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Marketing Research Review

Volume XII, Number 10

November 1998

International research issue

- The view from Europe and China
- Interviewing Asian farmers
- Phone research in Latin America 

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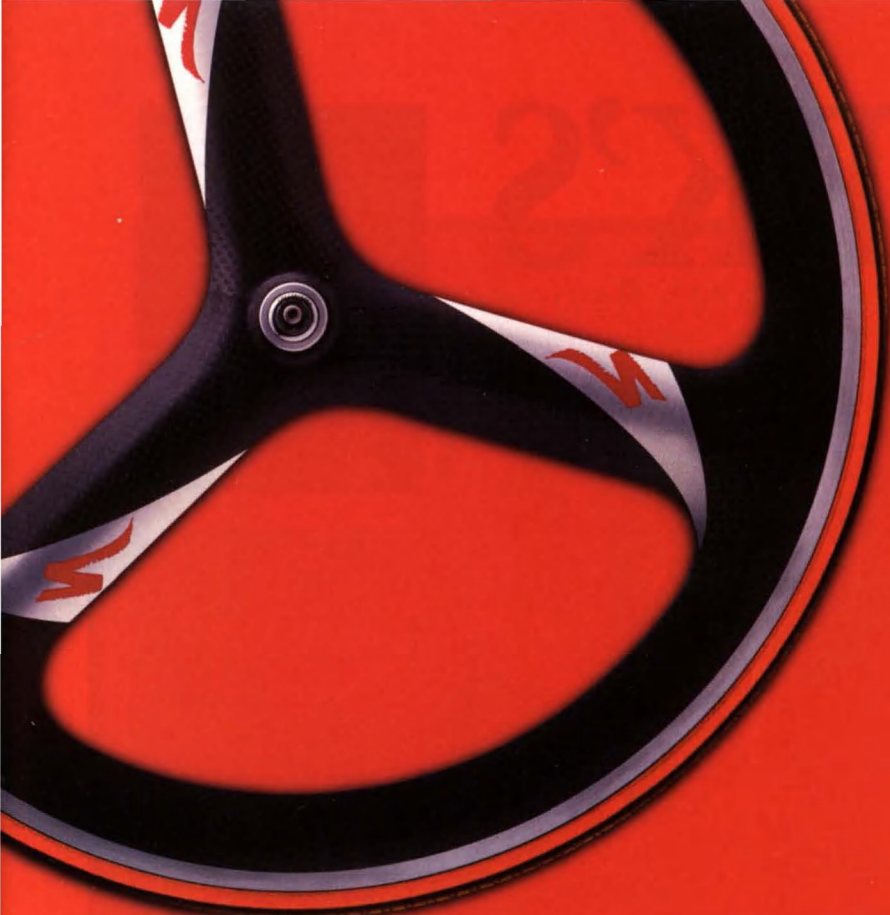
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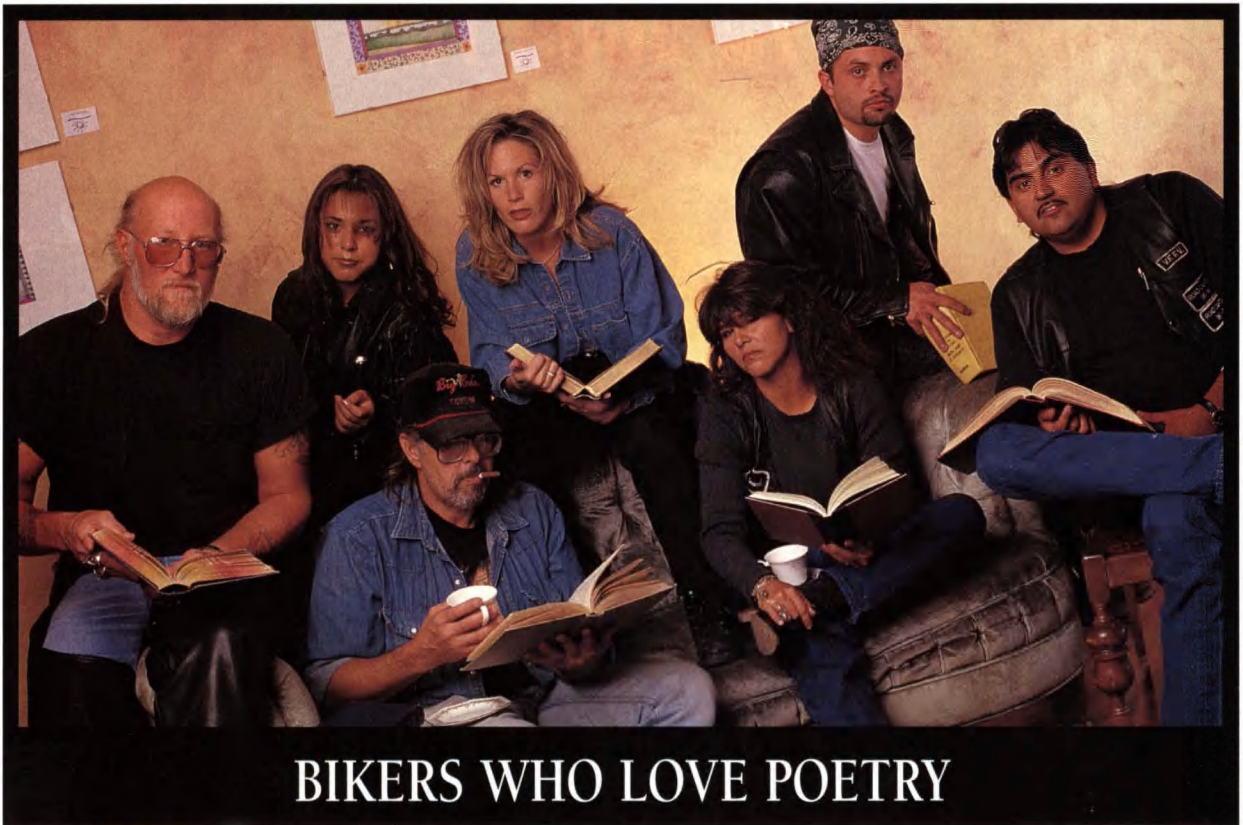
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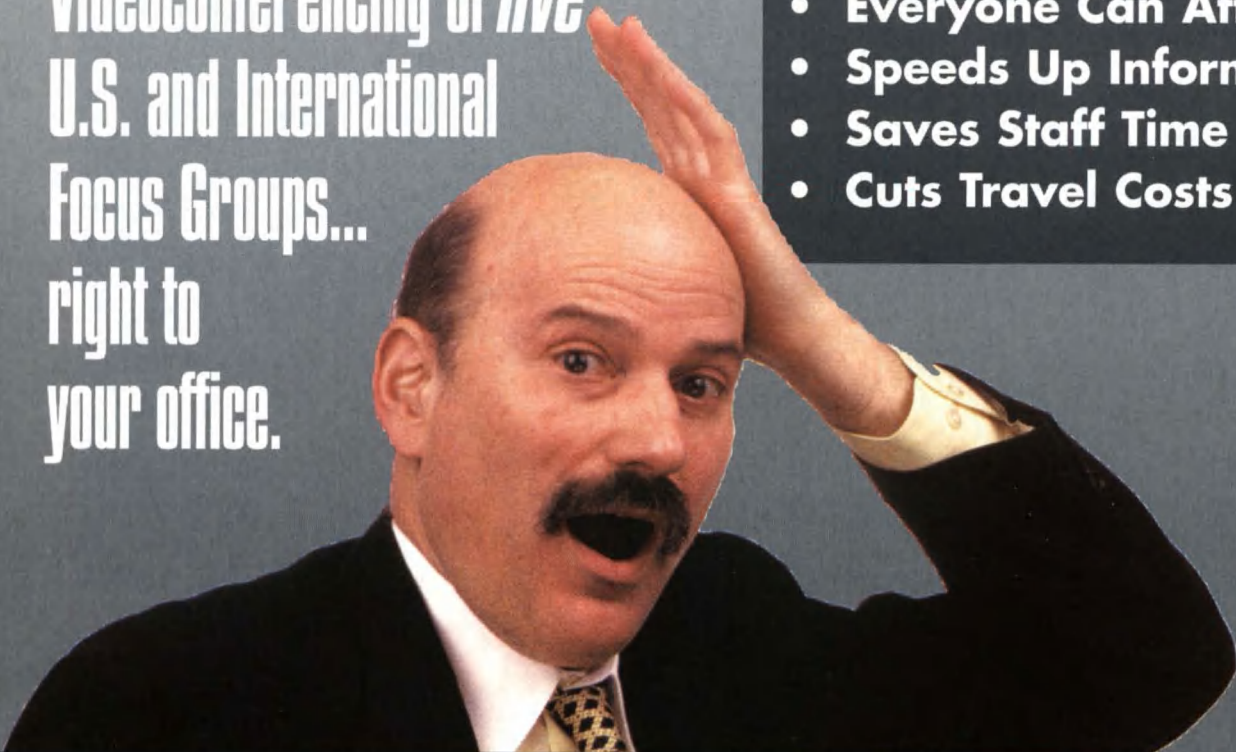
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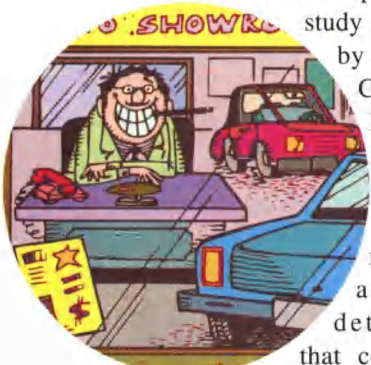
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Retail experience critical to consumer patronage

Think one bout of bad customer service will have little effect on a consumer's decision to shop at that retailer in the future? Think again. A



recent proprietary study conducted by the Chicago headquarters of Frankel, a brand marketing agency, determined that consumers'

continued patronage of a retailer is highly dependent on the occurrence of negative experiences while shopping. And with the increasing competitive pressure to move brands and product, such data is a large determinant of which retailers will sell now — and which will continue to sell later.

Based on the premise that the store is a medium and the most effective way to reach and communicate with customers, Frankel commissioned a study to examine shoppers' experiences in the retail environment and how those experience relates to purchases and future store loyalty. A total of 3,228 shoppers (representing 15,000+ shopping visits) responded to the mail panel study, which asked them to report their shopping behavior and experiences during the November/December 1997 time period — two of the heaviest retail shopping months of the year.

The study classified respondents' shopping incidents into three categories: "critical," where a negative experience kept a customer from returning to a store; "marginal,"

where the shopping experience was unsatisfactory, but the customer would return to the store; and "satisfactory," where the shopping experience was satisfactory and the customer would visit the store again.

While the majority of shoppers experienced no unsatisfactory shopping experiences (65 percent), more than 35 percent experienced marginal or critical incidents in the retail environment — or approximately 15 percent of total shopping visits. The result? Nearly one in 10 respondents switched retailers after a critical incident, indicating that from a revenue and customer loyalty perspective,

there is room for improvement. On average, 73 percent of the shoppers visiting a store made a purchase, emphasizing that there is a distinct relationship between the satisfaction rating for a retailer and purchasing rate at that same retailer. In fact, the reported rate of purchases increases with the quality of shopping experiences — consumers will only purchase at a rate of 42 percent after experiencing a critical incident experience versus an 82 percent purchasing rate with a satisfactory shopping experience.

"Unlike advertising or promotion, continued on p. 54

How early is too early for Christmas?

Should the holiday season be limited to the last six weeks of the year, or is anything after the fourth of July fair game? According to a Maritz AmeriPoll, Americans are fairly evenly split over when exactly 'tis the season to be jolly.

Nearly 1,000 people were polled and asked to rate on a 1 to 5 scale (where 1 is not at all annoyed and 5 is extremely annoyed) how much it bothers them to see stores displaying holiday merchandise before Halloween. A full 40 percent say they get extremely or very annoyed when stores and catalogs trot out the Yuletide trappings before most people have even finished carving their Halloween jack-o'-lanterns.



But 37 percent, who say they are not at all annoyed, are on the other end of the scale (giving their reactions a 1 rating) eagerly awaiting the rush of the holiday shopping crowds and displays of tinsel trees and plastic Santas. About 7 percent rate their distaste as somewhat annoyed and the remaining 14 percent are neutral.

One identifiable trend is that the older you get, the more annoyed you are with the ever-earlier arrival of Christmas retailing. Just 25 percent of respondents age 18-24 get extremely or very annoyed, compared to 41 percent of people over age 65. Maritz AmeriPoll is conducted by St. Louis-based Maritz Marketing Research. For more information call 800-446-1690 or visit the company's Web site at www.maritz.com/apoll/.

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Raosoft updates two software products

Seattle-based Raosoft, Inc., has released Raosoft EZReport version 4.0 for Windows95 and Windows98, the first graphical version of Raosoft's EZReport statistical report writer, which was available previously in DOS only. All commands are menu-driven so no programming experience is necessary. The software lets users view graphs and tables of data, with either single or multiple variables per page as wanted. Users can create memory variables for temporary calculations, calculate formulas using fieldname values, or provide standard statistics such as sum, count, and average. Text can be analyzed by word count, word string, and crosstabulation. Users may save

report results as templates for future use or save screens in PDF format for off-site distribution.

The company has also released SURVEYWin version 4.0, an updated edition of its data collection and statistical analysis program that is compatible with Windows, Windows95 and NT. Version 4.0 includes more support for electronic data gathering methods and new options for form design control. For example, designers can now use if, then, else statements and comment write-ins can be converted to a pocket notepad, so that comments made throughout a questionnaire can be aggregated into a common text field for analysis. The new interface for the analysis section has been simplified. End users can produce reports by point and click selection. Data can be grouped into different categories to produce tables

and graphs with the newly aggregated data. For more information call Catherine McDole Rao at 206-525-4025 or visit the company's Web site at www.raosoft.com.

