currently offered, as well as others we thought were possible, and try to understand which ones were most valued by customers," says Bob Whitwell, director, global ductfree split systems, Carrier Corp.

"We wanted to see if we could use the same product in every market and, if so, what the potential impact of doing that would be on customer satisfaction. We also wanted to understand if there were opportunities for differentiation in individual markets by providing some features that aren't generally valued on a global basis."

Kano method

Rather than a standard conjoint study, which it had used in the past, Carrier and its research partner, BAIGlobal, Tarrytown, N.Y., conducted face-to-face interviews with potential commercial and residential users of the ductfree systems in Italy, Spain, Korea and Singapore using the Kano method.

Based on the work of Noriaki Kano, a professor at Tokyo Rika University, the Kano method aims to uncover the subtle reasons why certain product attributes are more desirable than others by requiring respondents to answer two-part questions for each attribute: "How do you feel if a feature is present in the product?" and "How do you feel if the feature isn't present?" Respondents must answer each part with one of five replies:

- I like it that way.
- It must be in the product.
- It does not make a difference to me.
- I can live with it that way.
- I dislike it that way.

The Kano method tells you how attractive a feature is and how a person views it by classifying it into one of six categories based on the combination of answers to the two-part questions:

- Attractive — The customer is more satisfied when the product has this feature, but is not necessarily dissatisfied if it doesn't. On a car, for example, an automatically retracting radio antenna is nice to have but its absence wouldn't make a person choose not to buy the car.
- Must-be — The product must have this feature or the consumer would be dissatisfied, but the consumer is neutral about it otherwise, because it's an expected feature. Continuing with the car example, you expect a car to have good brakes.
- One-dimensional — The more of the feature, the better. The better a car's gas mileage, the happier the consumer is. If it doesn't have it, people are dissatisfied.
- Reverse — The customer does not want the feature and having it means dissatisfaction. An example might be a car's color.
- Indifferent — The customer doesn't care either way. Having the feature doesn't mean satisfaction or dissatisfaction.
- Questionable — The customer's responses on this feature contradict themselves.

"We had proposed using conjoint but there was a curiosity about this methodology," says Gunilla Broadbent, president of the Worldwide Services Division of BAIGlobal. "The client wanted to see if it might give more nuance. Conjoint gives you values which are linear, which is an advantage. You can really look at the difference in importance between attributes because the level of the utility is totally linear, which makes it easier to interpret but isn't always totally correct, because there are certain things that, from an emotional point of view, might be more or less important to a person but they don't come out."

"We were trying to look for an alternative that wouldn't involve the cost and limitations of the traditional types of trade-off, conjoint and discrete choice," says Joe Lanzetta, director of global marketing research, Carrier Corp. "This approach allowed us to construct a survey where respondents could answer questions on 15 or 20 attributes and give us an idea of the importance of each. In the past we had used conjoint and discrete choice, which are good techniques, but one of the limitations is the number of attributes you can efficiently test. You can test a lot of attributes but it requires setting up more and more scenarios, and that can be time-consuming and expensive."

Broadbent says that while the Kano method does provide insights to the subtle reasons why one feature is preferred over another, the technique isn't a replacement for conjoint. "This method presents a challenge, especially when you're dealing with several different languages, to find the right nuance and the right way of expressing it, so we did a lot of pretesting before we were satisfied with the wording. It's very difficult to always find exact equivalents to what you had in English, and here it's especially important because if the nuance is wrong, the whole analysis becomes wrong. That's a drawback to the technique; it is very sensitive to language."

"We had to be a little more careful on translation because we wanted to maintain the meaning of statements like 'I like it that way.' You had to make sure that you captured the essence," Lanzetta says.

Measuring price sensitivity was another facet of the research. Respondents were asked to indicate a range of prices, including prices at which they would view the product as so inexpensive that it might be shoddy, those at which it's a bargain but a quality product, and those at which it's unaffordable. "As the manufacturer, you have to define the prices, which may be difficult. This way the consumers define the price for you. By asking people how much they're willing to pay you probably get an unrealistic price, but with the approach we used, you understand where the person is coming from, what is too cheap or too expensive, how big the normal price range is for that person and where it falls," Broadbent says.

Biggest lesson

Working on this study, his second international research project at Carrier, Whitwell says he learned a lot. The biggest lesson is that it's helpful to have a research company handle the overseas interviewing and coordination. "For the

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Don't forget your at-risk customers

By Bill Etter

Editor's note: Bill Etter is vice president, director of research at Rockwood Research, St. Paul. He can be reached at 612-697-5003.

Customer satisfaction research continues to be a hot topic. Conferences and seminars focus on it. Marketing research journals devote entire issues to it. Research firms claim expertise in it. But there is increasing awareness that measuring customer satisfaction is not enough (see for example, Jones and Sasser (1995), and Pruden, et al (1996)). The concepts of loyalty and brand equity are mentioned more and more as important components for customer retention. This article will focus primarily on the concept of loyalty. In particular, we consider loyalty as a continuum and suggest that it is important to look at both ends of the loyalty spectrum. In the process of looking not only at the most loyal customers, but also the least loyal, we define, in a somewhat different fashion than some other researchers, the concept of penalty and reward attributes and introduce the concept of power attributes. These concepts are illustrated with data from a real world study.

Loyal and at-risk customers defined

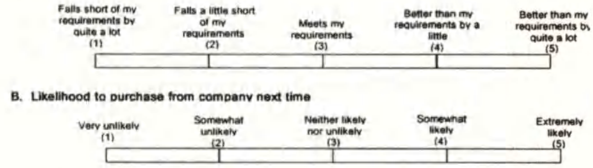
Researchers often define loyalty using one or some combination of three measures — overall satisfaction, intention to repurchase, and willingness to recommend. The work of Jones and Sasser (1995) is an example using a single measure, intent to repurchase, as a measure of loyalty. We have followed the lead of some others in using all three measures to define loyalty.

A recent article in these pages (Pruden, et al (1996)) suggested that using all three measures is, "... not only simplistic, it also lacks potential diagnostic value." Simplicity (which is related to parsimony) has long been recognized as a virtue in many areas of human endeavor, including analysis, and this article will suggest that there is a good deal of diagnostic power in defining loyalty using these three measures, especially if the measures are collected for key competitors.

Others have argued the relative merits of behavioral versus attitudinal based measures of loyalty (e.g., Jacoby and Chestnut (1978) and Pruden, et al (1996)). We will not review those issues here. What follows is essentially a real-world example of the diagnostic power that can be obtained from data collected on the three above mentioned measures[1]. We would suggest that two of these measures are quasi-behavioral (intention to repurchase and willingness to recommend) and one is attitudinal (overall satisfaction).

The concept of loyalty can be thought of as representing a continuum. At one end of this continuum a company can find its most loyal customers; at the other end are the customers who are least loyal. (We do not consider here former customers who might consider being customers again). We have chosen to give labels to the definitions of two types of customers: loyal customers and at-risk customers. Formally, we define loyal customers as those who rate a company a four or five (top two-boxes) on scales A, B, and C in Figure 1 and at-risk customers as those who rate a company a one or two (bottom two-boxes) on scales A, B, or C.

Figure 1. Definition of Loyal and At-Risk Customers



These measures are collected for all companies in a given respondent's consideration set[2].

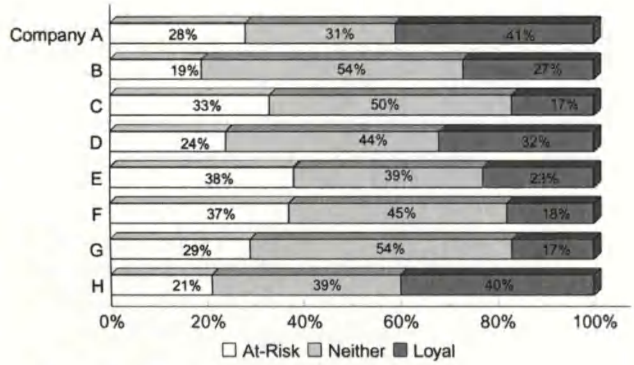
Our definitions of loyalty and at-risk correspond roughly to the labels loyalist/apostle and defector/terrorist used by

Jones and Sasser (1995). Their paper focuses primarily on the link between satisfaction and loyalty. Our focus in this article is primarily on the diagnostic link between perceived levels of performance on individual product/service attributes and levels of loyalty/at-risk.

Loyalty/at-risk assessment by company

Having competitive information allows loyalty and at-risk measures to be compared across competing brands or companies in a given market as shown in Figure 2.

Figure 2. Loyalty/At-Risk Assessment by Company



In this category the ratio across companies between highest to lowest loyalty is 2.4 (41/17) and the corresponding at-risk ratio is 2.0 (38/19). Thus in this category there are considerable differences in the proportion of loyal and at-risk customers across companies. Net loyalty, the difference between the percent of loyal customers and the percent of at-risk customers for a given company, is a measure of the commitment of a company's customer base. Table 1 shows that this commitment varies widely across companies in our example.

Table 1. Net Loyal Customers

Company	Net Loyal %
A	13
B	8
C	-16
D	8
E	-15
F	-19
G	-12
H	19

While we haven't established it empirically, we would hypothesize that to the degree a company has a less committed customer base (i.e., has more at-risk customers than loyal customers) that company is vulnerable to an erosion of their customer base through brand switching behavior. We would

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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. He can be reached at 818-782-4252 or at artshulman@aol.com.

Ellen Karp of Ellen Karp Research/ ANERCA International recalls working on a project concerning AIDS. In preparation for upcoming interviewing, she visited a pharmacy, which happened to be very busy at the time, to purchase a large number of condoms. In the aisle displaying the condoms she merrily selected a wide variety of product, placing it in her basket as other shoppers either admired her with smiles or threw her disdainful looks.

Once she reached the checkout line, again the nearby shoppers noticed what was in her basket and either smiled or sneered, as Karp, thinking of her project, told them, "Busy weekend coming up."

At last she was checked through and gave the checker a personal credit card. Then, realizing that she was buying the condoms for a project, she took out a different credit card, one she used for business, and exclaimed, "No, give me that card back. Use this one. This is a business expense!"

A hush descended over Karp's checkout line.

Jerry Mandel of The Marketing Strategy Group tells about some one-on-one interviews he was conducting with wealthy investors. A heavyset respondent was in mid-sentence when his head dropped down on the table, and he became motionless. A shocked and concerned Mandel stood up and was on his way to the phone to dial emergency medical assistance when the man raised his head and spoke up, "I've got this palsy that comes up every once in a while."

Mandel continued with the interview, though he admits that the respondent fared better than he did the rest of the way.

Ed Sugar of Pine Company, a Santa Monica, Calif., research firm, tells a sweet story. His mother's maiden name was Laurel Cane. So when she got married to Ed's father, she became Laurel Cane Sugar. Later, Ed's grandfather, Maurice Cane, married Ed's grandmother on the other side, B.J., making her Mrs. Sugar Cane.

In a focus group I conducted with kids, there was a cute seven-year-old girl who would not say one word during the session, not even when we went around the room and had the girls tell their names and what kind of toys they played with. Whatever I asked, even simple questions such as whether she liked something or didn't like it, or whether or not she would like to own the test toy, she remained silent. Her silence was surprising to me, since after the qualification screening with her mom, the recruiter spoke to the girl herself to make sure she wasn't shy and could express herself.

After the session, when I told the hostess about the girl's silence, she explained that she'd overheard the mom talking with her daughter in the lobby prior to the session. It seems that the girl had gotten into trouble with her teacher that day at school for talking too much, and was reprimanded by her mom for this misbehavior. So, from the girl's point of view, she was really behaving well during the group session by not opening her mouth.

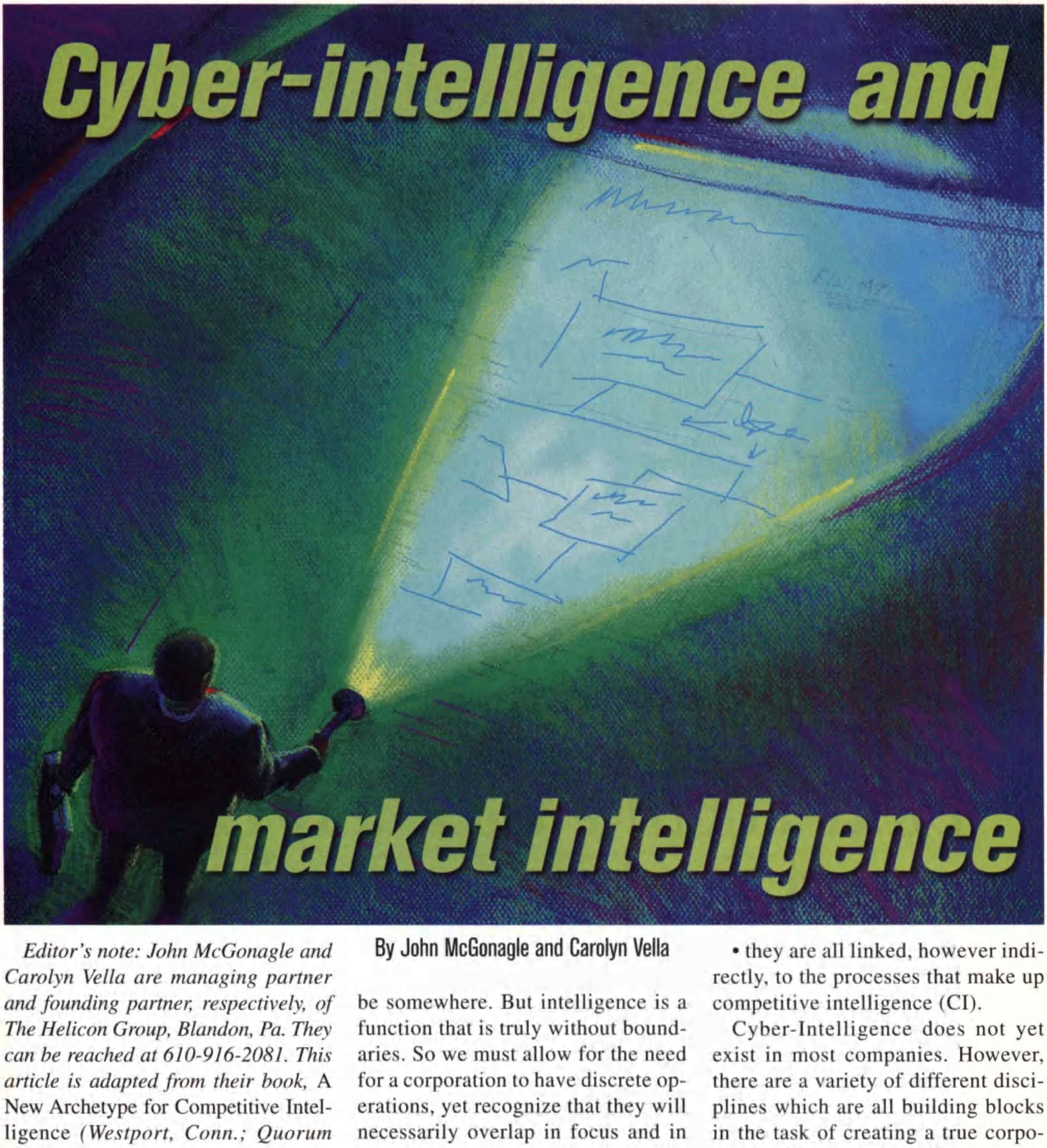
Carol Davis of Davis Marketing Research tells about an interviewer who'd worked for her a long time, and always worked on taste tests. The interviewer was pouting about not being assigned to a certain project. When Davis asked why the woman was upset, the interviewer said, "You know how I like to work on taste tests."

Despite Davis' disclaimer that no taste tests were scheduled the interviewer insisted, "Oh, yes, there's a corn study that starts tomorrow. It's on the schedule."

Trying to keep a straight face, Davis patiently explained that the study was for a foot corn remedy.

Ron Sellers of Ellison Research reports working on focus groups with a very tough recruit of business professionals (doctors, dentists, attorneys, etc.). They managed to recruit two attorneys for the first group. In the waiting area during rescreening, the observant hostess noticed each attorney glancing nervously at the other. The tension in the room was high. Turns out they were about to conduct focus groups with rival attorneys on a very ugly, high-profile case. One of them was paid and sent home.

In future issues, we'll report on more quirky, loopy and strange happenings in the world of market research. If you'd like your story to be told — anything related to research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires — please call me at 818-782-4252 or, better yet, write it up and fax it to me at 818-782-3014 or E-mail me at artshulman@aol.com. ❑



Cyber-intelligence and market intelligence

Editor's note: John McGonagle and Carolyn Vella are managing partner and founding partner, respectively, of The Helicon Group, Blandon, Pa. They can be reached at 610-916-2081. This article is adapted from their book, A New Archetype for Competitive Intelligence *(Westport, Conn.; Quorum Books).*

By John McGonagle and Carolyn Vella

Over the next several years, we will be seeing see the emergence of a new form of business intelligence, what we call Cyber-Intelligence™. By this term, we mean to elicit a vision of an intelligence function which operates almost without visible boundaries. Realistically, in the corporate world, everything must be somewhere. But intelligence is a function that is truly without boundaries. So we must allow for the need for a corporation to have discrete operations, yet recognize that they will necessarily overlap in focus and in operation. And, in seeing it in this way, we must also appreciate that this goes against the grain of corporate operations and structure.

As we view it, Cyber-Intelligence is currently composed of a variety of elements, which can be seen as building blocks. Each has several elements in common:

• they are outward focused, at least in part, and

• they are all linked, however indirectly, to the processes that make up competitive intelligence (CI).

Cyber-Intelligence does not yet exist in most companies. However, there are a variety of different disciplines which are all building blocks in the task of creating a true corporate intelligence. The building blocks of Cyber-Intelligence are the following:

- competitive intelligence
- strategic intelligence
- market intelligence
- crisis management
- benchmarking
- reverse engineering, and
- defensive (or counter) intelli-

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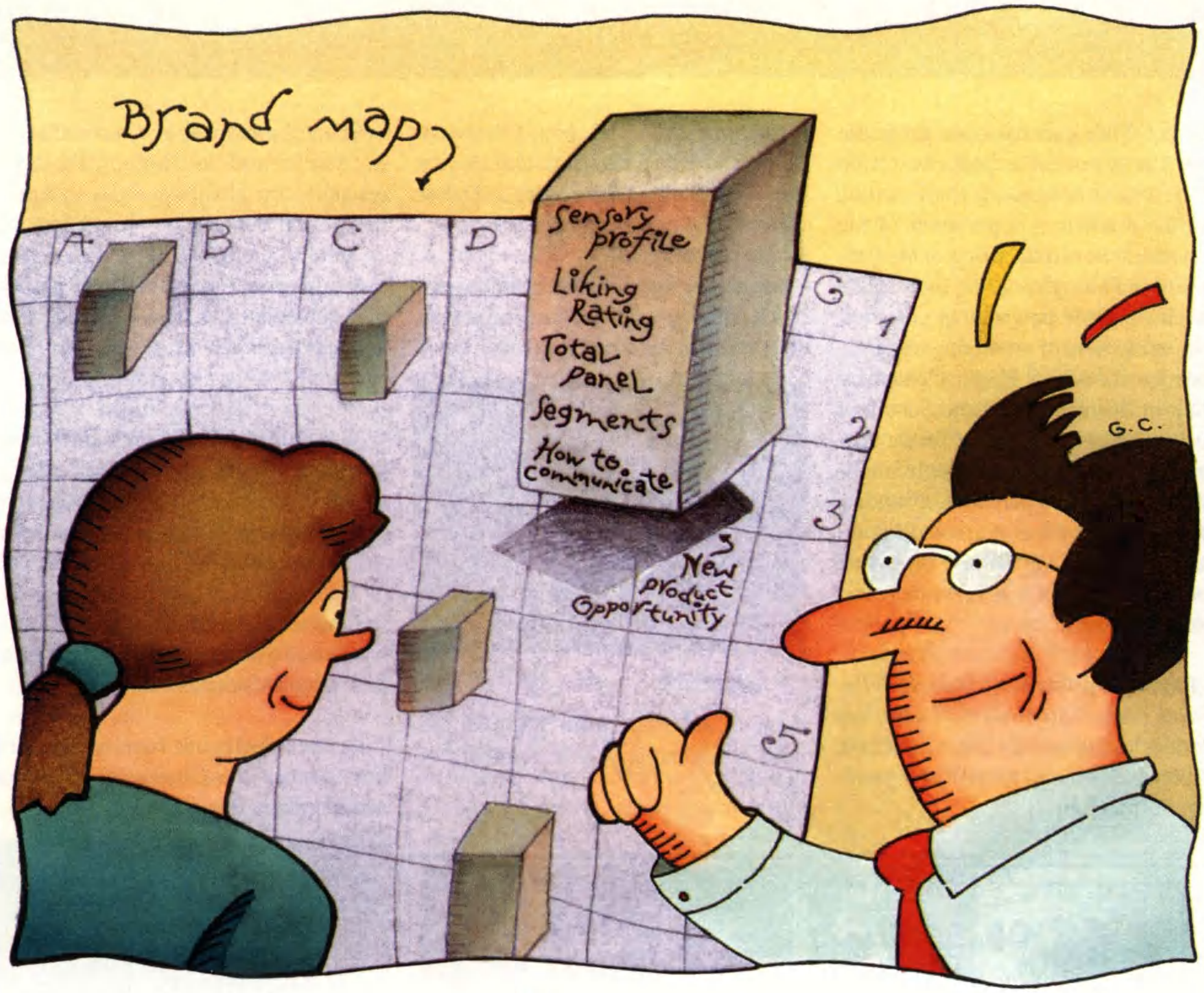

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Vijay Mahajan has been given the *1997 Parlin Award*, an honor bestowed by the *American Marketing Association* and the marketing department of the *Wharton School of Business at the University of Pennsylvania* on individuals who have made outstanding contributions to the field of marketing research. Mahajan, the John P. Harbin Centennial Chair in Business, Graduate School of Business, The University of Texas, Austin, has worked on the strategic implications of market penetration models and analysis and has presented his research at more than 70 universities and research institutions in more than two dozen countries.

Jonathan Rubin has joined *NFO Research, Inc.*, Greenwich, Conn., as president of its new division, InfoCom. Jill Wynn has been named vice president of InfoCom.

Alliance Research, Inc., Crestview Hills, Ky., has named **Beth Daush** vice president of client services at its Dallas office.

Market Strategies, Inc., Southfield, Mich., has named **Carolyn Holmes** research director of its Healthcare Division. In addition, **John Thomas** has been promoted to research director of the division.


Holmes **Thomas**

Frank Leinweber has joined *Chilton Research Services*, Radnor, Pa., as a research consultant specializing in the health care industry.

Junghwan Choi has been named vice president, marketing sciences, at *Conway|Milliken & Associates*, Chicago.

Neil Palosaari has been named market research associate at *C.J. Olson Market Research, Inc.*, Minneapolis. **Jolie Kennedy** has been named market research assistant.

Aragon Consulting Group, St. Louis, has named **Steven Ballou** vice president and associate research director.

Brian Schultz has been named vice president at the Cincinnati office of *Market Facts, Inc.*


Schultz **Knopf**

CB&A Market Research, Winston-Salem, N.C., has promoted **Pam Knopf** to vice president of operations. In addition, the company promoted **Rita Lewis** to textile lab coordinator and **Trent Creed** to building manager. **Karen Lefler** has joined the firm as senior project manager.

Darlene Shelton has joined *The Matrix Group*, Lexington, Ky., as field director. **Samantha Eades** has been named project coordinator.

MovieFone, Inc., New York, has hired **Jay Mattlin** to manage its movie audience research efforts.

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Research Industry News

Ziment, a New York-based research firm, held its second annual international marketing research conference at its headquarters in New York. The theme: the need for international research to always involve local expertise. Latin America was selected as the featured region for the conference in response to the region's growing importance in multinationals' international marketing efforts.

The conference featured talks by representative from four of the Latin American partners in The Research Alliance: Brazil, Argentina, Colombia and Mexico/Central America. Ziment is the U. S. representative for the Alliance, a worldwide international network of strategic full-service marketing research consultancies.

In attendance were marketing and marketing research professionals from a number of multinational companies, including Revlon, Citibank, Merck & Co., Bristol-Myers Squibb, Advanta National Bank, Lucent Technologies, Hewlett-Packard and BellSouth.

The conference started off with an introductory presentation by Howard Ziment, managing director of Ziment, who spoke regarding the importance of using local expertise in conducting research in international markets. He referred to the five C's of international research: careful design, control, consistent analysis, culture, and crave local expertise. He ended his talk by indicating the need for local expertise even in Latin American markets, because although close by, they are all very different from the U.S., with many of us holding misperceptions of the region.

Ziment was followed by Gustavo Mendez-Kuhn, president of Improdir, Mexico City. He indicated that although Mexico is still recovering from the peso crisis in December, 1994, it is now at a point where investment in Mexico would be advantageous to those firms who decide to do so. This is because President Zedillo has implemented economic reforms and plans that are proving to be effective in moving the economy forward. Economic growth of at least 5 percent per year is predicted between now and the year 2000.

Meanwhile, the consumer in Mexico is interested in the quality of U.S.-made products, and will seek out this quality as long as pricing is not prohibitive.

Juan Jose Lloret, managing director of Market Link, Buenos Aires presented the economic picture in Argentina. The per capita income in Argentina is far above (double) that found in other Latin American countries. However, the availability of products, especially in terms of the nearly infinite choices found in the U.S., is not prevalent in Argentina. Therefore, there actually can be said to be pent-up demand in Argentina for high quality products that can enhance Argentinean lifestyles.

Next, Liliana Baepa, vice president of International at Market Research de Colombia, spoke to the group on the characteristics of the Colombian people, their attitudes, media habits and goals in life. They are generally happy compared to measured levels in other Latin American countries, and consider the home and family to be of high priority in their lives. They are highly motivated in their work lives. In urban areas, they universally watch TV and listen to radio, and a high majority (over 80 percent) read newspapers/magazines.

Although violence and narco-terrorism is of concern to them, they are actively seeking to build better lives and to achieve higher education. Their main goal is to have success in their career and to have family and friends be proud of them.

She closed by speaking of important cultural nuances with respect to conducting research in her country. As an example, telephone surveys cannot be

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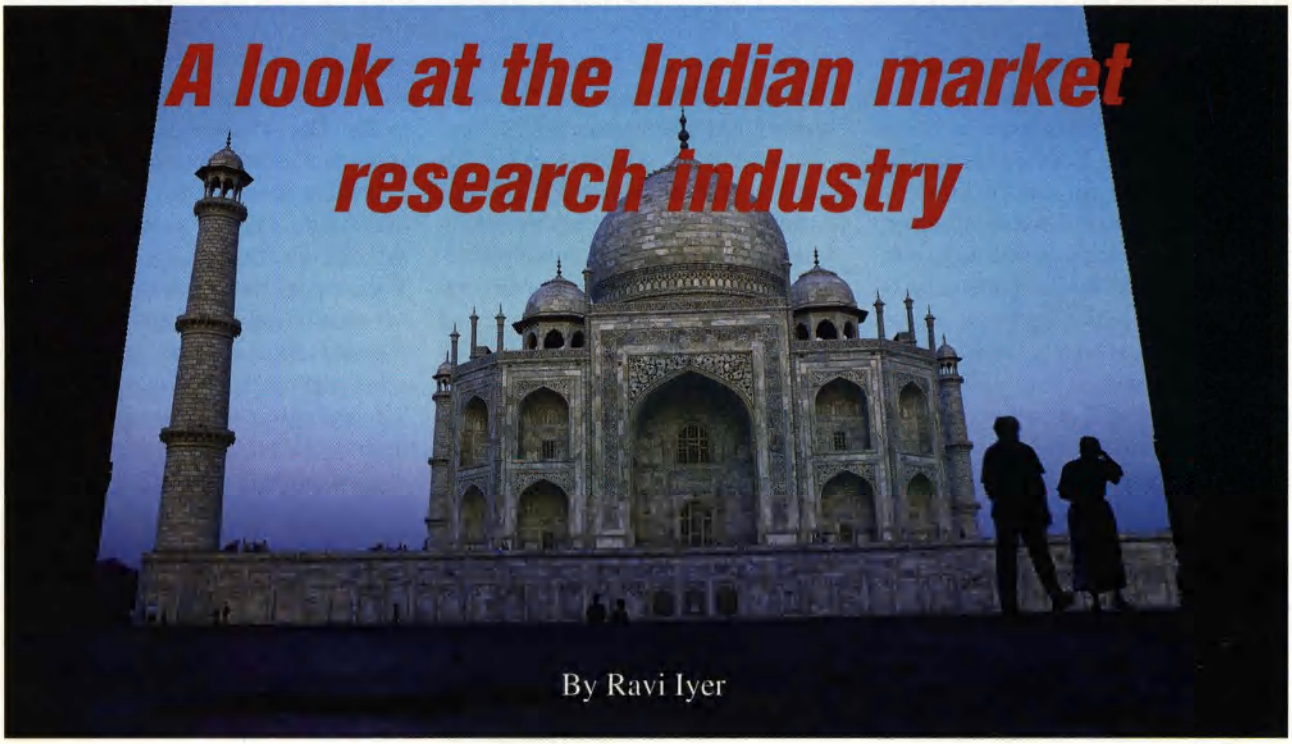


A look at the Indian market research industry

By Ravi Iyer

Editor's note: Ravi Iyer is president of Paradigm Technologies International, a Westwood, N.J. research firm. He can be reached at ravipara@aol.com. or at 201-722-3550.

The Indian marketing research industry has been growing by more than 30 percent for the past three years. The spending for marketing research activities is presently estimated at $35 million. There are about 200 firms that provide marketing research services, of which eight to 10 firms are large and have nationwide capabilities. The torrid pace of growth is expected to stabilize at around 20 percent per year. Since the total spending for research comprises only one percent of total spending on all marketing services (advertising, marketing research, public relations, etc.), researchers believe the market holds tremendous potential.

Growth areas

The growth has largely been in the category dubbed "fast-moving consumer goods." This category, which comprises over 100 consumer products sold at the retail level, constitutes 60 percent of the total spending for marketing research activities. Other growth areas have been the financial services and automotive sectors.

The Indian automobile market was, until a few years ago, closed to the global giants. Deregulation has resulted in a rush of the world's major automobile manufacturers to India. Today, American, European, Japanese and Korean automobile companies manufacture vehicles in India. Demand for research in this area inevitably followed. Recognizing the need, several of the large marketing research companies have set up groups within their organizations to cater to this burgeoning market. The other major growth area has been in media services. While most research is conducted on consumer goods, business-to-business studies have been catching up. The main research interests of biz-to-biz studies have been in the office automation and industrial products areas.

Major players

The two giants in marketing research are the Indian Market Research Bureau (IMRB) and ORG-MARG. Founded in 1970, IMRB, the larger of the two firms, is also the largest marketing research organization in South Asia (India, Nepal, Sri Lanka and Bangladesh), and has a staff of 400. Several of the newer firms were founded by IMRB alumni. ORG-MARG was formed in 1995 by the merger of Operations Research Group (ORG) and Marketing and Research Group (MARG), and employs more than 900 people. The other large marketing research firms include Dun & Bradstreet Marketing Research, Protech India Limited, Indica Research, Marketing and Business Associates, MBL Research and Consultancy Group, MODE Research, Pathfinders: India, and Research International India. Several large U.S. and European firms have established a presence in India. They have accomplished this either through strategic alliances or partial ownership. Some well-known U.S. firms which have a presence include Dun & Bradstreet, Millward Brown, Gallup, and Yankelovich. European firms include Research International, Lintas Worldwide, MBL Group plc, MRB Group and VNU.

Almost all the large companies are headquartered in the city of Bombay, with branch offices in other large cities. Bombay is the business capital of

the country. A few of the large firms are located in other cities such as New Delhi, Calcutta, Bangalore and Hyderabad. An average research study costs between $5,000 and $10,000.

Research methods

Quantitative research is the most commonly used approach, accounting for 80 percent of the research studies conducted by companies in India. Qualitative makes up the other 20 percent. Due to lack of a strong research infrastructure, several of the data collection methods commonly prevalent in the U.S. cannot be used. The most common data collection method for quantitative studies is in-person interviews. The response rate for this method is up to 60 percent in upscale markets and as high as 80 percent among other population segments.