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INSURANCE RESEARCH ANNUAL CONFERENCE:

The Society of Insurance Research will conduct its 28th annual conference, along with optional workshops covering competitive intelligence and product development, on November 15-18 at the Charleston Place Hotel in Charleston, S.C. Speaker topics include market research techniques, product development, underwriting, claims, competitive intelligence and electronic commerce. For more information call 770-426-9270 or visit the organization's Web site at www.sirnet.org.

SAWTOOTH TECHNOLOGIES SEMINARS:

Sawtooth Technologies will hold the following seminars near the company's offices in Evanston, Ill.: perceptual mapping: theory and practice, December 7; conjoint analysis: theory and practice, December 8-9; introduction to ACA & Sensus TradeOff, December 10. 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. Topics covered include study design, sampling, analysis and presentation of results. Case studies are also presented. Discounts are available for three or more attendees from the same company. For information on fees and registration call Nicole Garneau at 847-866-0870 or visit the company's Web site at www.sawtooth.com.

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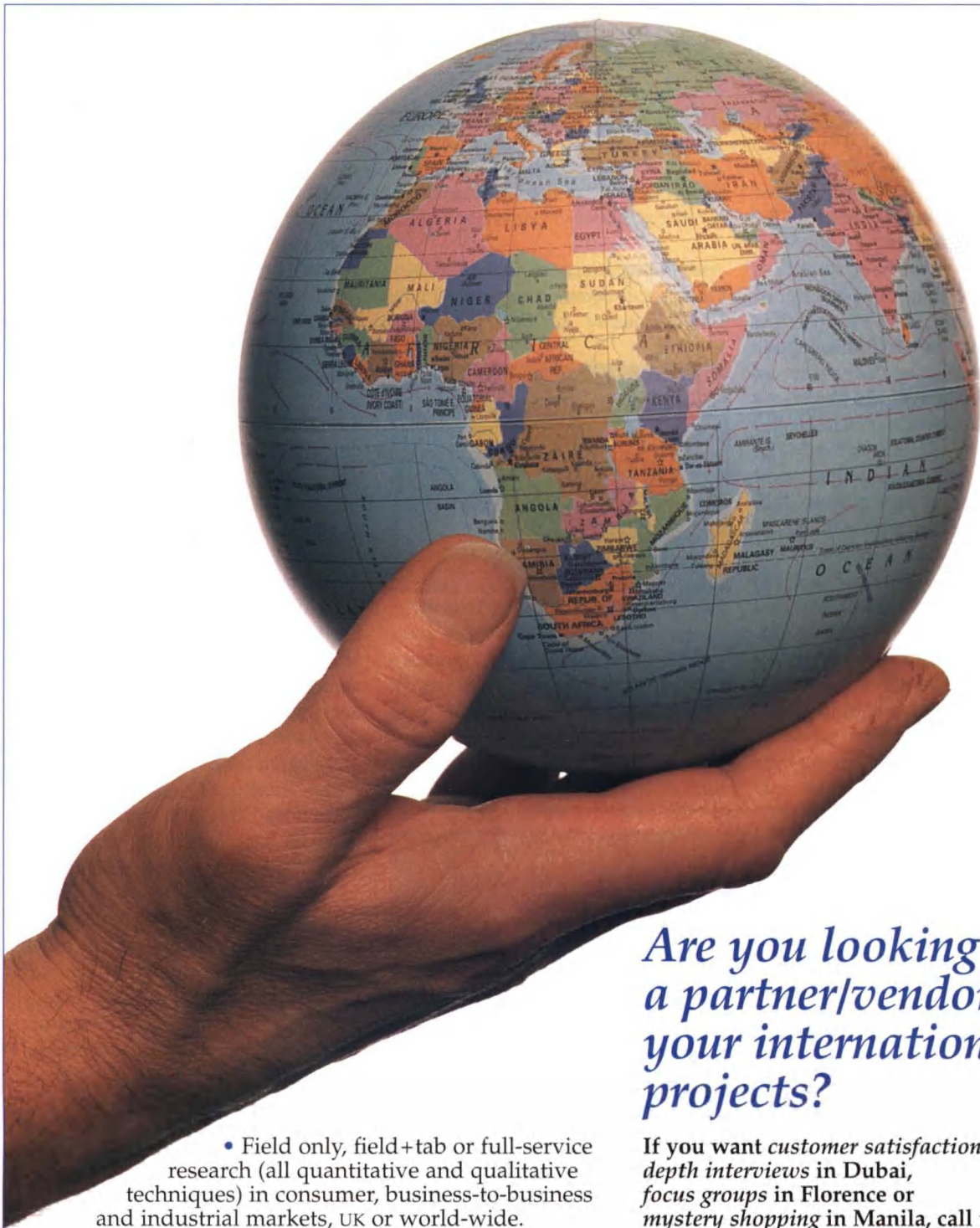
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Names of Note

Kristin Juffer has been named director, domestic radio research, at the *Arbitron Co.*, New York.

Katherine Walker has been named project manager at *The Market Solutions Group*, a Minneapolis research firm resulting from the recent merger of tk associates of Minneapolis and N.K. Friedrichs & Associates.

Dennis And Company Research, Atlanta, Ga., has named **Steven J. Campana** president and chief operating officer of Dennis And Company's East Coast Division. **Kathleen T. Mocniak** has been named executive vice president and chief operating officer of Dennis And Company's Mid-West division. She will also serve as general manager of the Minneapolis office, freeing **Kevin Menk**, executive vice president, to concentrate his

efforts on client service and major account activity.

Marketing Support, Inc., Chicago, has named **Nancy Carpenter** retail project manager.



Carpenter

Wolf

BAIGlobal Inc., a Tarrytown research firm, has added **Steven D. Wolf** as senior vice president and qualitative division director.

Jeff Taylor has joined the marketing and sales department of *Michigan Consolidated Gas Company*, Detroit, as market research manager.

Scantron Corporation, a Tustin, Calif., provider of software, services and systems for the collection, management and interpretation of data, has announced a new organizational structure, which includes three divisions and the naming of three new presidents. Scantron will operate under three separate business units: Scantron Scanning division, Scantron Service division and the newly formed Scantron Technologies division. **Larry Moore** has been named president of the Scanning division. **David Conway** was named president of the Scantron Service division. **Timothy Loomer** was named president of the Scantron Technologies division.

Charles Battista and **Robert Bisciglia** have joined *Savitz Research Solutions*, Dallas, as vice presidents.

Lois Kaufman, executive vice president of Princeton, N.J.-based *Environmental Research Associates* has accepted a one-year term on the U.S. Environmental Protection Agency's (EPA) Environmental Information and Public Access Committee of the National Advisory Council for Environmental Policy and Technology. Kaufman will offer advice and feedback on ways to improve the EPA's management of environmental information as well as provide advice to the EPA's newly created Center for Environmental and Information Statistics.


Yan Saguansataya has been named managing director at *Focus First America*, Stamford, Conn.

Michael Connolly has joined *Intelligent Marketing Systems*, Minneapolis, as its president and chief operating officer.

Gail Janensch will manage market-

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ing communications and community relations for *Greenfield Online*, Westport, Conn. In addition, **Jason Levy** has been named manager of client services, **Laura Tabor** has been named assistant project director, and **Alastair Bruce** has been named vice president for client development.

Tim George has joined Cincinnati-based *Burke, Inc.*, as director of human resources.

Digital Marketing Services, Dallas, has named **Stuart Kiefer** director, business development.

Data Research Services, Atlanta, has added **Michelle O'Halloran** and **Jonathon Clark** as research analysts and **Gary Griffin** as data collection manager.

Sharon Forshee Haukohl has been promoted to director of sales and marketing at *Shop'n Chek*, an Atlanta mystery shopping firm.

Research International USA, New York, has appointed **Dan Stults** execu-

tive vice president and managing director of its consumer packaged goods practice.

Gordon Bailey & Associates, an Atlanta consulting and research firm, has hired **Susan Thrower** as senior account representative.

Kirk Black has been named manager of analytical services at *DSS Research*, Fort Worth, Texas.

Bira Nascimento has joined *Eastern Research Services*, Springfield, Pa., as MIS director. In addition, **Damon Young** has been named senior programmer and **Maryann Lakofsky** has been named manager of the Pennsylvania Phone Room.

Michael Brereton has been named group vice president of the Automotive Research Group of *Maritz Marketing Research*.

Patrick Palmer has joined the Chicago office of *Cramer-Krasselt* advertising as vice president, director

of account planning.

Aragon Consulting Group, St. Louis, has named **H. Lynn Beck** research analyst. In addition, **Tim Ross** has been named market analyst.

Denise Lee Yohn has joined *Grace & Rothschild Advertising*, New York, as director of account planning.

Clearwater Research, Boise, Idaho, has announced several new hires and promotions. At the Boise office: **Cindy Greenfield** has been promoted to data collection quality control coordinator; **Rebecca Needles** has been promoted to data collection supervisor I; **Andrea Phillips**, **Paula Wigger** and **Mariah Norris** have been named research technical assistants; **Patrick Thomason** has been named data collection supervisor II; **Bud Roach** has been named human resources assistant director; and **Christoph Talkner** has been named statistical research intern. At the firm's Council, Idaho, office, **Charles Dickinson** and **Krystin Walker** have been promoted to data collection assistant supervisors.

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Scantron Corporation, a Tustin, Calif., provider of software, services and systems for the collection, management and interpretation of data, has announced a partnership agreement with the Dallas-based **National Business Research Institute (NBRI)** under which Scantron will broaden its survey offerings by providing national sales and marketing support of NBRI's organizational assessment services.

USADATA.com has opened a new Web site at <http://USADATA.com>, bringing together a range of intelligence on consumer patterns, media preferences, behaviors and product choices.

The **Polk Company**, Detroit, has reached an agreement to have its

"Intender" file managed by list manager **Response Media Products (RMP)**. Atlanta-based RMP will manage the file — to be named **Polk's Life Transitions** — effective immediately. Polk's life intention data identifies consumers in the market for new products or those about to make significant life changes associated with various new product and service needs. Intender data is self-reported and gathered from various surveys, including product registration questionnaires and Polk's Survey of America.

ADAPT Inc., a Minnetonka, Minn., survey processing firm, has relocated to a larger facility at 5610 Rowland Rd., Ste. 160, Minnetonka, Minn., 55343. The phone numbers will remain the same.

Market Probe, Inc., Milwaukee, has acquired **Butler Research Associates**, a Toronto firm specializing in consumer and business-to-business research.

MDI Research, Carlsbad, Calif., has changed its name to **Analytique**. The firm's address, phone and fax numbers remain the same.

PGM Incorporated, a Provo, Utah, data collection firm, has added a third CATI data collection center in St. George, Utah.

Dennis Research Service, Fort Wayne, Ind., and **Bay Area Research**, Baltimore, Md., have formed a partnership that will create a 30-station CATI facility using CfMC technology.

IPSOS-ASI, a Stamford, Conn., research firm, will team with **Home Network**, Redwood City, Calif., to research the effectiveness of on-line ads for seven consumer products and

services companies. The goal is to allow advertisers to compare the impact of Internet ads and traditional media. Intel is co-sponsoring the research.

Atlanta-based **Equifax** has purchased 80 percent ownership in **Seguranca ao Credito e Informacoes**, a commercial financial information company and supplier of consumer information in Brazil. In separate news, Equifax has entered an alliance with IBM to develop and market services to help ensure more secure transactions over the Internet and other networked environments.

Erlich Transcultural Consultants, a Woodland Hills, Calif., research firm, has opened a Web site at www.etctranscultural.com.

Rodgers Marketing Research, formerly of Canton, Ohio, has moved to The Range, 1038 Highway 485, Jemez Pueblo, N.M., 87024. Phone 505-834-1962. Fax 505-834-1964.

Woodward and Associates, a new research firm, has opened at 15967 State Route 725, Germantown, Ohio, 45327. Phone 937-787-4455. Fax 937-787-9603. Contact Laurette Woodward for more information.

The **Arbitron Company**, New York, has received the Chesapeake Human Resources Association's 1998 James W. Rouse Diversity Award in recognition of its strategies to advance the concept and spirit of diversity in the workplace.

Ruppman Marketing Technologies, Inc., Peoria, Ill., has acquired **AFFINA**, a Troy, Mich.,

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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.

Jim Nelems of The Marketing Workshop tells about one of his interviewees who was recently denied credit to buy a condo. It turns out that six years earlier she worked as a mystery shopper on a bank study, which involved her opening a checking account with a free safety deposit box for the first year. Upon completion of the study, the interviewer returned all the study materials and forgot about the safety deposit box. Later the bank was sold to a second bank and then to a third. Six years later, the third bank turned in a bad debt charge to the credit bureau for \$165, which included an \$80 charge to drill out the lock, since the key had never been turned in.

Ron Sellers of Ellison Research once worked in the research department of a nationwide bank. The people at the corporate office felt like they knew everything and that Sellers' department didn't have a clue. The bank conducted a segmentation study involving multivariate analysis, and the corporate rep, when going over the results with Sellers and his boss by phone, explained importantly, "We ran it every which way you can, and we know this is the right segmentation plan, according to

the Eisenhower values." Sellers and his boss nearly broke out laughing; the corporate office had managed to give eigenvalues a presidential promotion.

Sellers also tells about working recently with a focus group facility to recruit a group of church employees. He asked them to fax him the Yellow Pages listing of churches in their city so he could see the denominational listings. They faxed the list right away — a complete list of Church's Fried Chicken restaurants.

An anonymous researcher who works for an electric utility tells about the time the utility, in preparation for deregulation, hired a consulting firm to conduct focus groups to test the "unbundling" of the electric bill. Focus group participants were given copies of the unbundled bill so they could provide their likes, dislikes, etc. Suddenly, one of the participants let loose an amused squeal. She held up the bill and explained that on the back of the bill the phrase "to report an outage" instead read "to report an outrage"!

Anthony Stanowski of the Sachs Group tells about conducting a community needs survey early in his career on consumers' health attitudes, behaviors, and risks. One of the questions involved asking female respondents if they'd been pregnant within the past five years. A 74-year-old female laughed and said that if she had been, they would have surely heard about it by now. On the news.

Bob Budlong, now of AE Clevite Engine Parts, once worked at a public

relations agency. One of his clients was a large automotive supplier who developed a technologically advanced consumer product. The company announced that they'd introduce their new product in Dallas at price of \$1,995. They'd done no research to determine that Dallas was the right place, and all they had in the way of research on pricing was an industry survey that reported that people thought a product of this nature would probably cost \$2,000. Not that they thought it was worth that money, or that they would actually spend it — just that it would probably cost that much. The company lined up distributors in Dallas, signed insertion orders for ads in local magazines and newspapers and even bought radio time. All the while Budlong's PR firm and the ad agency were begging for research — if only to help tailor their messages. Finally, three weeks before the campaign was to break, the client announced they'd hired a research firm to conduct focus groups on the product — in Chicago. Budlong reports the company shortly was put up for sale.

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. **74**

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The insignificance of significance testing

By Neil Helgeson

Editor's note: Neil Helgeson is senior methodologist with Winona Research, Minneapolis. He can be reached at 612-881-5400.

After conducting a study to compare two products or services, there are a number of questions that a researcher could ask when comparing the two along a relevant dimension:

1. Which one is better, and by how much?
2. Did the two differ?
3. How likely is it that the two differ?
4. How likely is it that we obtained the observed difference if the two did not actually differ?

Most researchers would like the answer to #1, would settle for #2 or #3, and would say "Who cares?" about #4. Unfortunately, #4 is the question answered when we use an inferential statistical test on our data. Most users of these tests have no idea that it is really #4 they are answering when they ask for statistical testing.

Inferential statistics are required when we work with samples, not populations. When we use samples, we cannot be certain that the conclusions we reach based upon them accurately reflect the populations from which the samples are drawn. To guide us in using our results we can perform a statistical test. The approach is called "null hypothesis testing," and while the calculations vary based on the specific test we perform, conceptually they contain the same

steps.

1. Assume the null hypothesis is true. The null hypothesis is the opposite of the conclusion we are testing (which we call the alternative hypothesis). For example, if we think that stated purchase intents for product A and Product B are different (our alternative hypothesis), our null hypothesis would be that the population purchase intent for product A was equal to the population purchase intent for product B. The null hypothesis and alternative hypothesis must be mutually exclusive and exhaustive — one and only one of them is true. It is important to note that these are statements about population parameters, not sample statistics, as our goal is to draw conclusions about populations. If we want to draw conclusions about the samples, we only need to compare their means directly. This is simple, but we usually do not care about our samples, only about the populations they represent

2. Calculate a statistic whose distribution is known, given the null hypothesis. The statistic we calculate depends upon the test — t , χ^2 , etc. If we are doing a t -test, we calculate t — a statistic that involves the differences in the sample means, the variability in the samples, and the sample sizes. If the null hypothesis is true, we know how likely it would be to get t values in a given range — the range of interest usually being "as large or larger" than the value we obtained.

3. Determine whether it is reasonable to keep assuming

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Agricultural research in Asia

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By Nick Easen

Editor's note: Nick Easen is the specialist agricultural project manager of Asia Market Intelligence, a Hong Kong-based research firm.

The vast majority of Southeast Asians are still toiling in the paddy fields, filling the region's rice bowls. In many cases agricultural research in the region is a headache for multinational companies in the agriculture industry, especially if the research is being done at a distance with limited control.

More often than not both clients and market research companies may have a limited understanding of the local situation. For example, it is a tall order to expect one company to understand the attitudes of corn farmers in Heilongjiang Province, China; or the effects of pest infestation in Mindanao, Philippines; or how El Niño influences local grain prices in Sumatra, Indonesia.

To account for all the variables in the field, researchers have to be willing to innovate. The keys to effective agricultural research in Asia are a willingness to learn and the ability to adapt research techniques to the requirements of the specific job.

To successfully complete a recent research project, which examined Indonesian farmers' usage of and attitudes towards planting and harvesting corn, we relied on investigation, education, understanding and innovation.

Issues were complex

Over one million small farm holdings exist in Indonesia. Early on, we recognized that organizing a sample survey of 800 farmers in this country was equivalent to interviewing 10 farmers in the U.S. and saying that their usage and attitudes reflected the entire North American continent's grain farmers!

The issues involved were understandably complex. How could the client expect the results to represent or mean anything? How could we really

expect to understand all the spheres of influence affecting Indonesian farmers? On the agency side there was the question of coverage and logistics — how to have widely dispersed interviews in rural areas, yet still conduct the research within the constraints of a fixed budget.

After initial investigation, many more questions were raised as even more variables surfaced. These fell into five categories, which are associated with any agricultural research project:

- **Climate.** Indonesia straddles three time zones, and its climate varies significantly across the archipelago, from Java to Lampung to Sumatra. This can widely affect growing conditions, timing of planting and harvest, as well as yield. Last year raging forest fires coupled with the unusual weather effects of El Niño also had a major impact on agriculture.

- **Agronomy.** Semantics added to the confusion. There is one name in Bahasa (Indonesia's national language) for three types of insects. There are also remote Bahasa terms for various diseases. Up to three crops may be grown, and hand-weeding may be more prevalent than pesticide control.

- **Geography.** Irrigation, transport to and from market, availability of seed and quality of the soil differed from holding to holding. There are six different units of measurement for land area: *ru*, *bumi*, *patok*, *tumbak*, *lobang* and the *bahu*. Each is roughly about a third of an acre. However, again, sizes were not standard. The average size of a plot of land is about an acre.

- **Socioeconomic situation.** The farmers' decisions are based on how much they could afford for seed, fer-

The keys to effective agricultural research in Asia are a willingness to learn and the ability to adapt research techniques to the requirements of the specific job.

tiziers and pesticides. A low level of education and illiteracy are common, as well as a lack of understanding of farming practices.

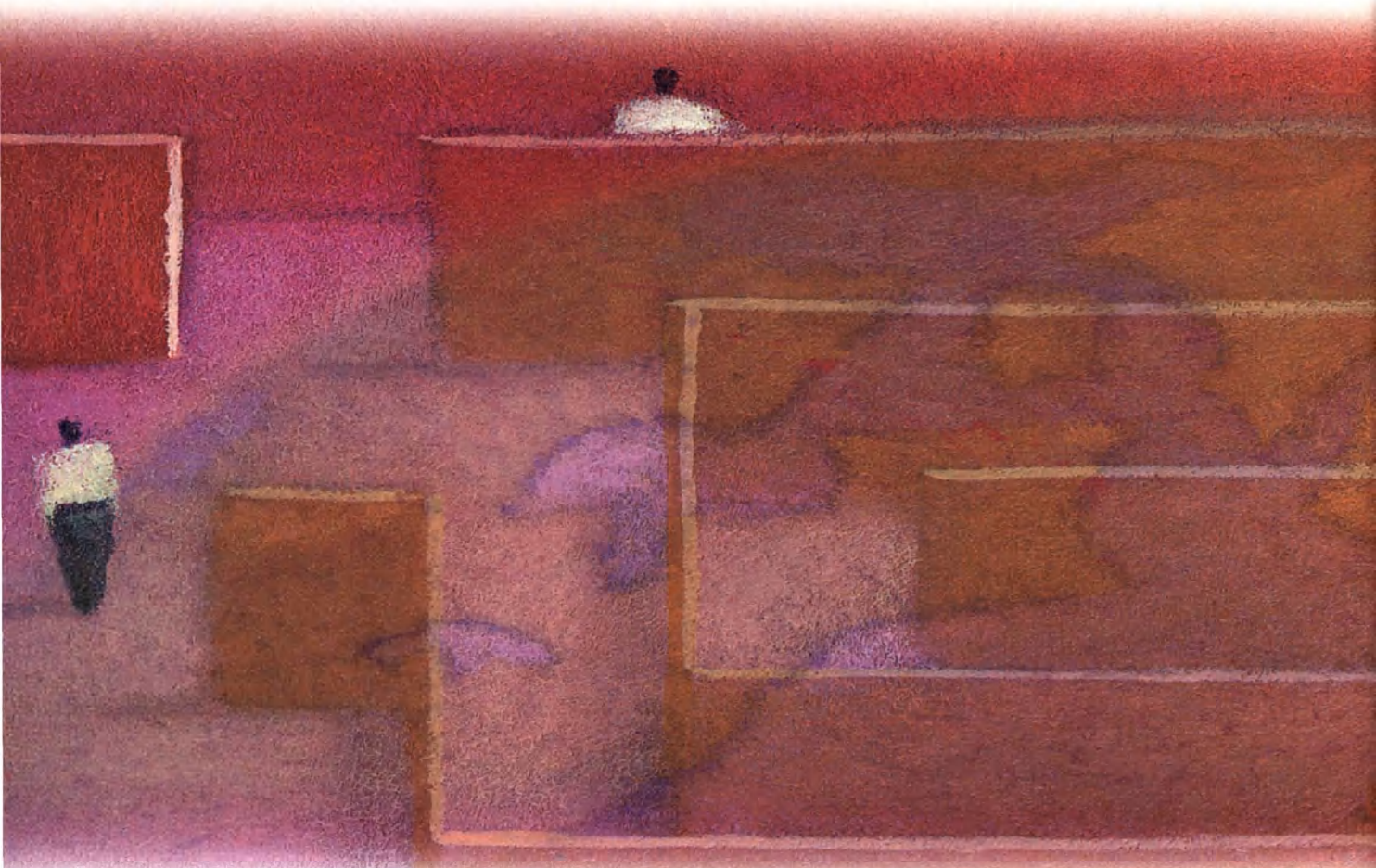
- **Culture.** Agriculture in Indonesia is considered a livelihood rather than a profession. Decisions are based on habit and tradition rather than monetary gain. Farmers are influenced more by the village chief and their next-door neighbor rather than advertisements or promotions. Each area has its own dialect, with few farmers speaking Bahasa.

All these variables had to be accounted for within the framework of the research program, so that the differences in responses concerning usage and attitude could be attributed to one of the categories and reasoning listed previously. Cause and effect were crucial to understanding any

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An insider's guide to conducting effective research in developing countries

By Stephen Phillips



Editor's note: Stephen Phillips is vice president of worldwide services at BAIGlobal Inc., a full-service market research firm headquartered in Tarrytown, N.Y. He can be reached at 914-332-5300.

While developing countries offer wide opportunities for business growth, they present a special challenge for marketers and researchers because local conditions often defy Western expectations. For example, a manufacturer of automatic paper-feeders recently expanded to Indonesia and found their sales were low. They were about to conduct market research when a local customer pointed out the problem. It wasn't the product that was at fault, it was the Indonesian labor situation. With wages at pennies a day, it was simply cheaper for businesses to hire

full-time employees to feed paper into their photocopiers than to buy an automatic gadget.

Given such unexpected situations, researchers who are only familiar with the developed world need to consider whether they have the time/inclination to study local cultures to ensure research goes smoothly. As an alternate to intensive cultural education, they can hire a research firm that specializes in international work to conduct studies on their behalf. Professional research firms with experience in developing markets can offer the expertise needed to avoid cultural pitfalls and deliver accurate results. Having lived and worked in several Southeast Asian developing countries over the past decade, I offer the following insider's guide on how to conduct effective market research in this challenging environment.

The "culturally sensitive" game

A novice will often take one of two approaches to conducting research in developing countries. The first is to expect everything to be the same as in the West, a potentially dangerous assumption, as we've just seen. The second is to be very concerned about cultural sensitivities and "how things are done here." Surprisingly, for research purposes, by far the best of these approaches is the first, allowing some room for flexibility. This is because local research suppliers can find it fun to take "culturally sensitive" newcomers for a ride:

"We tend not to finish things on time here, it's a cultural thing."

"We can't do interviews that long, it's a cultural thing."

"Often only three or four respondents arrive for focus groups, it's a

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Yes, you can!

Tips on conducting telephone research in Latin America

By Jennifer Mitchell

Editor's note: Jennifer Mitchell is director of the international division at Hispanic & Asian Marketing Communication Research, Inc., a multicultural research firm in Belmont, Calif. She can be reached at 650-595-5028 or IntlDiv@hamcr.com.

When speaking to clients who want to conduct research in Latin America, many mention that they have been advised not to conduct telephone research with Latin American consumers, as it is “not feasible” and not “appropriate to the culture.”

In our experience, this is not always the case. Often enough, telephone interviews are in fact the best way to conduct a study. This article will attempt to dispel some myths about this methodology in Latin America. I will also identify problem areas and review the advantages this methodology has over others . . . even in Latin America!

The main hurdles to telephone interviewing in the Latin American region are telephone penetration and list availability and quality. When the target of the research is higher-income consumers, then telephone penetration becomes less of a problem, given that

telephone penetration is concentrated in the higher-income brackets. If the issues around list availability can be solved, the advantages of telephone interviewing over in-person methodologies are significant. Amongst them, cost effectiveness, time in collecting the data and data quality.

So what about phone penetration? Phone figures in these countries are anything but encouraging when considering a telephone interview, as the number of telephones per 100 citizens is still very low, especially when compared to the U.S., which has four times more phones. The table below



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shows some figures of estimated phone penetration in different countries and cities, from a variety of sources. Given that the market is changing so rapidly, it is difficult to estimate at any given time the number of accessible telephone lines in each country.

But these figures can be misleading.

Country	Population	Lines/100 Inhabitants	Estimated Number of Lines
Argentina	35,797,985	18	6,220,000
Brazil	164,511,366	14	14,380,000
Colombia	37,418,290	13	4,790,000
Chile	14,508,158	15	2,240,000
Mexico	97,563,374	12.4	11,890,868
Venezuela	22,396,407	11	2,490,000

Source: CIA Factsheet 1996, 1997

For example, the table on p. 27 shows differences in telephone penetration, by region, in Brazil. The more cosmopolitan cities have a much greater telephone penetration, as would be expected. In addition, if one considers that each household has on average four people, in São Paulo we are looking at 35 phones per 25 households. Although this simple calculation does not eliminate business lines, these figures shed a different light on the phone penetration issue.