Focus group facilities equipped with one-way mirrors and audio/video-recording devices are not available. Hence, focus groups are held mostly in hotel rooms with closed-circuit television monitoring facilities.

Telephone interviews and mail surveys are used on a very limited basis. The principal reasons are lack of adequate telephones and low literacy rates. Lack of scientific samples and databases are another major drawback. Companies usually rely on telephone books to compile lists. Telephone availability is mostly restricted to middle- to high-income families living in the large cities. Among this segment, as many as 50 percent of the households have telephones.

The low penetration of telephones is also compounded by rates for long-distance calls, which are comparatively high by Indian standards. While clients increasingly recognize the need for research, they balk at the high cost of telephone, and computer-assisted personal interviewing (CAPI) methods in collecting data.

The use of scanners and automated equipment at retail checkout counters in almost nonexistent. Nevertheless, there are companies that conduct retail audits and provide data on consumer product sales.

Some U.S. and European Companies With a Presence in India

Company	Affiliation
Dun & Bradstreet Marketing Research Pvt. Ltd.	Dun & Bradstreet, U.S.
Indian Market Research Bureau	MRB Group Limited, U.K.
Marketing and Business Associates Pvt. Ltd.	The Gallup Organization, U.S.
MBL Research & Consultancy Group Pvt. Ltd.	The MBL Group, Plc. U.K.
MODE Research Pvt. Ltd.	Sofres Group, France
ORG-MARG	VNU Group, The Netherlands
Pathfinders: India	Lintas Worldwide
Protech India Ltd.	Paradigm Technologies International, U.S.
Research International India	Research International Group, U.K.
Source: ESOMAR Directory, Advertising & Marketing, and personal interviews.	

While syndicated studies are just beginning to gain recognition, researchers believe that the number of clients is not sufficient enough to justify them. For similar reasons, companies are hesitant to offer off-the-shelf reports similar to those being conducted in the U.S. and Europe.

National readership studies are conducted once every two years. Advertising agencies use these studies for their media planning activities. Political polling, while being a recent phenomenon, is also gaining increased attention.

An advertising study was initiated in 1987 by the consumer products giant, Hindustan Lever. Lever, India's equivalent of Procter & Gamble in the U.S., is an affiliate of Unilever. This study, called PULSE, has been regularly tracking advertising since then. Recently, however, several other research firms have launched their own studies to track advertising.

The most interesting development has been in the area of measuring television ratings. The two largest firms, IMRB and ORG-MARG, both have their own ratings study and are locked in a race to be the winner. Both companies have invested heavily in people meters. Recently a joint industry group awarded the ratings contract

to IMRB. A fallout may result in the future. Nevertheless, for now, the two competing systems are seemingly secure because clients continue to use both.

Most market research companies have staff who are experienced in analytical techniques, including sophisticated analysis. They use industry standard software such as SPSS and SAS, and custom software developed in-house. According to V. Ravi, executive director of Indica Research, research companies in India are modeled after companies in the U.K. and thus tend to use psychology in focus groups. Conducting nationwide studies poses a challenge to researchers because of multiple language skills required. However, researchers have developed a keen sense of understanding of the cross-cultural differences that exist among the various regions in India.

Growing pains

The rapid growth has not been without its problems. Researchers in India are hampered by a serious lack of supporting infrastructure. For example, only one percent of all households has telephones. Literacy rates are also low. Thus, telephone and mail surveys are almost nonexistent.

The lack of adequate support services such as list companies, and focus group facilities have prevented researchers from offering the quick turnaround that clients in the U.S. and Europe are accustomed to. Rapid growth has also led to a shortage of trained research staff, says Thomas Puliyel, country manager for Research International India, a member of the Research International, the U.K.-based giant.

Professional organizations

The Marketing Research Society of India (MRSI) is the professional body for India's marketing researchers. The society, established in 1981, has 50 corporate and 110 individual members. While there are no government regulations on the research industry, the society has established a set of rules called the Contractors Code of Conduct for its members. It encourages its individual and corporate members to actively participate in industry seminars. Several members have presented papers at past meetings of the European Society for Opinion and Market Research (ESOMAR). MRSI is based in Bombay on the campus of Xavier Institute of Management, one of India's best management schools. The society publishes a membership directory and is considering the publication of a regular newsletter or magazine.

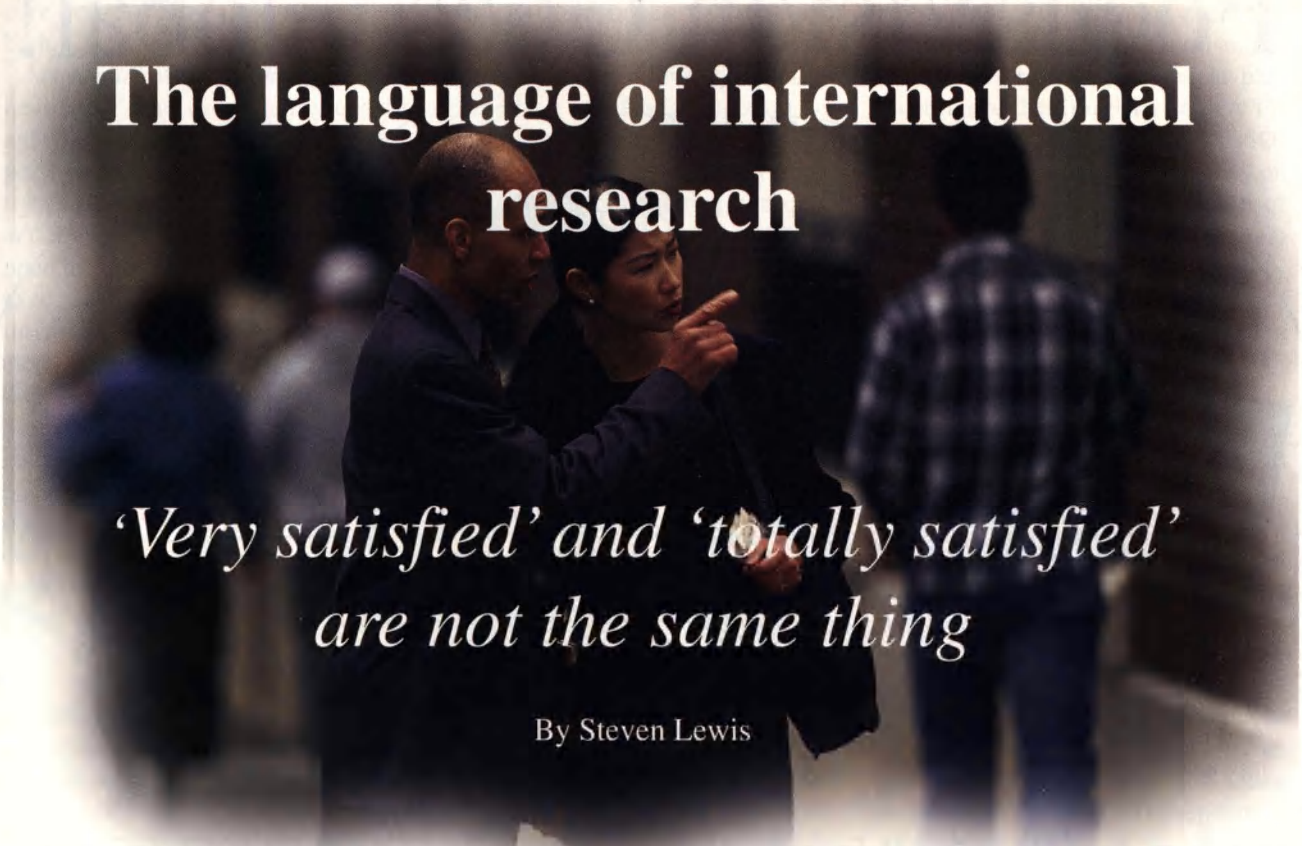
Future outlook

While India's marketing research industry will continue to grow, it faces some important challenges. The need for a well-established research infrastructure is paramount. As India deregulates further, the telecommunications industry is expected to grow rapidly. The lack of reliable list samples has to be addressed. Focus group facilities with one-way mirrors and equipment for audio and video recording are also needed, especially in the large cities.

The Indian market is not homogenized. In order to obtain data on a nationwide basis, researchers have to target several cities, each with its own set of challenges, such as a different language and culture. While researchers understand such complexities, they have to work hard to justify high costs of conducting national studies to clients. According to Indica Research's V. Ravi, another critical task facing the industry researchers is the need to articulate the value that research adds to a client's competitive efforts.

Challenges and opportunities

The Indian market offers plenty of challenges and opportunities. The rapid rise in the number of Indian research firms and increasing presence of U.S. and European firms is strong evidence of the opportunities. While it lacks the infrastructure available in developed countries, the growing number of companies reflect a sense of optimism that eventually, it will become a market that cannot be ignored. ❑



The language of international research

'Very satisfied' and 'totally satisfied' are not the same thing

By Steven Lewis

Editor's note: Steve Lewis is a co-founder and partner of Development II, Inc., a Woodbury, Conn., market research firm specializing in global customer satisfaction surveys. He can be reached at 203-263-0580.

Over the past nine years, our firm has conducted a number of global customer satisfaction surveys, collectively encompassing work in many countries and languages. Some of us have also spent time living and working overseas, gaining exposure to a variety of languages and cultures. That combined experience has alternately proven to be educational, at times amusing, and on occasion, even embarrassing.

While living in Sweden a few years ago, struggling to learn the language, I frequently found my communication efforts generating quizzical looks, vague smiles of polite but unknown origin, even bouts of open laughter. I vividly recall the evening years many ago that I had dinner with my future Swedish mother-in-law. She had prepared and served an exquisite and bountiful meal of local cuisine and I had eaten to my heart's content.

When she asked me if I wanted more, I was determined to impress her by responding in her native tongue. "No thank you," I said in my best Swedish, "I'm full." Feeling quite proud of my diplomatic prowess, I was thus surprised when she looked at me a bit oddly in response, a fleeting but detectable look of curiosity passing across her features. Some time later I learned that I had actually said, "No thank you, I'm drunk," a linguistic *faux pas* no doubt made all the more curious by the fact that I'd had but one glass of wine with dinner. Her good manners kept her from ever saying anything.

It was, of course, far from being my only communication gaffe in that country. The bright point was that my local colleagues, between snickers, admitted that at least they now understood how they sounded when they spoke English.

Such problems are hardly one-sided. A European friend stayed at my house a few years ago and, told to make himself at home, decided one night to grab a beer from the refrigerator. After finishing the can he winced a bit and proceeded to tell me that he found American beer to be disgustingly sweet. That foundation of that seemingly incongruous opinion only became apparent when a look at the can revealed that he just finished drinking a root beer.

Few companies dealing in international markets have been immune to the difficulties associated with language. Most people have heard of the headaches Pepsi suffered when they discovered that their slogan "Come alive with the Pepsi generation," translated into Chinese as "Pepsi brings your ancestors back from the dead." Or General Motors South American experience with the Chevy Nova which, in loosely translated Spanish means "It won't go."

Those types of experiences require all of us involved in the field of international research to fully appreciate the minefield of nuances that language can present. That very awareness was reflected in our early efforts of designing global customer satisfaction surveys. The first and perhaps most important consideration in that regard lies in the structure of a survey's scaling metric.

A few years ago, we began designing a global customer satisfaction survey for a client who had previously conducted such surveys in English-speaking countries, but had no experience in other languages. While the client was accustomed to, and requested use of, a metric of "very satisfied," we expressed concern about using a somewhat vague and subjective word like "very," fearing that the term, though generally understood in English, might create confusion in other languages. We felt a more clear-cut benchmark was needed. As such, we proposed that the surveys being designed utilize the following scale:

Totally Satisfied
Somewhat Satisfied
No Opinion
Somewhat Dissatisfied
Totally Dissatisfied

To determine the validity of our concern, we contacted a team of language experts who had previously assisted us with the translation of surveys into nine European and five Asian languages. We asked them what would happen to the context of a survey given use of the word "totally" versus the word "very."

The responses from the Europeans were all similar. The use of "totally satisfied" in their languages represents a distinctive end point in satisfaction. That is, if one is totally satisfied, there are no unmet needs or unresolved issues. In short, there is no need or room for improvement.

On the other hand, a "very satisfied" response indicates that the respondent may be happy, but it also strongly implies that there is room for improvement. So much so that all of the European translators asked why we were even debating the issue. In their local languages, we were informed, the term "very satisfied" has the exact same meaning as the term "somewhat satisfied."

When we contacted our Chinese and Japanese translators to get their perspectives on the issue, both expressed the same opinions we had heard from the Europeans. "Totally satisfied," they agreed, is a much better indicator of definitive opinion than is "very satisfied," the primary reason being that the terms "very satisfied" and "somewhat satisfied" have virtually no difference in their languages.

The Japanese translator took it a step further, pointing out that the words "very" and "totally" have extremely different meanings in Japanese. He felt that, in the Far East, "very satisfied" as a top level of importance does not hold nearly the same distinction as "totally satisfied."

The Chinese translator agreed, using a recent experience to support what he had long known. He told of how he had recently translated an English survey into Chinese for a U.S.-based credit card company. The English version used the words "very satisfied," but when that wording was translated into Chinese, it caused such confusion that his U.S. client quickly requested the wording be changed to "totally." The company had little choice but to make the same changes in the U.S. as well, in order to have comparable results across the cultures.

"Totally satisfied" instead of "very satisfied"

Our of our translators once made the observation that "English is a word-rich language, and Americans in particular are more casual about word meanings than is the rest of the world." Illustrating his point is the old American slogan for Salem cigarettes: "Salem — Feeling Free." When that slogan was introduced into the Japanese market, the translation produced the line, "When smoking Salem, you feel so refreshed that your mind seems to be free and empty."

And of course it's not just in the realm of conceptual thinking that problems can occur. Even simple words and phrases can become confused when moving from one language to another. A classic example of that occurred in Italy some years ago when an advertising campaign for Schweppes Tonic Water came out of the translation process as "Schweppes Toilet Water." One phrase, two entirely different interpretations that can hardly be seen as interchangeable.

Thus clarity is of primary importance whenever dealing in a multiple language, multi-culture environment. Nothing can be taken for granted, and we can never assume that what we understand in the U.S. is what will be understood elsewhere.

In the field of international research that realization is crucial. Through research and experience we long ago determined that use of the "totally satisfied" instead of "very satisfied" produces clear and necessary benefits. Among them:

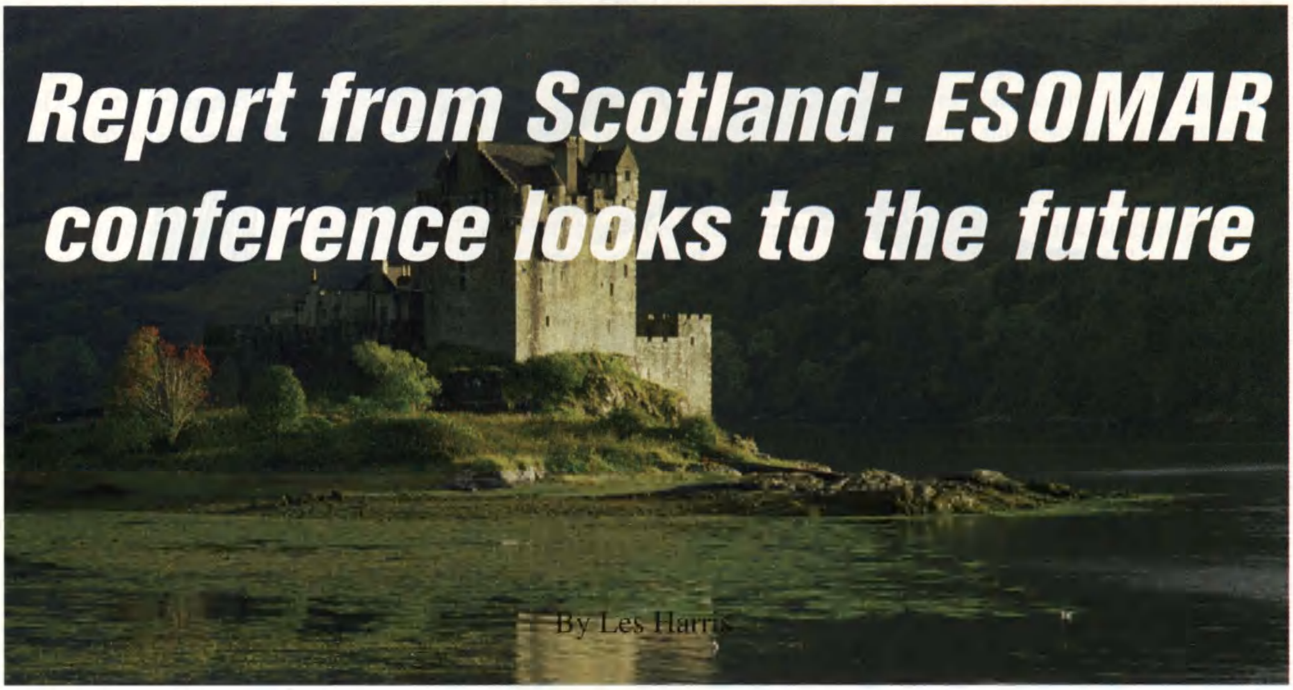
• It allows a survey to be consistent across languages and cultures.

• It provides a distinctive end point by which to determine customer perceptions and opinions.

• As a definitive opinion point, it provides a much more reliable mark by which to calibrate movement in customer decision-making criteria.

With the less concise wording of "very," a term easily overlapped with "somewhat," the true movement of customers' viewpoints is masked. There are no definitive points upon which to base the measurement and effectiveness of improvement programs, especially in the non-English-speaking countries.

The conclusion is simple. In our experience, the word "very" should never be substituted for "totally" in global customer satisfaction surveys. ❑



Report from Scotland: ESOMAR conference looks to the future

By Les Harris

Editor's note: Les Harris is managing partner of Mature Marketing & Research, Boston. He can be reached at 617-720-4158.

The European Society for Opinion and Marketing Research (ESOMAR) held its 50th annual congress and exhibition in Edinburgh, Scotland, from September 7 to 10. Thirteen sessions were scheduled during the three days with a total of 44 presentations; 1,218 participants from 65 countries attended. In addition to the presentations and social events, over 60 exhibitors took part in an agency fair, which included market research agencies, suppliers of syndicated reports, software companies and consultants.

Many of the attendees I spoke with felt the conference contained a number of high quality presentations. Networking was a second important benefit; the congress provided ample opportunity to meet and talk with people from other companies and other countries.

The conference's them was "Learning From the Future: Creative Solutions for Marketing Research." Linda Caller, international planning director of Ogilvy and Mather in the U.K., and chairperson of the program committee, said the theme was chosen to reflect market research's changing role from a data and information supplier to more a part of the strategic decision making process. Research must use information creatively, transforming it into knowledgeable and usable data which can then be applied to new ways of solving business problems.

Following are some of the themes and topics which were discussed at the conference.

The new millennium — Many presenters focused on examining how the world will be in the future so that market researchers can prepare themselves. Sir Michael Angus, chairman of Whitbread PLC, believes that market research should be a support system for innovation and growth. The title of his presentation was "Back to the Future, Lessons from the Past."

Rowan Gibson, creative director, Europe RSCG, commented that we have to shape the future before it shapes us. His topic, "Rethinking the Future," looked at the idea that we can, to some extent, control, order and predict the future with a new mindset based on the concept of discontinuous change.

Hazel Kahan from the U.S. addressed the changing beliefs, values and attitudes of consumers, and how the market and opinion research profession should respond. She spoke of the intensification of socio-psychological responses as the end of the millennium approaches. She concluded with the belief that a growing spirituality will become one of the more striking changes in the new millennium.

Susan Holder and David Young of U.K.-based Future Featuring Ltd., offered the hypothesis that the core competence of understanding the consumer is now being under-utilized; researchers aren't respecting the consumer as an equal partner in the research process. The researcher must reach beyond his or her current knowledge and identify the unsatisfied needs of consumers to work with the consumer's agenda, not their own. The market research industry must improve its ability to help clients identify new markets and create real product differentiation to fit the future market.

Creativity and market research — Andrew Dexter, managing director of U.K.-based DVL Smith Ltd. Cognition, addressed the issue of creativity and market research by noting that it is necessary to take an empirical, rather than only a qualitative and impressionistic, view of creativity. His paper demonstrated that research's role as a creative tool can be improved by more effectively using and classifying the range of mindsets that exist among respondents.

The Internet — The future use of the Internet by market research was addressed by David Pring, executive vice president of CLT Research Associates in the U.S. His discussion centered on the increasing growth of the interactive medium and the role market research will have in the on-line environment. If on-line is to become a dominant form of data gathering in the coming millennium, market research must decide the role it wishes to have, and, more importantly, the legitimacy and relevance of this method of data gathering.

Use of laptops — Lorna Tee, director, U.K.-based Intimations Ltd., and Steve Bather, U.K.-based ISP Limited, spoke on the use of computer software supporting consumer group discussions. Although this technique, in which a laptop computer is given to each respondent, creates a very different environment to a group session, the use of computer software can help stimulate respondent interaction in groups and reduce negative group dynamics. The result can be more creative and constructive sessions, particularly with some sensitive discussions and among young people who are sometimes reluctant to express their thoughts.

CAPI — Bill Blyth and Greg Smith's paper about computer-assisted interviewing looked at one technology in particular, the pen computer, and its applications. Blyth is research director, and Smith is development director, with U.K.-based Taylor Nelson. They noted that parallel applications of pen against paper resulted in fuller questionnaires being received and increased use of the extremes on semantic differentials. They also reported that proficiency of interviewers with the equipment substantially increases speed and ease of use compared with paper, which may result in more responses on some questions.

Innovations in techniques — In their presentation, "It Is Time We Started Using Statistics," Jeremy Wyndham, managing director, Public Attitude Surveys, U.K., and Richard Goosey, chief statistician, Research International, U.K., addressed the issue of using basic statistics to improve the operating and analytical efficiency of quantitative market research. For example, the use of basic statistical formula to optimize sample size and the replacement of random sampling techniques by quota sampling. Executives, according to Wyndham and Goosey, have focused their attention on computer technology and ignored the use of basic statistical procedures. They further added that although most research executives have an initial understanding of the application of basic statistics, they infrequently use this knowledge when interpreting research findings.

Developments in multi-country research — Andrew C. Gross and W. Benoy Joseph of Cleveland State University's College of Business Administration identified three sources of global market information: national governments and international agencies; private sector companies and nonprofit groups; and selected individual experts or groups. During the past 25 years, Gross and Joseph have concluded that historical data describing the size and nature of national, regional and global markets for specific products have become more available; conversely, the data has become more difficult to analyze and forecast. Although more data is now available from multiple databases and on-line services, and more sophisticated techniques and faster computers accelerate the collection of the data, evaluating and forecasting the information so that it is both accurate and meaningful is often more difficult because of the complexities of national and global markets.

Finding a future — In her paper, Roberta Chicos, vice president, Stratford Associates, and owner of U.S.-based Thinking Cap Productions, focused on the use of future-oriented approaches by market research to reduce uncertainty in decision making. Three case studies were presented: forecasting the future sales of a new product, concept and product development of new services and the possible effect on a company's brand image and future advertising message. Chicos concluded that by incorporating future scenarios and traditional market research, uncertainty about the future can be reduced. ❑

Gerhard Unholzer

Carlos Harding

Q&A Research in Europe

In conjunction with our international research issue, we asked Lane Weiss, QMRR's West Coast representative, to put on his reporter's cap during his recent trip to Europe and bring back some perspectives on European marketing research. He chose as his interview subjects Gerhard Unholzer, a retired member of the board of directors of Infratest Burke AG, Munich; and Carlos Harding, director general, IPSOS, Paris.

With offices and affiliated companies around the world, Munich-based Infratest Burke is a full-service firm specializing in strategic and tactical marketing, and research on public policy, customer retention and personnel development. Paris-based IPSOS, with offices throughout Europe, is also a full-service firm, specializing in advertising, media, customer satisfaction and social research.

QMRR: *What are the most popular research techniques in your respective countries?*

Gerhard Unholzer: People in the United States may be surprised to hear that face-to-face interviewing is feasible and very popular in Germany. About 45 percent, as of 1996, of the interviews done here were face-to-face. Telephone interviewing is growing in popularity, now that telephone penetration has reached acceptable levels. It took a long time for the development of a reasonable figure for households with telephones. Only in the mid-'80s did the telephone penetration reach 80 percent. Since then telephone interviewing has grown quite a bit. In 1996, 44 percent of the research was done with telephone interviewing. In 1995 it was only 30 percent.

Long-term, we will run into problems similar to those in the U.S. Response rates are dropping. We can still live with it but you can see it, in five to 10 years, becoming a problem.

We see a trend toward access panels, an approach that European research buyers are still not used to but American buyers are. We still have to educate our European clients to get used to that type of data collection system. We never had to use access panels, for example, because we never needed them. It was so easy to get data from face-to-face or telephone.

Carlos Harding: Telephone interviewing is more popular in France, relative to other countries, but that doesn't mean that other techniques are rejected. I don't know what the split is, but I would estimate it to be about 40 percent telephone, 60 percent face-to-face. With more people working during the day, telephone gives you more flexibility in contacting them for research when they're home. Qualitative research is very popular. It is different than what I would call Anglo-Saxon qualitative research. There is a strong school working with projective techniques, something that is maybe closer to consulting work than just collecting data on limited numbers of interviews.

Are there research techniques which aren't used often, perhaps due to cultural reasons or privacy concerns?

GU: We don't do much mall interviewing, because we have very few malls! We have similar discussions regarding invasion of privacy here in Europe as you are having in the U.S. Laws have been drafted which would have nearly made it impossible to do telephone interviewing. Fortunately that didn't come to pass. But it is an ongoing discussion.

In certain cities, door-to-door interviewing becomes more difficult due to crime concerns. So it's not so much invasion of privacy, it's fear of crime and the tendency to the one-person household. It's difficult to contact them because they are at work or out at night.

CH: In general, French people like to answer polls so we don't see the level of refusal that exists in the States, where people don't answer the phone or use answering machines to field the calls. I think that people like to participate in product testing because they feel they are providing their opinion in order to produce a better product.

What are some trends you're seeing in research? Is technology having an effect?

GU: We see panels becoming more popular. Also, laptop computers are replacing paper-and-pencil research to a large degree. We had used laptops for a long time but we used them only for specific approaches like conjoint analysis. Now they are used for the usual day-to-day research. It has replaced 50 percent of our paper-and-pencil interviewing. It has all the advantages of being more precise and faster because of the speed of data transmission. It is also much better because if you have the right programs you can check for mistakes during the interview instead of afterward. It's faster, it's better, it's much more effective.

CH: Technology is becoming more and more important in research. Certainly the use of laptops is becoming more important, not only in home tests but in many other types of data collection. It is a very strong way to lower the cost, to speed up the transmission of data. Laptops with multimedia capabilities are excellent for testing advertising, enabling respondents to clearly recognize sounds, advertising and colors. We also see panels similar to those of National Family Opinion and Market Facts in the States becoming more popular, particularly for product concept testing.

Are there government restrictions in Europe on conducting research that U.S. marketers should be aware of?

GU: In Germany, fortunately until now, there are no restrictions. There have been attempts with the European initiatives to make life miserable for us. As the marketing research trade groups are doing in the U.S., we are lobbying to make them understand the difference between direct marketing and marketing research, because some high-level politicians don't understand the difference. They just see the word 'marketing' in marketing research and after that there's no differentiation in their minds between research and selling.

What tips or guidance would you offer U.S. marketers who are going to conduct international research?

CH: The first thing to understand in international research is that nothing is black and white. Never take for granted things that seem to be evident. The same language, the same word, can have very different meanings.

Research companies and clients have to have a partnership. Rather than saying, 'Here is what I want done, please do it this way, the way I am used to doing it,' clients should be open to trying new methods. You have a wider spectrum of methods to use in Europe. To try to impose one method is difficult because there may be better options.

GU: First, look for a research firm who is able to do the research, draw samples, organize field work, one who has expertise in that market you're working in. If you are a car manufacturer, for instance, you should buy research from a company that understands research and the auto industry. Without this expertise, the research company might not be able to understand what the client is looking for. You must consider the local brands. Take the beer market in Germany. We have more than 1,000 brands. The biggest company has a market share of 5 percent, so you have to know these markets, you have to understand these local brands and their importance. If you think of nationwide categories you might take the wrong approach.

A client should ask advice at two steps in the process: at the very beginning, for example, when drafting a questionnaire, ask the research company about their opinion; and at the other end of the project, when you get the data, ask their interpretation to get the benefit of their local knowledge and expertise.

Translation is also important. Simply translating your questionnaire into German is very problematic. You end up with German which is not very German. The same thing happens if you try to translate a German questionnaire into English. It looks English but it isn't. The syntax is different.

I have seen it with global companies that are pressing to have the same questionnaire all over the world. It's fine to standardize but you must know how to do it. Standardizing does not necessarily mean you have the same word in each language.

If you are buying research in Europe, and have a multinational product, it's important to find a research company that is already familiar and knowledgeable about all or at least the most important European countries. It's very exhausting for a non-European marketer to go country by country to find out what type of company to use in each country. It's time-consuming and requires a lot of experience. It's easier for a European firm to organize a European survey throughout the countries and these agencies should be able to point out if there are differences in the countries you're researching in.

Have you noticed any misconceptions that American marketers have about doing research in Europe?

GU: It depends very much on the client company's history of doing business here. If they have worked here before, they understand the markets and understand the countries. If they don't have a lot of experience, people sometimes look at Europe as if it were the United States, as one country with various states. To look at Europe that way causes big problems!

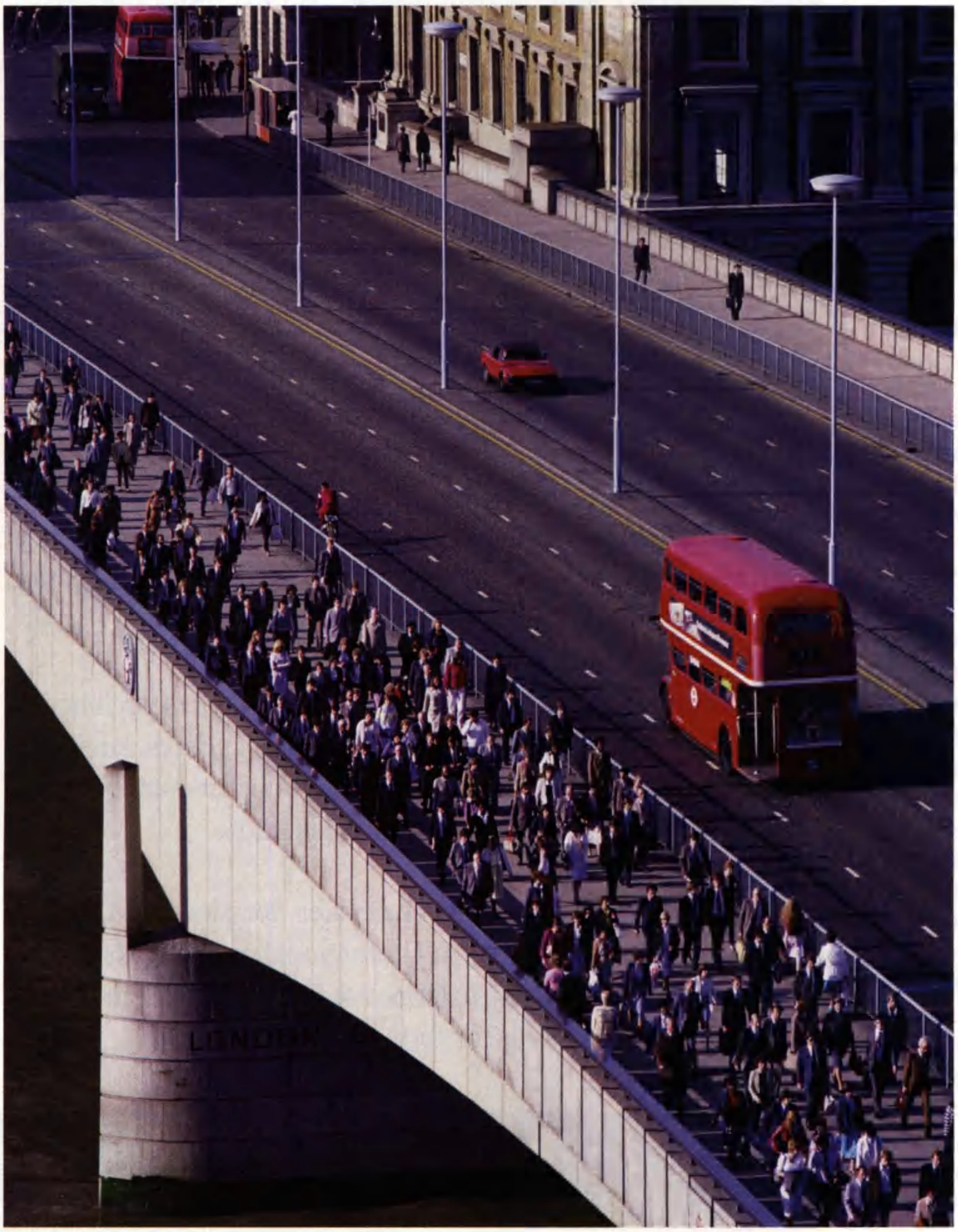
People may overstress the differences in culture and overlook huge differences in market conditions, from the presence of local brands to the distribution system, which are very different from country to country. Regional differences exist as well, between Eastern Europe, for example, and Western Europe. These differences are more important, in my belief, than so-called cultural differences.