It is key to consider the target respondent in context of the country and city. Will the average Latin American citizen, representing the middle-class and above, be likely to have a phone in their home? In most major cities, the answer is yes. Lack of a phone in a middle-class household probably indicates that the person does not belong within the description

of the average middle-class citizen, just as it would in the U.S.

Telephone penetration is changing daily in Latin America. Seventeen million fixed lines are expected to be installed in the next five years in addition to capacity for 16 million new cellular phones. In Brazil alone, direct investments in telecommunications

are expected to surpass U.S.\$100 billion over the same time frame!

Certain caveats

There are of course certain caveats to address when conducting telephone interviews. There is a high-class neighborhood in San Salvador, for example, which does not have fixed phone lines – residents have cellular phones because it has not been possible to install telephone lines. In Brazil, often the name on the list does not match the respondent's because lines are bought and sold like commodities. However, these lines are restricted to the particular area in which they were bought, so it is very likely that the social class of the end user will be similar to the person who originally paid for the line. Digits are being added to telephone numbers in some cities in Brazil to meet the demand for

lines, so many lists are rendered useless. These are all wrinkles in the sampling that have to be addressed during the design of the research and taken into account in the analysis.

List quality of course is key. In some countries it is possible to buy good telephone lists, while in others the best resource is residential pages, pulling numbers using a random method. Some countries even have cellular phone listings! In other countries, such as Colombia, it is difficult to conduct telephone interviews with those in higher socioeconomic strata, as these respondents are never listed. Although the sampling is more difficult than for a U.S. phone survey, in many cases it is possible to adapt the best sampling method available to match the objectives of the study without introducing any more biases than would be present in an in-person methodology.

Assuming the target audience for the region is middle-class and above (with the exception of Colombia), an additional significant advantage is the "representativeness" of the sample. This is due to the fact that personal interviews will always have a recruiter bias if respondents are recruited to a facility. Intercepts will have a geographical bias and an interviewer bias in the selection of candidates towards those that appear more approachable. Telephone interviewing, on the other hand, permits wider geographical coverage and a more random selection of candidates. The fact that unlisted phone subscribers will not be included in the sample must also be considered.

Significant benefits

The benefits of telephone surveys in Latin America are significant. The first of course is cost. It is possible to conduct a greater number of interviews across a wider geographical coverage. And as telephone rates decrease, the cost advantage will become more significant.

The second is time. It is much more efficient to conduct all interviews in a central telephone location. Questionnaires do not need to be painstakingly edited. They don't get lost somewhere crossing the border into the U.S. or stuck in customs.

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Brazil	Telephone Lines per 100 Inhabitants	Average Household Size
Total Country	10 to 14	4 people per household
By City		
São Paulo	35	4
Brasília (capital)	60	4
Nordeste	6	5

Source: Pró-Marketing Inteligência de Mercado, 1998

The third advantage is cooperation. Respondents tend to be very cooperative, given the relatively low level of telemarketing activity compared to the U.S. They are much less likely to hang up. Add to that the "surprise factor" of a native Brazilian calling São Paulo from California to ask a few questions regarding a local beer, and you have them hooked (for the most part!) for the next 20 minutes. Our results in previous studies have shown there is no apparent bias in responses if native-speaking interviewers are used in the research. The fact that we are calling from the U.S. acts simply as a hook to increase participation.


From a quality standpoint, supervisors can monitor what the respondent is saying and how it is getting captured in the questionnaire responses. They can provide suggestions in progress, and check data and open-ends daily for quality. Especially when conducting a multi-country study, centralization is key to making changes efficiently and safely and to ensure consistency in data collection across all countries.

Lastly, what about the human contact dilemma? Yes, it is true that Latin cultures are centered on personal relationships. Human contact is an important element in Latin relationships of

The fourth is accuracy of data. From a technical standpoint, by using CATI it is possible to implement sophisticated research instruments and obtain more reliable data. The quality and completeness of the data is also much better than if it were conducted without the assistance of a well-programmed questionnaire.


all types. This has long been a justification for conducting interviews in-person, especially with business-to-business. Nonetheless, the business pace in Latin America is fast and getting faster every year. We have found that executives are more accepting and appreciative of approaches that are less intrusive on their schedule. Using well trained executive interviewers, we have obtained higher participation rates than if we had conducted them in-person. And, once the time has been set aside, respondents willingly spend it with the interviewer to ponder their answers.

Yes, you can

Next time you're considering research in Latin America and your needs don't necessitate showing visuals or any other in-person interaction, consider telephone interviewing as an option. It is possible to design methodologically sound, cost-effective research with Latin American consumers and business people with telephone methodologies. 


¹Latin Trade, October 1997

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Emerging trends in China's marketing

research industry — 1998

By Barton Lee, Tony Zhao and
David Tatterson

Editor's note: Barton Lee and Tony Zhao are managing director and manager of strategic planning, respectively, of East Marketing Research, Ltd. (EMR), Guangzhou, China. They can be reached at 8620-8384-6783 or at emr@chinaemr.com. David Tatterson is the U.S. representative of EMR. He can be reached at 630-964-5631 or at tatter@ix.netcom.com.

In the November 1996 issue of *Quirk's Marketing Research Review*, we provided an overview of the marketing research industry in China. However, China is a rapidly growing and constantly changing market. Significant changes occur in short periods of time. With this in mind, we submit the following update of our previous article.

The marketing research industry in China started less than 10 years ago. Before 1990 there was only one professional marketing research firm in the whole of China. This situation changed quickly. In 1993 there were approximately 20 firms and today there are over 300 professional firms. Most of these firms are concentrated in the large cities. Guangzhou, for instance, has over 30 firms. There is at least one firm in the capital city of each province. Many of these have evolved from the statistical departments of various government agencies. In addition, marketing research services are also provided by numerous other organizations, e.g., universities, advertising agencies, information service companies, government organizations, etc. Field support service firms are also present in the large (Beijing, Guangzhou, Shanghai, etc.) and secondary (Wuhan, Chengdu,



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Harbin and Fuzhou) cities. Overall the industry has developed quickly and continued rapid growth is expected.

Foreign joint ventures

SRG, the first marketing research joint venture, was formed in 1992. Since then many foreign joint ventures followed, particularly in the last three years. Gallup International, Market Behavior, Ltd. (MBL), Market Facts, Research International, A.C. Nielsen, Sofres Group and NOP Group all formed joint ventures with domestic Chinese companies. This trend is expected to continue. Currently only five domestic firms over five years old remain independent. These joint ventures introduced many new research techniques which domestic research companies quickly adopted.

Development of the marketing research profession

The rapid development of the marketing research industry has attracted people with a wide variety of academic backgrounds into the profession. Initially, marketing research professionals were government statisticians who had ready access to data collected for measuring economic production and growth. More recently, many highly qualified persons with backgrounds in sociology, psychology and economics have entered the field. Many of these people have advanced degrees including an MBA. Many have also studied abroad and worked for large multinational corporations such as Procter & Gamble. The domestic marketing research profession has benefited greatly from this influx of diverse backgrounds.

The talents required also vary with client. Foreign clients require data collection and tabulation (fieldwork skills). Domestic companies also require fieldwork skills. However their needs are greater. They need data analysis and interpretation skills as well as the ability to develop a marketing strategy based on the results.

More products researched

Initially, marketing research stud-

ies focused on daily consumer products such as laundry detergent, shampoo, beer, tobacco, etc. The past few years have brought changes here also. Today high-tech products (medicine, mobile phones, automobiles, data networks, etc.) are being evaluated by manufacturers prior to entering the marketplace. In the near future, we expect service industries such as banking, insurance and real estate will seek marketing research services.

The entrance of foreign products into the Chinese market forced domestic Chinese companies to begin to rely on marketing research data to guide their marketing efforts. International advertising agencies such as Ogilvy & Mather and Saatchi & Saatchi aided this process. They quickly acquired domestic clients and taught them the value of research in guiding their advertising. Some of the large domestic companies now maintain their own marketing research departments. The next step for Chinese manufacturers is to begin using foreign marketing research firms in the countries to which they export.

Trade associations

ESOMAR (the European Society for Opinion and Marketing Research) held its first East Asia Conference in Hong Kong in 1996. While many Chinese research firms belong to ESOMAR and participated in the conference, it drove home the importance of an association to the development of a healthy research industry. Chinese marketing research firms have been meeting and plans are currently underway for a domestic research association. It would not be surprising for one to be announced within the year.

Average billings remain small

There is much room for growth in the Chinese industry. In spite of the rapid growth of the marketing research industry, the billings of the typical research firm remain modest. Very few research firms (approximately 5 percent) have billings exceeding \$1.25 million. Most of

these are joint venture companies which attract foreign business. In medium to large companies (approximately 15 percent of research firms) annual billings are in the range \$125,000 to \$1.25 million. Many small companies (80 percent of research firms) average only \$25,000 to \$75,000 in annual billings. It is estimated that national billings for all firms in China is only \$65 million. This is very small compared to more developed markets such as Japan where annual billings were estimated at \$970 million in 1997.

New approaches

Traditional methods such as door-to-door, central location and focus groups remain the backbone of the research tools in China. Phone surveys are gaining acceptance as a larger percentage of households acquire them. Cellular phones are driving this trend. Phone surveys are currently used in business-to-business studies. More advanced techniques such as panels, omnibus studies, car-clinics, off-air testing of advertising and in-home achievement tests are making inroads. Demographic data books characterizing the products and services purchased in China's large cities are now available. These are popular with advertising and marketing research firms. The widespread use of computers are making e-mail surveys feasible, particularly in business-to-business studies.

Growing and developing

The marketing research industry in China is growing and developing as fast as the market itself. Recent economic reforms in Beijing strengthen China's move to a market-based economy away from a planned economy. The Asian financial crisis notwithstanding, we foresee these research trends continuing. The chief drivers are increased competition and a more sophisticated, demanding consumer. As a result, both domestic and international corporations are demanding more and more market information. 

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Telephone research in Asia - the wave of the future?

By Bjorn Huysman

Editor's note: Bjorn Huysman is chairman of ACR, a Hong Kong research firm, and research director international at NIPO, a Netherlands research firm. He can be reached at bjorn.huysman@nipo.nl.

Marketing research in Asia is in its late childhood. Whereas 10 years ago virtually no research was done in Asia, we now clearly see a booming and professionalizing industry. With this growth comes growing pains. The parents of this industry (mostly Westerners) have to support their children as they mature.

In terms of research expenditures, Asia is still a low-key market, compared to Europe and the U.S. Whereas in Asia a marketing research agency with 40-50 people can be considered one of the leading agencies, in Europe and the U.S. it would only be a small agency. Certainly, with the present crisis in Asia, local expenditures will be cut. The larger

research agencies and agencies with a lot of local business will feel the crisis for sure. Nevertheless, we see U.S. and European clients continuing to conduct research in Asia.

Clients interested in research in an emerging market like Asia often prefer to apply their existing research approaches to new markets. This is true for the questionnaire as well as for the method of research. Traditionally, virtually all research in Asia has been done face-to-face, due to the lack of telephones and the cultural unacceptability of giving strangers information over the phone. However, telephone research — by means of CATI — is highly preferred by many Western clients, especially when taking into consideration the size of some Asian countries and the lack of infrastructure (both in telecommunication, trained staff and roads) — all of which makes the thought of a face-to-face approach quite scary.

But is it possible and feasible to

conduct telephone interviews in Asian countries? Are there agencies equipped with CATI to cope with the complicated questionnaires? The answer to both questions is yes.

The hardware

When we think of Asia we think of a lack of infrastructure, which includes a lack of telephone lines. Obviously, if consumers don't have a telephone, you can't reach them. But while it seems that most Asian countries have low to fairly low telephone penetrations, countries like Hong Kong (and do not make the mistake of treating Hong Kong as China; Hong Kong is a separate market), Singapore, South Korea and Japan have Western-like telephone penetrations. Countries like Indonesia, Thailand and China are quite different. Yet, taking China as an example, telephone penetration in the big cities exceeds 40 percent already, which seems to make telephone research feasible from a hardware point of view.

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In most Asian countries consumers start with mobile phones rather than a fixed ground line. For telephone research, this means that telephones are much more of an individual — rather than a household — feature. The fact that individual consumers have their own telephones implies first of all that they are “always” reachable, secondly that samples are not household-based anymore and thirdly that randomly calling consumers may mean that we call them during a business meeting, a subway ride, or a romantic dinner.

In Hong Kong we see a very high telephone penetration among consumers (both fixed lines as well as mobile). In Hong Kong, carrying out telephone research is very well accepted and actually often the only way to carry out research. Clearly, Hong Kong is now used to telephone research and participation is quite equal to responses in Europe. Some 97 percent of Hong Kong is Chinese, which gives us some trust that, in the end, Asian people do not object to

giving information to strangers by phone (though some questions may have to be phrased differently than in a Western environment). In time, telephone research will become accepted.

In China, calling any consumer and asking questions for research would certainly not lead to getting the information. People wouldn't participate at all. It would be considered rude. Perhaps, as we've seen in Hong Kong, that perception will change.

Resistance to change

Change is something that in most societies leads to resistance. Two years ago, before we installed a CATI facility in our company in Hong

do research in Asia met similar problems. They had asked their counterparts in Asia if they could do such and such study in this way in China, South Korea or Hong Kong and generally the answer was no.

We have been carrying out business-to-business research using CATI in literally all Asia-Pacific countries (all centrally from Hong Kong using native-speaker interviewers), including Japan, where most people would say telephone research is impossible.

Well, I can tell you telephone research in Japan is very much possible. Why does everybody tell you it is not possible? Again it may be the reluctance to try new things. Yet, it is good to see that some Japanese

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Which Agencies Offer CATI, How Many Stations And Through Which Software?

Agency	CATI?	Geographic Coverage	No. of stations	Software
Acorn (Hong Kong)	no, planned for 1999	Hong Kong, Singapore	-	-
ACR (Hong Kong)	yes	Asia-Pacific	25	NIPO CATI system
AMI (Asia)	yes	Asia	130	Surveycraft
Gallup Korea	yes	South Korea	15	NIPO CATI system
JMRB (Japan)	no	Japan	-	-
JSR (Japan)	yes	Japan	100	Surveycraft
Lynco (Japan)	yes	Japan	10	NIPO CATI system
MBL (Hong Kong)	yes	Hong Kong	?	Surveycraft
MDR (Hong Kong)	yes	Hong Kong	15	NIPO CATI system
MiC (Japan)	no	Japan	-	-
MRS (Japan)	no	Japan	-	-
Nikkei (Japan)	yes	Japan	30	Ronin
NRC (Japan)	yes	Japan	17	Ronin
PAMRI	yes	China	3	NIPO CATI system
QMRC	yes	China	3	NIPO CATI system
Research Pacific group	yes	HK, Singa., Malaysia	30	NIPO CATI system
RI (Asia)	no, planned for 1999	Asia, through local offices	-	-
SRG (Asia)	no	Asia	-	-
SSRI (Japan)	no	Japan	-	-

Kong, we asked around. Would it work? Could it work? Looking back, it is no surprise to me that everybody we asked quite clearly and without hesitation said: no, telephone research in Asia is not possible.

Good for us that we were pig-headed enough to go for it anyway.

In talking to clients at the Advertising Research Foundation conference in New York earlier this year I noticed that clients wanting to

research agencies have started CATI facilities.

A lot of Asian telephone fieldwork at this moment is done from outside the country being interviewed. Why? There is a general lack of experience and there simply aren't many telephone fieldwork facilities in Asia. If telephone fieldwork is being carried out locally, it is still often on paper and the amount of telephone work agencies get is still limited. Most


local agencies believe CATI will come but they also feel the investment is still too big. It's a chicken-or-the-egg problem. Western (co-)

CATI? As telephone interviewing is new to most local agencies, the larger and/or more Western-oriented agencies have picked up telephone

but due to the number of small agencies in Asia, the list is not complete.

Where do we go from here?

In summary, our experience has shown that business-to-business research in Asia is very feasible. We even find levels of cooperation between 60 percent and 80 percent (even in IT studies), which in any Western country would be unthinkable. Consumer research is already possible in most Asian countries. The chart at left shows where telephone consumer research is possible at this moment.

In all countries it remains important to realize that telephone penetrations are generally lower than in Western countries. However, keeping in mind that telephones are often present at households with spending power, interviewers are often talking to your target groups. As long as all involved keep this framework in mind, it is clear that telephone research is the future in Asia. 

The Feasibility of Consumer Telephone Research in Asia

<u>Country</u>	<u>Feasibility</u>
Australia	yes
China, Mainland	no, but within five years in big cities
Hong Kong	yes, best method by far
India	yes, for big cities and in English
Indonesia	yes, in Java, Bali and Sumatra
Japan	yes
South Korea	yes
Malaysia	yes, Peninsula
New Zealand	yes
Philippines	yes
Singapore	yes
Taiwan	yes
Thailand	yes
Vietnam	no

owned agencies seem be willing and financially powerful enough to make the investment. Among these agencies CATI has been entering the market only during the last few years.

Which agencies are able to offer

research and CATI approach easiest.

The chart on p. 34 gives a sampling of agencies in Asia offering CATI and through which software. The grid is based on different sources. I have tried to be as extensive as possible

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International focus groups:

Embrace the unpredictable

By Steve Lewis and Misty Hathaway

Editor's note: Steve Lewis is a co-founder and vice president of Development II, Inc., a Woodbury, Conn., market research firm. He can be reached at 203-263-0580. Misty Hathaway works in international administration and marketing at the Mayo Clinic, Rochester, Minn. She can be reached at 507-284-9244.

Those who believe we're living in an ever-shrinking world need only spend an evening conducting (or viewing) a focus group outside of their native culture. Flexibility, the capacity to endure large masses of ambiguity, and a great sense of humor (including the ability to laugh at oneself) are the three essential personality traits required to enter the world of cross-cultural information gathering.

Focus groups in North America have become an inherent part of our business culture. After all, we've been running focus groups since just after World War II when Madison Avenue "discovered" the power of rapid responses from a core group of carefully profiled consumers. Focus groups are quick, relatively inexpensive and can provide profound insight into the thought patterns of consumers. Indeed, even politicians have succumbed to their allure.

We must issue a general warning about focus groups. Focus groups are a proven methodology for collecting qualitative information. Place special emphasis on the word "qualitative." When eight to 10 people are together in a room exploring ideas, perceptions and opinions, the information collected

is anything but cohesive. Even with a skilled moderator at the helm, focus groups have a tendency to take on a life of their own, trekking up paths that no one can foresee.

In the early '90s, Development II worked for a Swedish bus company that was having difficulty attracting senior citizens to its bus tours. The bus company's young management team concluded that the problem must relate to the routes or destinations and proceeded to make major changes based upon internal perceptions. After this strategy failed to attract the number of seniors the company desired, the management team asked Development II to conduct a series of focus groups with retirees in Sweden.

The Swedes are great to work with in groups. They'll show up if they say

In-store studies grow in importance

In the retail environment shoppers don't have to "remember," they're already there. The store shelf and shopping experience can be part of the stimulus.

By William J. Hruby

Editor's note: William Hruby is a market research and advertising consultant with nearly two decades of packaged goods marketing experience.

A quandary exists for packaged goods marketers: Consumers often think about crucial product or marketing issues only while they stand at the shelf. Yet research is most commonly conducted in malls, mail panels and other locations far removed from the point-of-sale. The fact that 100% of all buying decisions are ultimately made at the shelf favors the case for in-store research.

Go where the shoppers decide to buy.

To capture those fleeting points which translate into product A being selected over product B, consumers must be intercepted in the store where top-of-mind issues are present. Meet that same consumer in a mall two weeks later, and, **IF** you can get them to speak with you at all, it is highly unlikely they can remember their purchase decisions, awareness of brand options, motivations for purchase, etc. And certainly not with the same degree of accuracy as an interview conducted at the point-of-purchase.

Participation is a major and growing problem for traditional research methods. Mall wave-off rates (shoppers who refuse to even be approached) hover around 90%, compared to in-store wave-offs which are more typically 30-50%.

In a recent issue of *Marketing Research* (Spring, 1998), authors Bearden, Madden and Uscategui summarized this point. In their report they emphasize that the pool of qualified respondents is drying up. Their concern: "Lack of representativeness resulting from refusals to participate . . . jeopardizes the accuracy of survey results. Evidence suggests that the decline in participation rates is already occurring and may accelerate."

Three questions you should ask: Prior to going to field, cutting edge market researchers ask themselves three questions, according to Dr. Herb Sorensen of Sorensen Associates

- 1) What information is needed?
- 2) Who has that information?
- 3) Where are they; and are most capable of providing the information?

For packaged goods researchers involved in concept, prototype and related phases of product development who rely on

Product Guidance Research, the answers often point to in-store research.

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Purchase-intention surveys can take you only so far; marketers would also do well to observe consumers in real buying situations.

Harvard Business Review
May-June 1998



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they will, and they arrive on time — not one minute too early or too late. During the focus groups we explored all of the previously concocted ideas and received great concurrence that it was definitely the destinations that discouraged the elderly from these bus tours. Late in one of the sessions, a soft-spoken elderly man commented that he didn't take bus tours because there were no toilets on the bus, and the bus drivers didn't make frequent enough stops. The other participants didn't even acknowledge the comment.

When we listened to the audio tapes from these focus groups (hint: always audio tape your groups; video taping is optional), we noted this man's comment and eventually incorporated it into the questionnaire designed to survey a wider audience. We sent out about 1,000 questionnaires and received about 750 completed and returned. Far and away, the primary reasons these senior respondents did not take bus trips were the lack of adequate toilet facilities on the bus and too few stops. The bus company's management team heard the message, made adjustments, and began to discretely advertise the change in facilities and stops along the way. Within a year, they had exceeded their passenger-on-board goals and needed additional buses.

Had we listened only to the consensus of the focus groups and based our

decisions upon that qualitative data, we would have been stuck following the same unsuccessful route as before. By carefully listening to all of the responses, even the "minor" ones, and quantifying the responses, the customers ultimately told us the solution.

Social understanding

Conducting focus groups requires some science but mostly social understanding. The organizational and operational nuances depend largely upon the culture of the participants. In the late '60s, the Social Democratic party in Sweden passed the "du" law ("du" is the informal pronoun for "you"), obligating everyone to use the first name in greetings. Previously one was greeted as "Engineer Johansson" or "Professor Gustafsson." With the "du" law those individuals became known as Sven or Göran. As a reflection of the equalizer orientation, it's easy to get Swedes to participate in focus groups, vocalize and listen to each other's opinions.

Japan on the other hand is a society still rife with cultural hierarchy, especially within the business community. In typical Japanese business meetings, the head man sits at the conference table with his back to the wall and as far away from the door as possible. (Perhaps this is a holdover from the days of social feudalism when the person in power could never be sure who

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his friends were). His next in command sits to his right and left and so on around the table, until all are seated according to job title. In our experience, this head man is the first to express an opinion; however, he is also a good listener and generally will not reach a decision until all have been heard, and a consensus is reached. The Japanese rules governing groups are very well defined.

When conducting focus groups in Japan, we disrupt this rigidity, and the Japanese can be as much fun and as creative as any groups we've worked with. Since we know who's been invited, we know the job title and societal expectations. We place our guests around the table in places they might not ordinarily be seated. We begin our conversations making certain that the top-rated person speaks last. We joke and try to instill lightness to the party. In every country except Japan we use native speakers to conduct the groups. In Japan, though, we've discovered that having an American in the group using an interpreter elicits greater creativity and candor from the participants. It's as if it's okay for them to disrupt the status quo with an American in their midst. We're allowed to break the rules in this environment and the Japanese thoroughly enjoy it.

Focus groups with Muslim participants

Recently Development II worked with the Mayo Clinic in Rochester, Minn., on five focus groups to explore expectations and satisfaction among international — in this case, Middle Eastern — patients. Observing the needs of these primarily Muslim participants required us to use Arabic speaking moderators, to separate the men's and women's groups, to plan around evening prayer time, and to offer foods that didn't violate cultural and religious practices.

Recruitment for the groups also required flexibility. While standard recruitment would have involved a letter to a random sampling of patients' homes and return postcard enclosures, this methodology was not feasible. Instead, we needed to recruit from among these non-English speaking patients already in Rochester. This was very challenging. Interpreters were

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used to identify and invite patients already being served in the Mayo Clinic system, and invitation cards printed in Arabic were required for each session. The interpreters had to call the patients and confirm the ses-

sions multiple times to ensure attendance, given the unfamiliarity and relative suspicion towards the process.

In most of the Arabic-speaking countries, focus groups are not standard fare. Inviting these patients involved

overcoming reluctance in some cases and outright suspicion in others. The fact that the Mayo Clinic sponsored the groups helped tremendously since a positive relationship was already established. We initially tried to keep the groups segmented by country in order to compare responses and to avoid any potential regional friction. As it turned out, several countries were represented in most groups with no ill effect.

As we anticipated, the Middle Easterners' sense of time did not compare to that of the Swedes. We expected some casualness with respect to arrival time and established meeting times appropriate to the culture. Despite our preparations, however, we were definitely unprepared for one of the women's groups. It seems that one of their princes was arriving at the Mayo Clinic for a check-up around the same time as our 5:30 group was scheduled. Most of the women went to greet their leader and pay their respects. At 6:00 we had one woman in our group (out of nine recruited). Panic set in. As 6:30 approached the women began trickling in, satisfied that they had greeted their prince and thrilled with the idea that the Mayo Clinic was asking them to express their opinions. One woman arrived at 6:50, remarkably surprised that we had already begun the discussions. The poor moderator had to start this session about a half-dozen times.

Not surprisingly, once gathered, Middle Eastern participants had little trouble expressing their opinions and providing valuable input to the Mayo Clinic's international administration. At the same time, the native Arabic-speaking moderators encountered unusual challenges in keeping conversations focused on the Mayo Clinic, as opposed to politics, prayer, praise for national leaders, or household relationships. There was a particularly interesting interaction during one of the women's groups. While one woman expounded with pity on the experience of her husband who traveled alone to the United States for health care, the others re-directed the discussion to challenge her on her wifely duties, wondering aloud why she had allowed him to travel by himself under such trying circumstances.

We also conducted focus groups in



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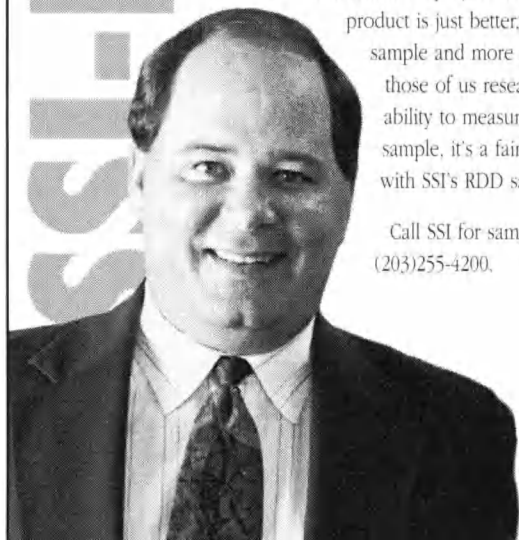
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Mexico City for Spanish-speaking patients of the Mayo Clinic. Recruitment for these groups offered different opportunities for flexibility and required yet another level of attention to detail. The mailing of the recruitment letter (in Spanish) was not as easy as a mailing to Mayo Clinic patients in Minnesota or Iowa. Despite attempts to make the registration process international, the Mayo Clinic's electronic forms are not entirely receptive to international addresses, and a non-Spanish speaking registrar may not enter data as accurately as desired. Many addresses of Mexican patients had to be revised and manually edited by a Spanish-speaker familiar with a map and postal system of Mexico City. International telephone numbers do not fit in the "three-digit area code plus seven-digit number" slots designed for U.S. communication; similarly, phone numbers had to be retrieved manually from alternate screens in the system.