Looking at the rest of Europe, people have been overly optimistic about Russia and how big the market is and how quickly it will grow. After some economic and political problems, it's now stabilizing. The first investors were hurt. This disappointment takes time to wear off.

Russia is a market that is coming back and will start being a market for other products. It was immediately a market for cigarettes and fast food, but for sophisticated products — telecommunications, technology — these are the future markets. The other central European countries will come along. ❑

Overcoming the obstacles to conducting international qualitative research

By Susan McCullough and Tom Pearson



Editor's note: Susan McCullough and Tom Pearson are managing directors with MarketResponse International USA, Minneapolis They can be reached at 612-943-2230.

Even for those with experience in the international realm, conducting qualitative, multi-country research may at times seem like attempting to run an obstacle course while safely carrying an egg on a spoon.

Too often, standard domestic approaches may not address the key emotional motivators of today's global consumer. Truly, each international research study must be looked at with a unique perspective, specific to the particular country or countries in which the research is being conducted. It is not language nuances alone which are a factor here — the cultural gap is often the more dominant obstacle in any international research endeavor.

The key to success is to

clearly communicate the research goals while at the same time maintaining a flexible mindset.

Cultural perspective

Will focus group participants in China be hesitant to respond for fear that the government will use what they say against them? Is it possible to conduct a focus group in two hours in Brazil, where drinking and socializing are often an integral part of the research experience? Are Germans too rational to provide meaningful responses to emotional image questions?

The answer to all of these questions is both yes and no. Language differences will underscore the need for clear communication, but shouldn't present an insurmountable obstacle to information gathering. However, diligent attention to cultural subtleties is critical, especially when conducting a multicountry study. It is important to realize that while the core methodology used will remain basically the same from country to country, even within the same study, what works in one country will likely need to be modified for the next. By balancing adaptability and adherence to research objectives, you can generate the desired output that is comparable from country to country.

Overcoming the obstacles

Experience in multicultural, multinational qualitative research methods is key in knowing what it takes to adapt from country to country and deliver comparable, culturally sensitive results. An important element for success is to travel to each country and work individually with every moderator. Going eyeball-to-eyeball with local moderators helps them understand the research hypotheses and assists them in asking probing questions in a manner appropriate for their culture.

An additional approach for communicating the research objectives is to design a comprehensive interview guide that is detailed enough to spell out the information sought, but flexible enough to allow moderators to tailor the questions as they deem appropriate. Insisting that questions be literally translated into the local language may not be the best way to obtain information. Communicating the desired result, then allowing the translator and moderator to approach the question from a local perspective, has proven both efficient and effective. No doubt about it, translating the guide and working with moderators is an interactive process. With international qualitative research, you are constantly toeing the line between controlling ambiguity and maintaining flexibility. Using an international qualitative analyst who has experience working with moderators and local agencies in multiple country studies has proven to be invaluable in successfully accomplishing this balance.

Once the qualitative analyst and moderator reach an understanding on the interviewing guide, it's time to begin. Just as with a domestic qualitative study, the international qualitative analyst will observe the focus groups in action, then hold a debriefing with the moderator. The debriefing is particularly important in global research because the moderator lends cultural insights and perspectives to what may not have been apparent in the analyst's observations. This "cultural disaster check" is a critical step in any international study.

Crossing the finish line

There are unquestionably an infinite number of obstacles one may face when conducting international qualitative research. To achieve your goals, one of the most important items to consider is that of flexibility. Flexibility will enable you to see beyond the standard, domestic approaches and techniques and allow a deeper understanding of the cultural and sociological circumstances that exist in different regions of the world. Conducting meaningful multi-country qualitative research requires a delicate balance of both flexibility and firmness to properly gather and analyze the information you need when making crucial business decisions.

Flexibility will enable you to see beyond the standard, domestic approaches and techniques and allow a deeper understanding of the cultural and sociological circumstances that exist in different regions of the world. Conducting meaningful multi-country qualitative research requires a delicate balance of both flexibility and firmness to properly gather and analyze the information you need when making crucial business decisions.

The obstacle course is a treacherous one, but with the appropriate level of attention and homework dedicated to understanding cultural gaps and their implications, it is one that can be run successfully. But remember to keep your head up because language is only one of the many hurdles along the course. ❑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Survey Monitor

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While Latin women occasionally use QSRs out of personal choice, Latin men use QSRs frequently because they have no other alternative.

The majority of QSR users are 18-29. About 12 percent are in the 45+ bracket — which, when projected across Latin America's half billion consumer population, represents a market of some 90 million potential consumers. Almost two thirds of the children in QSR heavy-using households are under 18, and 47 percent are under 13.

On a market-by-market analysis, fast-food fans are found in greater numbers among Mexicans, followed closely by Brazilians, then Argentineans by a third less and finally Chileans, who use QSRs about half as often as Mexicans.

Contrary to the U.S., where QSR users skew towards the blue-collar segment, in Latin America, the skew is towards the white-collar (who account for almost half the heavy-users). Clearly, Latin QSR heavy-users are not mirror images of their U.S. counterparts.

QSR heavy-users have the mindset of a "cosmopolitan climber." Above all, they are "with it." They are Latin urbanites, par excellence, taking direction for their lifestyle and usage habits less from the local, Latin scene than from the global scene. Attitudinally, they are not satisfied with the status quo and are avid risk takers.

Latin QSR heavy-users are defined primarily by their high indexing on hedonism, trendiness and status consciousness. Because they believe they need exercise, they index high, for example, on: bowling, karate/martial arts, tennis, basketball, swimming, bicycling and soccer. Their favorite hobbies reflect back on their lifestyle attitudes, including, predictably, working on computers, going to concerts, studying foreign languages, playing a musical instrument, and going to plays and movies.

Their music preferences are, typically, modern; they like rock in English or other languages, as well as in their own language. Yet, they are not snobs, because they stay away from classical opera far more than the average. Predictably, while their antipathy is not as great as it is to classical opera, they also shy away somewhat from their own national folk music and the old-style romantic Latin ballads.

The single major determinant is their greater number of years of higher education, and their tendency to read more, which gives them their greater awareness and their worldliness.

They can be reached mainly through TV — they watch about as much TV as anybody else in the region. However, they also listen to more radio than others. Their viewing choices are, by order of preference: music and videos, movies and dramas, sports and talk shows and informational programs. At the same time, they stay away from both news and soaps.

Their "with-it" mindset leads them to own more American, rather than European or Japanese, cars. They buy lots of electronic gadgets. For example, they index especially high on computers, beepers, fax machines, electronic equipment, electric razors and dishwashers. They also own far more cellular phones and make more international long-distance calls than others.

Expectedly, they have somewhat smaller households, with fewer children, overall, than their counterparts. Clearly, Latin QSR heavy-users are not only attitudinally different from their U.S. heavy-using counterparts, they use QSRs for different reasons than their U.S. counterparts. For more information call 619-232-5628.

BellSouth tops J.D. Power satisfaction ranking

For the second year in a row, BellSouth achieved the highest customer satisfaction ranking in the annual J.D. Power and Associates Residential Local Telephone Customer Satisfaction Study. The study now features 13 of the largest local telephone companies, including the seven regional bell operator companies (RBOCs), and independent carriers GTE, SNET, Sprint (United Telephone & Centel), ALLTEL Corp., Frontier and Cincinnati Bell.

In general, the RBOCs achieve higher overall customer satisfaction ratings than most of their independent competitors, including Sprint, ALLTEL, Frontier and GTE. While these independent carriers rank below the industry average in most areas impacting customer satisfaction, their major weakness is in corporate image. However, the two exceptions are Cincinnati Bell and SNET, both of whom perform well in measures relating to corporate image.

"This year's results suggest that the companies that do not have a strong brand image on a local or national basis are going to have a major challenge in the new competitive environment," says Zaiba Nanji, group director of telecommunications services at J.D. Power and Associates. "As new rivals enter the local telephone marketplace, and consumers are faced with a confusing array of choices, corporate image will become an important differentiator."

As J.D. Power and Associates found in the 1996 Residential Local Telephone Customer Satisfaction Study, BellSouth again performs above the industry average in all customer satisfaction measures. Its main advantages versus its nearest rivals are in the areas of corporate image, specifically company reputation and being perceived as a technical innovator as well as a leader in the industry. Another area where the company ranks high is in the promotions area, including offering promotions that recognize loyalty.

The study is conducted among 15,600 consumers, who evaluate their local telephone company on the key areas that impact customer satisfaction. The eight areas, in order of importance to overall satisfaction, are:

- customer service, 23 percent,
- cost of service, 20 percent,
- corporate image, 19 percent,
- call quality, 12 percent,
- promotions, 10 percent,
- billing, 8 percent,
- calling card, 4 percent, and
- operators, 4 percent.

Another significant finding in the study is that there has been a major shift in consumers' attitudes toward the type of companies they would choose to provide all of their telecommunications needs. While more households would still choose a long distance provider as their sole telecommunications carrier, the proportion who would pick a local telephone company has increased substantially. In 1996, only 35 percent indicated a preference for a local telephone company, while in 1997, 43 percent prefer their local carrier. This may be a result of both aggressive marketing programs by local providers and a perceived lack of differentiation between the long distance carriers. For more information call 818-889-6330.

Collection agency revenues soar with consumer debt

Marketdata Enterprises, Inc., a Tampa, Fla., market research publisher of off-the-shelf studies about service industries, has released a new edition of its report, *The U.S. Credit Bureaus & Collection Agencies Industry*. The latest survey highlights, facts, opinions, forecasts from the Census Bureau, American Collectors Association, Commercial Law League, The Nilson Report, International Credit Association, Mortgage Bankers Association and more.

According to John LaRosa, Marketdata Enterprises research director, "As more people got into debt, there arose a multitude of credit repair schemes that preyed on them to 'fix' their credit problems, for a fee. The FTC has aggressively fined dozens of such operations, and at least 24 states enacted laws regulating the credit repair industry. An estimated 600 million credit reports are generated each year — affecting virtually every auto purchase, home mortgage, even pre-employment screening."

Some of the study's major findings:

1. Industry size: Credit reporting was a $3.05 billion industry in 1996, expected to grow 6.9 percent per year to 2002. Debt collection is a $5.63 billion industry in 1996 (up 14.5 percent), forecast to grow 7.8 percent yearly to 2002. Total combined industry revenues are valued at $8.68 billion in 1996, forecast to grow 7.5 percent per year to $13.2 billion by the year 2002. The collection agencies segment has grown faster in recent years than credit reporting; 300-500 new companies enter the market each year and profitability has improved since the 1990-91 recession.

2. In 1995, banks mailed 2.7 billion pre-approved credit card solicitations to American consumers — or about 17 offers to every American aged 18-64. Although this number fell to 2.4 billion in 1996 and 2.0 billion is projected for 1997, experts believe it will take some time before the cautionary measures that banks have finally put into effect will begin to be felt.

3. There is increased blurring of lines of distinction between credit reporting and collection services, as credit bureaus begin to purchase collection agencies. During the past few years, a number of credit card-related companies have acquired collection agencies. For non-collection companies trying to diversify their portfolios, buying a collection agency is a quick way to bring in new types of accounts.

4. 1995 was an exceptional year for collection agencies, as placements soared 38 percent. As in the credit reporting sector, the bulk of the business is with consumer accounts. The typical firm is estimated to have gross receipts of $916,000 now vs. $636,000 in 1992. Pre-tax profits are at 7 percent of sales — a five-year high. It's estimated that the consumer collections business is 10-15 times larger than the commercial segment.

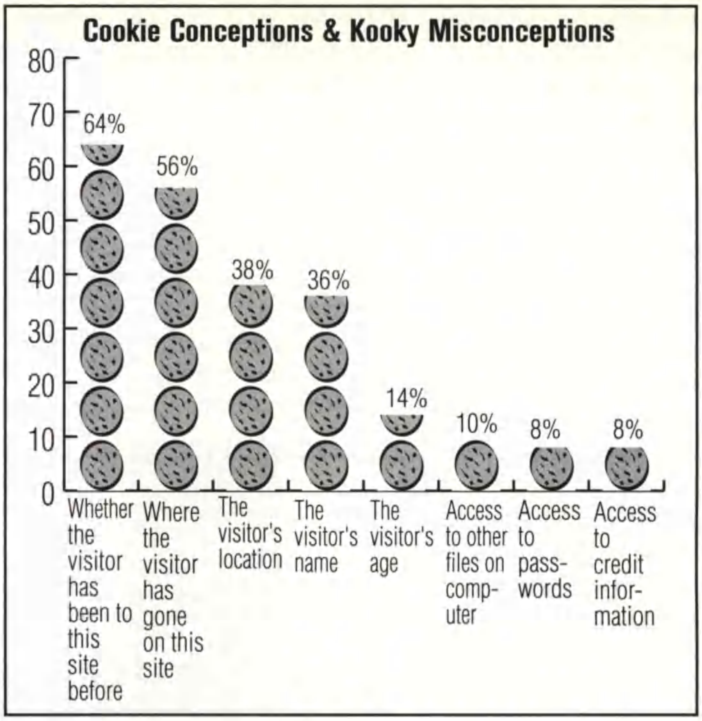
5. Two distinct segments comprise the industry, and their characteristics are very different. For example, credit reporting is dominated by the three systems operated by Equifax, Trans Union, and Experian (formerly TRW). This business is national in scope. By contrast, debt collection is performed mainly by nearly 8,000 small firms operating on a local scale. The collections segment is also more recession-proof than credit reporting.

For more information call 813-931-3900 or visit the company's Web site at http://www.mkt-data-ent.com.

Should we fear the cookie monster?

The issue of privacy on the Internet is a growing concern for the general public. In an on-line poll conducted by Cyber Dialogue, New York, in July, and reported in the organization's newsletter, *Cyber Insider*, 84 percent of respondents said that too much information can be revealed on the Web without one's knowledge or consent. Adding to this concern is the apparent confusion over the information that a cookie can or cannot reveal about a Web visitor. (Cookies are files stored on your hard drive by your Web browser after you visit a Web site that hold information about your browsing habits, such as which sites you've visited, etc.)

While approximately two thirds (64 percent) of respondents correctly say that cookies tell whether one has visited a particular site before and more than half (56 percent) say that it can be used to determine where on a site a visitor has gone, respondents also make some clearly inaccurate statements about the powers of a cookie. Nearly four in ten (38 percent) believe that a cookie specifies someone's actual location while they are visiting a Web site, and more than one-third (36 percent) think that it can even determine the visitor's name. Fourteen percent of respondents believe that a cookie can reveal an on-line user's age and about one in 10 think that it can gain access to other files on their computer. In addition, 8 percent believe that cookies can either locate passwords stored on a computer or gain access to personal credit information.



One-quarter of respondents admit to having no idea what information cookies can determine and many on-line users are also at a loss when it comes to describing their browser's setting for accepting or rejecting cookies. Half of all respondents do not know whether their browser is set to accept, reject, or seek permission before accepting a cookie. Of those who do know their browser's setting, one-quarter (28 percent) say their browser is set to ask for permission first. About one in five (19 percent) say their browser accepts all cookies and only 3 percent report that their browser is set to reject all cookies.

The confusion over cookies suggests that some of the public's concern with privacy issues stems from fundamental misconceptions about the capacities of Internet technologies. Thus the solution to this anxiety may well be found in a clear articulation of the Internet's capabilities, its limitations, and its intended uses. For more information call 212-255-6655.

I'll change the oil myself

When it comes to changing the oil in their cars, nearly one-third of Americans do it themselves, according to a recent Maritz AmeriPoll. And it's not just men who are crawling under cars to drain oil pans — 29 percent of women say they change their own oil.

Getting the oil changed at a specialty store, such as Jiffy Lube, ran a close second, preferred by 29 percent of the population, followed by service through an all-purpose auto repair shop (20 percent) and a car dealership (18 percent). Women are more likely than men to choose a dealership or all-purpose shop, whereas men prefer the quick ease of an oil-change specialty store. Twenty-eight percent of Americans 55 and older trust their dealerships to do the job.

Despite Americans' love of speedy service in their busy lives, 30 percent listed quality of work as the number one factor in choosing their oil-change provider. Other considerations include quality of customer service (20 percent), price (17 percent), location (12 percent), speed (9 percent) and no-appointment-needed policy (8 percent). Again, motivated by convenience and ease, men are significantly more likely than women (15 percent vs. 9 percent) to be influenced by the location of the oil change provider.

Most Americans are fairly conscientious about changing their oil regularly. A full 57 percent have it done at or before 3,000 miles, and another 29 percent who procrastinate do it before they hit 4,000 miles. Just 14 percent of people go beyond the 4,000-mile mark.

Maritz AmeriPoll is a national consumer opinion poll conducted regularly by Maritz Marketing Research Inc., St. Louis. Results are based on telephone interviews with American adults. Accuracy of the results is within ±3.09 percent. For more information call 800-446-1690.

Many Internet users doubt Web information

Nearly half of Internet users doubt the reliability of the information acquired over the Web, according to a survey recently released by New York-based, CDB Research & Consulting Inc., the research subsidiary of the public relations agency Creamer Dickson Basford.

"Although familiarity with and usage of on-line services has increased steadily since 1994, an astounding number of consumers are not yet convinced of the accuracy of the information available," says Dr. Larry Chiagouris, executive vice president and managing director of CDB Research & Consulting Inc. (47 percent fear information is not reliable vs. 53 percent who believe information is reliable).

Despite this apparent lack of faith in the Internet, those who do use on-line services tend to use them frequently. In fact, 44 percent report going on-line every day. The users also subscribe to an array of service providers, including America Online (50 percent), Microsoft Network (25 percent), CompuServe (18 percent), and Prodigy (11 percent).

The average Internet user is more likely to be male than female and between the ages of 35 and 44 (62 percent male vs. 38 percent female). Willingness to use the Internet decreases dramatically with age. Of Internet users, 34 percent are age 35-44; 21 percent are age 45-54; 3 percent are age 55-64; and 4 percent are age 65+. Younger users include 12 percent age 18-24 and 26 percent age 25-34.

Education and employment also factored in the results of the survey, revealing that almost half (48 percent) of Internet users have at least a college education. Eight out of 10 of the users are employed (83 percent employed vs. 17 percent unemployed), primarily in professional/managerial jobs (55 percent hold such jobs). The majority (53 percent) of those employed earn over $55,000 per year and are likely to own their own home (73 percent are homeowners).

Study methodology: Telephone interviews were conducted the last week of November 1996. The sample consisted of a national cross-section of 500 adults, ages 18 years or older. The margin of error is ±6 percentage points. For more information call 212-367-6866.

Product & Service Update

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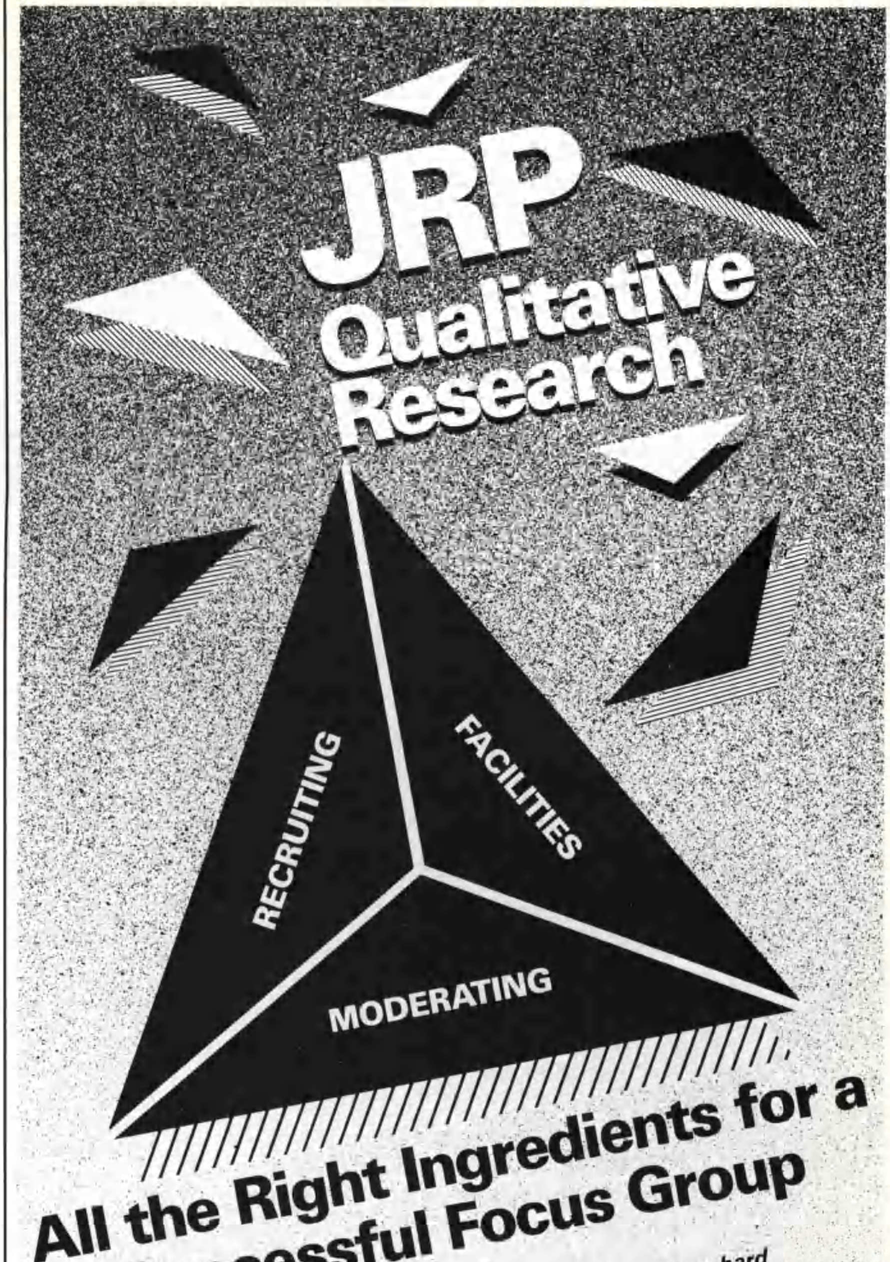
boxes and can be formatted to suit any user's house style. A Word macro then generates the instructions for scanning. At the end of the survey, Qscan generates a Quantum data file for tabulation. For more information call Anastasia Schleck at 212-447-5300 or visit the company's Web site at http://www.quantime.com.

QI upgrade, NewView from SPSS

SPSS Inc., Chicago, has introduced NewView, a tool for personal data analysis and reporting. The product combines data and reporting features of conventional analytical packages and query and reporting tools. The company now also offers QI Analyst 3.5 and QI Analyst DB 3.5. QI Analyst offers added functionality and QI Analyst DB, a new multiple-user database version, also includes network capabilities. For more information call 312-329-2400 or visit the company's Web site at http://www.spss.com.

Wessex offers demographic projections

Wessex, Inc., a Winnetka, Ill., supplier of demographic data to the desktop mapping market, is now offering current-year estimates and five- and 10-year projections. The Estimates & Projections data set includes numbers to block group, census tract and ZIP code, as well as larger geographies, for the entire nation. The product includes over 190 demographic variables, such as population by household type, labor force by status, industry and occupation, and age of head of household by income. For more information call 800-892-6906 or visit the company's Web site at http://www.wessex.com.



Virtual Insight tests concepts, products, packages

Decision Insight, Kansas City, Mo., has introduced Virtual Insight, a proprietary multimedia research application developed specifically for concept, product and package design testing. Artwork can be sourced from photographs, 3D objects and electronic illustrations. High-end artwork editing allows for changes up to 24 hours before fieldwork begins. Computer stations can also be set up in almost any location. Many different research objectives can be achieved with multiple target segments. Computer programming allows for complex questionnaires and advanced analytics. Product and package attributes can be isolated and measured with greater accuracy. Interviewer bias and error are eliminated because the survey is self-administered and consistently delivered. Questions, products and attributes are automatically rotated and randomized. The interactivity of the interview is designed to reduce boredom and fatigue and make respondents more enthusiastic about the process. The self-administered surveys are Macintosh or PC compatible and use high-resolution monitors for optimal artwork quality. Data is captured at the computer station and then downloaded to Decision Insight's headquarters for processing and tabulation. For more information call John Stevenson at 816-221-0445 or visit the company's Web site at http://www.decision.net.

MCNC debuts Web-based software service

MCNC, Research Triangle Park, N.C., has released PRO-survey, a Web-based integrated software service that includes hosting by MCNC over multiple high-speed Internet access paths. The software comes with a graphical interface for survey design. It features a relational database management system for real-time data analysis. PRO-survey is platform-independent and operates on virtually any PC, Macintosh or other terminal with a Web browser that supports tables and frames. Using a point-and-click design template, non programmers can create surveys that capture both quantitative and qualitative information. If they choose, survey designers can add their own HTML to customize the appearance and functionality of the survey and to include multimedia elements. For more information call 919-248-1415 or visit the company's Web site at http://www.netprovisions.com/.

Statistics calculator from StatPac

StatPac Inc., Minneapolis, is offering a new Windows software utility program to perform common statistical tests and sample size estimates. The Statistics Calculator uses summary data to perform significance tests. The software sells for $49.95 and a free demo can be downloaded from http://www.statpac.com or by calling 612-925-0159.

New Web survey software from Perseus

Perseus Development Corp., Braintree, Mass., has introduced SurveySolutions for the Web, Release 1.0, a Web-based version of its survey design and analysis software. The product enables users to create surveys, post them on the Web or distribute them via E-mail, automatically collect responses, analyze the results and produce presentations. Questionnaires are created and modified in a word processor without scripting, programming or dialogue sequences. Analysis functions include point-and-click crosstabs, frequency distribution reports, summary statistics and charting. For more information call Richard Nadler at 781-848-4494.

Upgraded Perception Analyzer

WinPA 5.2, the latest software version for the Perception Analyzer Wireless Audience Response System is now available from Columbia Information Systems, Inc., Portland, Ore. The new release features improved questionnaire editing capabilities and enhancements to data management and display. The Perception Analyzer is an interactive electronic group measurement system used in qualitative and quantitative research. For more information call 503-225-8418 or visit the company's Web site at http://www.cinfo.com/.

New merchandise planning and analysis software

MarketMAX, Inc., Danvers, Mass., has introduced MarketMAX IMS (Integrated Marketing Solution), a software system that brings merchandise planning and analysis to all product categories, including softlines. The product enables softline retailers to apply merchandise management techniques to the variety of racks, displays, product sizes, style characteristics, seasonal assortments and pricing/margin formulas common to softlines. The software combines assortment planning, category management, clustering, store and space planning and related financial functions into a single management system. For more information call 978-777-0057 or visit the company's Web site at http://www.marketmax.com.

Data Use

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also hypothesize that the net loyal measure of company commitment in the above table is positively correlated with a company's brand equity as discussed, for example, by Park and Srinivasan (1994).

The correlation between loyal and at-risk measures is, for this example, -.59 ($r^2 = .35$) suggesting that while there is a negative relationship between the measures as expected, knowing one does not do a very good job of explaining the other.

No company wants to lose customers. The normally higher cost of gaining new customers versus keeping old customers is well understood (for a discussion see Engel et al, 1993, p. 575). At-risk customers represent a class of customers that needs reassurance about the value of remaining a customer. At the same time it is important to know what not to mess up for loyal customers. The idea of penalty and reward attributes as defined below can help a company develop strategies for boosting the confidence of at-risk customers and keeping loyal customers loyal.

The nature of reward, penalty and power

Our motivation is to answer the question, "What is the gain or reward, if any, for moving customers into the highest levels (top two boxes) of satisfaction on a given attribute, and, conversely, what is the loss or penalty, if any, of having customers move into the lowest levels (bottom two boxes) of satisfaction on a given attribute?"

Suppose we look at all customers who say a given brand or company is better than they require (top two boxes)[3] on a given attribute and calculate the percent of these customers who meet our loyalty definition. Next, calculate the percent of loyal customers among all customers who say the brand or company is meeting their requirements on the attribute and subtract this percent from the first percent. If this difference in percentages is relatively high we can infer that high performance on this attribute is associated with a relatively large gain in brand or company loyalty. Stated another way, delighting customers on such an attribute offers the reward of increased loyalty.

Conversely, we can look at all customers who say a given brand or company falls short of their requirements (bottom two boxes) on a given attribute and calculate the percentage of these customers who meet our definition of at-risk. Subtract from this percent the percent of at-risk customers among all customers who say the brand or company is meeting their requirements on the attribute. An attribute with a relatively high difference in these percentages suggests that poor performance on this attribute is associated with a relatively large increase in at-risk customers, or, alternatively, that disappointing customers on such an attribute results in a penalty of increased at-risk customers.

Tables 2 and 3 show the reward and penalty calculations, respectively, for one brand from our example[4]. In this study there were 23 attributes. For the sake of brevity in Tables 2

Table 2.
Percent of Company B's Customers Answering at Each Level Who Are Loyal

Attributes	Better Than Requirements	Meets Requirements	Difference
a Rep's knowledge	75%	15%	60%
b Rep customer service	69	18	51
c Rep understands me	72	27	45
d Product performance	65	24	41
e Communicates cust pgms	71	32	39
f Rep understands grower	64	28	36
g Product value for money	67	31	36
•			
•			
•			
s Product availability	53	34	19
t Co has rep coverage	64	46	18
u Co stands by product	31	20	11
v Product pkg size	48	37	11
w Communicates dealer pgms	25	26	-1

and 3, we show results of the calculations only for the highest and lowest scoring attributes.

We focus on the Difference columns in Tables 2 and 3. It is clear that attributes where delighting customers (better than requirements) is associated with large loyalty gains are not necessarily the same attributes where disappointing customers (falls short of requirements) is associated with large increases in being at-risk and vice versa. For example, attribute e, communicates customer programs, is fifth highest in Table 2, but last in Table 3 . So for this attribute, delighting customers is associated (rewarded) with relatively large gains in loyalty (60 percentage points), but disappointing customers is not associated (penalized) with large increases in the percent of customers being at-risk (6 percentage points). The

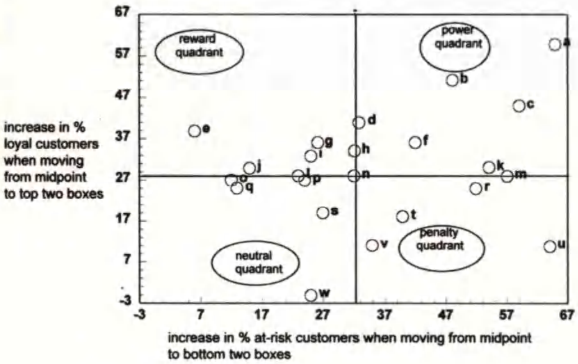
Table 3.
Percent of Company B's Customers Answering at Each Level Who are At-Risk

Attributes	Falls Short of Requirements	Meets Requirements	Difference
a Rep's knowledge	86%	21%	65%
u Co stands by product	85	21	64
c Rep understands me	72	13	59
m Rep's manner & appearance	82	25	57
k Reps problem solving	69	15	54
r Co respects my bus	65	13	52
b Rep customer service	69	21	48
•			
•			
•			
l Co provides training, etc.	40	17	23
j Cust pgms support my sales	37	22	15
q Adm of cust pgms	36	23	13
o Timely rebate payments	30	18	12
e Communicates cust pgms	31	25	6

opposite relationship exits for attribute u, company stands by its products, which is second highest in Table 3 and third lowest in Table 2. However, some attributes like a and b are high in both tables. A quadrant map based on the data in these two tables can give a better picture of the situation.

By plotting data from the Difference columns in Tables 2 and 3 and marking the horizontal and vertical medians, we get the quadrant map shown in Figure 3. The letters on the map correspond to the attributes listed in Tables 2 and 3. Those attributes above the horizontal median we call reward attributes; those to the right of the vertical median we label penalty attributes.

Figure 3. Quadrant Map - Company B



The four quadrants, beginning in the upper left quadrant and proceeding in a clockwise direction, have been labeled, respectively, reward, power, penalty and neutral. Attributes that fall in the power quadrant are those that lead to large increases in customer loyalty when customers experience delight (better than I require) and also lead to large increases in number of at-risk customers when customers experience disappointment (falls short of what I require). Thus these attributes carry significant power or leverage at both ends of the scale; they are both penalty and reward attributes. They have the potential to make (reward) or break (penalize) a company or product. In this example, these attributes are mostly associated with characteristics of the company's sales reps (a, b, c, f, k) and product performance (d). For example, consider attribute a, rep's knowledge. Customers who perceive their rep's knowledge to be better than they require are much more likely to be loyal customers than are customers who perceive their rep's knowledge to be just meeting requirements, and, conversely, customers who perceive their rep's knowledge to fall short of their requirements are much more likely to be at-risk customers than are customers who perceive their rep's knowledge to be meeting requirements. Thus the relationship between rep and customer is key to this company having loyal or at-risk customers. The same rep, of course, could have both loyal and at-risk customers.

Companies with significant numbers of at-risk customers will want to look carefully at the penalty attributes as providing opportunities for shoring-up the confidence of their less-loyal customer base. In particular those penalty attributes that are in the power quadrant would have first priority, everything else being equal (e.g., cost of implementing change on a given attribute); those penalty attributes not in this quadrant (i.e., in the penalty quadrant) would have secondary priority. Not disappointing customers on these attributes will lead to fewer numbers of at-risk customers.

Companies hoping to gain a more loyal customer base will want to concentrate efforts on the reward attributes. Delighting customers on these attributes will lead to increased numbers of loyal customers. Similar to dealing with penalty attributes, reward attributes in the power quadrant would have highest priority everything else equal; secondary consideration would be given to reward attributes in the reward quadrant.

This quadrant map is for a single company. Each competing company in the market will have its own map. Chances are they will be similar, but differences may exist from company to company.

Conclusion and implications

We have demonstrated, by way of an example, the type of diagnostic information contained in the measures we have used to define loyal and at-risk consumers. Certain concepts have been defined and illustrated; for example, the concepts of net loyalty (commitment), penalty, reward and power attributes. Despite the potential diagnostic value of these and similar analyses, one limitation should be mentioned. There is no way to estimate the actual impact, in terms of gain or loss in market share, of the strategies suggested by these types of diagnostic analyses.

For example, in the above discussion of penalty and reward attributes we have not said anything about the relative payoff to the company of focusing efforts on one type of attribute versus the other. Certainly it would seem that companies with significantly more at-risk customers than loyal customers would want to move customers out of the at-risk category and therefore focus on strategies for improving performance on penalty attributes before turning to strategies for increasing the number of loyal customers. However, it might turn out that, in fact, a strategy of increasing the base of loyal customers would have an equal or even higher payoff for the bottom line. With the data available in typical customer satisfaction studies, managers can only hypothesize about the most effective strategy and use the type of diagnostic analyses presented here to increase their confidence that they are taking the best action. Similarly, in situations where it would seem the appropriate strategy is to focus on attributes that we have defined as reward attributes, the reality may be that improved perceptions on one or more penalty attributes may have an equal or better bottom-line payoff. How can managers increase their confidence in the decisions they make about where to allocate product or brand improvement resources?

We have written elsewhere (Etter, 1996) about the advantages of placing the entire customer satisfaction data collection methodology and analysis in the context of choice models. Such a system allows the estimation of the specific bottom-line implications of strategies focusing on penalty attributes versus strategies focusing on attributes suggested by some other analyses. In short, a choice model simulator allows a manager to explore the relative bottom-line impact of multiple customer satisfaction/loyalty improvement strategies regardless of the source of these strategies. ❑

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[1] The data for this example was collected via a mail survey in August 1996. The average number of respondents profiling a particular company is 141.

[2] The wording of these scales may have to be modified to fit the particular category under study.

[3] We normally use five-point requirement scales in our customer satisfaction work and the ideas discussed here assume a five-point scale, but the type of scale (e.g., requirement, expectation, satisfaction) is not critical. Adjustments to the procedures described here can be made for scales containing fewer or more than five points.

[4] An alternative notion of penalty and reward attributes is based on the data in a modified version of Table 2. Suppose that in addition to the difference in column three we had a second difference formed by subtracting from the percentages in column two (meets requirements) the percentage of loyal customers among all customers who perceive company B to fall short of requirements (bottom two boxes). We could then compare these two differences. Roughly speaking, the first difference, when large compared to the second difference for a given attribute, defines a reward attribute; conversely, the second difference, when large compared to the first difference, defines a penalty attribute.

Competitive intelligence

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gence

What are each of these building blocks?

Competitive intelligence — CI is based on the premise that at least 90 percent of the information that any company needs to make key decisions and to understand its market and competitors is already public or can be systematically developed from data that is already public using proven techniques. CI is thus made up of two elements.

1). Using public sources to develop data on competition, competitors, and the market environment.

2). Through analysis, transforming that data into usable information, usually on specific competitors.

CI as an element of aggressive competition is not new. For example, the late Sam Walton, founder of Wal-Mart Inc., used many competitive techniques in building Wal-Mart, Inc. to America's largest retailer. Among the techniques he tried over his decades in the retail trade was buying clothing at a competitor's store (and analyzing the stock that same night in a hotel room), and wandering through a store with a mini-tape recorder, making notes on merchandise, prices, etc.

Over time, competition has brought things full circle. Now firms competing against Wal-Mart, and other stores like it, are advised to study the competition by: reviewing annual reports; reading industry evaluations; looking at the way competitors display goods in high-traffic areas and near checkouts; and observing the type of customers shopping there.

While CI's practical origins date back decades, CI has its intellectual origins with Harvard Professor Michael Porter's first work on competitive strategy[1]. That, in turn, means that CI was initially tied, in the eyes of many users, with strategic planning. However, through the efforts of a number of pioneers of CI, CI has become something separate and apart.

CI is still typically most often used by those in strategic planning. It most often focuses on the capabilities and intentions of direct competitors, as well as the competitive environment. Its time horizon is usually one year forward and one year back.

Strategic intelligence — Strategic intelligence, as articulated by Herb Meyer[2], is like corporate radar. It is designed to give a company a view of its total environment — competitive, regulatory and political. As with radar, it is designed to warn the company of impending problems, and alert it to upcoming opportunities — always in time to take needed action.

Strategic intelligence typically supports those in senior management. It usually focuses on the overall strategic, even global, environment. The direct competitive environment is included in that focus, as are indirect competitors, technology trends, and even political risks. The time horizon for its practitioners typically runs from two years past to five to 10 years in the future.

Market intelligence — Market intelligence as currently practiced is a child of the computer age (as is CI). In the U.S., companies sell thousands of makers of grocery and personal care products retail sales data on virtually a real-time basis. This data includes information on sales of targeted products, at what prices, with or without coupons. In addition, these firms offer the capability of knowing what else a food store customer bought at the same time.

As a result, U.S. firms are increasingly tracking what is going on in the trenches, at the retail level where competitors face off for customers and consumers, with market intelligence. Marketing intelligence's customers are those in marketing and sales. It provides data and analysis on pricing, terms, promotions and their effectiveness. Market intelligence's time horizon typically runs from three to six months in the past to no more than six months in the future

Crisis management — Crisis management involves preparing a company for those "shocks" which can do significant, sudden damage to its operations or to its reputation. The classic cases studied by crisis managers range from how firms handled the Tylenol tampering case to the Bhopal disaster.

Crisis management seeks to serve middle and senior management by developing a plan and creating systems which permit rapid response by a company to an external threat where swift reaction is critical. While its primary focus is internal, well-designed programs must look to the experience of competitors and others to try and anticipate probable crises and prepare options for responses.

Benchmarking — Benchmarking, as popularized by Robert Camp at Xerox[3], is still in the development stage. Basically, benchmarking involves analyzing what you do, quantifying it, and then finding ways that other firms do it better, or better and differently, or not at all. Then, you adapt (not adopt) what you have learned to your own firm.

One form of benchmarking, competitive benchmarking, is most often used by those in planning and marketing. It focuses on what the competition does better and how your firm can catch up (or even overtake) those competitors. Its time horizon is the present, rarely the future.

Forms of benchmarking, other than competitive benchmarking, are designed to have your firm learn from dissimilar industries and companies, by the exchange of information on techniques and practices. Here, the focus is more often on manufacturing, engineering and distribution practices, with the customers being the "owners" of those processes in your own firm. And, as with competitive benchmarking, the time horizon is the present.

Reverse engineering — The next building block is reverse engineering. Here, a firm takes apart a product, studies how it was assembled, what it cost, and what the entire package and its components tell us about the competition and its activities.

Typically, the customers of reverse engineering are those in product development and engineering. The time horizon is always retrospective, since the company is looking at what has already been done. And the targets are competitors, direct and sometimes indirect.

Defensive (counter) intelligence — Defensive (or counter) intelligence is a variant of internal corporate security. While corporate security usually stresses protecting the physical and information assets of a company by barring access or preventing direct damage, defensive intelligence has a different role.

Defensive intelligence involves looking at what competitors may be learning about you through their CI, understanding what they have already learned from it and then devising responses to thwart their efforts. These efforts may be as simple as closing

Element	Typical Internal Audience	Most Common Focus	Time Horizon	Decisions Supported
CI	Planning	competitors - capabilities/intentions competitive environment	near past—near future	tactical; some operational/strategic
SI	Senior Management	strategic/global environment	recent past—distant future	strategic
MI	Marketing/Sales	price, terms, etc.	immediate past—imm. future	operational
CM	Senior/Middle Management	operations/customers	near future—distant future	tactical/strategic
BM	Operations/Manufacturing Middle Management	processes	recent past—present	operational
RE	Product Development Engineering	production/engineering	recent past	operational
DI	Senior/Middle Management	internal security	recent past	tactical

your plant to tours[4], or as complex as developing policies on how external information is generated and made available. Its audience should be the same as that of corporate security, senior and middle management. The time line is the recent past.

How are these building blocks related now? The following table illustrates where these groups overlap and separate - now.

CI - Competitive intelligence
SI - Strategic intelligence
MI - Market intelligence
CM - Crisis management
BM - Benchmarking
RE - Reverse engineering
DI - Defensive intelligence

Of particular interest to market research specialist should be the way the relationship between market intelligence and Cyber-Intelligence should develop.

Establishing linkages

As with every one of the building blocks, market intelligence will contribute to Cyber-Intelligence through establishing and exploiting current and potential linkages with its components. These linkages will tie marketing intelligence directly to four of the six building blocks (and indirectly to the other two).[5]

Market intelligence and competitive intelligence — Market intelligence should provide some direct input to CI, chiefly by giving current information on what is happening in the marketplace. In turn, CI should be able to provide those using market intelligence with a sense of perspective so that they can understand or even predict changes. This may be a prediction of changes in marketing plans of a competitor, limits on its capabilities, lead-times for new product introductions, and so on.

To the extent that market intelligence encompasses market planning, the skills of the CI analysts would also be applicable to market intelligence.

Market intelligence and crisis management — Market intelligence may be in a position to provide a warning to the firm's crisis management team on current problems in the market, particularly with customers. That input may be critical when the crisis management problem involves the restructuring of a product which is doing poorly against its competition.

Market intelligence and benchmarking — Benchmarking should provide market intelligence with a sense of the "metrics" of its competitors, that is how fast it can respond, where it stands in the competitive environment in terms of skills, etc.

Market intelligence and reverse engineering — Reverse engineering should be closely linked to market intelligence. That is because reverse engineering can provide specific, relatively current information, on product performance. In addition, it may be able to provide estimates of the costs of manufacturing and distribution by an analysis of the packaging and the protective measures, if any, that are taken with the product. Such data can be invaluable to determining the proper response to immediate market moves by competitors.

Destructive competition

What we are painting here is a picture of a process - a difficult business at best. But, if those involved in intelligence do not prepare for cooptation, they will face destructive competition, in the form of turf wars, which no one can win. ❑

[1]Michael E. Porter, Competitive Strategy; Techniques for Analyzing Industries and Competitors. (New York: The Free Press, 1980). See in particular pages 71-74, "The Need for a Competitor Intelligence System."
[2]Herbert E. Meyer, Real World Intelligence. (Friday Harbor, Washington: Storm King Press, 1991).
[3]Robert C. Camp, Benchmarking: The Search for Industry Best Practices that Lead to Superior Performance. (Milwaukee, Wisconsin: ASQC Press, 1989).
[4]See, e.g., Robin Estrin, "In Woburn, there isn't always room for Jell-O," Associated Press, January 21, 1996.
[5]Strategic intelligence and defensive intelligence have no direct linkages to market intelligence.

Carrier

continued from p. 13

first international project, we took the coordinator role and contacted individual research companies in each of the countries to do the field work. It was not an easy thing for us to do. We ended up spending a lot of time analyzing the results across countries and trying to draw conclusions on a global basis. In this case we used BAIGlobal to perform that function. That made it simpler for us. They had companies that they were familiar in each of the countries that we wanted to conduct research in so they handled a lot of those issues."

Client and research company worked to make sure the translation was accurate. After the surveys were translated into the local language, representatives from local Carrier offices in those countries checked the surveys to make sure the technical terminology was translated correctly.

In addition, usage examples and scenarios were tailored to the individual markets, to make them relevant, Whitwell says. "We wanted to give them a good baseline from which to make their comparison. For example, when we talked to commercial customers, we gave them a price and a system capacity that they would commonly consider putting into their application. We did the same for the residential customers. In Italy, for example, the typical application for a residential customer might be a bedroom, so he's going to have a different capacity size than the residential customer in Korea, who might place it in his living room, and the pricing would be different, so we came up with a range of prices and applications depending on who was being asked the questions."

Opportunity exists

The research gave Carrier a good handle on the importance of the various features and confirmed company suspicions that it might be worthwhile to begin marketing products with features customized to the individual markets and applications, Whitwell says. "We had budgeted a certain amount of money in the cost of the product for the control features, and we wanted to provide the most valued features that we could for the cost that we had budgeted. If it was a 'must-be,' then we had to figure out the most cost-effective way to provide this feature. If it's 'one-dimensional,' we have to make a judgement as to how much we can spend on it and what level to provide. 'Attractive' features we could put in if we had money left in our controls budget; 'neutral' we wouldn't spend money on.

"There was a preliminary list of features that we intended to put in the product. In this case the product development cycle was ahead of the research so we said let's use this tentative list of features and start the development of the product and use the research to validate. If we find something different as a result of the research we want to be prepared to go back and make the appropriate changes. For the most part, our initial choices were validated." ❑

IBM

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simple and straightforward translation process. Prior to starting the translation process, approval and finalization of the questionnaire are essential to avoid repeated translation, project delays and added costs. RONIN typically conducts an English language pilot test to identify what, if any, changes must be made to the questionnaire before translation occurs. Clients attend these tests and changes are made to the CATI program in real time, allowing for immediate testing of new question or response wording.

McNair offers these tips to keep in mind when conducting international research:

• Thoroughly investigate potential sample sources to make sure they are able to provide a representative sample of the universe to be studied. Request documentation from each sample source about the demographics of the file, and verification steps performed to ensure proper coverage. A few questions to ask include: Does it cover all regions/cities of the country? Are all vendors represented? Are all size companies and industries included? What proportion of the universe is covered? Are there any biases in the companies which are covered or omitted? How is the sample source assembled? How is it updated?

• Interview length varies by language and country and is typically longer than studies conducted in the U.S. For example, a 20-minute English language survey could take 18 minutes in Italian due to the speed of the spoken language. The same survey would take approximately 23 minutes in French due to respondents' tendency to elaborate on their answers. Japanese interviews would be even longer.

• Use native language interviewers to enhance the comfort level of respondents and to increase cooperation rates. RONIN has found that by using native language speakers, respondents from those countries are more willing to participate and also find it easier to converse. This is particularly important for qualitative open-ended questions, or questions such as awareness and brand image, where subtle nuances must be identified.

• Use a single call center for a given geography to provide a single point of contact and consistency of results across countries and languages, with rapid turn-around. "We maintain maximum control over the project, always knowing precisely where it stands in all countries, and are able to expedite any changes or special instructions that are to be implemented worldwide. Briefings, training, and pilots can be conducted and monitored simultaneously," McNair says.

• For analysis and reporting purposes, remember that a few select countries are not representative of

Europe as a whole. In many cases, research is typically conducted in France, Germany, Italy, and the U.K. However, countries such as Spain, Sweden, Switzerland or Poland are typically left out of the mix. Consequently, the data should only be interpreted for the surveyed countries.

Quite cooperative

Hogarty says that because the survey, now in its fourth year, is widely viewed as the most comprehensive in the industry, respondents are usually quite cooperative about participating. They're offered the incentive of a summary of the results, which gives them a chance to see how they compare to the rest of the world. "In order to keep the response rate up, we send a feedback report to those who participate. That's helped out quite nicely. We also put a variation of that report on-line, for our executive customers. The goal is to get them interested in the results and get them willing to participate."

Enabling interviewers to quickly navigate through thousands of similar-sounding brands and models has been a long-sought "holy grail" for the research industry. Likewise, enabling interviewers to add new models to a choice list, without incurring the time and cost of post-interview coding, had historically hampered the process of keeping such product lists up-to-date. When conducting global research, these problems are greatly compounded by the mix of languages, remote geographies and country-specific needs.

IBM and RONIN overcame these difficulties through the use of the database-oriented "brand-list" question found in Results for Research, the CATI system used for IBM's global research project.

By storing the model list as an external Results database, new models can be added to the list from within an interview. This way, new models can be instantly available to all other interviewers without requiring a separate coding step. Because the same database of models can be accessed from multiple-language questionnaires, models added in Germany, for example, can be instantly available to Spanish, Italian and Japanese interviewers.

It is also possible to identify specific attributes to each model (or record) in such a brand-list database. By adding performance-related information on each pre-coded model in the database, it was possible to base the questionnaire branching on the computing power of each model selected – ensuring IBM the detail it needed on its customers, while reducing overall interview length.

Still, it's a struggle to get busy people to take time to complete the survey. "The feedback report helps, but it's a constant challenge to keep the response rate up. We're always looking for new ways to make it easier for the customer to take the survey. But we've found that most customers are interested in trying to help." ❑

Research Industry News

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Information Resources, Inc., Chicago, has been selected by Wal-Mart Stores, Inc., to provide digital product images and descriptive copy for products offered to consumers on Wal-Mart's Internet shopping service, Wal-Mart Online.

J.D Power and Associates, Agoura Hills, Calif., has completed a test run of a new quality survey that will be the basis of its annual Initial Quality Study beginning in 1998. The new study, IQS2, will cover new technologies and features that did not exist in the auto industry when the current study was designed in 1987. In addition, the information provided to be manufacturers will be more specific, identifying more details about each problem, such as location and driving conditions.

SPSS Inc., Chicago, has opened a new office, SPSS South Africa. The address is Bryanston Gate 3, Cnr. Curzon and Main Road, Bryanston, Johannesburg, South Africa. Phone 27-11-706-7015. In other SPSS news, the company has signed an agreement to distribute worldwide StatXact and LogXact, software for exact analysis of small samples.

The Spanish National Railway Company, R.E.N.F.E., has decided that all survey data supplied to it should be made available in electronic format using Pulsar, an interactive data analysis package from **Pulse Train Technology**, Guildford, England. As one of the largest purchasers of market research in Spain, the railway's decision will have a substantial impact on most of the major Spanish research companies.

Ziment, a New York-based research firm, held its second annual international marketing research conference at its headquarters in New York. The theme: the need for international research to always involve local expertise. Latin America was selected as the featured region for the conference in response to the region's growing importance in multinationals' international marketing efforts.

The conference featured talks by representative from four of the Latin American partners in The Research Alliance: Brazil, Argentina, Colombia and Mexico/Central America. Ziment is the U. S. representative for the Alliance, a worldwide international network of strategic full-service marketing research consultancies.

In attendance were marketing and marketing research professionals from a number of multinational companies, including Revlon, Citibank, Merck & Co., Bristol-Myers Squibb, Advanta National Bank, Lucent Technologies, Hewlett-Packard and BellSouth.

The conference started off with an introductory presentation by Howard Ziment, managing director of Ziment, who spoke regarding the importance of using local expertise in conducting research in international markets. He referred to the five C's of international research: careful design, control, consistent analysis, culture, and crave local expertise. He ended his talk by indicating the need for local expertise even in Latin American markets, because although close by, they are all very different from the U.S., with many of us holding misperceptions of the region.

Ziment was followed by Gustavo Mendez-Kuhn, president of Improdir, Mexico City. He indicated that although Mexico is still recovering from the peso crisis in December, 1994, it is now at a point where investment in Mexico would be advantageous to those firms who decide to do so. This is because President Zedillo has implemented economic reforms and plans that are proving to be effective in moving the economy forward. Economic growth of at least 5 percent per year is predicted between now and the year 2000.

Meanwhile, the consumer in Mexico is interested in the quality of U.S.-made products, and will seek out this quality as long as pricing is not prohibitive.

Juan Jose Lloret, managing director of Market Link, Buenos Aires presented the economic picture in Argentina. The per capita income in Argentina is far above (double) that found in other Latin American countries. However, the availability of products, especially in terms of the nearly infinite choices found in the U.S., is not prevalent in Argentina. Therefore, there actually can be said to be pent-up demand in Argentina for high quality products that can enhance Argentinean lifestyles.

Next, Liliana Baepa, vice president of International at Market Research de Colombia, spoke to the group on the characteristics of the Colombian people, their attitudes, media habits and goals in life. They are generally happy compared to measured levels in other Latin American countries, and consider the home and family to be of high priority in their lives. They are highly motivated in their work lives. In urban areas, they universally watch TV and listen to radio, and a high majority (over 80 percent) read newspapers/magazines.

Although violence and narco-terrorism is of concern to them, they are actively seeking to build better lives and to achieve higher education. Their main goal is to have success in their career and to have family and friends be proud of them.

She closed by speaking of important cultural nuances with respect to conducting research in her country. As an example, telephone surveys cannot be done in Colombia, unless they are very short and to the point. Otherwise, a face-to-face interview is called for.

The final speaker was Jose Edson Bacellar, managing director of Analise &: Sintese, Sao Paulo, who focused on Brazil's growth. For instance, Brazil in 1994-5 added a group of people to its "economically active population" the size of the country of Portugal. This kind of growth has of course resulted in huge opportunities in Brazil for the marketing and sales of all products, including imports from the U.S. The main reason for the large opportunities currently in Brazil is the stabilization that has resulted from the Plano Real, which reduced inflation from about 2,700 percent in 1993 to about 9 percent in 1996.

He added a cautionary note at the end of his speech, indicating that there may be increases in the current levels of import duties in Brazil, thus making it more and more important that U.S. companies establish themselves in Brazil without delay.

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L — low-income (under $30,000)
Stations — number of interviewing stations
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K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations
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Consumer Pulse of Birmingham
Brookwood Village Mall, #612A
Shades Creek Pkwy.
Birmingham, AL 35209
Ph. 205-879-0268 or 800-336-0159
Fax 205-879-1058
E-mail: consumer.pulse@internetMCI.com
Sally Cherry, Director
Income: H-30% M-50% L-20%
Stations: 8 C K P O

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Ph. 205-985-3099
Fax 205-985-3066
Tina Gavin, Supervisor
Income: H-20% M-50% L-30%
Stations: 6 C K P O
(See advertisement on p. 75)

Gadsden

Facts
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1001 Rainbow Dr.
Gadsden, AL 35901
Ph. 205-985-3099
Fax 205-985-3066
Beth Holliday, Supervisor
Income: H-25% M-50% L-25%
Stations: 5 C K
(See advertisement on p. 75)

Huntsville

Facts
Div. of Polly Graham and Associates, Inc.
Madison Square Mall
5901 University Dr., #86
Huntsville, AL 35806
Ph. 205-985-3099
Fax 205-985-0146
Terry Wood, Supervisor
Income: H-50% M-30% L-20%
Stations: 5 C K O
(See advertisement on p. 75)

Mobile

Facts
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3289 Bel Air Mall
Mobile, AL 36606
Ph. 334-471-0059
Fax 334-478-0015
Martha Bowers, Supervisor
Income: H-30% M-35% L-35%
Stations: 6 C K P O
(See advertisement on p. 75)

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Montgomery Mall
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Ph. 334-284-4164
Fax 334-286-9788
Deidra Nolan, Partner
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Metro Center Mall
9606 Metro Pkwy. E.
Phoenix, AZ 85051
Ph. 904-677-5644
Fax 904-677-5534
E-mail: KirkPopeCFS@Digital.Net
Kirk Pope, Manager
Income: NA
Stations: NA
(See advertisement on p. 79)

Friedman Marketing Services
Paradise Valley Mall
4550 E. Cactus Rd.
Phoenix, AZ 85032
Ph. 602-494-7813 or 914-698-9591
Fax 602-996-7465
Income: H-50% M-25% L-25%
Stations: 10 C K P O
(See advertisement on p. 91)

Friedman Marketing Services
Christown Mall
1739 W. Bethany Home Rd.
Phoenix, AZ 85015
Ph. 602-242-4868 or 914-698-9591
Fax 602-242-4910
Income: H-30% M-50% L-20%
Stations: 11 C K P O
(See advertisement on p. 91)

Friedman Marketing Services
Desert Sky Mall
7611-118 W. Thomas Rd.
Phoenix, AZ 85033
Ph. 602-849-8080 or 914-698-9591
Fax 602-849-8083
Income: H-25% M-50% L-25%
Stations: 14 C K P O
(See advertisement on p. 91)

Quick Test
Superstition Springs Center
6555-1004 E. Southern Ave.
Mesa, AZ 85206
Ph. 602-985-2866
Fax 602-985-6321
E-mail: info@quicktest.com
http://www.quicktest.com
Ali Arastu, Manager
Income: H-3% M-37% L-60%
Stations: 7 C K P O

Valleywide Research, Inc.
Sante Fe Square Mall
1107 S. Gilbert Rd., #110
Mesa, AZ 85204
Ph. 602-892-5583
Fax 602-497-3272
DeAnn Corey, Manager
Income: H-20% M-60% L-20%
Stations: 4 K P

Tucson

Car-Lene Research, Inc.
Tucson Mall
4500 N. Oracle
Tucson, AZ 85705
Ph. 520-292-0966
Fax 520-292-0800
Laura Metelovski, Manager
Income: NA
Stations: NA K P O

Arkansas

Ft. Smith

C & C Market Research, Inc.
Central Mall
5111 Rogers Ave., #40-N
Ft. Smith, AR 72903
Ph. 501-484-5637
Fax 501-484-7379
Income: H-20% M-60% L-20%
Stations: 8 C K P O

Little Rock

Friedman Marketing Services
The Pines Mall
2901 Pines Mall Dr.
Pine Bluff, AR 71601
Ph. 870-535-1688 or 914-698-9591
Fax 870-535-1754
Income: H-25% M-50% L-25%
Stations: 15 C K P O
(See advertisement on p. 91)

California

Fresno

Bartels Research Corp.
145 Shaw Ave., Ste. C1 & C2
Clovis, CA 93612
Ph. 209-298-7557
Fax 209-298-5226
Joellen Bartels, Owner
Income: H-10% M-75% L-15%
Stations: 6 C K P O

Nichols Research, Inc.
Fashion Fair Mall
557 E. Shaw Ave.
Fresno, CA 93710
Ph. 209-226-3100
Fax 209-226-9354
E-mail: fresno@nichols-research.com
http://www.nichols-research.com
Amy Shields, Manager
Income: H-20% M-70% L-10%
Stations: 6 C K P O

Los Angeles

(See also Orange County)

Adept Research, Inc.
Hawthorne Plaza
12270 Hawthorne Blvd., #203
Hawthorne, CA 90250
Ph. 818-727-7494
Fax 818-727-7351
Iris Gross, Owner
Income: H-10% M-80% L-10%
Stations: 8 K

Adept Research, Inc.
Sherman Oaks Fashion Square
14006 Riverside Dr., #235
Sherman Oaks, CA 91423
Ph. 818-727-7494
Fax 818-727-7351
Iris Gross, Owner
Income: H-60% M-35% L-5%
Stations: 6 K

Car-Lene Research, Inc.
Sante Fe Springs Mall
13350 E. Telegraph
Santa Fe Springs, CA 90670
Ph. 562-946-2176
Fax 562-944-4167
Danella Hawkins, Manager
Income: H-10% M-60% L-30%
Stations: 7 C K P O

Car-Lene Research, Inc.
Puente Hills Mall
386 Puente Hills Mall
City of Industry, CA 91748
Ph. 621-964-4589
Fax 621-964-4809
Luisa Smith, Manager
Income: H-20% M-50% L-30%
Stations: 7 K P O

Consumer Pulse of Los Angeles
Galleria at South Bay, #269
1815 Hawthorne Blvd.
Redondo Beach, CA 90278
Ph. 310-371-5578 or 800-336-0159
Fax 310-542-2669
E-mail: consumer.pulse@internetMCI.com
Angie Abell, Director
Income: H-25% M-50% L-25%
Stations: 9 C K P O

Cunningham Field & Research Service
Inland Center Mall
500 Inland Center Rd., Ste. 400A
San Bernardino, CA 92408
Ph. 904-677-5644
Fax 904-677-5534
E-mail: SandySolomanCFS@Digital.Net
Sandy Soloman, Manager
Income: H-20% M-70% L-10%
Stations: 5 C K P O
(See advertisement on p. 79)

Facts 'n Figures
Panorama Mall, Ste. 78B
14550 Chase St.
Panorama City, CA 91402
Ph. 818-891-6779
Fax 818-891-6119
Cecelia Chavez, Manager
Income: H-30% M-50% L-20%
Stations: 12 C K P O

Facts 'n Figures
Antelope Valley Mall
1233 W. Ave. P, #701
Palmdale, CA 93551
Ph. 805-272-4888
Fax 805-272-5676
Renee Stapleton, Manager
Income: H-20% M-70% L-10%
Stations: 8 C K P O

Friedman Marketing Services
Stonewood Center Mall
206 Stonewood St.
Downey, CA 90241
Ph. 562-861-9392 or 914-698-9591
Fax 562-861-2592
Income: H-40% M-40% L-20%
Stations: 14 C K P O
(See advertisement on p. 91)

Heakin Research, Inc.
Fallbrook Mall
6633 Fallbrook Ave., Ste. 304
Canoga Park, CA 91304
Ph. 818-712-0660
Fax 818-712-9229
Gail Stutz, Manager
Income: H-40% M-50% L-10%
Stations: 14 C K P O

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

L.A. Research, Inc.
9010 Reseda Blvd., Ste. 109
Northridge, CA 91324
Ph. 818-993-5500
Fax 818-993-5664
Income: H-30% M-50% L-20%
Stations: 7 C P

Los Angeles Marketing Research Associates
Warner Plaza Mall
Ventura Blvd.
Woodland Hills, CA 91364
Ph. 818-506-5544
Fax 818-762-5144
William Bilkiss, Sr. Vice President
Income: H-40% M-40% L-20%
Stations: 6 K P

Los Angeles Marketing Research Associates
Laurel Plaza Mall
Laurel Canyon & Oxnard
N. Hollywood, CA 91602
Ph. 818-506-5544
Fax 818-762-5144
William Bilkiss, Sr. Vice President
Income: H-20% M-65% L-15%
Stations: 8 K P O