As it turned out, the location of our research partner's focus group facility in Mexico City happened to be a street where a Mexican deputy was recently murdered. We decided it inappropriate to invite Mayo Clinic patients to such a locale. To ensure their confidence and maintain a safe and reputable image, we transferred the groups to a local, well-reputed restaurant and again provided a schedule and menu in keeping with the lifestyle of the Mexican capital city.

Embrace the unpredictable

In conclusion, conducting focus groups in non-American settings and cultures can be both fun and enlightening. You'll need flexibility, a willingness to deal with and embrace the unpredictable, and a strong dose of cultural understanding — understanding that must not be applied universally but rather to each specific culture. You can't expect Middle Eastern cultural norms to apply to Mexicans or Swedes, nor can you assume that everyone will behave like the Americans. You'll be more successful if you take the time to learn the nuances of each distinct culture you're working with. And then, just when you think you've got them figured out and have covered everything . . .

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Editor's note: Kent Hamilton is vice president/director of international services at A&G Research, Inc., New York. He can be reached at 212-686-6370 or khamilton@agresearchny.com.

Have you ever moved across the country with a professional moving company, or taken a long vacation and consulted with AAA or a travel agent? Often, these organizations will give you a checklist to insure success in such a major undertaking.

Well, guess what? A global marketing research project is also a major undertaking! So why hasn't someone put together a checklist to help marketing researchers and other professionals navigate the rough seas that can threaten the validity and actionability of these projects?

Below please find your checklist, which can be copied for your convenient use and that of your colleagues.

I have written this list from the

point-of-view of a researcher who may plan either to use a coordinating marketing research firm or to directly field a study in international markets. In either case, the issues and concerns in the checklist are the same.

General

- ✓ Does the local in-market research firm being used to field your study have 10 or more years of experience in fielding research in each country they are responsible for (or, at least six years in markets that weren't open until '90-'91, such as Eastern Europe), so that a strong understanding of local cultural variables and appropriate study design is available?
- ✓ Has the questionnaire/discussion guide been translated to the local language by personnel who currently speak the local language day-to-day, and who are therefore up-to-date on current meanings, usages and slang, etc.?
- ✓ Has the local language question-

naire/discussion guide version been back-translated to English, again by personnel who are current speakers of the local language and English?

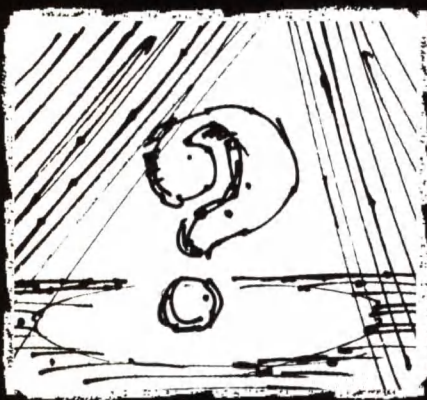
- ✓ Is your study benefiting from consulting help from your local in-market research firms at the stages of determining local study methodology, questionnaire/discussion guide design, and again during analysis of results?
- ✓ Is your study being fielded by local companies that have the correct level of expertise for the study at hand and who have sufficient experience and caring to brief and monitor fieldwork, and to validate the results of the interviewing?
- ✓ Have you arranged for translation of briefing materials, respondent stimuli (including any videotapes), etc., into the appropriate local languages? In addition, have you ascertained the appropriate format for any videotaped stimuli (i.e., PAL, NTSC, etc.)?
- ✓ If there are study requirements that include the need for certain water



An international marketing research checklist

By Kent D. Hamilton

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temperatures or for amounts of different items such as in a recipe, are these requirements expressed in understandable terms for all countries included in the study (i.e., Fahrenheit versus

Celsius, metric versus English measurements, etc.)?

✓ If a certain study has requirements for electrical equipment, such as a particular computer or an appli-

ance that must be demonstrated, have you determined that appropriate electrical adapters are available so that the equipment can be used in each country?

✓ Have you checked for recent major weather or other events, such as the large forest fires in Mexico and Indonesia which caused smoke to travel over vast areas of surrounding countries? These events could have a major impact on planned research, especially research that depends on sensory perceptions of taste and smell.

✓ Have you checked for possible political issues with respect to conducting research in each country? As an example, Indonesia places a moratorium on conducting polling or marketing research three months prior to a national election. Such local regulations may affect your ability to deliver research results on time.

✓ Have you allowed for possible lengthy delays in customs for certain types of product in certain countries? Again, this can cause major problems in conducting work on time.

Quantitative

✓ Have you dealt with the actual fielding of the study within each country in terms of the cities that are selected, and assured that each cell of the study is receiving the identical geographic spread within each country (across cities, etc.)?

✓ If you are conducting a multi-country study, are editing, coding, data entry, and data tabulation functions centralized with consistent decision-making and oversight?

✓ If you are conducting a multi-country study, have you designed the questionnaire so that different brand lists can be fielded in each country, and so that identical brands can be easily identified and tabulated across all countries where they are found?

✓ If you plan to view the results of your multi-country study in total, have you assessed the need for the cross-calibration of any scalar data, so that results are able to be combined and analyzed across cultures?

✓ Have you considered the need to create more than one questionnaire per country, depending on the number of regional dialects or even indigenous

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languages that may exist?

✓ Do not automatically assume that a CATI telephone study as it is fielded in the U.S. is also the appropriate method for international markets. You very likely will need to go to door-to-door interviewing or some other type of face-to-face approach, such as hall interviewing with street intercepts. Here is where local consulting advice is critical in getting the job done right.

Qualitative

✓ Have you secured moderators in each country that have the appropriate language and cultural fit to relate well to respondents and elicit their feedback?

✓ If personnel are attending who do not speak the local language, have you arranged for simultaneous translation? Have you also arranged for audiotaping of the simultaneous translation, along with videotaping of the interviewing?

✓ Although you may be used to using one moderator across all cities in the U.S., have you checked for the need to use different moderators within the same country in international markets, due to different cultural situations and languages/regional dialects?

✓ If you or your colleagues do not attend qualitative work internationally, have you arranged for transcripts of the interviewing to be created and translated to English? And, have you arranged for these English transcripts to be sent to you electronically?

✓ Have you arranged for briefing of all moderators, either in-person or via long-distance conference call, depending on whether you are traveling to the interviewing sites?

✓ Have you determined if a viewing room with a one-way mirror is available, or whether a video set-up is available for observing the interviewing?

It is important to review all of these issues when coordinating international/global marketing research studies. Others may arise that have not been included here. If so, I would be very happy to hear about them. Meanwhile, enjoy the opportunities global/international work can provide – and may you do so as successfully as possible. ☺

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G.H.P. Etienne



Manuel da Rocha



Research in Europe '98

Editor's note: In conjunction with last year's international research issue, we published interviews conducted by QMRR's West Coast ad rep Lane Weiss with principals of two European research firms. Well, another year, another international research issue and another trip to Europe for Lane! This time he sat down with Manuel da Rocha, president of ACHAB Research, a Paris firm specializing in qualitative research with a focus on new product development and brand positioning; and G.H.P. Etienne, managing director, CBEM, a Brussels-based full-service research firm.

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

Manuel da Rocha: We use face-to-face in-depth interviews when we have to think about segmentation of the market, the brands of our clients, the strategic competitors in the market, and when we have to define purchasing or consumption behaviors. Focus groups are mainly reserved for

more creative projects. When the client has developed product concepts and when we have to define the packaging or the product concepts, we rely on focus groups.

Our business is to help clients position their brand and help them to develop new products. More and more we're moving between market research and strategic consulting. We compete with the consulting firms, which are more and more involved in operational marketing issues. Our other competitors are the communication groups, the advertising agencies.

Qualitative research was conceived to get qualitative data, on how a market is changing, which direction it is going in. Now, our clients are coming to us with a new product idea, for example, and saying, "Help us to develop, to conceive, to define this new product."

G.H.P. Etienne: In Belgium, all kinds of techniques are used. Standard opinion polls are not so popular; we do not conduct as many as in France, England or the U.S. But otherwise all the techniques are the same. Door-to-

door is less used now because it has become more difficult to reach people at home during the day, and in the evening people don't like to be interviewed at home.

QMRR: *What are some of the social or cultural factors to consider when doing research in France, Belgium, or another European country?*

Da Rocha: From an American point of view, Europe might appear to be a homogenous market. That's only partially true. I think German, French or Spanish people all expect quality products, but you have to be respectful of cultural factors. For instance, we are developing new products for a client and, as I said, German and French consumers expect quality products but we have to be very careful with the way we present the product to each culture. We had a meeting with the client's marketing team and we worked on lists of words to use in order to present the product in each country with the most appropriate vocabulary and expressions.

Etienne: In Belgium, first there is the language. About half the people

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speak French, and half speak Flemish and a small percentage speak mainly German. It's important to have a nationally representative sample of these two main segments of the country because they are quite different in character, eating habits, TV viewing habits. The Flemish people follow TV programs from Holland, Germany, and the U.K., in English and in Dutch and the side of Belgium that speaks French follows the programs from France and the habits of France.

QMRR: *Is Internet research viable in Europe now?*

Da Rocha: It depends on the category of the product you want to investigate. If you want to work on a video game, for example, then Internet is a

good medium to use. If you want to launch a new dairy product, Internet isn't the best medium to use to research the average citizen.

Etienne: It is viable now and is getting more viable but it varies from country to country. If you have a country where computers are used more often at home, obviously it's easier. The second thing to consider is language; the Internet is usually in English, so it's easy to do Internet research in England but less so in Spain or Italy or any region where only a few people speak English. It will certainly be easier in Scandinavia, Holland, parts of Belgium, not so easy in Germany . . . certainly very difficult in the south of Europe because you will not find enough computers and not enough people speak English. Language will always be the main factor, the main obstacle to international research via the Internet.

QMRR: *What advice would you give to U.S. marketers who are considering conducting research in Europe and/or in your respective*

countries?

Da Rocha: Between Western and Eastern Europe, there are strong differences in the field of qualitative research. In Western Europe, you have sophisticated marketers and sophisticated expectations from the consumers. So when you work on new product development for example, you can't work on the same basis as in Eastern Europe. If you want to launch something in Eastern Europe, that's another matter. You have to work closely with suppliers because some of them come from backgrounds other than marketing. In Prague, for example, the manager at one new qualitative company was a former secret police officer! If you want to do an in-depth job in those countries you need to work with local suppliers closely.

Etienne: It is better to pick one research company in Europe to centralize the job, one company that already knows the European markets and that knows what is possible and what is not. Otherwise the client will lose time, money and encounter a lot of difficulties.

QMRR: *Do you do any research in the emerging markets in Eastern Europe? Do those markets present difficulties?*

Etienne: We have contacts with international and U.S. companies who have found it difficult to find research organizations in these countries. Most important European research companies have already taken over research firms in these countries and conduct research there. In Russia it is similar. But the problem will be solved in two or three years. The larger research companies will have opened their own offices there and sent their own people there to run them.

QMRR: *For U.S.-based clients, is it necessary to travel to the European country where the research is being conducted to monitor the process?*

Etienne: The best way for U.S.-based clients is to work with one company in Europe who will centralize the job and keep in close contact with them. These people will be responsible for all the jobs done in the other countries. Traveling here is not the solution because it means

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going to each European company and explaining the same thing 10 times. We had a meeting in Paris for an American client with 10 other research companies from Europe and there were 20 or 30 people there. With all these people who have different languages, it's difficult to capture all the information in one visit. The larger companies have people in each of the countries who know the local situations and they can centralize the project and keep costs lower.

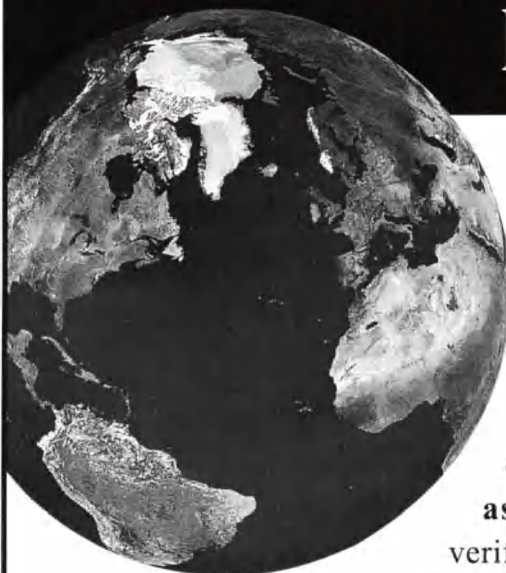
Da Rocha: If you are working on a strategic program, the launch of new products, or if you are thinking about a new positioning, I would say that it is necessary to come here in order to discuss the cultural differences and aspects and what we will need to respect as strong basic cultural differences and what we'll have to consider as formal differences. If it's just a test of packaging or advertising, then the American officials can stay at home.

QMRR: *Any general tips for U.S. marketers looking to conduct research or begin marketing in Europe?*

Da Rocha: I think they have to respect the phrase, "Think globally, act locally." If you want to launch a new product, it is legitimate to think of a launch in the five main markets [France, Italy, Spain, Germany, the U.K.]. Then you need to slightly adapt each launch to each local cultural context and competitive context. There are brands that are very strong on a local level and you must take them into account.

An American marketing manager needs to understand that Europe is involved in political constriction and all of the populations are divided between pro- and anti-European union. This fracture divides all the countries. These divisions have a deep implication on the attitudes of consumers toward certain products. For instance, certain brands are perceived as American, or as a global brand and product. I think there is room for local brands, strong products which will position themselves using their local roots. U.S. marketers must be aware of them when planning their marketing programs. [E]

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Keys to conducting international research:



Quality control will help lead to success

By Tom Pearson

Editor's note: Tom Pearson is managing director, MarketResponse International USA, Minneapolis. He can be reached at 612-943-2230.