Mid-America Rsch./Facts In Focus
Santa Monica Place
301 Santa Monica Pl.
Santa Monica, CA 90401
Ph. 310-260-3237
Fax 310-260-3241
David Ottenfeld, Manager
Income: H-25% M-70% L-5%
Stations: 25 C K P O

PKM Marketing Research Services
The Plaza at West Covina
1200 W. Covina Pkwy.
West Covina, CA 91793
Ph. 818-856-3883
Fax 818-856-3886
Robin Koerner, Manager
Income: H-20% M-45% L-35%
Stations: 6 C P O

Quick Test
Lakewood Center Mall
Space 25
Lakewood, CA 90712
Ph. 562-633-7344
Fax 562-633-3791
E-mail: info@quicktest.com
http://www.quicktest.com
Lisa Fleming, Manager
Income: NA
Stations: NA C K

Suburban Associates
Sherman Oak Galleria
15301 Ventura Blvd., Ste. 386
Sherman Oaks, CA 91403
Ph. 818-906-8036
Fax 818-906-2539
Don Smith, Manager
Income: H-20% M-60% L-20%
Stations: 10 C P O

U.S. Research Co.
Montclair Plaza
2157 Montclair Plaza Ln.
Montclair, CA 91763
Ph. 909-624-1244
Fax 909-626-5183
Income: H-25% M-50% L-25%
Stations: NA C K P O

Orange County

(See also Los Angeles)

The Question Shop, Inc.
2860 N. Santiago Blvd., Ste. 100
Orange, CA 92667
Ph. 714-974-8020 or 800-411-7550
Fax 714-974-6968
Ryan Reasor, President
Income: H-50% M-40% L-10%
Stations: NA C K P O

Quick Test
Huntington Center Mall
7777 Edinger Ave.
Huntington Beach, CA 92647
Ph. 714-899-3888
Fax 714-899-3878
E-mail: info@quicktest.com
http://www.quicktest.com
Linda Green, Manager
Income: H-20% M-60% L-20%
Stations: 4 C K P O

Quick Test
2009 Westminster Mall
Westminster, CA 92683
Ph. 714-891-2111
Fax 714-891-8985
E-mail: info@quicktest.com
http://www.quicktest.com
Linda Green, Manager
Income: H-20% M-60% L-20%
Stations: 9 C K P

Sacramento

American River Research
Cable Park Mall
Oarangevale, CA 95662
Ph. 916-989-0961
Fax 916-989-3670
Charlotte Banks, Manager
Income: H-20% M-60% L-20%
Stations: 8 C K P O

Heakin Research, Inc.
Arden Fair Mall
1689 Arden Way, #1281
Sacramento, CA 95815
Ph. 916-920-1361
Fax 916-920-1371
Nancy Cunningham, Manager
Income: H-23% M-56% L-21%
Stations: 13 C K P O

San Bernardino/Riverside

Car-Lene Research, Inc.
Ontario Mills
1 Mills Circle
Ontario, CA 91764
Ph. 909-481-7666
Fax 909-481-7706
Tracy Nuno, Manager
Income: NA
Stations: NA K P O

Field Management Associates
3601 Riverside Plaza
Riverside, CA 92506
Ph. 909-369-0800
Fax 909-369-0957
Robert Hellman, Partner
Income: H-30% M-60% L-10%
Stations: 7 C K P O

Heakin Research, Inc.
Moreno Valley Mall
22500 Towne Circle, #1090
Moreno Valley, CA 92553
Ph. 909-653-3200
Fax 909-653-3255
Jim Scott, Manager
Income: H-24% M-46% L-30%
Stations: 10 C K P O

L.A. Research, Inc.
Hardman Center
5222 Arlington
Riverside, CA 92504
Ph. 909-358-0300
Fax 909-358-0309
Income: H-20% M-70% L-10%
Stations: 5 C P

San Diego

Jagorda Interviewing Services
Plaza Bonita Mall
3030 Plaza Bonita Rd., #2001
National City, CA 92123
Ph. 619-479-2760
Fax 619-479-2526
Gerald Jagorda, President
Income: H-23% M-33% L-44%
Stations: 8 C K

Luth Research
Mission Valley Center Mall
1640 Camino Del Rio N., Ste. 328
San Diego, CA 92108
Ph. 619-299-7487
Fax 619-299-0513
Jeff Harper, Manager
Income: H-30% M-50% L-20%
Stations: 8 C K P O

Novick Ayres Research
2657 Vista Way, Ste. 5
Oceanside, CA 92054
Ph. 760-967-1307
Fax 760-967-4143
Suzette Novick, Owner
Income: H-20% M-60% L-10%
Stations: 3 C K P O

San Diego Surveys, Inc.
3689 Midway Dr.
San Diego, CA 92110
Ph. 619-224-3113
Fax 619-582-1562
Nancy Bedoe
Income: H-25% M-65% L-10%
Stations: 6 C K P O

San Francisco/San Jose

Car-Lene Research, Inc.
County East Mall
2550 Sommersville Rd.
Antioch, CA 94509
Ph. 510-706-9103
Fax 510-706-0437
Craig Owen, Manager
Income: NA
Stations: NA K P O

Car-Lene Research, Inc.
Stonestown Galleria
3251 20th Ave.
San Francisco, CA 94132
Ph. 415-566-9925
Fax 415-566-9929
Olinda Owen, Manager
Income: H-25% M-50% L-25%
Stations: 6 C K P O

Consumer Opinion Services, Inc.
Great Mall of the Bay Area
500 Great Mall Dr.
Milpitas, CA 95035
Ph. 408-934-9036 or 206-241-6050 for bids
Fax 408-934-9038
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Maxine Kuzod, Manager
Income: H-25% M-55% L-20%
Stations: 9 C K P O
(See advertisement on p. 101)

Field Management Associates-San Francisco
217 Tanforan Pk.
San Bruno, CA 94066
Ph. 415-588-9500 or 909-369-0800
Fax 415-588-9756
Hal Berke, Partner
Income: H-30% M-50% L-20%
Stations: 7 C K P O

Friedman Marketing Services
5820 Northgate Mall
San Rafael, CA 94903
Ph. 415-472-5394 or 914-698-9591
Fax 415-472-5477
Income: H-50% M-40% L-10%
Stations: 13 C K P O
(See advertisement on p. 91)

Friedman Marketing Services
Capitola Mall
1855 41st Ave., Space C1
Capitola, CA 95010
Ph. 408-465-1592 or 914-698-9591
Fax 408-465-1597
Income: H-25% M-50% L-25%
Stations: NA C K
(See advertisement on p. 91)

Heakin Research, Inc.
Vallco Fashion Park, Ste. 2031
10123 N. Wolfe Rd.
Cupertino, CA 95014
Ph. 408-253-4690
Fax 408-253-6647
Ann Pollard, Manager
Income: H-50% M-37% L-13%
Stations: 6 C K P O

Heakin Research, Inc.
262 Bay Fair Mall
San Leandro, CA 94578
Ph. 510-278-2200
Fax 510-278-6738
Steve Teichner, Manager
Income: H-20% M-50% L-30%
Stations: 25 C K P O

MSI International
14 Hillsdale Mall
San Mateo, CA 94403
Ph. 415-574-9044
Fax 415-574-0385
Liane Farber, Manager
Income: H-50% M-40% L-10%
Stations: 5 C P O

Nichols Research, Inc.
1155 New Park Mall
Newark, CA 94560
Ph. 510-794-2990
Fax 510-794-3471
E-mail: newpark@nichols-research.com
http://www.nichols-research.com
Cheryl Blumenthal Olvera, Manager
Income: H-20% M-70% L-10%
Stations: 8 C K P O

Quick Test
203 Southland Mall
Hayward, CA 94545
Ph. 510-785-4650
Fax 510-785-0641
E-mail: info@quicktest.com
http://www.quicktest.com
Lori Silva, Manager
Income: H-5% M-20% L-75%
Stations: 9 C K P O

Quick Test
West Valley Mall
3200 Naglee Rd., Ste. 406
Tracy, CA 95376
Ph. 209-839-0532
Fax 209-839-0705
E-mail: info@quicktest.com
http://www.quicktest.com
Ayala Saltzman, Manager
Income: H-20% M-75% L-5%
Stations: 11 C K P O

Margaret Yarbrough & Associates
South Shore Center
415 South Shore Center
Alameda, CA 94501
Ph. 510-521-6900
Fax 510-521-2130
Diane Kientz, Manager
Income: H-30% M-50% L-20%
Stations: 7 C K P

Ventura/Santa Barbara

Reyes Research
Esplanade Dr. Mall
177 Esplanade Dr.
Oxnard, CA 93030
Ph. 805-278-1444
Fax 805-278-1447
E-mail: reyesresearch@reyesresearch.com
http://www.reyesresearch.com
Arvind Datta, Manager
Income: H-25% M-40% L-35%
Stations: 6 C K

Colorado

Boulder

Car-Lene Research, Inc.
Crossroads Mall
1700 28th St.
Boulder, CO 80301
Ph. 303-444-1500
Fax 303-444-9897
Don Hoglin, Manager
Income: NA
Stations: NA K P O

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Colorado Springs

Consumer Pulse of Colorado Springs
The Citadel Mall, #1084
750 Citadel Dr. E.
Colorado Springs, CO 80909
Ph. 719-596-6933 or 800-336-0159
Fax 719-596-6935
E-mail: consumer.pulse@internetMCI.com
Mary Schneider, Director
Income: H-25% M-55% L-20%
Stations: 8 C K P

Barbara Prince Associates, Inc.
Mall on the Bluffs
3650 Austin Bluffs Pkwy.
Colorado Springs, CO 80918
Ph. 719-594-9192
Fax 719-594-0961
Barbara Prince, President
Income: H-15% M-60% L-25%
Stations: 10 K P O

The Springs Research
Div. of Brewer Research
750 Citadel Dr. E., Ste. 3122
Colorado Springs, CO 80909
Ph. 719-597-9869
Fax 719-597-9869
Esther Brewer, Owner
Income: H-15% M-40% L-45%
Stations: 8 C K P O

U.S. Research Co.
Chapel Hill Mall, Ste. 315
1710 Briargate Blvd.
Colorado Springs, CO 80920
Ph. 719-598-8070
Fax 719-590-1376
Income: H-25% M-50% L-25%
Stations: NA C K P O

Denver

Car-Lene Research, Inc.
Twin Peaks Mall
1250 S. Hover Rd., Ste. 51
Longmont, CO 80501
Ph. 303-682-0131
Fax 303-682-0118
Terri Cruz, Manager
Income: NA
Stations: 6 C K P O

Car-Lene Research, Inc.
Thornton Town Center
10001 Grant St.
Thorton, CO 80229
Ph. 303-452-2696
Fax 303-452-2630
Cindy Rodriquez, Manager
Income: NA
Stations: NA K P O

Consumer Pulse of Denver
The Aurora Mall
14200 Alameda Ave.
Aurora, CO 80012
Ph. 303-341-1211 or 800-336-0159
Fax 303-341-4469
E-mail: consumer.pulse@internetMCI.com
Steve Ansel, Manager
Income: H-30% M-60% L-10%
Stations: 9 C K P O

Friedman Marketing Services
Southwest Plaza Mall
8501 W. Bowles Ave.
Littleton, CO 80123
Ph. 303-972-8734 or 914-698-9591
Fax 303-933-0476
Income: H-20% M-60% L-20%
Stations: 14 C K P O
(See advertisement on p. 91)

Friedman Marketing Services
Westminster Mall, Space 65A
5513 W. 88th Ave.
Westminster, CO 80030
Ph. 303-428-6117 or 914-698-9591
Fax 303-428-6513
Income: H-20% M-60% L-20%
Stations: NA C K P O
(See advertisement on p. 91)

Quick Test
Villa Italia Mall, Ste. 203
7200 W. Alameda
Lakewood, CO 80226
Ph. 303-937-0144
Fax 303-937-0502
E-mail: info@quicktest.com
http://www.quicktest.com
Jackie Stepanich, Manager
Income: H-2% M-80% L-18%
Stations: 4 C K P O

Connecticut

Danbury

U.S. Research Co.
Danbury Fair Mall, Ste. 342
Danbury, CT 06810
Ph. 203-798-0648
Fax 203-798-0655
Income: H-60% M-30% L-10%
Stations: NA C K P O

New Haven

Shapiro Research Services, Inc.
Trumbull Shopping Park
5065 Main St.
Trumbull, CT 06611
Ph. 203-373-9391
Fax 203-371-4257
Sandy Shapiro, President
Income: H-20% M-60% L-20%
Stations: 6 C K P O

Waterbury

Cunningham Field & Research Service
Brass Mill Center
495 Union St., Ste. 1102
Waterbury, CT 06706
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MaryCunninghamCFS@Digital.Net
Mary or Paul Cunningham, Principals
Income: NA
Stations: NA
(See advertisement on p. 79)

Firm Facts Interviewing
Naugatuck Valley Mall
Waterbury, CT 06705
Ph. 203-759-1142
Fax 203-759-5822
Harriet Quint, Co-Owner
Income: H-25% M-55% L-20%
Stations: NA C K P

District of Columbia

Car-Lene Research, Inc.
Potomac Mills
2700 Potomac Mills Cir.
Woodbridge, VA 22192
Ph. 703-497-4444
Fax 703-497-0999
Debbie Nistle, Manager
Income: NA
Stations: NA K P O

Consumer Pulse of Washington
The Mall at Manassas
8300 Sudley Rd.
Manassas, VA 22109
Ph. 703-368-5544 or 800-336-0159
Fax 703-368-7709
E-mail: consumer.pulse@internetMCI.com
Jeff Davis, Director
Income: H-25% M-55% L-20%
Stations: 8 C K P O

Cunningham Field & Research Service
Springfield Mall
6691B Springfield Mall
Springfield, VA 22150
Ph. 904-677-5644
Fax 904-677-5534
E-mail: YvonneFaysonCFS@Digital.Net
Yvonne Fayson, Manager
Income: H-20% M-70% L-10%
Stations: 3 C K P O
(See advertisement on p. 79)

Facts In Focus, Inc.
St. Charles Towne Center
5000 Rte. 301, #2006
Waldorf, MD 20603
Ph. 301-870-7799
Fax 301-705-8348
Anne O'Connor, Manager
Income: H-40% M-35% L-25%
Stations: 15 C K P O

Friedman Marketing Services
Landmark Mall
5801 Duke St., Ste. E110
Alexandria, VA 22304
Ph. 317-916-8565 or 914-698-9591
Fax 317-916-8567
Income: NA
Stations: NA
(See advertisement on p. 91)

Shugoll Research
Ballston Common
4238 Wilson Blvd., #3122
Arlington, VA 22203
Ph. 703-841-2414
Fax 703-841-2422
E-mail: Shugoll@erols.com
Iris Halako, Manager
Income: H-20% M-60% L-20%
Stations: 4 C

T.I.M.E. Market Research
425 Spotsylvania Mall
Fredericksburg, VA 22407
Ph. 540-786-3376
Fax 540-786-3925
Steve Ingalls, Partner
Income: H-25% M-60% L-15%
Stations: 12 C K P O

Florida

Daytona Beach

Cunningham Field & Research Service
Orange Park Mall
1910 Wells Rd., Ste. 1002
Orange Park, FL 32073
Ph. 904-677-5644
Fax 904-677-5534
E-mail: JenniferHembyCFS@Digital.Net
Jennifer Hemby, Manager
Income: H-20% M-70% L-10%
Stations: 6 C K P O
(See advertisement on p. 79)

Ft. Lauderdale/Boca Raton

Car-Lene Research, Inc.
Broward Mall
8000 Broward Mall
Plantation, FL 33388
Ph. 954-476-6840
Fax 954-476-6839
Fran Sciulla, Manager
Income: NA
Stations: NA K P O

Carolana Research
Oakbrook Mall
7209 W. Oakland Park Blvd.
Ft. Lauderdale, FL 33313
Ph. 954-741-2234
Fax 954-742-3733
Carol Nadell, President
Income: H-25% M-50% L-25%
Stations: NA C K P

Cunningham Field & Research Service
Pembroke Lakes Mall
11401 Pines Blvd., Ste. 702
Pembroke Pines, FL 33026
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CarlaVezzaCFS@Digital.Net
Carla Vezza, Manager
Income: H-30% M-50% L-20%
Stations: 6 C K P O
(See advertisement on p. 79)

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Heakin Research, Inc.
Coral Square Mall
9569 W. Atlantic Blvd.
Coral Springs, FL 33071
Ph. 954-753-4466
Fax 954-753-4981
Linda Boneville
Income: H-34% M-56% L-10%
Stations: 14 K P O

Mar's Surveys
Pompano Square Mall
Ft. Lauderdale, FL 33351
Ph. 954-755-2805
Fax 954-755-3061
E-mail: eric@marsresearch.com
http://www.marsresearch.com
Eric Lipson, Vice President
Income: H-20% M-60% L-20%
Stations: NA C K P O

Mar's Surveys
Plantation Fashion Mall
Ft. Lauderdale, FL 33351
Ph. 954-755-2805
Fax 954-755-3061
E-mail: eric@marsresearch.com
http://www.marsresearch.com
Eric Lipson, Vice President
Income: H-60% M-30% L-10%
Stations: NA C

South Florida Market Research
The Festival Mall
2900 W. Sample Rd.
Ft. Lauderdale, FL 33060
Ph. 954-975-5982
Fax 954-984-8963
Beatrice or Lester Alenik
Income: H-30% M-60% L-10%
Stations: 5 C P

Ft. Myers

Quick Test
Edison Mall
4125 Cleveland Ave., Ste. 23
Ft. Myers, FL 33901
Ph. 941-939-1200
Fax 941-939-1413
E-mail: info@quicktest.com
http://www.quicktest.com
Rod Gruber, Manager
Income: H-30% M-40% L-30%
Stations: 12 C K P O

T.I.M.E. Market Research
505 Pt. Charlotte Towne Center Mall
1441 Tamiami Trail
Port Charlotte, FL 33948
Ph. 941-625-5111
Fax 941-625-6416
Sharon People, Manager
Income: H-25% M-60% L-15%
Stations: 10 C K P O

Jacksonville

Consumer Pulse of Jacksonville
Regency Square Mall, #680
9501 Arlington Expy.
Jacksonville, FL 32225
Ph. 904-723-3322 or 800-336-0159
Fax 904-723-0048
E-mail: consumer.pulse@internetMCI.com
Income: H-20% M-60% L-20%
Stations: 8 C K P

Quick Test
The Avenues Mall
10300 Southside Blvd., Ste. 168
Jacksonville, FL 32256
Ph. 904-363-1480
Fax 904-363-2281
E-mail: info@quicktest.com
http://www.quicktest.com
Kathy Paddock, Manager
Income: NA
Stations: NA

Melbourne

Quick Test
Melbourne Square Mall
1700 W. Newhaven Ave., Ste 577
Melbourne, FL 32904
Ph. 407-729-9809
Fax 407-729-9551
E-mail: info@quicktest.com
http://www.quicktest.com
Vicki Crosthwaite, Manager
Income: H-30% M-50% L-20%
Stations: 10 P

Miami

Focus World International, Inc.
16750 N.E. 14th Ave.
#210, Bldg. #11
N. Miami Beach, FL 33162
Ph. 732-946-0100
Fax 732-946-0107
E-mail: FocusWorld@worldnet.att.net
http://www.focusworldint.com
Gary Eichenholtz, CEO/CFO
Income: H-10% M-80% L-10%
Stations: 6 C P

JML Interviewing Service, Inc.
163rd St. Mall
N.E. 163rd St.
Miami, FL 33172
Ph. 305-264-5780
Fax 305-264-6419
Jean Light, President
Income: H-1% M-85% L-14%
Stations: 8 C K P

Miami Market Research, Inc.
6840 S.W. 40 St., Ste. 201A
Miami, FL 33155
Ph. 305-666-7010
Fax 305-666-7960
E-mail: miamktrsch@aol.com
Income: H-30% M-50% L-20%
Stations: 10 C K

Quick Test
Miami International Mall
1455 N.W. 107th Ave., Ste. 687
Miami, FL 33172
Ph. 305-591-1388
Fax 305-592-1188
E-mail: info@quicktest.com
http://www.quicktest.com
Janet Penayos, Manager
Income: H-30% M-60% L-10%
Stations: 11 C K P O

Rife Market Research, Inc.
Flamingo Pines Plaza
136 S. Flamingo Rd., #134
Pembroke Pine, FL 33027
Ph. 305-620-4244
Fax 305-621-3533
E-mail: RIFE A@aol.com
Sandy Palmer, Vice President
Income: H-35% M-50% L-15%
Stations: 4 C
(See advertisement on p. 81)

Rife Market Research, Inc.
Skylake Mall
1688 N.E. Miami Gardens
N. Miami, FL 33179
Ph. 305-620-4244
Fax 305-621-3533
E-mail: RIFE A@aol.com
Sandy Palmer
Income: H-15% M-74% L-11%
Stations: 8 C K P O
(See advertisement on p. 81)

Weitzman & Philip, Inc.
California Club Mall
850 Ives Dairy Rd.
Miami, FL 33179
Ph. 305-653-6323
Fax 305-653-4016
E-mail: dphilipl@aol.com
Dan Philip, President
Income: H-25% M-45% L-30%
Stations: 10 K P O

Orlando

Car-Lene Research, Inc.
West Oaks Mall
9401 W. Colonial Dr., Space 401
Ocoee, FL 34761
Ph. 407-298-6668
Fax 407-298-6877
Linda Powers, Manager
Income: NA
Stations: NA KPO

Barbara Nolan Market Research
Florida Mall
8001 S. Orange Blossom Trail
Orlando, FL 32809
Ph. 407-851-7114
Fax 407-851-7115
Income: H-60% M-30% L-10%
Stations: 8 CKPO

Barbara Nolan Market Research
Seminole Town Center
275 Town Center Cir.
Sanford, FL 32771
Ph. 407-330-2344
Fax 407-323-3235
Income: H-50% M-40% L-10%
Stations: 8 CKPO

Barbara Nolan Market Research
Altamonte Mall
521 Altamonte Ave.
Altamonte Springs, FL 32701
Ph. 407-332-9260
Fax 407-332-0718
Income: H-60% M-30% L-10%
Stations: 10

Quick Test
Lake Square Mall
10401-082 Highway 441
Leesburg, FL 34788
Ph. 352-365-0505
Fax 352-365-2000
E-mail: info@quicktest.com
http://www.quicktest.com
Christy Thierren, Manager
Income: H-9% M-28% L-63%
Stations: 6

Sarasota

Mid-America Rsch./Facts In Focus
De Soto Square
303 U.S. 301 Blvd. W., Ste. 811
Bradenton, FL 34205
Ph. 941-746-1849
Fax 941-746-6157
Margaret Wilde, Manager
Income: H-12% M-78% L-10%
Stations: 12 CKPO

Starr Research
Sarasota Square Mall
8201 S. Tamiami Trail, #54
Sarasota, FL 34238
Ph. 941-925-7827
Fax 941-922-3289
Jim Pobicki, Vice President
Income: H-30% M-60% L-10%
Stations: 6 CKPO

Tallahassee

Friedman Marketing Services
Tallahassee Mall
2415 N. Monroe St.
Tallahassee, FL 32303
Ph. 904-385-4399 or 914-698-9591
Fax 904-385-3481
Income: H-25% M-50% L-25%
Stations: 9 CKPO
(See advertisement on p. 91)

Tampa/St. Petersburg

Adam Market Research, Inc.
University Mall
Tampa, FL 33612
Ph. 813-875-4005
Fax 813-875-4055
Mark Siegel, Director
Income: H-25% M-40% L-35%
Stations: 7 KP

Car-Lene Research, Inc.
Tyrone Square Mall
6901 22nd Ave. N.
St. Petersburg, FL 33710
Ph. 813-344-6886
Fax 813-344-6596
Sharon Brandy, Manager
Income: NA
Stations: NA KPO

Car-Lene Research, Inc.
West Shore Plaza
350 West Shore Plaza
Tampa, FL 33609
Ph. 813-289-8202
Fax 813-289-8302
Sharon Brandy, Manager
Income: NA
Stations: NA KPO

Car-Lene Research, Inc.
Pinellas Square Mall
7200 U.S. Hwy. 19
Pinellas Park, FL 33781
Ph. 813-527-0113
Fax 813-527-5563
Sharon Brandy, Manager
Income: H-14% M-36% L-50%
Stations: 8 CKPO

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Cunningham Field & Research Service
Countryside Mall
27001 US Hwy. 19 N., Ste. 2074
Clearwater, FL 34621
Ph. 904-677-5644
Fax 904-677-5534
E-mail: KevinEatonCFS@Digital.Net
Kevin Eaton, Manager
Income: H-30% M-50% L-20%
Stations: 6 C K P O
(See advertisement on p. 79)

Cunningham Field & Research Service
Brandon Towne Center
334 Brandon Towne Center
Brandon, FL 33511
Ph. 904-677-5644
Fax 904-677-5534
E-mail: TraceyStarkey@Digital.Net
Tracey Starkey, Manager
Income: H-10% M-80% L-10%
Stations: 5 C K P O
(See advertisement on p. 79)

Isabel Dunn Interviewing Service, Inc.
Eastlake Square Mall
5701 E. Hillsborough Ave., Ste. 1411
Tampa, FL 33610
Ph. 813-621-8172 or 813-623-1599
Fax 813-622-7238
Isabel Dunn, President
Income: H-31% M-57% L-12%
Stations: 12 C K P O

Quick Test
Gulf View Square Mall, Ste. 709
9409 U.S. Hwy. 19 N.
Port Richey, FL 34668
Ph. 813-847-2222
Fax 813-842-8541
E-mail: info@quicktest.com
http://www.quicktest.com
Randy Carson, Manager
Income: H-10% M-30% L-60%
Stations: 6 P

Suburban Associates
Tampa Bay Center Mall
4302 W. M.L.K. Hwy., #1037A
Tampa, FL 33607
Ph. 813-871-2516
Fax 813-874-0792
Barbara Talbott, Manager
Income: H-20% M-50% L-30%
Stations: 5 C K P O

West Palm Beach

Friedman Marketing Services
Palm Beach Mall
1801 Palm Beach Lakes Blvd.
West Palm Beach, FL 33401
Ph. 561-712-1060 or 914-698-9591
Fax 561-712-1063
Income: H-25% M-50% L-25%
Stations: 8 C K
(See advertisement on p. 91)

Heakin Research, Inc.
Boynton Beach Mall
801 N. Congress Ave., Ste. 283
Boynton Beach, FL 33426
Ph. 561-733-8998
Fax 561-733-9918
Susan Davis, Manager
Income: H-34% M-56% L-10%
Stations: 10 C K P O

Georgia

Athens

Jackson Associates, Inc.
Georgia Square
3700 Atlanta Hwy.
Athens, GA 30610
Ph. 706-353-3338
Fax 706-546-7518
E-mail: research@jacksonassociates.com
http://www.jacksonassociates.com
Marisa Pope, Dir. of Rsch.
Income: H-10% M-40% L-50%
Stations: 6 C K P

Atlanta

Car-Lene Research, Inc.
North Dekalb Mall
2050 Lawrenceville Hwy.
Decatur, GA 30033
Ph. 404-728-8810
Fax 404-633-9841
Casandra McClain, Manager
Income: NA
Stations: NA K P O

Cunningham Field & Research Service
North Point Mall
1000 N. Point Cir., Ste. 1002
Alpharetta, GA 30202
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MyraEbnerCFS@Digital.Net
Myra Ebner, Manager
Income: H-35% M-55% L-10%
Stations: 6 C K P O
(See advertisement on p. 79)

Heakin Research, Inc.
Gwinett Plaza Mall
2100 Pleasant Hill Rd.
Duluth, GA 30136
Ph. 770-476-0714
Fax 770-476-3194
Terri Clark, Manager
Income: H-34% M-37% L-29%
Stations: 10 C K P O

Heakin Research, Inc.
Shannon South Park Mall
339 Shannon Mall
Union City, GA 30291
Ph. 770-964-9634
Fax 770-964-9665
Charles Smalley, Manager
Income: H-20% M-50% L-30%
Stations: 10 C K P O

MacConnell Research Services, Inc.
Belmont Hills Center
2486 N. Atlanta St.
Smyrna, GA 30080
Ph. 770-451-6236
Fax 770-451-6184
Joy MacConnell, President
Income: H-10% M-60% L-30%
Stations: 10 C K P

MacConnell Research Services, Inc.
Avondale Mall
3588 E. Memorial Dr.
Decatur, GA 30032
Ph. 770-451-6236
Fax 770-451-6184
Joy MacConnell, President
Income: H-20% M-50% L-30%
Stations: 10 C K P O

MacConnell Research Services, Inc.
Greenbrier Mall
2841 Greenbrier Pkwy. S.W.
Atlanta, GA 30331
Ph. 770-451-6236
Fax 770-451-6184
Joy MacConnell, President
Income: H-30% M-40% L-30%
Stations: 10 C K P

MacConnell Research Services, Inc.
Southlake Mall
1000 Southlake Mall, Ste. 2443
Morrow, GA 30260
Ph. 770-451-6236
Fax 770-451-6184
Joy MacConnell, President
Income: H-35% M-45% L-20%
Stations: 8 C K P

Mid-America Rsch./Facts In Focus
Lenox Square Mall
3393 Peachtree Rd. N.E.
Atlanta, GA 30326
Ph. 404-261-8011
Fax 404-261-5576
Jonathan Yardley, Manager
Income: H-26% M-60% L-14%
Stations: 24

Mid-America Rsch./Facts In Focus
Northlake Mall
4800 Briarcliff Rd.
Atlanta, GA 30345
Ph. 770-493-1403
Fax 770-493-9050
Michael Skinner, Manager
Income: H-19% M-76% L-5%
Stations: 12 C K P O

Quick Test
Town Center at Cobb, Ste. 272
400 Ernest Barrett Pkwy.
Kennesaw, GA 30144
Ph. 770-423-0884
Fax 770-424-5354
E-mail: info@quicktest.com
http://www.quicktest.com
Leigh Brown, Manager
Income: H-55% M-35% L-10%
Stations: 10 C K P O

John Stolzberg Market Research
Outlets Limited Mall
3750 Venture Dr.
Duluth, GA 30136
Ph. 404-497-8656
Fax 404-497-8656
John Stolzberg, President
Income: H-30% M-60% L-10%
Stations: 4 C P

Tannenbaum Research Services
80 South Dekalb Mall
Decatur, GA 30034
Ph. 404-241-3061
Fax 404-636-3037
Judy Tannenbaum, Owner
Income: H-30% M-50% L-20%
Stations: 8 C K P O

Gainesville

Jackson Associates, Inc.
Lakeshore Mall
150 Pearl Nix Pkwy., Ste. C6
Gainesville, GA 30501
Ph. 770-536-2054
Fax 770-536-2065
E-mail: research@jacksonassociates.com
http://www.jacksonassociates.com
Marisa Pope, Dir. of Rsch.
Income: H-20% M-50% L-30%
Stations: 6 C K P O

Idaho

Boise

Consumer Opinion Services, Inc.
Boise Towne Square
350 N. Milwaukee St.
Boise, ID 83788
Ph. 208-323-8584 or 206-241-6050 for bids
Fax 208-323-8593
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Robert Corbin, Manager
Income: H-15% M-60% L-25%
Stations: 9 C K P
(See advertisement on p. 101)

Illinois

Chicago

Bryles Survey Service, Ltd.
Brementown Mall
6847 W. 159th St.
Tinley Park, IL 60477
Ph. 708-532-6800
Fax 708-532-1880
Robert Bryles, President
Income: NA
Stations: 6 C K P

Bryles Survey Service, Ltd.
Northfield Square Mall
1600 N. State Rte. 50
Bourbonnais, IL 60914
Ph. 815-937-8822
Fax 815-937-8885
Kim Kommer, Supervisor
Income: H-10% M-70% L-20%
Stations: 8 C K P O

Car-Lene Research, Inc.
1108 Northbrook Court
Northbrook, IL 60062
Ph. 847-498-1305
Fax 847-498-1491
Robin Rome, Manager
Income: H-40% M-60% L-0%
Stations: 8 K P O

Car-Lene Research, Inc.
Yorktown Center
266 D Yorktown Center
Lombard, IL 60148
Ph. 630-705-1303
Fax 630-705-1304
Marlene Szafranski, Manager
Income: NA
Stations: NA K P O

Car-Lene Research, Inc.
River Oaks Center
8 River Oaks Center
Calumet City, IL 60409
Ph. 708-862-6666
Fax 708-862-0660
Pat Beal, Manager
Income: NA
Stations: NA K P O

Car-Lene Research, Inc.
Lincolnwood Town Center
3333 W. Touhy Ave.
Lincolnwood, IL 60645
Ph. 847-679-4470
Fax 847-679-4472
Demetra Kourelis, Manager
Income: NA
Stations: NA K P

Consumer Pulse of Chicago
Spring Hill Mall, #1140
W. Dundee, IL 60118
Ph. 847-428-0885 or 800-336-0159
Fax 847-428-4554
E-mail: consumer.pulse@internetMCI.com
Steve Lehman, Director
Income: H-30% M-50% L-20%
Stations: 8 C K P O

Consumer Surveys Co.
Northpoint Shopping Center
304 E. Rand Rd.
Arlington Heights, IL 60004
Ph. 847-394-9411
Fax 847-394-0001
E-mail: fberla19@mail.idt.net
Deanne Kohn, Nat'l. Field Director
Income: H-44% M-38% L-18%
Stations: 10 C K P O

Consumer Surveys Co.
730 Chicago Ridge Mall
Chicago Ridge, IL 60415
Ph. 708-499-6000
Fax 708-499-4621
E-mail: fberla19@mail.idt.net
Deanna Kohn, Nat'l. Field Director
Income: H-32% M-48% L-32%
Stations: 5 C K P O

Cunningham Field & Research Service
Gurnee Mills Mall
6170 W. Grand Ave., Ste. 588
Gurnee, IL 60031
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MarianneSatinskyCFS@Digital.Net
Marianne Satinsky
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 79)

Cunningham Field & Research Service
Lincoln Mall
208 Lincoln Mall, Ste. 146B
Matteson, IL 60443
Ph. 904-677-5644
Fax 904-677-5534
E-mail: KelleyBolesCFS@Digital.Net
Kelley Boles, Manager
Income: H-20% M-80% L-0%
Stations: 6 C K P O
(See advertisement on p. 79)

Facts In Focus, Inc.
2260 Fox Valley Center
Aurora, IL 60504
Ph. 630-898-2166
Fax 630-898-2172
Walt Nakapsuka, Manager
Income: H-40% M-40% L-20%
Stations: 12

CODES
Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)
Stations — number of interviewing stations
Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations
NA — information not available

Friedman Marketing Services
Harlem-Irving Plaza
4192 Harlem Ave.
Norridge, IL 60634
Ph. 708-452-7660 or 914-698-9591
Fax 708-452-9865
Income: H-25% M-50% L-25%
Stations: NA C K O
(See advertisement on p. 91)

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
Income: H-18% M-50% L-32%
Stations: 8 K P

Heakin Research, Inc.
Louis Joliet Mall
1166 Mall Loop Dr.
Joliet, IL 60435
Ph. 815-439-2053
Fax 815-439-2162
Molly Vaught, Manager
Income: H-34% M-39% L-27%
Stations: 8 C K P O

Heakin Research, Inc.
Yorktown Center
Ste. 203 B
Lombard, IL 60148
Ph. 630-627-8907
Fax 630-627-8881
Erick Bach, Manager
Income: H-40% M-33% L-27%
Stations: 7 C K

Heakin Research, Inc.
Golf Mill Center
373 Golf Mill Center
Niles, IL 60714
Ph. 847-824-6550
Fax 847-824-6550
Susan Habel, Manager
Income: H-22% M-65% L-13%
Stations: 10 C K P O

Mid-America Rsch./Facts In Focus
Randhurst Center
999 N. Elmhurst Rd., Ste. 17
Mt. Prospect, IL 60056
Ph. 847-392-0800
Fax 847-259-7259
Lori Tomeleoni, Manager
Income: H-33% M-52% L-15%
Stations: 20 C K P O

Mid-America Rsch./Facts In Focus
Orland Square Mall
280 Orland Sq.
Orland Park, IL 60462
Ph. 708-349-0888
Fax 708-349-9407
Joan Rogers, Manager
Income: H-24% M-63% L-14%
Stations: 12 C K P O

Mid-America Rsch./Facts In Focus
Fox Valley Mall
2260 Fox Valley Center
Aurora, IL 60504
Ph. 630-898-2166
Fax 630-898-2172
Income: NA
Stations: NA C K P O

Quick Test
Ford City Mall
7601 S. Cicero Ave.
Chicago, IL 60652
Ph. 773-581-9400
Fax 773-581-9758
E-mail: info@quicktest.com
http://www.quicktest.com
Amy Brown, Manager
Income: H-9% M-44% L-47%
Stations: 12 C K P O

Quick Test
Stratford Square Mall
424 Stratford Square
Bloomingdale, IL 60108
Ph. 630-924-0285
Fax 630-924-7442
E-mail: info@quicktest.com
http://www.quicktest.com
Michele Klein, Manager
Income: NA
Stations: NA K P O

Quick Test
429 Hawthorn Center
Vernon Hills, IL 60061
Ph. 708-367-0036
Fax 708-367-4863
E-mail: info@quicktest.com
http://www.quicktest.com
Ann-Marie Hogan, Manager
Income: H-60% M-30% L-10%
Stations: 11 C K O

The Research Group, Inc.
Oak Mill Mall
7900 Milwaukee, Ave., Ste. 222
Niles, IL 60714
Ph. 847-966-8900
Fax 847-966-8871
E-mail: RGI222@aol.com
http://members.aol.com/rgi222/index.htm
Income: H-30% M-50% L-20%
Stations: 5 K P O

Survey Center, LLC
North Pier Mall
455 E. Illinois St., Ste. 660
Chicago, IL 60611
Ph. 312-321-8100
Fax 312-321-8110
E-mail: MSMITH@mcs.com
Carol Tobler
Income: H-40% M-50% L-10%
Stations: 5 C K P O

Survey Center, LLC
Hickory Palos Square
9638 S. Roberts Rd.
Hickory Hills, IL 60457
Ph. 708-430-6400
Fax 708-430-6489
Matthew Smith, Director
Income: H-20% M-50% L-30%
Stations: 15 C

U.S. Research Co.
Charlestowne Mall, #C221
St. Charles, IL 60174
Ph. 708-377-7020
Fax 708-377-7252
Income: H-25% M-60% L-15%
Stations: NA C K P O

Peoria

Scotti Research, Inc.
Northwoods Mall
4501 War Memorial
Peoria, IL 61613
Ph. 309-682-4254
Fax 309-673-5942
Vince Birkman, Mall Manager
Income: H-25% M-50% L-25%
Stations: 6 C K P

Indiana

Evansville

Gore/Knauff Research & Associates
Eastland Mall
Evansville, IN
Ph. 812-485-2160
Fax 812-485-2164
E-mail: jknauff@evansville.com
Jim Knauff
Income: H-25% M-50% L-25%
Stations: 6 C K P O

Ft. Wayne

Dennis Research Service, Inc.
Glenbrook Square
4201 Coldwater Rd.
Ft. Wayne, IN 46805
Ph. 219-483-2884
Fax 219-482-5503
Linda Hammer, Mall Supervisor
Income: H-30% M-60% L-10%
Stations: 5 C K P O

Gary

Bryles Survey Service, Ltd.
Century Mall
8275 Broadway
Merrillville, IN 46410
Ph. 219-769-7380
Fax 219-738-2480
Cheryl Carrillo, Supervisor
Income: H-10% M-80% L-10%
Stations: 12 C K P O

Indianapolis

Friedman Marketing Services
Castleton Square Mall
6020 E. 82nd St., #604
Indianapolis, IN 46250
Ph. 317-570-8845 or 914-698-9591
Fax 317-570-8848
Income: H-31% M-20% L-49%
Stations: 5 P
(See advertisement on p. 91)

Herron Associates, Inc. (Br)
Greenwood Park, #C-26
1251 U.S. 31 N.
Greenwood, IN 46142
Ph. 317-882-3800
Fax 317-887-8304
E-mail: herron@iquest.net
http://www.herron-research.com
Paul Jorgensen
Income: H-35% M-48% L-17%
Stations: 10 C K P O
(See advertisement on p. 85)

Herron Associates, Inc.
Washington Square
10202 E. Washington St.
Indianapolis, IN 46227
Ph. 317-882-3800
Fax 317-897-8265
E-mail: herron@iquest.net
http://www.herron-research.com
Paul Jorgensen
Income: H-30% M-44% L-26%
Stations: 8 C K P O
(See advertisement on p. 85)

Jackson & Jackson Research, Inc.
Fair Oaks Mall
5144 Madison Ave., Ste. 9
Indianapolis, IN 46227
Ph. 317-782-3066
Fax 317-788-3165
Janet Jackson, President
Income: H-15% M-71% L-14%
Stations: 6 C K P O

Iowa

Davenport

PMR-Personal Marketing Research, Inc.
NorthPark Mall
320 W. Kimberly Rd./P.O. Box 404
Davenport, IA 52806
Ph. 319-388-4759
Fax 319-388-4796
E-mail: PERMARRES@aol.com
Income: H-20% M-70% L-10%
Stations: 6 C K P

Des Moines

T.L. Grantham & Associates, Inc.
Park Fair Mall
100 E. Euclid Ave., Ste. 157
Des Moines, IA 50313
Ph. 515-288-7156
Fax 515-288-0661
Vada Grantham, CEO
Income: H-15% M-65% L-20%
Stations: 2 C K P O

Mid-Iowa Interviewing, Inc.
Valley West Mall
1551 Valley W. Dr., Ste. 157A
W. Des Moines, IA 50266
Ph. 515-225-6232
Fax 515-225-1184
E-mail: douglas.brown@internetmci.com
Debbie Gudehus, General Manager
Income: H-30% M-40% L-30%
Stations: 6 C K P O

Mid-Iowa Interviewing, Inc.
Southridge Mall
1111 E. Army Post Rd., Ste. 152
Des Moines, IA 50315
Ph. 515-225-6232
Fax 515-225-1184
E-mail: douglas.brown@internetmci.com
Debbie Gudehus, General Manager
Income: H-35% M-45% L-20%
Stations: 12 C K P O

PMR-Personal Marketing Research, Inc.
Merle Hay Mall
3800 Merle Hay Rd., Ste. 200
Des Moines, IA 50310
Ph. 515-270-1703
Fax 515-270-9070
E-mail: PERMARRES@aol.com
Income: H-17% M-68% L-15%
Stations: 6 C K P O

Kansas

Kansas City
(See Kansas City, MO)

Wichita

Data Net
Towne East Square
7700 E. Kellogg, Ste. 231
Wichita, KS 67207
Ph. 316-682-6655
Fax 316-682-6664
Janet Brown, Manager
Income: H-20% M-70% L-10%
Stations: 9 C K P

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

U.S. Research Co.
Town West Square, Store #804
Wichita, KS 67209
Ph. 316-943-1153
Fax 316-943-4435
Income: H-25% M-50% L-25%
Stations: NA C K P O

Kentucky

Louisville

Fangman Research, Inc.
Green Tree Mall, Hwy. 131
Clarksville, IN 47129
Ph. 502-456-5300
Fax 502-456-2404
E-mail: fangman@compuserve.com
Allen B. Fangman, Vice President
Income: H-25% M-50% L-25%
Stations: 6 C K P O

MRK, Inc.
Mid City Mall
1250 Bardstown Rd.
Louisville, KY 40204
Ph. 502-458-4159
Fax 502-456-5776
Connie Pearl, Co-Owner
Income: H-1% M-79% L-20%
Stations: 7 C K P O

Personal Opinion, Inc.
Bashford Manor Mall
Louisville, KY 40207
Ph. 502-899-2400
Fax 502-899-2404
Linda Schulz, Dir. Mktg. Rsch.
Income: H-20% M-60% L-20%
Stations: 6 C K P

Personal Opinion, Inc.
River Falls Mall
Clarksville, IN
Ph. 502-899-2400
Fax 502-899-2404
Linda Schulz, Dir. Mktg. Rsch.
Income: H-20% M-55% L-25%
Stations: 9 C K P O

Louisiana

Baton Rouge

Gulf State Research Center
Bon Marche Mall
7361 Florida Blvd.
Baton Rouge, LA 70806
Ph. 800-848-2555 or 504-926-3827
Fax 504-925-9990
Robert Landsberger, President
Income: H-20% M-70% L-10%
Stations: 6 C K P O

New Orleans

Car-Lene Research, Inc.
North Shore Square Mall
150 North Shore Circle
Slidell, LA 70460
Ph. 504-847-0405
Fax 504-847-0042
Kendra Williams, Manager
Income: NA
Stations: NA K P O

Friedman Marketing Services
Oakwood Shopping Center
197 Westbank Expwy., Ste. 7
Gretna, LA 70056
Ph. 504-367-5808 or 914-698-9591
Fax 504-367-5852
Income: H-25% M-50% L-25%
Stations: 5 C K P
(See advertisement on p. 91)

Gulf State Research Center - New Orleans
Clearview Shopping Mall
4426 Veterans Blvd.
Metairie, LA 70006
Ph. 800-845-GULF (4853) or 504-454-1737
Tim Villar, Vice President
Income: H-30% M-50% L-20%
Stations: 6 C K P

Heakin Research, Inc.
Esplanade Mall
1401 W. Esplanade, Ste. 118
Kenner, LA 70065
Ph. 504-464-9188
Fax 504-464-9936
Income: H-21% M-45% L-34%
Stations: 12 C K P O

Linden Research Services, Inc.
Lakeside Mall
3301 Veterans Blvd., Ste. 201
Metairie, LA 70002
Ph. 504-837-0013
Fax 504-837-0012
E-mail: mjgreen@accesscom.net
http://www.lindenresearch.com
Mike Green, Director of Operations
Income: H-37% M-43% L-20%
Stations: 6 C K P O

Maryland

Baltimore

Assistance in Marketing/Baltimore
Golden Ring Mall
6400 Rossville Blvd.
Baltimore, MD 21237
Ph. 410-391-7750
Fax 410-391-7850
E-mail: AIM@aim.charm.net
http://www.charm.net/~aim/
Sue Roberts, Manager
Income: H-40% M-40% L-20%
Stations: 6 C K P O

Assistance in Marketing/Baltimore
Security Square Mall
6901 Security Blvd.
Baltimore, MD 21207
Ph. 410-597-9904
Fax 410-597-9908
E-mail: AIM@aim.charm.net
http://www.charm.net/~aim/
Debbie Michocki, Manager
Income: H-50% M-30% L-20%
Stations: 6 C K P O

Consumer Pulse of Baltimore
Westview Mall
5748 Baltimore National Pike, #B102
Baltimore, MD 21228
Ph. 410-687-3400 or 800-336-0159
Fax 410-687-7015
E-mail: consumer.pulse@internetMCI.com
Kim Colwell, Director
Income: H-15% M-55% L-30%
Stations: 8 C K P O

Consumer Pulse of Baltimore
The Mall in Columbia
10300 Little Patuxent Pkwy.
Columbia, MD 21044
Ph. 410-687-3400 or 800-336-0159
Fax 410-687-7015
E-mail: consumer.pulse@internetMCI.com
Kim Colwell, Director
Income: H-30% M-50% L-20%
Stations: 8 C K P

Heakin Research, Inc.
Owings Mill Town Center
10300 Mill Run Circle, Ste. 1155
Owings Mills, MD 21117
Ph. 410-998-3939
Fax 410-998-3555
Randi Stone, Manager
Income: H-46% M-41% L-13%
Stations: 10 C K P O

Heakin Research, Inc.
White Marsh Mall
8200 Perry Hall Blvd., #1160
Baltimore, MD 21236
Ph. 410-933-9400
Fax 410-933-9440
Sylvia Yager
Income: H-37% M-45% L-18%
Stations: 10 C K P O

Massachusetts

Boston

Car-Lene Research, Inc.
Silver City Mall
2 Galleria Dr.
Taunton, MA 02780
Ph. 508-880-0087
Fax 508-880-8715
Steve Martin, Manager
Income: H-20% M-60% L-20%
Stations: 5 K P O

Cunningham Field & Research Service
Natick Mall
1245 Worchester St., Ste. 1218
Natick, MA 01760-1553
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MaryCunninghamCFS@Digital.Net
Mary or Paul Cunningham, Principals
Income: H-40% M-40% L-20%
Stations: 5 C K P O
(See advertisement on p. 79)

Northeast Data
Liberty Tree Mall
100 Independence Way
Danvers, MA 01923
Ph. 508-777-8433
Fax 508-777-8443
Income: H-60% M-30% L-10%
Stations: 6 C K P O

Performance Plus
Westgate Mall
200 Westgate Dr., Ste. 23
Brockton, MA 02401
Ph. 508-580-2984
Fax 508-587-3082
Shirley Shames, President
Income: H-10% M-70% L-20%
Stations: 10 C K P

Performance Plus
2 Faneuil Hall Marketplace, 4th fl.
Boston, MA 02109
Ph. 617-973-4868
Fax 617-973-4879
Shirley Shames, President
Income: H-60% M-30% L-10%
Stations: 10 C K P

Performance Plus
Meadow Glen Mall
3850 Mystic Valley Pkwy., Rte. 16
Medford, MA 02155
Ph. 617-393-5588
Fax 617-393-5649
Shirley Shames, President
Income: H-30% M-60% L-10%
Stations: 10 C K P

Quick Test
Silver City Galleria
2 Galleria Mall Dr., #248
Taunton, MA 02780
Ph. 508-822-0333
Fax 508-822-9025
E-mail: info@quicktest.com
http://www.quicktest.com
Heather Wakefield, Manager
Income: H-25% M-46% L-29%
Stations: 10 C K P O

Quick Test
South Shore Plaza
250 Grantite St., Ste. 197
Braintree, MA 02184
Ph. 617-849-1692
Fax 617-843-5276
E-mail: info@quicktest.com
http://www.quicktest.com
Carla McPherson, Manager
Income: H-25% M-46% L-29%
Stations: 10 C K P O

Quick Test
Watertown Mall
550 Arsenal St.
Watertown, MA 02172
Ph. 617-924-8486
Fax 617-923-0261
E-mail: info@quicktest.com
http://www.quicktest.com
Geri Marry, Manager
Income: H-20% M-50% L-30%
Stations: 9 C K P O

U.S. Research Co.
Independence Mall, Sp. A-123
Kingston, MA 02364
Ph. 617-585-1653
Fax 617-585-9504
Income: H-25% M-50% L-25%
Stations: NA C K P O

Springfield

Friedman Marketing Services
Eastfield Mall
1655 Boston Rd.
Springfield, MA 01129
Ph. 413-543-8515 or 914-698-9591
Fax 413-543-8430
Income: H-30% M-50% L-20%
Stations: 6 C K P O
(See advertisement on p. 91)

Quick Test
Holyoke Mall at Ingleside
50 Holyoke Rd.
Holyoke, MA 01040
Ph. 413-533-6180
Fax 413-532-6855
E-mail: info@quicktest.com
http://www.quicktest.com
Debbie Mullaly, Manager
Income: H-15% M-55% L-30%
Stations: NA C K

Trends of Springfield
Div. of Performance Plus
Fairfield Mall
591 Memorial Dr.
Chicopee, MA 01020
Ph. 508-872-1287
Fax 508-879-7108
Shirley Shames, President
Income: H-10% M-70% L-20%
Stations: 10 C K P O

Michigan

Detroit

Consumer Pulse of Detroit
Summit Place Mall
315 N. Telegraph, #N 123
Waterford, MI 48328
Ph. 248-681-4399 or 800-336-0159
Fax 248-681-3526
E-mail: consumer.pulse@internetMCI.com
Shelia Smith, Director
Income: H-20% M-55% L-25%
Stations: 8 C K P

Consumer Research Center
Westland Mall
35000 W. Warren Rd.
Westland, MI 48185
Ph. 313-513-5040
Fax 313-513-8966
Lois Forman, Partner
Income: H-25% M-45% L-30%
Stations: 12 C K P O

Detroit Marketing
Wonderland Mall
29755 Plymouth Rd.
Livonia, MI 48150
Ph. 313-427-5360
Fax 313-427-5250
Paula Crimmins, Partner
Income: H-25% M-45% L-30%
Stations: 7 C K P

Friedman Marketing Services
Frenchtown Square Mall
2121 N. Monroe St., Unit 105
Monroe, MI 48161
Ph. 313-241-1610 or 914-698-9591
Fax 313-241-6804
Income: H-25% M-50% L-25%
Stations: 13 C K P O
(See advertisement on p. 91)

Friedman Marketing Services
Oakland Mall
350-B. W. 14 Mile Rd.
Troy, MI 48083
Ph. 248-589-0950 or 914-698-9591
Fax 248-589-0271
Income: H-30% M-50% L-20%
Stations: 15 C K P O
(See advertisement on p. 91)

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Heakin Research, Inc.
Macomb Mall
32441 Gratiot, Ste. 440
Roseville, MI 48066
Ph. 810-294-3232
Fax 810-294-3759
P.J. Hills, Manager
Income: H-31% M-41% L-28%
Stations: 8 K P O

Heakin Research, Inc.
Eastland Mall
1800 Bernier Rd., Ste. 731
Harper Woods, MI 48225
Ph. 313-521-8811
Fax 313-521-9152
Clyde Mayberry, Manager
Income: H-30% M-35% L-35%
Stations: 9 C K P O

Quick Test
Southland Center Mall
23000 Eureka Rd.
Taylor, MI 48180
Ph. 313-287-3600
Fax 313-287-3840
E-mail: info@quicktest.com
http://www.quicktest.com
Jill Cerasuolo, Manager
Income: H-25% M-50% L-25%
Stations: 11 C K P O

Grand Rapids

Barnes Research, Inc.
Rogers Plaza
1051 28th St. S.W.
Wyoming, MI 49509
Ph. 616-363-7643
Fax 616-363-8227
Howard Rozema, Vice President
Income: H-25% M-50% L-25%
Stations: 10 C K P

Minnesota

Duluth

Bryles Survey Service, Ltd.
Miller Hill Mall
1600 Miller Trunk Hwy.
Duluth, MN 55811
Ph. 218-722-9274
Fax 218-722-9327
Ann Hendrickson, Supervisor
Income: H-10% M-70% L-20%
Stations: 12 C K P O

Minneapolis/St. Paul

Car-Lene Research, Inc.
Brookdale Mall
1269 Brookdale
Brooklyn Center, MN 55430
Ph. 612-585-1858
Fax 612-585-1859
Angellique Green, Manager
Income: NA
Stations: NA K P O

Car-Lene Research, Inc.
Southdale Center
0306 Southdale Center
Edina, MN 55435
Ph. 612-922-1444
Fax 612-922-1999
John Sandor, Manager
Income: NA
Stations: NA K P O

Comprehensive Research
Har Mar Mall
2100 N. Snelling Ave.
St. Paul, MN 55113
Ph. 612-481-6937
Income: H-20% M-60% L-20%
Stations: 8 C K P O

N.K. Friedrichs & Associates, Inc.
Northtown Mall
117 Northtown Dr.
Blaine, MN 55434
Ph. 612-784-7332
Fax 612-783-9314
Judy Lestina, Manager
Income: H-15% M-60% L-25%
Stations: 8 C K P O

Heakin Research, Inc.
Knollwood Mall
8332 Hwy. 7
St. Louis Park, MN 55426
Ph. 612-936-0940
Fax 612-936-9078
Bruce Bale, Manager
Income: H-29% M-49% L-22%
Stations: 12 C K P O

Heakin Research, Inc.
Mall of America
300 E. Broadway
Bloomington, MN 55425
Ph. 612-854-3535
Fax 612-854-4375
Income: H-25% M-50% L-25%
Stations: 14 C K P O

Quick Test
Maplewood Mall
2013 Maplewood Mall
Maplewood, MN 55109
Ph. 612-770-5636
Fax 612-770-7639
E-mail: info@quicktest.com
http://www.quicktest.com
William Conner, Manager
Income: NA
Stations: NA K

Mississippi

Jackson

Friedman Marketing Services
Metrocenter Mall, 1275 Metrocenter
Highway 80 and Robinson Rd.
Jackson, MS 39209
Ph. 601-352-9340 or 914-698-9591
Fax 601-355-3530
Income: H-20% M-60% L-20%
Stations: 13 C K P O
(See advertisement on p. 91)

Missouri

Kansas City

C & C Market Research, Inc.
9525 Metcalf, #D-6
Metcalf South Mall
Overland Park, KS 66212
Ph. 913-381-8420
Fax 913-381-8226
Craig Cunningham, President
Income: H-40% M-40% L-20%
Stations: 7 C K P O

Heakin Research, Inc.
Blue Ridge Mall
4200 Blue Ridge Blvd.
Kansas City, MO 64133
Ph. 816-737-1130
Fax 816-737-0530
Debbie Culver, Manager
Income: H-20% M-43% L-37%
Stations: 10 K P O

Heakin Research, Inc.
116 Independence Center
Independence, MO 64057
Ph. 816-795-0706
Fax 816-795-1416
Jackie Sparks, Manager
Income: H-23% M-48% L-29%
Stations: 10 K P O

Heakin Research, Inc.
Bannister Mall
5600 E. Banister Rd., #102
Kansas City, MO 64137
Ph. 816-767-8300
Fax 816-761-0110
Pat Stoeckman, Manager
Income: H-24% M-55% L-21%
Stations: 10 C K P O

St. Louis

Car-Lene Research, Inc.
Alton Square Mall, #203 B
Alton, IL 62002
Ph. 618-462-1173
Fax 618-462-1180
Dee Lawrence, Manager
Income: NA
Stations: NA K P O

Car-Lene Research, Inc.
South Country Mall
Hwy. 55 & Lindbergh Blvd.
St. Louis, MO 63129
Ph. 314-845-2002
Fax 314-845-6254
Karen McClarin, Manager
Income: NA
Stations: NA K P O

Consumer Opinion - St. Charles
1720 Mid Rivers Mall
St. Peters, MO 63376
Ph. 314-397-8473
Fax 314-692-2427
Mark Holloway, Manager
Income: H-40% M-50% L-10%
Stations: 12 C K P O

Cunningham Field & Research Service
St. Clair Square Mall
125 St. Clair Square
Fairview Heights, IL 62208
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MaryCunninghamCFS@Digital.Net
Mary or Paul Cunningham, Principals
Income: H-30% M-40% L-30%
Stations: 5 C K P O
(See advertisement on p. 79)

Friedman Marketing Services
St. Louis Union Station
1820 Market St.
St. Louis, MO 63103
Ph. 314-241-4559 or 914-698-9591
Fax 314-241-6058
Income: H-30% M-50% L-20%
Stations: NA C K P O
(See advertisement on p. 91)

Quick Test
505 Northwest Plaza
St. Louis, MO 63074
Ph. 314-291-8888
Fax 314-291-8581
E-mail: info@quicktest.com
http://www.quicktest.com
Fletcher Peacock, Manager
Income: H-2% M-55% L-43%
Stations: 10 C K P O

Superior Surveys of St. Louis, Inc.
1720 Mid Rivers Mall
St. Peters, MO 63376
Ph. 314-397-8463
Fax 314-692-2427
Income: H-40% M-50% L-10%
Stations: 12 C K P O

U.S. Research Co.
338 Jamestown Mall
Florissant, MO 63034
Ph. 314-741-0284
Fax 314-741-6971
Income: H-25% M-50% L-25%
Stations: NA C K P O

Springfield

Bryles Survey Service, Ltd.
227 Battlefield Mall
Springfield, MO 65804
Ph. 417-887-1035
Fax 417-887-0209
Dana Elam, Supervisor
Income: H-10% M-80% L-10%
Stations: 12 C K P O

Nebraska

Omaha

Car-Lene Research, Inc.
Westroads Shopping Mall
10000 California
Omaha, NE 68114
Ph. 402-343-9090
Fax 402-343-9191
Income: NA
Stations: NA K P O

Nevada

Las Vegas

Consumer Research Center
1370 E. Flamingo Rd., Ste. J
Las Vegas, NV 89119
Ph. 702-737-3272
Fax 702-737-1023
Buddy Goldbaum, President
Income: H-15% M-50% L-35%
Stations: 7 C K P O

Cunningham Field & Research Service
The Galleria at Sunset
1300 W. Sunset Rd., Ste. 1324
Henderson, NV 89014
Ph. 904-677-5644
Fax 904-677-5534
E-mail: JudyGinsbergCFS@Digital.Net
Judy Ginsberg, Manager
Income: H-30% M-60% L-10%
Stations: 6 C K P O
(See advertisement on p. 79)

New Hampshire

Concord

Cunningham Field & Research Service
Steeplegate Mall
270 London Rd., Ste. 1164
Concord, NH 03301
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MaryCunninghamCFS@Digital.Net
Mary or Paul Cunningham, Principals
Income: H-20% M-60% L-20%
Stations: 5 C K O
(See advertisement on p. 79)

Manchester/Nashua

New England Interviewing, Inc.
Bedford Mall
S. River Rd.
Bedford, NH 03110
Ph. 603-429-1082
Heidi B., Manager
Fax 603-883-1119
Income: H-27% M-61% L-12%
Stations: 5 K P

New England Interviewing, Inc.
Nashua Mall
Rte. 3 & 130
Nashua, NH 03063
Ph. 603-889-8100
Fax 603-883-1119
Joan Greene, Mall Coordinator
Income: H-14% M-68% L-18%
Stations: 4 C K P

New Jersey

Northern New Jersey

Car-Lene Research, Inc.
Bergen Mall
Rte. 4 & Forest Ave.
Paramus, NJ 07652
Ph. 201-845-5600
Fax 201-845-6201
Nina Velella, Manager
Income: NA
Stations: NA K P O

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Car-Lene Research, Inc.
Moorestown Mall
Rte. 38 & Lenola
Moorestown, NJ 08057
Ph. 609-231-0600
Fax 609-231-9575
Evan Celwyn, Manager
Income: NA
Stations: NA KPO

Cunningham Field & Research Service
Raceway Mall
3710 Rte. 9, Ste. 2201
Freehold, NJ 07728
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CarolKleinCFS@Digital.Net
Carol Klein, Manager
Income: H-50% M-40% L-10%
Stations: 6 CKPO
(See advertisement on p. 79)

Ebony Marketing
Newport Shopping Mall
30 Mall Dr. W.
Jersey City, NJ 07310
Ph. 201-714-9455
Fax 201-714-9396
E-mail: emr@interport.net
Rafaela Ramirez
Income: H-10% M-90% L-0%
Stations: 8 CPO

Focus World International, Inc.
Consumer Reaction Research
Seaview Square Mall
Rte. 66 & 35
Ocean, NJ 07712
Ph. 908-918-0100
Fax 908-918-7070
E-mail: FocusWorld@worldnet.att.net
http://www.focusworldint.com
Gary Eichenholtz, CEO/CFO
Income: H-10% M-70% L-20%
Stations: 8 CKP

Mid-America Rsch./Facts In Focus
Livingston Mall
131 Livingston Mall
Livingston, NJ 07039
Ph. 201-740-1566
Fax 201-740-0569
Leonard McCoy, Manager
Income: H-15% M-80% L-5%
Stations: 12 CKPO

Northeast Data
High Income Mall Testing Center
Wayne Towne Center, Rte. 23 S.
Wayne, NJ 07470
Ph. 201-785-4449
Fax 201-785-3679
Income: H-70% M-25% L-5%
Stations: 10 CKPO

Quick Test
Menlo Park Mall
312 Menlo Park
Edison, NJ 08837
Ph. 908-548-2900
Fax 908-549-0026
E-mail: info@quicktest.com
http://www.quicktest.com
Chad Muney, Manager
Income: H-70% M-20% L-10%
Stations: 10 CKPO

Suburban Associates
Willowbrook Mall
1230 Willowbrook Mall - Rte. 46
Wayne, NJ 07470
Ph. 937-785-0770
Fax 937-785-0771
E-mail: WeAsk@aol.com
Cindy Conklin, Manager
Income: H-25% M-55% L-20%
Stations: 10 CKPO

Suburban Associates
Monmouth Mall
1230 Monmouth Mall - Rte. 35
Eatontown, NJ 07724
Ph. 732-542-5554
Fax 732-389-3921
E-mail: WeAsk@aol.com
Antoinette Cusack, Manager
Income: H-10% M-60% L-30%
Stations: 8 CKPO