Company strategies are adapting to a rapidly evolving world economic order. Instead of relying on domestic markets, managers are developing ideas and products which serve international and global markets. Increasingly, internationally-oriented companies are looking at their international brands with an eye on a single global philosophy. However, although the economic borders between countries are opening up, cultural and linguistic barriers remain intact. Taking those remaining differences into consideration, adjusted marketing strategies are often required.

International research agencies must look at the changes in the economic world order and recognize the far-reaching consequences involved in approaching and conducting marketing research overseas.

Quality control in international research studies

When conducting international research, there must be a strong quality control system in place to ensure superior results. In addition to the general control measures implemented on domestic studies, variables such as distance, timing, language and cultural differences need to be managed in order to maintain control of a project.

When working with data collection agencies in other countries, continuous contact and communication is necessary. It is important not to assume anything, as standards and acceptable levels of service are different and ever-changing worldwide. Field control measures must be implemented for everything from the design of update sheets and receipt of daily reports, to coding, data entry specifications and verification of interviews.

Agency selection

Agency selection is critical to ensuring research quality. It is important to take into consideration the nature and scope of the study when selecting an agency to work with. This begins by developing strong relationships with local suppliers from around the globe who maintain the highest reputations in their area. For each international project the choice of local supplier should be determined by the particular expertise required. And as a database is built of supplier experiences and relation-

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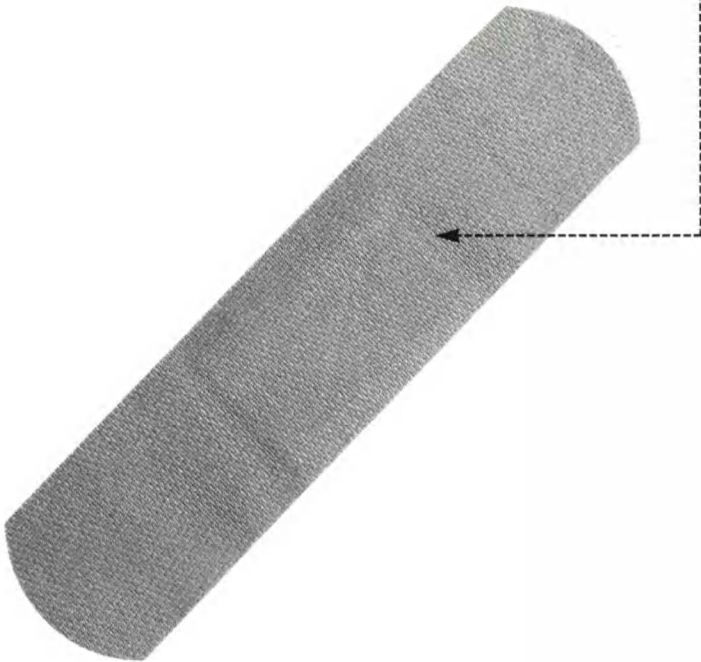
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ships throughout the world, a more effective match of special requirements of each study to local suppliers is achieved.

Interviewer briefings

A step to further ensure superior data collection is to have the international project director attend the interviewer briefings and take an active role in piloting the questionnaire and monitoring the first few interviews. This is an added expense, but it is worthwhile when conducting international research. Attendance and management of briefings is particularly important when dealing with complex questionnaires; it is critical that the interviewers thoroughly understand the mechanics and intent of the instrument.

Cultural and linguistic hurdles

In comparing measurements from one country to the next, there are cultural differences that must be taken into account. For example, in some countries respondents are more generous with their answers and tend to give higher scores. Interpretation of results across countries becomes more difficult and adjustments sometimes need to be made to overcome the cultural bias.

Linguistic differences can also impact the time it takes to complete a questionnaire. For example, a 20-minute interview in the U.S. may take closer to 30 minutes in Brazil.

Literal translations vs. intended content

The translation of survey instruments is not a straightforward process. Literal word-for-word translations can often lose their intended meaning. For example, “homemaker” might be translated to “a builder of homes.”

It is also important to keep in mind that some concepts may be difficult to translate because of cultural differences. In Saudi Arabia, for example, the English word “macho” does not exist, and there is not a similar word or phrase to support this concept.

Translation review

The local field agencies make the first translation of questionnaires from English into their local language.


Next, an experienced translation agency or native speaker in the U.S. reviews all translations of important documents. If you do not have your screener or questionnaire properly reviewed, you run the risk of changing the meaning of questions, losing interviewer directions, and maybe even losing a question or two.

Compiling and processing international data

Coding of open-ended questions in multi-language studies is an interactive process between each local agency and the central coordinator of the study. Once again language nuances need to be taken into consideration during this step in order to obtain accurate and useful information. Only in rare cases are all verbatim open-ended questions translated into English, mostly because of the cost of doing so, but also because of the possibility of misinterpretation out of the cultural context.

Once a study is successfully launched in the field, the next challenge comes in "repatriating" the data. In multinational studies it is sometimes necessary to implement different data collection methodologies; for example, in some countries CATI is preferred, but in others paper and pen is the norm. Creating questionnaire formats and a universal map file and ensuring all data is consistently entered and delivered requires experience, flexibility and extra planning.

Where do you begin?

With your international research project at hand, and quality control top of mind, you're ready to set foot in the global research arena. By carefully selecting your suppliers, monitoring the fieldwork, and understanding the cultural differences and nuances, your study will have some of the elements which can lead to success. The best advice for quality and consistency, however, is not to toss your study out to a variety of different suppliers with the expectation that there can be multiple managers. It's better to allow the final responsibility for the project to remain with a single, experienced international research agency. 

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Survey Monitor

continued from p. 8

the retail environment represents a different type of brand contact for the consumer," says Jim Lucas, director of planning and research at Frankel and head of the Critical Incidents study. "Not only are many choices made in the retail environment, but also it represents the end of a long process of trying to get customers to make a purchase. To get them that far, and to have a marginal or poor experience is truly neglecting important revenue opportunities."

The occurrence of critical/marginal incidents does vary across retailers and classes of trade, however. Interestingly, retailers where single big-ticket purchases are the norm, such as consumer electronics stores, had the highest levels of reported critical/marginal incidents, while more frequented stores, including mass merchandisers, department stores and bookstores, had the lowest

occurrence of these negative experiences. "Customers need and expect more from unfamiliar retail environments where they are not as knowledgeable about the products they are purchasing. Add this to higher priced items, and you'll have a higher degree of scrutiny," Lucas says.

The study suggests there is a financial basis for providing satisfactory shopping experiences. Thus, Lucas emphasizes the importance of both short-term and long-term "recovery strategies" to maintain customer loyalty — and to salvage sales in the process. For example, retailers can "make good" with customers by strengthening areas that shoppers view as controllable, such as slow service and bad customer service. In addition, by developing long-term, proactive strategies which address issues such as store environment, selection, etc., retailers will maintain a sense of retail trust and satisfaction with their clientele.

Frankel conducted the Critical

Incidents initiative to gain a better understanding of the importance of retail satisfaction as it relates to retention. The survey was mailed to randomly selected individual households between December 1, 1997 and January 5, 1998. For more information call 312-552-5000 or visit the company's Web site at www.frankel.com.

No time for breakfast

Breakfast is said to be the most important meal of the day, but it is the meal most often skipped by Americans (55 percent). It's also the easiest meal to prepare and the shortest one to eat: 38 percent of respondents to a TeleNation poll conducted for BSMG Worldwide said they spend five to 10 minutes eating breakfast; 33 percent take 10 to 20 minutes and 16 percent allot five minutes or less.

Cold cereal with milk is the food of choice for 40 percent of respondents; 14 percent dig into a plate of bacon and eggs; 8 percent eat bagels with butter or cream cheese; and 5 percent indulge in hot cereal. And 12 percent consider coffee and/or juice to be ample breakfast fuel.

Americans are too busy taking showers and getting dressed to spend too much time in the breakfast nook, it seems. Those are the activities both men and women said they spend the most time on in the morning. TeleNation is a national telephone survey conducted by Arlington Heights, Ill.-based Market Facts. For more information call 847-590-7000.

Environmental concern rises in good times

According to the Rutgers/ERA Packaging & The Environment Research Group Study, conducted by Environmental Research Associates, Princeton, N.J., more adults rate the environment as "extremely serious" than in years past — which is not surprising in a time of economic prosperity. On the other hand, fewer adults feel the environment is continuing to degrade. There is, however,

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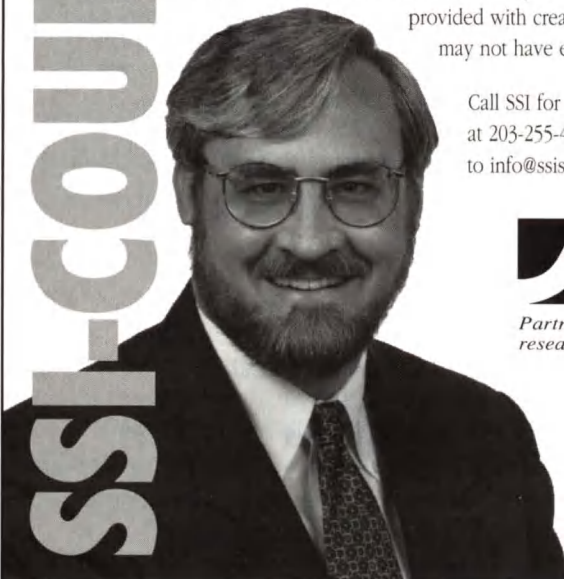
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increasing top-of-mind concern over global warming issues which is, presumably, in part due to increased political and media attention to these issues and the recent unusual weather patterns.

As seen in prior waves of this study, a small percentage of Americans consistently rate the environment as the single most important issue facing the country. However, the percentage of Americans who consider the environment an "extremely serious" issue has increased recently. 1997, a year of strong economic performance, saw the highest percentages of adults rating the environment as "extremely serious" (25 percent) in half a decade (both in wave nine and this wave), compared to 1992, when 22 percent of adults rated the environment as "extremely serious."

Pollution, most notably of air and water, continues to be the most pressing environmental issue. Another area of significant concern, however, is atmospheric change issues (e.g., global warming and ozone depletion). Once again, this is likely due to more extensive media coverage of these topics. These are rated as the next most pressing.

Packaging related issues such as waste disposal and natural resource depletion are relatively less important than top-of-mind environmental issues to Americans.

Attitudes regarding the direction of the quality of the environment are also changing. There appears to be a recent trending of these attitudes back towards those reminiscent of 1993 and 1994. A plurality of adults (nearly four in 10) rate the quality of the environment as "staying the same." However, among those who do see changes, more see the environment getting worse than see it getting better.

Litter is a significant issue to many adults. When asked about the amount of litter in their community compared with three years ago, close to four in 10 adults report there is less. Bottles and cans are the types of litter most commonly reported by adults. Fast-food containers and various types of paper litter are also commonly

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reported. According to respondents, litter is most commonly seen in cities. Adults report seeing litter most on city freeways or highways, in city business districts and city residential streets.

Trash dumped or washed into waterways and oceans is seen as the most common source of litter in respondents' communities. Motorists and pedestrians, specifically, are rated as significant sources of litter.

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For the most part, teenagers and young adults are blamed for littering. Apathy and laziness are considered the prime culprits behind littering by adults. Being too lazy to discard trash is considered the primary reason people litter, by a wide margin. People being "too busy to find a trash receptacle" and travelers or visitors who don't care about a community that is not their own are also noted as reasons for litter.

When asked directly about their own littering, being lazy is also the most common reason given. However, a significant portion of adults (four in 10) claim they have never littered and so did not provide a reason for ever doing so.

Adults clearly consider not littering an individual responsibility. The vast majority of adults feel that people who improperly discard materials that become litter are more responsible for litter in the community than manufacturers of the products and packaging that become litter. Similarly, adults feel, for the most part, that individuals are responsible for paying for litter cleanup rather than the government or manufacturers.

Adults consider clean-up programs such as "Adopt-a-Highway" the most effective approaches to reducing litter. Educational programs are also considered "extremely effective" by a significant portion of adults. Higher fines are considered "extremely effective" by a significant portion as well, but this same approach is deemed not effective by even more adults.

Much of the clean-up effort today seems to be related to children. Volunteer programs through schools and Scouts, for example, or households with children are seen as the most likely to volunteer for clean-up programs. Adults feel that educational programs should be aimed at children to influence their parents and anti-littering messages should stress the benefits to children of a cleaner community.

Messages which were considered effective overall, but less so, include: encouraging people to take pride in their community; communicating

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that fish and wildlife are harmed by litter; and that people who litter will be heavily fined. Adults were generally not particularly receptive to messages involving a celebrity in an anti-littering campaign.

Nearly half of respondents report they remember seeing, in the past year, an advertisement or commercial asking people to stop other people from littering. Residents of the South Central and South Atlantic regions are most likely to recall such peer pressure oriented ad campaigns.

Nearly as many adults, four in 10, report that in the past year they have asked someone they saw littering to stop. Adults with children in the household are especially likely to report having used peer pressure to try and stop people from littering.

Most adults feel that people are negatively impacted by litter in the places where they live and work. A strong majority agree that employees prefer to work in areas without litter problems and residents prefer to leave areas with litter problems. Fewer respondents, but more than half, agree that employers prefer to leave areas where litter is a problem and that criminals are attracted to such areas.

Volunteering for a litter clean-up program is relatively common, according to respondents. One-quarter report that they, or some other member of their household, has participated in a volunteer litter clean-up program in the past year. Again, children seem to play a large role. Adults with children in the household, along with environmental activists and more affluent adults are most likely to report participation in such programs.

According to respondents, arms of the government such as a municipality or a school most commonly organize litter clean-up programs. However, such diverse organizations as volunteer organizations, religious groups, and businesses, are reported as sponsoring these programs too.

Donating money and time to environmental, conservation, and wildlife groups is relatively common among Americans, according to respondents. Four out of 10 adults report making monetary contributions to such groups

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and close to one-fifth report volunteering their time. These findings are consistent with prior waves of this study. For more information call 609-683-4035.