Southern New Jersey (See Philadelphia, PA)

New Mexico

Albuquerque

Car-Lene Research, Inc.
Coronado Center
6600 Menaul Blvd. N.E.
Albuquerque, NM 87110
Ph. 505-889-3070
Fax 505-889-3071
Scott Solis, Manager
Income: NA
Stations: NA KPO

U.S. Research Co.
Cottonwood Mall, D-201
Albuquerque, NM 87114
Ph. 505-792-9411
Fax 505-792-4629
Income: H-25% M-50% L-25%
Stations: NA CKPO

Sante Fe

Quick Test
1124 Villa Linda Mall
Sante Fe, NM 87505
Ph. 505-471-1699
Fax 505-438-3846
E-mail: info@quicktest.com
http://www.quicktest.com
Manager
Income: H-20% M-50% L-30%
Stations: 7 CKPO

New York

Albany

Markette Research, Inc.
Clifton County Mall
Clifton Park, NY 12065
Ph. 518-383-1661
Fax 518-371-0791
Dawn Whalen, Vice President
Income: H-60% M-30% L-10%
Stations: 4 CKP

Quick Test
1 Crossgates Mall Rd.
Albany, NY 12203
Ph. 518-456-8641
Fax 518-456-8642
E-mail: info@quicktest.com
http://www.quicktest.com
Pat Figler, Manager
Income: H-25% M-50% L-25%
Stations: 6 CKPO

Buffalo

Buffalo Survey & Research, Inc.
Main Place Mall, 2nd level
Buffalo, NY 14202
Ph. 716-845-6262
Fax 716-834-6499
Jeanette Levin, President
Income: H-10% M-50% L-40%
Stations: 4 KP

Ruth Diamond Market Research Services
Boulevard Mall
770 Alberta Dr.
Buffalo, NY 14226
Ph. 716-836-1110
Fax 716-836-1114
Harvey Podolsky, President
Income: H-22% M-49% L-29%
Stations: 6 CKPO

Marion Simon Research Service, Inc.
C-103 Walden Galleria
Buffalo, NY 14225
Ph. 716-684-8025
Fax 716-684-3009
E-mail: Msrdc@aol.com
Income: H-35% M-35% L-30%
Stations: NA CKPO

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Survey Service, Inc.
McKinley Mall
3701 McKinley Pkwy.
Blasdell, NY 14219
Ph. 716-876-6450
Fax 716-876-0430
E-mail: sservice@surveyservice.com
http://www.surveyservice.com
Susan Adelman, President
Income: H-25% M-50% L-25%
Stations: 8 C K P O

Survey Service, Inc.
Eastern Hills Mall
4545 Transit Rd.
Williamsville, NY 14221
Ph. 716-876-6450
Fax 716-876-0430
E-mail: sservice@surveyservice.com
http://www.surveyservice.com
Susan Adelman, President
Income: H-25% M-50% L-25%
Stations: 8 C K P O

New York City

Answers to Questions, Inc.
South Shore Mall
1701 Sunrise Hwy.
Bay Shore, NY 11706
Ph. 516-666-9705
Fax 516-666-4596
Mary Garofaldo, Managing Director
Income: H-20% M-60% L-20%
Stations: 7 C K P O

Brianne Associates, Inc.
Hunting Square Mall
4000 Jericho Turnpike
E. Northpoint, NY 11731
Ph. 516-462-2052
Fax 516-462-2957
Fern Roseman, Manager
Income: H-25% M-60% L-15%
Stations: NA C P

Car-Lene Research, Inc.
Galleria at Crystal Run
Middletown, NY 10941
Ph. 914-692-2226
Fax 914-692-2207
Tabatha Roache, Manager
Income: NA
Stations: NA K P O

Ebony Marketing
Jamaica Mall
162-10 Jamaica Ave.
Jamaica, NY 11434
Ph. 718-526-3204
Fax 718-526-3312
E-mail: emr@interport.net
Elan Miller, Mall Manager
Income: H-0% M-55% L-45%
Stations: 6 K

Ebony Marketing Research, Inc.
2100 Bartow Ave., Ste. 243
Bronx, NY 10475
Ph. 718-217-0842
Fax 718-320-3996
E-mail: emr@interport.net
Esther Remusat, Mall Manager
Income: H-5% M-95% L-0%
Stations: 8 K P O

Friedman Marketing Services
The Galleria at White Plains
100 Main St.
White Plains, NY 10601
Ph. 914-422-3484 or 914-698-9591
Fax 914-422-3484
Income: H-25% M-50% L-25%
Stations: 4 C K P O
(See advertisement on p. 91)

Friedman Marketing Services
Jefferson Valley Mall
650 Lee Blvd.
Yorktown Heights, NY 10598
Ph. 914-962-9400 or 914-698-9591
Fax 914-962-1067
Income: H-30% M-50% L-20%
Stations: 18 C K P O
(See advertisement on p. 91)

J & R Field Services, Inc.
Attais Mart
5750 Sunrise Hwy.
Sayville, NY 11782
Ph. 516-244-0475
Fax 516-244-0839
Income: H-15% M-65% L-20%
Stations: 4 C P

J & R Field Services, Inc.
East Meadow Mall
1917 Front St.
East Meadow, NY 11554
Ph. 516-542-0081
Fax 516-542-6314
Income: H-10% M-55% L-35%
Stations: 6 C

Primary Data Collection Services
1063 Green Acres Mall
Valley Stream, NY 11581
Ph. 516-561-1723
Fax 516-561-2523
Tom Champion, President
Income: H-20% M-65% L-15%
Stations: 8 C P O

Quick Test
Kings Plaza Mall
5102 Kings Plaza
Brooklyn, NY 11234
Ph. 718-338-3388
Fax 718-692-4365
E-mail: info@quicktest.com
http://www.quicktest.com
NancyAnne Canalerich, Manager
Income: H-20% M-45% L-35%
Stations: 15 C K P

Quick Test
855 Sunrise Mall
Massapequa, NY 11758
Ph. 516-541-5100
Fax 516-541-1099
E-mail: info@quicktest.com
http://www.quicktest.com
Sina Ehrenfreund, Manager
Income: H-15% M-80% L-5%
Stations: 12 C K P O

Audrey Schiller Market Research
Nassau Mall, lower level
3601 Hempstead Tpke.
Levittown, NY 11756
Ph. 516-731-1500
Fax 516-731-4235
Audrey Schiller, President
Income: H-35% M-50% L-15%
Stations: 8 C K P O

Seaport Surveys, Inc.
135 William St., 5th fl.
New York, NY 10038
Ph. 212-608-3100 or 800-347-2662
Fax 212-608-4966
E-mail: Seaportand@aol.com
Income: H-40% M-40% L-20%
Stations: 10 C K P O

Suburban Associates
East Meadow Plaza
1966 Hempstead Tpke.
East Meadow, NY 11554
Ph. 516-794-3030
Fax 516-794-3519
E-mail: WeAsk@aol.com
Sherry Salus, Manager
Income: H-10% M-70% L-20%
Stations: 6 C K P O

Poughkeepsie

U.S. Research Co.
Poughkeepsie Galleria
790 S. Road, F114
Poughkeepsie, NY 12601
Ph. 914-297-1793
Fax 914-297-1620
Income: H-50% M-30% L-20%
Stations: NA C K P

Rochester

Car-Lene Research, Inc.
Irondequoit Mall
54 Irondequoit Dr.
Rochester, NY 14622
Ph. 716-342-7630
Fax 716-342-9047
Barry Rudner, Manager
Income: H-10% M-55% L-35%
Stations: NA P O

Car-Lene Research, Inc.
Greece Ridge Center Mall
150 Ridge Center
Rochester, NY 14626
Ph. 716-225-3100
Fax 716-225-2834
Jenn Graby, Manager
Income: H-38% M-44% L-18%
Stations: 6 C K P O

Car-Lene Research, Inc.
Marketplace Mall
301- Miracle Mile Dr.
Rochester, NY 14623
Ph. 716-424-3203
Fax 716-292-0523
Barbi White, Manager
Income: H-46% M-40% L-14%
Stations: 6 C K P O

Cunningham Field & Research Service
602 E. View Mall
Victor, NY 14564
Ph. 904-677-5644
Fax 904-677-5534
E-mail: SusanHoffmanCFS@Digital.Net
Susan Hoffman, Manager
Income: H-20% M-80% L-0%
Stations: 4 C K P O
(See advertisement on p. 79)

Syracuse

Lavalle Research
Carousel Center Mall
9763 Carousel Center Dr.
Syracuse, NY 13290-9763
Ph. 315-466-1609
Fax 315-466-7101
Maureen Colson, Manager
Income: H-20% M-65% L-15%
Stations: 8 C K P O

Q/A Research, Inc.
Shoppingtown Mall
3649 Erie Blvd. E.
Dewitt, NY 13214
Ph. 315-446-0011
Fax 315-446-0428
Jean Queri, President
Income: H-30% M-60% L-10%
Stations: 7 C K P

Marion Simon Research Service, Inc.
Northern Lights Mall
Syracuse, NY 13212
Ph. 315-455-5952
Fax 315-455-1826
E-mail: Msrdc@aol.com
Angie Macri, Manager
Income: H-30% M-50% L-20%
Stations: NA C K P O

Marion Simon Research Service, Inc.
Great Northern Mall
4081 Rte. 31
Clay, NY 13041
Ph. 315-455-5952
Fax 315-455-1826
E-mail: Msrdc@aol.com
Angie Macri, Manager
Income: H-35% M-35% L-30%
Stations: NA C K P O

North Carolina

Charlotte

A O C Marketing Research
Galleria Mall
2301 Dave Lyle Blvd., Ste. 183
Charlotte, NC 29730
Ph. 803-324-7596
Fax 803-324-7598
Betty Collins, Owner
Income: H-25% M-50% L-25%
Stations: 10 C K P O

Consumer Pulse of Charlotte
Eastland Mall
5625 Central Ave.
Charlotte, NC 28212
Ph. 704-536-6067 or 800-336-0159
Fax 704-536-2238
E-mail: consumer.pulse@internetMCI.com
Tracy Bryant, Director
Income: H-20% M-60% L-20%
Stations: 7 C K P O

Cunningham Field & Research Service
Eastridge Mall
246 N. New Hope Rd., Ste. E-120
Gastonia, NC 28054
Ph. 904-677-5644
Fax 904-677-5534
E-mail: JanetJayneCFS@Digital.Net
Janet Jayne, Manager
Income: H-30% M-50% L-10%
Stations: 5 C K P O
(See advertisement on p. 79)

Greenboro/Winston-Salem

Cunningham Field & Research Service
Cary Town Center
1105 Walnut St., Ste. E103A
Cary, NC 27511
Ph. 904-677-5644
Fax 904-677-5534
E-mail: KimCoyCFS@Digital.Net
Kim Coy, Manager
Income: H-30% M-60% L-10%
Stations: 7 C K P O
(See advertisement on p. 79)

Homer Market Research Associates, Inc.
333 Four Seasons Town Centre
Greensboro, NC 27407
Ph. 910-294-9415
Fax 910-294-6116
Jan Homer, Exec. Vice President
Income: H-25% M-45% L-30%
Stations: 10 C K P O

W.H. Long Marketing, Inc.
Golden Gate Shopping Center
2240 Golden Gate Dr.
Greensboro, NC 27408
Ph. 910-292-4146
Fax 910-299-6165
John Voss, Vice President
Income: H-33% M-34% L-33%
Stations: 8 C K P O

Raleigh/Durham

Quick Test
South Square Mall
4001 Chapel Hill Blvd.
Durham, NC 27707
Ph. 919-489-3104
Fax 919-489-8316
E-mail: info@quicktest.com
http://www.quicktest.com
Brian O'Neil, Manager
Income: H-26% M-33% L-41%
Stations: 7 P

Ohio

Akron

Cunningham Field & Research Service
Chapel Hill Mall
2000 Brittain Rd., Ste. 465
Akron, OH 44310
Ph. 904-677-5644
Fax 904-677-5534
E-mail: PatLuteCFS@Digital.Net
Pat Lute, Manager
Income: H-20% M-70% L-10%
Stations: 6 C K P O
(See advertisement on p. 79)

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Rosen Research
Rolling Acres Mall
2400 Romig Rd.
Akron, OH 44322
Ph. 330-745-8883
Fax 330-745-8883
Peggy Elliott, Supervisor
Income: H-10% M-70% L-20%
Stations: 6 K

Cincinnati

Assistance In Marketing, Inc.
9663 A Colerain Ave.
Cincinnati, OH 45251
Ph. 513-385-8228
Fax 513-385-2140
E-mail: PBBVO3A@prodigy.com
http://www.charm.net/~aim/
Susan Odom, Manager
Income: H-20% M-50% L-30%
Stations: 12 C K P

B & B Research Services, Inc.
Eastgate Mall
4601 Eastgate Ave.
Cincinnati, OH 45245
Ph. 513-793-4223
Fax 513-793-9117
Lynn Caudill, Project Director
Income: H-20% M-25% L-55%
Stations: 8 C K P O

Consumer Pulse of Cincinnati
Forest Fair Mall
514 Forest Fair Dr.
Cincinnati, OH 45240
Ph. 513-671-1211 or 800-336-0159
Fax 513-346-4244
E-mail: consumer.pulse@internetMCI.com
Susan Lake-Carpenter, Director
Income: H-20% M-55% L-25%
Stations: 8 C K P O

Quick Test
Florence Mall
2208 Florence Mall, #1150
Florence, KY 41042
Ph. 606-282-1333
Fax 606-282-6333
E-mail: info@quicktest.com
http://www.quicktest.com
Mary Ann Habel, Manager
Income: NA
Stations: NA K P O

Cleveland

Car-Lene Research, Inc.
Great Northern Mall
924 Great Northern Mall
North Olmsted, OH 44070
Ph. 440-979-0200
Fax 440-979-1163
Karen Cunningham, Manager
Income: NA
Stations: NA K P O

Cleveland Survey Center
Richmond Mall
691 Richmond Rd.
Cleveland, OH 44143
Ph. 800-950-9010 or 216-642-8883
Fax 216-642-8876
Betty Perry
Income: H-10% M-75% L-15%
Stations: 8 C K P O
(See advertisement on p. 95)

Heakin Research, Inc.
Euclid Square Mall, #324
Euclid, OH 44132
Ph. 216-261-2727
Fax 216-261-9271
Eric Silver, Manager
Income: H-28% M-32% L-40%
Stations: 14 C K P O

Pat Henry Market Research, Inc.
230 Huron Rd. N.W., Ste. 100.43
Cleveland, OH 44113
Ph. 216-621-3831
Fax 216-621-8455
E-mail: phenry3@ix.netcom.com
Mark Kikel, Vice President
Income: H-30% M-60% L-10%
Stations: 11 C K P O

OPINIONation
4301 Ridge Rd.
Cleveland, OH 44144
Ph. 216-351-4644
Fax 216-351-7876
E-mail: OPINION@ix.netcom.com
Diane Eck
Income: H-15% M-65% L-20%
Stations: 8 K P

Questions, Inc.
Great Lakes Mall
7850 Mentor Rd.
Mentor, OH 44060
Ph. 440-255-9940
Goldie Schkolnik, President
Income: H-20% M-60% L-20%
Stations: 7 C K

Rosen Research
Great Lakes Mall
7850 Mentor Ave.
Mentor, OH 44060
Ph. 216-974-0001
Fax 216-974-0001
Margaret Bennloff, Supervisor
Income: H-20% M-65% L-15%
Stations: 6 C K P

Columbus

B & B Research Services, Inc.
Brice Outlet Mall
5891 Scarborough Blvd.
Columbus, OH 43232
Ph. 614-486-6746
Fax 614-486-9958
Judy Fredericks, Project Director
Income: H-20% M-25% L-55%
Stations: 4 C P

T.I.M.E. Market Research
745 Indian Mound Mall
771 S. 30th St.
Heath, OH 43056
Ph. 614-788-8808
Fax 614-788-8809
Mike Ingalls, Manager
Income: H-10% M-60% L-30%
Stations: 8 C K P O

Dayton

T.I.M.E. Market Research
560 Dayton Mall
2700 Miamisburg-Centerville Rd.
Dayton, OH 45459-3730
Ph. 937-433-6296
Fax 937-433-5954
Laurette Lockwood, Manager
Income: H-25% M-60% L-15%
Stations: 6 C K P O

Oklahoma

Oklahoma City

Oklahoma City Research
Div. of Ruth Nelson Research
Quail Springs Mall
2501 W. Memorial Dr.
Oklahoma City, OK 73134-8003
Ph. 405-752-4710
Fax 405-752-2344
E-mail: rnncmrs@aol.com
http://www.ruthnelsonresearchservices.com
Bohn Macrory, Manager
Income: H-30% M-50% L-20%
Stations: 6 C K P

Oklahoma Market Research
Data Net
Sooner Fashion Mall
3475 W. Main
Norman, OK 73072
Ph. 405-329-9779
Fax 405-329-6766
Income: H-20% M-70% L-10%
Stations: 8 C K P O

Oklahoma Market Research
Data Net
Heritage Park Mall
6749-B E. Reno
Midwest City, OK 73110
Ph. 405-733-4266
Fax 405-733-0550
Income: H-15% M-70% L-15%
Stations: 6 C K P O

Quick Test
1153 Cross Roads Mall
Oklahoma City, OK 73149
Ph. 405-631-9738
Fax 405-632-0750
E-mail: info@quicktest.com
http://www.quicktest.com
Manager
Income: H-4% M-25% L-61%
Stations: 6 C K P O

Tulsa

Cunningham Field & Research Service
Woodland Hills Mall
7021 S. Memorial, Ste. 204A
Tulsa, OK 74133
Ph. 904-677-5644
Fax 904-677-5534
E-mail: ChristyHaneyCFS@Digital.Net
Christy Haney, Manager
Income: H-40% M-60% L-0%
Stations: 7 C K P O
(See advertisement on p. 79)

Cunningham Field & Research Service
Promenade Mall
4107 S. Yale, Ste. LA 107
Tulsa, OK 74135
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MarvelByrdCFS@Digital.Net
Marvel Byrd, Manager
Income: H-30% M-60% L-10%
Stations: 6 C K P O
(See advertisement on p. 79)

Cunningham Field & Research Service
Eastland Mall
14002 E. 21st, Ste. 144
Tulsa, OK 74134
Ph. 904-677-5644
Fax 904-677-5534
E-mail: LeilaniHughesCFS@Digital.Net
Leilani Hughes, Manager
Income: H-10% M-70% L-20%
Stations: 6 C K P O
(See advertisement on p. 79)

Oregon

Portland

Consumer Opinion Services, Inc.
1206 Jantzen Beach Center
Portland, OR 97217
Ph. 503-240-8159 or 206-241-6050 for bids
Fax 503-240-8161
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Kelly Pye, Manager
Income: H-5% M-50% L-45%
Stations: 8 C K P
(See advertisement on p. 101)

Consumer Opinion Services, Inc.
991 Lloyd Center
Portland, OR 97232
Ph. 503-281-1278 or 206-241-6050 for bids
Fax 503-281-1017
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Ann Kane, Manager
Income: H-15% M-55% L-30%
Stations: 9 C K P O
(See advertisement on p. 101)

Consumer Opinion Services, Inc.
Mall 205
9900A S.E. Washington St.
Portland, OR 97216
Ph. 503-255-8775 or 206-241-6050 for bids
Fax 503-255-8803
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Anita Rubadue, Manager
Income: H-10% M-65% L-25%
Stations: 6 C K
(See advertisement on p. 101)

Consumer Pulse of Portland
Clackamas Town Center
1200 S.E. 82nd Ave., #L-15
Portland, OR 97266
Ph. 503-654-1390 or 800-326-0159
Fax 503-654-1436
E-mail: consumer.pulse@internetMCI.com
Carol Woods, Director
Income: H-20% M-50% L-20%
Stations: 8 C K P

Pennsylvania

Erie

Moore Research Services, Inc.
Millcreek Mall
340 Mill Creek Mall
Erie, PA 16508
Ph. 814-868-0873
Fax 814-864-7012
E-mail: moore@erie.net
http://www.erie.net/~moore
Colleen Moore Mezler, Vice President
Income: H-28% M-48% L-24%
Stations: 8 C K

Philadelphia

Car-Lene Research, Inc.
Oxford Valley Mall
2300 E. Lincoln Hwy
Langhorne, PA 19047
Ph. 215-750-7202
Fax 215-750-9622
Bobbie Davis, Manager
Income: NA
Stations: NA K P O

Consumer Pulse of Philadelphia
Plymouth Meeting Mall, #2203
Plymouth Meeting, PA 19462
Ph. 610-825-6636 or 800-336-0159
Fax 610-825-6805
E-mail: consumer.pulse@internetMCI.com
Eleanor Yates, Director
Income: H-20% M-60% L-20%
Stations: 15 C K P O

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Heakin Research, Inc.
Cherry Hill Mall
2000 Rte. 38, Ste. 917
Cherry Hill, NJ 08002
Ph. 609-910-1000
Fax 609-910-1010
Tammy Stevens, Manager
Income: H-35% M-39% L-26%
Stations: 10 C K P O

JRA (J. Reckner Associates)
Montgomery Mall, Store 152
North Wales, PA 19454
Ph. 215-362-1060
Fax 215-362-7569
E-mail: mall@reckner.com
http://www.reckner.com
Barbara Ogrizck, Manager
Income: H-48% M-28% L-24%
Stations: 15 C K P O
(See advertisement on p. 97)

JRP Marketing Research Services
279 Granite Run Mall
Media, PA 19063
Ph. 610-565-7821
Fax 610-565-4403
Kathleen McCarty, V.P. Field Svcs.
Income: H-30% M-40% L-30%
Stations: 10 C K P O
(See advertisement on p. 49)

Mar's Surveys
Cinnaminson Mall, Rte. 130
Cinnaminson, NJ 08077
Ph. 609-786-8514
Fax 609-786-0480
E-mail: marlene@marsresearch.com
http://www.marsresearch.com
Marlene Teblum, Owner
Income: H-20% M-60% L-20%
Stations: 4 C K P O

Quality in Field
Leo Mall
11725 Bustleton Ave.
Philadelphia, PA 19116
Ph. 215-698-0606
Fax 215-676-4055
E-mail: afrieze828@aol.com
Arlene Frieze, Owner
Income: H-20% M-70% L-10%
Stations: 4 K

Quick Test
109 Neshaminy Mall
Bensalem, PA 19020
Ph. 215-322-0400
Fax 215-322-5412
E-mail: info@quicktest.com
http://www.quicktest.com
Alice Osborne, Manager
Income: H-5% M-80% L-15%
Stations: 11 C K P O

Quick Test
Franklin Mills Mall
1749 Franklin Mills Circle
Philadelphia, PA 19154
Ph. 215-281-9304
Fax 215-281-9362
E-mail: info@quicktest.com
http://www.quicktest.com
Barbara Sagel, Manager
Income: H-15% M-55% L-30%
Stations: 12 C K P O

TMR, Inc.
Springfield Mall
1200 Baltimore Pike
Springfield, PA 19024
Ph. 610-328-1147
Fax 610-328-0678
Elizabeth Wilson, Manager
Income: H-60% M-30% L-10%
Stations: 14 C K P O

Pittsburgh

Car-Lene Research, Inc.
Monroeville Mall
Monroeville, PA 15146
Ph. 412-373-3670
Fax 412-373-5076
Stacey Sanford, Manager
Income: H-25% M-50% L-25%
Stations: 7 C K P O

Data Information, Inc.
Century III Mall
3075 Clairton Rd.
W. Mifflin, PA 15123
Ph. 412-655-8690
Fax 412-655-8693
Nancy Palyo, President
Income: H-40% M-49% L-11%
Stations: 11 C K P O

Heakin Research, Inc.
Ross Park Mall
1000 Ross Park Mall Rd.
Pittsburgh, PA 15237
Ph. 412-369-4545
Fax 412-369-4473
Sandy Tuttle
Income: H-40% M-48% L-12%
Stations: 13 C K P O

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: H-30% M-40% L-30%
Stations: 6 K P O

T.I.M.E. Market Research
366 Beaver Valley Mall
Monaca, PA 15061
Ph. 412-728-8463
Fax 412-728-9806
Shawn Bishop, Manager
Income: H-20% M-55% L-25%
Stations: 10 C K P O

South Carolina

Charleston

G & G Market Research, Inc.
Charles Towne Square Mall
2401 Mall Dr.
N. Charleston, SC 29406
Ph. 803-744-9807
Fax 803-571-5785
Sissy Goldberg, President
Income: H-20% M-45% L-35%
Stations: 8 K P

G & G Market Research, Inc.
Marion Square Mall
342 King St.
Charleston, SC 29401
Ph. 803-853-7222
Sissy Goldberg, President
Income: H-50% M-30% L-20%
Stations: 8 C P O

Quick Test
Northwoods Mall
E1B Northwoods Mall
2150 Northwoods Blvd.
North Charleston, SC 29406
Ph. 803-553-0030
Fax 803-553-0526
E-mail: info@quicktest.com
http://www.quicktest.com
Judy Hart, Manager
Income: H-5% M-80% L-15%
Stations: 7 C K P O

South Dakota

Sioux Falls

American Public Opinion Survey & Market Research Corp.
Western Mall
Sioux Falls, SD 57105
Ph. 605-338-3918
Fax 605-338-3964
Warren Johnson, President
Income: H-50% M-40% L-10%
Stations: 2 C K P O

American Public Opinion Survey &
Market Research Corp.
Empire Mall
Sioux Falls, SD 57105
Ph. 605-338-3918
Fax 605-338-3964
Warren Johnson, President
Income: H-50% M-40% L-10%
Stations: 2 C K P O

Tennessee

Knoxville

HMR & Associates
Foothills Mall
Maryville, TN 37801
Ph. 615-281-0038
Fax 615-281-2250
John Myers
Income: H-30% M-55% L-15%
Stations: 3 C K P

Mellon Market Research
2850 Parkway Bldg. 6, Ste. 40
Pigeon Forge, TN 37863
Ph. 423-428-8360
Fax 423-428-6042
Vicki Phillips
Income: H-25% M-50% L-25%
Stations: 5 C K P O

Memphis

Friedman Marketing Services
Raleigh Springs Mall
3473 Raleigh Springs Mall
Memphis, TN 38128
Ph. 901-382-9970 or 914-698-9591
Fax 901-382-9929
Income: H-40% M-40% L-20%
Stations: 6 C K
(See advertisement on p. 91)

Friedman Marketing Services
Century Plaza Building
5830 Mt. Moriah, Stes. 1 & 2
Memphis, TN 38115
Ph. 901-795-0073 or 914-698-9591
Fax 901-360-1268
Income: H-40% M-40% L-20%
Stations: 6 C K
(See advertisement on p. 91)

Heakin Research, Inc.
6080 Hickory Ridge Mall
Memphis, TN 38115
Ph. 901-360-0400
Fax 901-360-8213
Kathy Hagen, Manager
Income: H-35% M-44% L-21%
Stations: 8 C K P O

Heakin Research, Inc.
Wolfchase Galleria
2760 N. Germantown Pkwy., Ste. 102
Memphis, TN 38117
Ph. 901-381-4811
Fax 901-381-4138
Kathy Hagen, Manager
Income: H-61% M-30% L-9%
Stations: 8 C K P O

Nashville

Car-Lene Research, Inc.
Stones River Mall
1720 Old Fort Parkway
Murfreesboro, TN 37129
Ph. 615-907-0037
Fax 615-907-0039
Jeanette Fritsher, Manager
Income: NA
Stations: NA K P O

Cunningham Field & Research Service
Coolsprings Mall
1800 Galleria Blvd., Ste. 1320
Franklin, TN 37064
Ph. 904-677-5644
Fax 904-677-5534
E-mail: SandyHoodCFS@Digital.Net
Sandy Hood, Manager
Income: H-20% M-80% L-0%
Stations: 3 C K P O
(See advertisement on p. 79)

Quick Test
Rivergate Mall
1000 Two Mile Pkwy., Ste. A10
Goodlettsville, TN 37072
Ph. 615-859-4484
Fax 615-851-0717
E-mail: info@quicktest.com
http://www.quicktest.com
Sylvia Sargent, Manager
Income: H-20% M-50% L-30%
Stations: 7 C K P O

Quick Test
1123 Hickory Hollow Mall
Nashville, TN 37013
Ph. 615-731-0900
Fax 615-731-2022
E-mail: info@quicktest.com
http://www.quicktest.com
Toni White, Manager
Income: H-25% M-60% L-15%
Stations: 7 C K P O

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Texas

Austin

Quick Test
Barton Creek Square
2901 Capital of Texas Hwy., B11
Austin, TX 78746
Ph. 512-327-8787
Fax 512-327-7460
E-mail: info@quicktest.com
http://www.quicktest.com
Carole Clester, Manager
Income: H-20% M-40% L-40%
Stations: 10 C K P O

U.S. Research Co.
Lake Line Mall
Cedar Park, TX 78613
Ph. 512-219-6057
Fax 512-219-6450
Income: H-25% M-50% L-25%
Stations: NA C K P O

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
E-mail: info@quicktest.com
http://www.quicktest.com
Lorna Turner, Manager
Income: H-20% M-50% L-30%
Stations: 6 C K P O

Dallas/Ft. Worth

C & C Market Research, Inc.
Valley View Mall
13331 Preston Rd., #1073
Dallas, TX 75240
Ph. 972-239-3162
Fax 972-239-3316
Craig Cunningham, President
Income: H-40% M-40% L-20%
Stations: 6 C K P O

Car-Lene Research, Inc.
Six Flags Mall
2911 E. Division, #409A
Arlington, TX 76011
Ph. 817-633-6020
Fax 817-633-4460
Patricia Palmer, Manager
Income: NA
Stations: NA K P O

Car-Lene Research, Inc.
Grapevine Mills
3000 Grapevine Mills Pkwy.
Grapevine, TX 76051
Ph. 972-724-6816
Fax 972-724-6819
Debbie Middleton, Manager
Income: NA
Stations: NA K P O

Car-Lene Research, Inc.
Richardson Square Mall
501 S. Plano Rd.
Richardson, TX 75081
Ph. 972-783-1935
Fax 972-680-3652
Joan Florio, Manager
Income: H-20% M-60% L-20%
Stations: 5 C K P O

Car-Lene Research, Inc.
Collin Creek Mall
811 N. Central Expwy.
Plano, TX 75075
Ph. 972-424-8587
Fax 972-424-7467
Debbie Middelton, Manager
Income: NA
Stations: NA K P O

Car-Lene Research, Inc.
North Hills Mall
728 North Hills Mall
N. Richland Hills, TX 76180-8308
Ph. 817-595-3737
Fax 817-595-1988
Mona Hinton, Manager
Income: NA
Stations: NA K P O

Friedman Marketing Services
Prestonwood Town Center
5301 Beltline Rd., Ste. 2128
Dallas, TX 75240
Ph. 972-387-8161 or 914-698-9591
Fax 972-385-1115
Income: H-40% M-40% L-20%
Stations: 7 C K
(See advertisement on p. 91)

Heakin Research, Inc.
Vista Ridge Mall
2401 S. Stemmons Fwy., Ste. 1420
Lewisville, TX 75067
Ph. 214-315-3555
Fax 214-315-8926
Brad McDonalds, Manager
Income: H-46% M-41% L-13%
Stations: 10 C K P O

Heakin Research, Inc.
Ft. Worth Town Center
4200 S. Freeway, Ste. B-31
Ft. Worth, TX 76115
Ph. 817-926-7995
Fax 817-927-2387
Vivian Taylor, Manager
Income: H-10% M-50% L-40%
Stations: 12 C K P O

Market Research & Analysis of Dallas, Inc.
The Research Center
13455 Noel Rd. Galleria
#325 Two Galleria Tower
Dallas, TX 75240
Ph. 214-239-5382
Fax 214-239-5399
Income: H-50% M-30% L-20%
Stations: NA C K P O

Probe Research, Inc.
Golden Triangle Mall
I-35 & Loop 288
Denton, TX 75137
Ph. 972-241-6696
Fax 972-241-8513
Richard Harris, Vice President
Income: H-0% M-50% L-50%
Stations: 11 K P O

Probe Research, Inc.
Irving Mall
Hwy. 183 & Beltline Rd.
Irving, TX 75062
Ph. 972-241-6696
Fax 972-241-8513
Income: NA
Stations: NA

Probe Research, Inc.
1036 Town East Mall
Mesquite, TX 75150
Ph. 972-241-6696
Fax 972-241-8513
Richard Harris, Vice President
Income: H-30% M-40% L-30%
Stations: 11 C K P O

Probe Research, Inc.
Red Bird Mall
3662 Camp Wisdom Rd.
Dallas, TX 75237
Ph. 972-241-6696
Fax 972-241-8513
Richard Harris, Vice President
Income: H-25% M-50% L-25%
Stations: 6 P

Probe Research, Inc.
Northeast Mall
Rte. 820 & 183
Hurst, TX 76053
Ph. 972-241-6696
Fax 972-241-8513
Richard Harris, Vice President
Income: H-50% M-50% L-0%
Stations: 9 C K P

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Savitz Research Center, Inc.
The Parks at Arlington Mall
3811 S. Cooper, Ste. 2053
Arlington, TX 76015
Ph. 817-467-6437
Fax 817-467-6552
Barbara Brodie, Manager
Income: H-30% M-50% L-20%
Stations: 11 C K P O

Houston

Car-Lene Research, Inc.
Northwest Mall
307 Northwest Mall
Houston, TX 77092
Ph. 713-686-5557
Fax 713-686-5584
Cheryl Sempe, Manager
Income: NA
Stations: NA K P O

Creative Consumer Research
First Colony Mall
Houston, TX
Ph. 281-240-9646
Fax 281-240-3497
Patricia Pratt, Field Director
Income: H-30% M-40% L-30%
Stations: 8 K P

Creative Consumer Research
Deerbrook Mall, #1122
20131 Hwy. 59
Humble, TX 77338
Ph. 281-446-9730
Fax 281-446-6649
Income: H-65% M-20% L-15%
Stations: 10 C K P O

Cunningham Field & Research Service
The Woodlands Mall
1201 Lake Woodlands Dr., Ste. 1104
The Woodlands, TX 77380
Ph. 904-677-5644
Fax 904-677-5534
E-mail: BonnieHannaCFS@Digital.Net
Bonnie Hanna, Manager
Income: H-30% M-60% L-10%
Stations: 4 C K P O
(See advertisement on p. 79)

Heakin Research, Inc.
247 Greenspoint Shopping Mall
Houston, TX 77060
Ph. 281-872-4164
Fax 281-872-7024
Valerie Owens, Manager
Income: H-27% M-50% L-23%
Stations: 12 C K P O

Heakin Research, Inc.
1670 San Jacinto Mall
Baytown, TX 77521
Ph. 281-421-2584
Fax 281-421-2514
Cheri Pate, Manager
Income: H-15% M-60% L-25%
Stations: 14 C K P O

Heakin Research, Inc.
Galleria II
5085 Westheimer, Ste. 3897
Houston, TX 77056
Ph. 713-871-8542
Fax 713-871-8549
Laurie DeRoberts, Manager
Income: H-37% M-51% L-12%
Stations: 12 C K P O

Houston Consumer Research
730 Almeda Mall
Houston, TX 77075
Ph. 713-944-1431
Fax 713-944-3527
Pat Williams
Income: NA
Stations: NA C P O

Market Research & Analysis Field Staff, Inc.
The Research Center
Galleria Mall Financial Ctr., #699
Houston, TX 77056
Ph. 713-271-5624
Fax 713-840-0699
Income: H-50% M-30% L-20%
Stations: NA C K P O

Quick Test
762 Sharpstown Center
7500 Bellaire Blvd.
Houston, TX 77036
Ph. 713-988-8988
Fax 713-988-1781
E-mail: info@quicktest.com
http://www.quicktest.com
Melodie Henderson, Manager
Income: H-15% M-65% L-20%
Stations: 8 C K P O

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
Income: H-40% M-50% L-10%
Stations: 8 C P

Creative Consumer Research
Weslakes Mercado
1401 S.W. Loop 410
San Antonio, TX 78228
Ph. 210-673-0802
Fax 210-680-9906
Richard Weinhold
Income: H-20% M-60% L-20%
Stations: 6 C K P

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
Income: H-10% M-40% L-50%
Stations: 7 C P

Friedman Marketing Services
Consumer Opinion Center
Rolling Oak Mall
6909 Loop 1604 E., Ste. 1112
San Antonio, TX 78247
Ph. 210-651-6971 or 914-698-9591
Fax 210-651-5777
Income: H-25% M-50% L-25%
Stations: 7 C K
(See advertisement on p. 91)

Galloway Research Services
Ingram Park
6301 N.W. Loop 410
San Antonio, TX 78238
Ph. 210-681-0642
Fax 210-681-8414
E-mail: Gallowaytx@aol.com
Mary Ann Olsen, Manager
Income: H-10% M-80% L-10%
Stations: 8 C K P

Galloway Research Services
Crossroads Mall
4522 Fredricksburg Rd., #A3
San Antonio, TX 78201
Ph. 210-737-1019
Fax 210-737-1476
E-mail: Gallowaytx@aol.com
Janet Ayers, Manager
Income: H-5% M-80% L-15%
Stations: 9 C K P O

Quick Test
14B Windsor Park Mall
San Antonio, TX 78218
Ph. 210-657-9424
Fax 210-657-9432
E-mail: info@quicktest.com
http://www.quicktest.com
George De La Rosa, Manager
Income: H-5% M-50% L-45%
Stations: 6 C K P O

Utah

Salt Lake City

Consumer Opinion Services, Inc.
1120 Newgate Mall
Ogden, UT 84405
Ph. 206-241-6050 for bids
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Income: NA
Stations: NA
(See advertisement on p. 101)

Cunningham Field & Research Service
South Towne Center
10450 S. State St., Ste. 1331
Sandy, UT 84070
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MikeSoloskoCFS@Digital.Net
Mike Solosko, Manager
Income: H-10% M-80% L-10%
Stations: 4 C K P O
(See advertisement on p. 79)

Utah Market Research
Div. of Ruth Nelson Research
Crossroads Plaza Mall
50 S. Main St.
Salt Lake City, UT 84144-0103
Ph. 801-363-8726
Fax 801-321-4904
E-mail: rnncmrs@aol.com
http://www.ruthnelsonresearchservices.com
Cheri Ingram, Manager
Income: H-40% M-40% L-20%
Stations: 3 C K P

Your Opinion Counts
Div. Gay Hill Field Service
Cottonwood Mall
4835 Highland Dr.
Salt Lake City, UT 84117
Ph. 801-261-4117
Fax 801-268-0247
Gay Hill
Income: H-40% M-50% L-10%
Stations: 8 C P O

Virginia

Newport News/Norfolk/ Virginia Beach

Quick Test
Coliseum Mall
1800 W. Mercury Blvd.
Hampton, VA 23666
Ph. 757-826-0299
Fax 757-826-1330
E-mail: info@quicktest.com
http://www.quicktest.com
Anne Brown, Manager
Income: H-5% M-50% L-45%
Stations: 6 C K P O

Washington

Everett

Consumer Opinion Services, Inc.
Everett Mall
1402 S.E. Everett Mall Way
Everett, WA 98208
Ph. 425-347-2424 or 206-241-6050 for bids
Fax 425-290-8433
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Maureen Barbee, Manager
Income: H-10% M-65% L-25%
Stations: 10 C K P
(See advertisement on p. 101)

Kelso

Consumer Opinion Services, Inc.
Three Rivers Mall
351 Three Rivers Dr.
Kelso, WA 98626
Ph. 360-425-8815 or 206-241-6050 for bids
Fax 360-425-3143
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Yvone Pecha, Manager
Income: H-10% M-60% L-30%
Stations: 12 C K P O
(See advertisement on p. 101)

Seattle/Tacoma

Consumer Opinion Services, Inc.
South Sound Center
651 Sleater-Kinney Rd. S.E., Ste. 1206
Lacey, WA 98503
Ph. 360-438-9660 or 206-241-6050 for bids
Fax 360-438-9660
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Judy Eaton, Manager
Income: H-10% M-65% L-25%
Stations: 4 K P
(See advertisement on p. 101)

Consumer Opinion Services, Inc.
Lakewood Mall
10509 Gravelly Lake Dr. S.W.
Tacoma, WA 98499
Ph. 253-588-0276 or 206-241-6050 for bids
Fax 253-588-1029
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Judy Riha, Manager
Income: H-10% M-50% L-40%
Stations: 9 C K P
(See advertisement on p. 101)

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Cunningham Field & Research Service
Super Mall of the Great N.W.
1101 Super Mall Way., Ste. 1239
Auburn, WA 98001
Ph. 904-677-5644
Fax 904-677-5534
E-mail: BrentJohnsonCFS@Digital.Net
Brent Johnson, Manager
Income: H-0% M-80% L-20%
Stations: 5 C K P O
(See advertisement on p. 79)

Field Management Associates-Seattle
3907 Factoria Square Mall S.E.
Bellevue, WA 98006
Ph. 425-641-8020 or 909-369-0800
Fax 425-641-5902
E-mail: ATKINSFAM@earthlink.net
Lynn Atkins
Income: NA
Stations: NA C K P

Friedman Marketing Services
South Hill Mall
3500 Meridian South
Puyallup, WA 98373
Ph. 206-840-0112 or 914-698-9591
Fax 206-840-0517
Income: H-30% M-50% L-20%
Stations: 11 C K P O
(See advertisement on p. 91)

Quick Test
Tacoma Mall Shopping Center, Rm. 699
4502 S. Steele St.
Tacoma, WA 98409
Ph. 206-474-9980
Fax 206-473-1931
E-mail: info@quicktest.com
http://www.quicktest.com
Marion Stevens, Manager
Income: H-10% M-40% L-50%
Stations: 7 C K P O

Research Trac, Inc.
Hillside Plaza
P.O. Box 25981
Federal Way, WA 98093
Ph. 206-564-5334
Fax 206-566-9811
Phyllis O'Reilly, CEO
Income: H-40% M-40% L-20%
Stations: NA C K P

Research Trac, Inc.
Westgate North Mall
Tacoma, WA
Ph. 206-564-5334
Fax 206-566-9811
Phyllis O'Reilly, CEO
Income: H-20% M-60% L-20%
Stations: NA C K P

U.S. Research Co.
Alderwood Mall, Store #374
3000 184th St S.W.
Lynnwood, WA 98036
Ph. 206-774-2151
Fax 206-771-4089
Income: H-25% M-50% L-25%
Stations: NA C K P

Spokane

Consumer Opinion Services, Inc.
Northtown Mall
4750 N. Division St., Ste. E-219
Spokane, WA 99207
Ph. 509-487-6173 or 206-241-6050 for bids
Fax 509-487-7205
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Ruth Rivers, Manager
Income: H-9% M-61% L-30%
Stations: 8 C K P O
(See advertisement on p. 101)

Vancouver

Consumer Opinion Services, Inc.
Vancouver Mall
8700 N.E. Vancouver Mall Dr.
Vancouver, WA 98662
Ph. 360-254-5650 or 206-241-6050 for bids
Fax 360-254-6588
E-mail: cos-info@cosvc.com
http://www.cosvc.com
Alice Hilby, Manager
Income: H-15% M-45% L-40%
Stations: 7 C K P
(See advertisement on p. 101)

West Virginia

Charleston

McMillion Research Service
Charleston Town Center Mall
Unit 3007
Charleston, WV 25389
Ph. 304-343-1578
Fax 304-343-1570
E-mail: MCMILLRES@aol.com
http://members.aol.com:/mcmillres/home/index.htm.
Barbara Kiddy, Manager
Income: H-40% M-50% L-10%
Stations: 7 C K P O

Huntington

McMillion Research Service
Huntington Mall, Unit 290
Rte. 60 at I-64
Barboursville, WV 25501
Ph. 304-755-5889
Fax 304-755-9889
E-mail: MCMILLRES@aol.com
http://members.aol.com:/mcmillres/home/index.htm.
Kathleen Dixon, Manager
Income: H-33% M-48% L-19%
Stations: 7 C K P O

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
Income: H-10% M-75% L-15%
Stations: 12 C K P O

Wisconsin

Eau Claire

Friedman Marketing Services
Oakwood Mall
4800 Golf Rd., Ste. 604
Eau Claire, WI 54701
Ph. 715-836-6580 or 914-698-9591
Fax 715-836-6584
Income: H-25% M-55% L-20%
Stations: 11 C K P O
(See advertisement on p. 91)

Green Bay/Appleton

Friedman Marketing Services
Fox River Mall
4301 W. Wisconsin
Appleton, WI 54915
Ph. 414-730-2240 or 914-698-9591
Fax 414-730-2247
Income: H-30% M-55% L-15%
Stations: 11 C K P O
(See advertisement on p. 91)

Wisconsin Research, Inc.
693 Bay Park Square
Green Bay, WI 54304
Ph. 920-405-1012
Fax 920-405-1013
Nancy Leurquin, Mall Supervisor
Income: H-35% M-50% L-15%
Stations: 10 C K P O

Milwaukee

Car-Lene Research, Inc.
Northridge Mall
7700 W. Brown Deer Rd.
Milwaukee, WI 53223
Ph. 414-357-6611
Fax 414-357-7757
Christine Malone, Manager
Income: NA
Stations: NA K P O

Consumer Pulse of Milwaukee
The Grand Avenue Mall, #2004A
275 W. Wisconsin Ave.
Milwaukee, WI 53203
Ph. 414-274-6060 or 800-336-0159
Fax 414-274-6068
E-mail: consumer.pulse@internetMCI.com
Esther Young, Director
Income: H-25% M-55% L-20%
Stations: 8 C K P O

Mazur/Zachow, Inc.
Bay Shore Mall
5900 N. Port Washington Rd., Ste. 102
Milwaukee, WI 53217
Ph. 414-962-9926
Fax 414-962-9952
Melissa Butson, Manager
Income: H-35% M-50% L-15%
Stations: 5 C K

Quick Test
Southridge Mall
5300 S. 76 St., Ste. 1325
Greendale, WI 53129
Ph. 414-421-2865
Fax 414-421-2990
E-mail: info@quicktest.com
http://www.quicktest.com
Mary Mulroy, Manager
Income: NA
Stations: NA K

Canada

British Columbia

Vancouver

Research House, Inc.
Willowbrook Shopping Centre
19705 Fisser Hwy.
Langley, BC V3A 7E9
Canada
Ph. 604-687-3714
Fax 604-687-3716
E-mail: vanc@research-house.ca
http://www.research-house.ca
Tammy Anderson, Manager
Income: H-25% M-55% L-20%
Stations: 4 C
(See advertisement on p. 36)

Research House, Inc.
Metrotown Centre
454-4800 Kingsway
Burnaby, BC V5H 4J2
Canada
Ph. 604-433-2696
Fax 604-433-1640
E-mail: mail@research-house.ca
http://www.research-house.ca
Tammy Anderson, Manager
Income: H-35% M-50% L-15%
Stations: 5 C K P O
(See advertisement on p. 36)

Manitoba

Winnipeg

Opinion Place
Polo Park Shopping Centre
66L - 1485 Portage Ave.
Winnipeg, MB R3G 0W4
Canada
Ph. 204-987-1960
Fax 204-987-1928
E-mail: esposito@quantext.mb.ca
Jeanne Oppenheim, General Manager
Income: H-35% M-50% L-15%
Stations: 8 K P O

Ontario

Hamilton

Research House, Inc.
Mountain Plaza Mall
661 Upper James St., Unit 15
Hamilton, ON L9C 5R8
Canada
Ph. 416-488-2333
Fax 416-488-2391
E-mail: mail@research-house.ca
http://www.research-house.ca
Paul Gauthier, V.P., Qualitative
Income: H-25% M-50% L-25%
Stations: 4 C K
(See advertisement on p. 36)

Toronto

Canadian Viewpoint
9350 Yonge St., Ste. 206
Richmond Hills, ON L4C 5G2
Canada
Ph. 905-770-1770 or 888-770-1770
Fax 905-770-1692
Carol Udell
Income: H-25% M-50% L-25%
Stations: 3 C K P O

Canadian Viewpoint
Meadowvale Town Center
6677 Battleford Rd.
Mississauga, ON L5N 3R8
Canada
Ph. 905-770-1770
Fax 905-770-1692
Carol Udell
Income: H-20% M-70% L-10%
Stations: 4 C P

Canadian Viewpoint
Centerpoint Mall
6464 Yonge St., Ste. N5
Toronto, ON M2M 3X4
Canada
Ph. 905-770-1770
Fax 905-770-1692
Carol Udell
Income: H-30% M-60% L-10%
Stations: 3 C K P O

Canadian Viewpoint
Eastgate Mall
75 Centennial Pkwy. N.
Hamilton, ON L85 2P2
Canada
Ph. 905-770-1770
Fax 905-770-1692
Carol Udell
Income: H-20% M-70% L-10%
Stations: 4 C P

CanTest Research Services
Lawrence Square
700 Lawrence Ave. W.
Toronto, ON M6A 1B6
Canada
Ph. 416-928-9122
Fax 416-928-2163
Peter Steyn, General Manager
Income: H-30% M-40% L-30%
Stations: 5 P

CanTest Research Services
Bayfield Mall
320 Bayfield St.
Barrie, ON L4M 3C1
Canada
Ph. 416-928-9122
Fax 416-928-2163
Peter Steyn, General Manager
Income: H-30% M-40% L-30%
Stations: 5 P

Market Probe International
A Div. of Market Probe, Inc.
900 The East Mall, Ste. 310
Toronto, ON M9B 6K2
Canada
Ph. 416-622-2253
Fax 416-622-2169
Income: H-50% M-30% L-20%
Stations: NA K P O

CODES

Income
H — est. percentage of mall customers in high-income bracket (+$60,000)
M — middle-income ($30,000-$60,000)
L — low-income (under $30,000)

Stations — number of interviewing stations

Facility features
C — computer-aided stations
K — kitchen facilities
P — private display room
O — one-way mirror for viewing of stations

NA — information not available

Research House, Inc.
Woodbine Centre
500 Rexdale Blvd., Ste. C1A
Rexdale, ON M9W 6K5
Canada
Ph. 416-488-2328
Fax 416-488-2368
E-mail: mail@research-house.ca
http://www.research-house.ca
Paul Gauthier, V.P., Qualitative
Income: H-35% M-50% L-15%
Stations: 5 C K P O
(See advertisement on p. 36)

Research House, Inc.
Don Mills Centre
939 Lawrence Ave. E.
Toronto, ON M3C 1P8
Canada
Ph. 416-488-2333
Fax 416-488-2391
E-mail: mail@research-house.ca
http://www.research-house.ca
Paul Gauthier, V.P., Qualitative
Income: H-40% M-50% L-10%
Stations: 5 C K P O
(See advertisement on p. 36)

Research House, Inc.
Five Points Centre
285 Taunton Rd. E.
Oshawa, ON L1G 3V2
Canada
Ph. 416-488-2333
Fax 416-488-2391
E-mail: mail@research-house.ca
http://www.research-house.ca
Paul Gauthier, V.P., Qualitative
Income: H-20% M-55% L-25%
Stations: 4 C K
(See advertisement on p. 36)

Research House, Inc.
Parkway Mall
85 Ellesmere Rd.
Scarborough, ON M1K 4B8
Canada
Ph. 416-488-2333
Fax 416-488-2391
E-mail: mail@research-house.ca
http://www.research-house.ca
Paul Gauthier, V.P., Qualitative
Income: H-20% M-60% L-20%
Stations: 3 C K P
(See advertisement on p. 36)

Research House, Inc.
Portage Place
1154 Chemong Rd.
Peterborough, ON K9H 7J6
Canada
Ph. 705-745-0670
Fax 416-488-2368
E-mail: mail@research-house.ca
http://www.research-house.ca
Suzanne Lefebvre, President
Income: H-35% M-50% L-15%
Stations: 3 C K P O
(See advertisement on p. 36)

Thompson Lightstone & Co., Ltd.
Bramalea City Center
25 Peel Centre Dr., Unit 260
Bramalea, ON L6T 3R5
Canada
Ph. 416-922-1140
Fax 416-922-8014
E-mail: TLC@tlcl.com
Anne Termaten, Vice President
Income: H-30% M-40% L-30%
Stations: 5 C K P O

Thompson Lightstone & Co., Ltd.
Eaton Centre
220 Yonge St., Ste. 105
Toronto, ON M5B 2H1
Canada
Ph. 416-922-1140
Fax 416-922-8014
E-mail: TLC@tlcl.com
Anne Termaten, Vice President
Income: H-50% M-35% L-15%
Stations: 4 C P

Quebec

Montreal

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Montreal, PQ H1S 1J7
Canada
Ph. 514-725-0306
Fax 514-725-0308
E-mail: mtl@research-house.ca
http://www.research-house.ca
Nancy Lefebvre, Manager
Income: H-25% M-65% L-25%
Stations: 4 C K P O
(See advertisement on p. 36)

Quebec Recherches
Les Promenades St. Bruno
1 Boul des Promenades, Ste. 1025
St. Bruno, PQ J3V 5J5
Canada
Ph. 514-725-0306
Fax 514-725-0308
E-mail: mtl@research-house.ca
http://www.research-house.ca
Nancy Lefebvre, Manager
Income: H-55% M-30% L-15%
Stations: 4 C K P O
(See advertisement on p. 36)

Mexico

EPI Grupo
Interlomas
Blvd. Interlomas 5, Local AZ-022
Mexico City, DF 11700
Mexico
Ph. 52-5-291-9294
Fax 52-5-251-5431
Ricardo Escobedo, President
Income: H-80% M-20% L-0%
Stations: 6 K P

EPI Grupo
Galerias
Melchor Ocampo 193, Local H8B
Mexico City, DF 11700
Mexico
Ph. 52-5-260-0925
Fax 52-5-251-5431
Ricardo Escobedo, President
Income: H-0% M-35% L-65%
Stations: 8 K P

EPI Grupo
Plaza Polanco
Jaime Balmes 11, Local 118
Mexico City, DF 11560
Mexico
Ph. 52-5-395-3237
Fax 52-5-251-5431
Ricardo Escobedo, President
Income: H-5% M-80% L-15%
Stations: 15 K P O

Index of Advertisers

1997-98 SourceBook Listing Additions and Corrections

Please add the following firms to the U.S. section of the 1997-98 Researcher SourceBook:

EMI Research Solutions
12477 St. Andrews Dr., Ste. C
Oklahoma City, OK 73120
Ph. 405-748-5835
Fax 405-748-5534
Burt Smith, President

Inform Marketing Research
162 W. Hubbard St.
Chicago, IL 60610
Ph. 312-661-0035
Fax 312-670-7259
E-mail: imr2000@aol.com
William Drier, Ph.D., President

Market Connections, Inc.
13814 S. Springs Dr.
Clifton, VA 22024
Ph. 703-818-2476
Fax 703-818-3730
E-mail: mktcnnect@aol.com
Lisa Dezzutti, President

Usable Solutions, LLC
133 E. 58th St., Ste. 906
New York, NY 10022
Ph. 212-588-0297
Karen Seidler, President

Wirthlin Worldwide (Br.)
17177 N. Laurel Park Dr., Ste. 203
Livonia, MI 48152
Ph. 313-542-1480
Fax 313-542-1485
E-mail: inquiries@wirthlin.com
http://www.wirthlin.com

Please add the following firms to the International section of the 1997-98 Researcher SourceBook:

ACNielsen.Pulse
15/F Columbia Tower
Ortigas Avenue
Mandaluyong City
Philippines
Ph. 63-2-727-3701
Fax 63-2-724-4020
Bienvenido Niles Jr., Managing Director

East Marketing Research Co., Ltd.
6/F Golden Lake Building
Guangzhou 510 100
China
Ph. 86-20-8384-6589
Fax 86-20-8384-2368
E-mail: gzemre@public1.guangzhou.gd.cn
http://www.pw2.netcom.com/~tatter/emrhp.htm
Barton Lee, General Manager

East Marketing Research is a full-service agency providing key data on China's fast growing, complex marketplace. EMR has the experience to understand your products and find your market niche. We specialize in both qualitative and quantitative studies targeted at end users and businesses. EMR consists of 30 professional researchers. We apply rigorous quality control procedures, guaranteeing top value for your dollar. Our experience spans China, with hundreds of studies in 20 different cities. See article Quirk's Marketing Research Review, November 1996. ESOMAR member.

TRENDEX - MEXICO
Tabasco 305 - PB
Mexico, DF 6700
Ph. 52-5-511-3544
Fax 52-5-511-3654
E-mail: jsbshawd@data.net.mx
John D. Sevier, Vice President

Please note the following corrections to the 1997-98 Researcher SourceBook (corrections shown in bold):

On p. 69, the fax number for Gross Marketing Research should read: **818-832-5436**.

On p. 107, please note the additional text in the listing for Focus First America:

Focus First America
969 High Ridge Rd.
Stamford, CT 06905
Ph. 203-322-1173
Fax 203-968-0421
Susan L. Weiss, President

The most professional, experienced and diversified qualitative facility in Stamford. Quality recruiting; luxurious facility features three spacious focus group rooms with galleries that accommodate 20 clients; mini-group and in-depth interview rooms; observable test kitchen. **Member of GroupNet.**

On p. 111, please note the correct logo for Aspen Systems Corporation:

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Rockville, MD 20850
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Fax 301-519-5885
E-mail: pmcarthy@aspensys.com
http://www.aspensys.com
Patrick McCarthy, Vice President

Aspen offers a full complement of marketing research and information management services, including data collection, analysis, and qualitative research studies. Our specialties include surveying professional and business populations that are often difficult to reach and require innovative follow-up. Our clients include the energy, automotive, consumer products, and health sectors.

On p. 150, please note the correct logo for HR and Associates, Inc.:

HR AND ASSOCIATES, INC.
Marketing Research and Analysis

HR and Associates, Inc.
223 Burlington Ave.
Clarendon Hill, IL 60514-1168
Ph. 630-789-0444
Fax 630-323-4066
E-mail: hra@hrandassociates.com
http://www.hrandassociates.com
Daphne Davis, Vice President

Full-service domestic and international marketing research firm. Areas of expertise are real estate, customer satisfaction, retail operations, and product quality. Services include research design and questionnaire development; data collection and processing; extensive data analysis and interpretation; maintenance of sophisticated relational databases; mapping and demographic profiling; and, field staffing. We will support your business development with professional and well-researched data, generating the most up-to-date marketing analysis for a continuously changing business environment.

On p. 171, the E-mail address for Stillwater Research should read: **s**tillwtr@mint.net

On p. 270, the fax number for MarketVision Research should read: 513-794-3500.

On p. 244, the E-mail address for Norman Hecht Research, Inc., should read: normhecht@mindspring.com

On p. 292, there should be no comma in the company name for Omega Group Inc.

On p. 382, the E-mail address for Semco International should read: **semcoitl@unitel.co.kr**.

Listing Additions

Please add the following firm to the 1997 Customer Satisfaction Directory:

Marketing & Research Resources, Inc.
5705 Industry Ln., 2nd fl.
Frederick, MD 21704
Ph. 301-694-2800
Fax 301-694-5171
E-mail: INFO@M-RR.com
Lisa Hammer, V.P. Research

Classified Ads

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BERNHARD SCHREIBER
President

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Fax: 431-5572
E-Mail: info@fieldresearch.com
http://www.fieldresearch.com

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Roanoke, TX 76262 USA

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Marketing & Research

Leslie M. Harris, Ph.D.
Managing Partner

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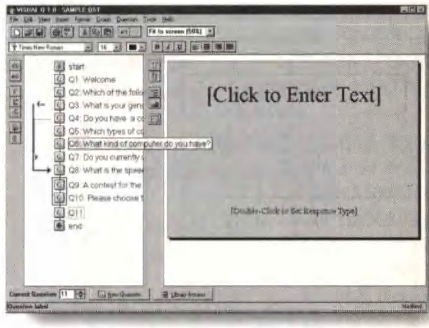

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Sales Offices

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

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

Trade Talk

continued from p. 110

ing. The simplest and most painless way is a proposed tiny tax on research expenditures. But it's open to question whether already cost-conscious researchers would agree to a tax like the one CMOR has in mind, no matter how small.

Though the early portion of the conference made me nervous, the discussion on ethics left me proud of the industry. Panelists included representatives of research and client companies, including George Creel, vice president/director, research and account planning, Martin-Williams Advertising; Herman Milligan Jr., senior market research analyst, Norwest Corp.; Roger Mayland, president, Northstar Interviewing; Roberta Rosenberg, vice president, Winona Research; and Joanne DiNapoli, senior account executive, Survey Sampling, Inc. Larry Mock, vice president, marketing research worldwide for Procter & Gamble, and national co-chair of CMOR, who also gave a brief talk on the role of research at P&G, joined the panel.

In their responses to moderator Stuart Rosen's questions, which covered a range of ethical issues, the panelists implicitly and explicitly stressed the value of client-research provider communication. They talked about an ethical issue that had arisen on the job and how they handled it. To a person, they exhibited resourcefulness and a strong urge to do the right thing.

One consensus was that an industry-wide set of ethical standards would be welcome. Many organizations and companies already have their own guidelines, but it would be helpful for all concerned if there were one set of standards recognized and upheld by all.

The key to staying on top of the issues facing us? Communication. As Northstar's Roger Mayland pointed out, it's only by taking a proactive approach and discussing issues now, with clients and suppliers at industry luncheons, trade shows and conferences, that we can determine how to overcome the obstacles ahead. ❑

Names of Note

continued from p. 20

MovieFone, Inc., New York, has hired **Jay Mattlin** to manage its movie audience research efforts.

Mark Ratekin has been promoted to vice president and market team leader, field and tab research, at *WalkerInformation*, Indianapolis.

Mark J. Dulle has joined *Integrated Research Associates*, Cincinnati, as vice president, client service.

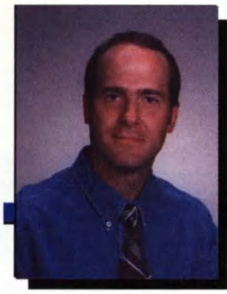
Dulle

Dakota Worldwide Corp., Minneapolis, has named **Jesse Lehman** research analyst and **Joe Frenkel** GIS analyst.

Elrick & Lavidge, Atlanta, has named **Ron Varnay** account director.

Lloyd Simon has joined *Cambridge Focus*, Cambridge, Mass., as managing director.

Marty Mills has joined *Quality Controlled Services* (QCS) as branch manager in the QCS Los Angeles office.



Trade Talk

By Joseph Rydholm/QMRR editor

The value of communication

In early October, I attended a half-day conference hosted by the Minnesota Upper Midwest Chapter of the Marketing Research Association near the QMRR offices in Minneapolis. The topic was "Ethics in Marketing and Opinion Research: Critical Issues, Implications and Solutions." As usual, it was a pleasure to get out of the office and talk to folks in the Twin Cities research community, but I came away from the proceedings a bit unnerved, though ultimately hopeful.

Based on what I heard at the conference, I'm worried about the future of the research profession. In order to survive, we need to improve communication with our peers, clients, and vendors — and with the public on whose cooperation we so desperately depend.

Farcus by David Waisglass Gordon Coulthart

"And would you say our service was courteous and friendly?"

The day began with an overview of some of the troubles facing the industry, as outlined by Diane Bowers, executive director of the Council of American Survey Research Organizations (CASRO), and president of the Council for Marketing and Opinion Research (CMOR). We're under siege from a host of sources, but two of the biggest are sugging (selling under the guise of research) and frugging (fund-raising under the guise of research), which poison the respondent pool for legitimate research by linking the words "I'm conducting a survey" with "I'm really after your money" in the public's mind.

In addition, consumer frustration with the intrusion of telemarketers and concern over privacy issues has caused government leaders, in an uncharacteristic bit of responsiveness, to propose a host of regulations that could severely curtail legitimate marketing research. And then there are the issues of Caller ID, answering machines, and other contributors to declining response rates.

Fortunately, CMOR and other research industry organizations are doing a fantastic job of monitoring legislation at the state and federal level which could hamper research efforts. In almost every case they've been able to lobby successfully to have the regulations rewritten to remove sections that could have damaging effects on research.

But the fight is far from over. CMOR gets by on a miniscule budget made up of contributions from member companies, most of which goes to lobbying efforts. If it's ever to undertake other ambitious and much-needed efforts, like a nationwide campaign to educate the public on the value of research (and teach them how to spot the sugging fruggers), it's going to require a lot more fund-

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