Men seek diversity, women seek improved fitness from sports

The name of the game is diversity. When it comes to the most popular sports for men, they have an array of interests. The most recent study by the Sporting Goods Manufacturers Association (SGMA), North Palm Beach, Fla., indicates that men are equally interested in team sports, leisure pursuits, and fitness activities.

Women of the '90s are attuned to fitness and sports. Six of the top 10 activities for women are fitness-related.

This information has been abstracted from study conducted by American Sports Data, Inc. This annual study tracks participation in

Most Popular Sports for Men Based on "Frequent" Participation (Age 6 and older)

Activity	1997 (000)
1. Basketball (25+ days)	14,853
2. Free Weights (100+ days)	8,387
3. Billiards/Pool (25+ days)	6,842
4. Fishing (Except Fly Fishing) (25+ days)	6,572
5. Baseball (Hardball) (25+ days)	6,436
6. Golf (25+ days)	5,764
7. Soccer (25+ days)	5,680
8. Running/Jogging (100+ days)	4,991
9. Fitness Walking (100+ days)	4,772
10. Bowling (25+ days)	4,639

Most Popular Sports for Women Based on "Frequent" Participation (Age 6 and older)

Activity	1997 (000)
1. Fitness Walking (100+ days/year)	10,030
2. Basketball (25+ days/year)	5,198
3. Exercise to Music (100+ days/year)	4,676
4. Treadmill (100+ days/year)	4,556
5. Free Weights (100+ days/year)	4,410
6. Stationary Bike (100+ days/year)	3,644
7. Bowling (25+ days/year)	3,401
8. Running/Jogging (100+ days/year)	3,141
9. Volleyball (Hard surface/grass) (25+ days/year)	3,050
10. Soccer (25+ days/year)	2,822



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Promotions scared off new fast-food customers

Meal Monitor, a food service monitoring program of Consumer Aptitudes, Inc., a Glencoe, Ill., research firm, has revealed that McDonald's recent Beanie Babies promotion both attracted and scared off new customers at the same time. The Meal Monitor service reported that sales at McDonald's increased approximately 70 percent during the first two weeks of a recent Beanie Babies promotion, and that the chain was able to maintain its core group of regular customers while simultaneously attracting infrequent patrons. A full one-third of customers during the promotional period were not regular McDonald's visitors.

However, according to Consumer Aptitudes, the promotion also prompted negative reactions from some customers, possibly compromising its success. "There is no doubt that the Beanie Baby promotion was unprecedented in its ability to drive short-term volume," says Paul Weaver, Consumer Aptitudes vice president. "But once the promotion ended, the new customers did not return to McDonald's."

Meal Monitor data showed that consumer ratings for order and wait times, overall satisfaction and meal value declined during the promotional period. Weaver explained that the crowds were a double-edged sword, accounting for dramatic sales growth, but also causing customers to develop negative opinions of McDonald's.

"Restaurants have very few opportunities to bring infrequent customers through their doors," says Rich Maturo, president of Consumer Aptitudes. "Once they do, it's imperative that they find a way to entice these individuals to return. There is no doubt that the Beanie Baby pro-

motion attracted non-regular customers, but McDonald's failed to give them a reason to return."

Maturo notes that McDonald's did not use the opportunity to accompany its Beanie Baby promotion with menu promotions targeted to its infrequent customers. "Our data show that the non-regular customer tends to be more health-conscious," he says. "McDonald's could have

pushed its healthy menu items, like salads and broiled chicken sandwiches, to encourage these customers to come back after the Beanie Baby promotion was finished."

Data collected by the Meal Monitor service is interpreted by Consumer Aptitudes for its clients to provide them with insight on individual consumer purchase behavior on a restaurant and menu item level. This

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information is used to develop and track marketing and promotion strategies, to plan menu items and evaluate new product introductions. The data on McDonald's Beanie Baby promotion was gathered as part of a study for another client. For more information call 847-835-9515.

Internet users make demanding customers for credit services

While Internet users represent a large market for credit (mortgages, auto loans, and credit cards), they can also be demanding customers, according to new data reported by Cybercitizen Finance and released by New York-based Cyber Dialogue in conjunction with Booz-Allen & Hamilton. Cybercitizen Finance identifies 4.6 million Internet users — "cybercitizens" — that have already applied for at least one loan product on-line, and 11.9 million Internet users that intend to apply for some

type of credit on-line within the next 12 months.

Cybercitizens are less loyal to their present bank than their off-line counterparts. Only 43 percent of cybercitizens interested in a mortgage believe that choosing their existing bank is an important consideration. "You can imagine the opportunities for non-traditional brands to compete for customers," says Mark Esiri, CEO of Cyber Dialogue.

The Internet provides fantastic opportunities for consumers to comparison shop for financial services. "Thirty-nine percent of cybercitizens that have purchased a home in the past 12 months used the Internet to compare rates," Esiri says. "Financial institutions must compete on more than price — interacting with customers and building a trusted brand should be one of the key elements of every organization's marketing strategy."

Credit cards provide an additional arena for both traditional and non-traditional institutions to compete for Internet users. Already, more than 3.7

million cybercitizens have applied for a credit card on-line. As they do with loans, cybercitizens are often looking for the best credit card deals — 44 percent of cybercitizens who use a credit card at least once per month have acquired a card in order to lower their interest rate or yearly fees, versus 33 percent of comparable non-cybercitizens. Cybercitizen Finance recommends that credit card issuers select affinity groups to whom they can market credit cards and cross-sell investment products and services. "Cybercitizens with credit cards are much more likely to be interested in on-line stock trading and investment advice," Esiri says.

Cybercitizen Finance is based on in-depth interviews with 1,000 Internet users and 500 non-users. Respondents were asked about their on-line and off-line financial services usage. The survey was fielded in the second quarter of 1998 and data is accurate within ± 3.1 percent at the 95 percent confidence level. For more information call Dana Simmons at 800-965-4636.

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Product & Service Update

continued from p. 10

Euromonitor offers Web site directory

Euromonitor is now offering its World Directory of Business Information Websites, which provides Internet addresses to sites specifically selected for their usefulness to the business researcher. The directory contains addresses of companies and organizations that provide a substantial part of or all of their information to Web site visitors free of charge. The directory lists thousands of trade associations, trade magazines, government departments, private research bodies, stockbrokers, stock exchanges and many others in the consumer, industrial and agricultural sectors in 94 countries. All entries contain the name and details of the organization, including e-mail and Web address as well as a descriptive paragraph. Users can also

access the directory on-line via Euromonitor Web site at www.euromonitor.com, where hyperlinks to the Web sites listed have been set up. For more information on costs, visit the company's Web site or call 800-577-EURO.

Analyze marketing campaigns with ROIit! 98

MarketWare Technologies, Inc., Chicago, has released ROIit! 98, a software product for marketers to utilize in forecasting and evaluating their future and past marketing campaigns. A marketing campaign could be a trade show, a print ad, a direct mail program or other marketing activities. ROIit! 98 analyzes up to 10 different campaigns including the Internet. MarketWare Technologies, Inc. plans to market the product worldwide using direct distribution on its Web site at www.marketware-tech.com. Pricing on the software starts at US\$129. The product is also available by calling 1-888-ROI-

WARE or 773-388-1750. ROIit! 98 runs on Windows 98, 95 or NT operating systems.

DMS adds AOL omnibus

Digital Marketing Services, Inc. (DMS), Dallas, has launched its Opinion Place Omnibus Surveys on America Online, which offers on-line surveys that combine the questions of several marketers into a single survey answered by a national sample of 1,000 randomly selected AOL members. Surveys are conducted Thursday through Sunday. DMS separates each marketer's results and delivers the information within 24 hours of completing the survey. For more information call 972-874-5080.

New version of WinCross debuts

The Analytical Group, Inc., Scottsdale, Ariz., has released version 2.5 of its WinCross crosstab software. New features include added

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New research software from StatSoft

StatSoft, Inc., Tulsa, Okla., has introduced STATISTICA Power Analysis, a research tool for analyzing all aspects of statistical power and sample size calculation. The product calculates confidence intervals for a number of statistical quantities such as standardized effect

size, the correlation coefficient, the squared multiple correlation, the sample proportion, and the difference between proportions. In addition, besides the wide range of distributions available in the probability calculator in all modules of STATISTICA, STATISTICA Power Analysis offers a number of specialized non-central distribution calculator functions that are useful in performing power calculations. For more information visit the StatSoft Web site at www.statsoft.com or call 918-749-1119.

CRS adds e-mail module to The Survey System

Petaluma, Calif.-based Creative Research Systems has released a new E-mail Module for The Survey System, the company's survey analysis package for PCs. The E-mail Module allows users to send out questionnaires via e-mail and receive e-mail replies in an immediately analyzable form.

The module incorporates two main features: it will only accept replies from people on the address list, thus prohibiting "pass along" questionnaires, which can invalidate the sample; and it will only accept one reply from each address, thus preventing "ballot stuffing" which can be a major problem in electronic surveys.

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Saja updates two Survey Select products

Saja Software, Longmont, Colo., is now offering 2.0 releases of its Survey Select and Survey Select Web/E-mail Module. Survey Select 2.0 allows users to design, administer and analyze surveys via floppy disk, network, hard copy of PC. The Survey Select Web/E-mail Module 2.0 integrates with Survey Select to allow users to conduct surveys on either Web sites or via e-mail. New features of Survey Select 2.0 include the addition of a ranking scale, the ability to skip or branch questions on electronic surveys, the ability to archive a customized scale to the database, and capabilities to create customized instructions for electronic surveys. The new version also allows users to add answers that do not count in data analysis (e.g., N/A, no opinion), delete archived questions and use search/replace and cut and paste functions. New features on Survey Select Web/E-mail Module 2.0 allow users to interface electronic surveys to with more e-mail systems, including Lotus Notes, CC Mail, Groupwise, and all MAPI and POP compliant systems. In addition, a new E-List feature allows users to monitor the progress of surveys on a regular basis. It also allows for e-mail reminders to be sent to encourage more survey responses, or to thank respondents for their participation. A free, self-running demo and/or interactive trial version of Survey Select 2.0 is available at the Saja Software Web site at www.surveysystem.com. Or for more information call 800-945-0040.

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in a specially created library. The LEXIS-NEXIS Web site has an enhanced Year 2000 section with a wealth of information about Y2K issues. It features links to news articles and to other Y2K Web sites. The site helps customers to easily identify the right LEXIS-NEXIS research software for their computing environment and includes demonstrations and tutorials. For more information visit the company's Web site at www.lexis-nexis.com.

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Data Use

continued from p. 18

the null hypothesis is true. If we can expect to get data which produces t values as extreme as ours infrequently if the null hypothesis is true, we reject our assumption of the null hypothesis in favor of the alternative hypothesis.

Common values for the probability of obtaining the data before we reject the null hypothesis are 5 percent or 10 percent. This number is called alpha α ; it represents what is called the type I error rate, the probability of rejecting the null hypothesis when it is true.

If we reject our null hypothesis about products A and B at an alpha of .05, it tells us that, if the null hypothesis is true, we would get a statistic (t in our example) as large or larger only 5 percent of the time.

There are a great many things that it does not tell us, the most frequently mistaken conclusion being:

"There is a 95 percent chance that the products are different."

The prevalence of this misinterpretation can be seen in the use of the phrases "95 percent confidence level," and "90 percent confidence level" rather than "alpha of .05" or "alpha of .10." The conclusion we reach is based upon the probability of getting data like ours if the null hypothesis is true, it is not based on the probability of the null hypothesis being true. This is a crucial distinction. Since our real concern is whether the products differ, it is convenient to

assume that this is what the test tells us, but the probability of the products being different is unknowable under most circumstances. From Bayes' Theorem we know that the probability of the two products being different given our data is:

$$\frac{p(\text{data given the alternative hypothesis}) \cdot p(\text{alternative hypothesis})}{p(\text{data given the alternative hypothesis}) \cdot p(\text{alternative hypothesis}) + p(\text{data given the null hypothesis}) \cdot p(\text{null hypothesis})}$$

All these are unknown to us. While we might be able to estimate reasonable values for the probability of the null hypothesis and alternative hypothesis, knowing the probability of the data given the alternative hypothesis requires knowing the "real" difference in product means. If we knew that, there would be no reason to do the statistical test! Under normal circumstances, there is no way of knowing the probability of products being different based on the analysis of experimental data. Any phrasing of the analysis of experimental results that states or implies that there is a certain probability of the products being the same or different is completely inaccurate. If we find two means different at the "95 percent confidence level," we are 95 percent confident that, if the null hypothesis is true, we would not have obtained a difference as large or larger than we obtained. We are not 95 percent confident that the products differ.

Another common misinterpretation of the results of a statistical test is that they tell us that:

"The differences are "real," or the findings are "valid."



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The finding of statistical significance does not tell us that the differences we observed are "real." We may choose to treat them as real if we find them to be statistically significant, but that is not what is being tested. No matter what the results of a test, there may or may not be a difference, and the difference we observe may or may not accurately reflect the size of that difference. It is important to remember that the means and the differences between means we observe are our best guess of the population means and differences, regardless of the results of any significance testing. If we observe a mean purchase intent of 3.86, 3.86 is our best guess of the population purchase intent, although we realize that the actual value is probably different. Finding that the 3.86 is significantly different from another value does not tell us that the 3.86 is correct, and finding that it is not significantly different does not tell us it is incorrect. The precision of our numbers is not directly addressed by the significance testing.

Another common misinterpretation is that:

"Failure to achieve significance shows that the means are the same."

The observed sample statistics are our best guess of the population parameters. If we find a difference, our best guess is that there is a difference, even if that difference is not significant. Failure to find that a difference is significant may mean that we do not treat the difference as "real," but it does not tell us that there is no difference.

The p values we calculate in reaching a decision about

the null hypothesis are not particularly useful in drawing other conclusions. In particular, it is not true that:

"Smaller p values indicate larger differences."

In testing means, the sample size, variability, and absolute difference in means enter into the calculations. If we hold all else constant, increasing the size of a difference will ultimately lower p value when we check our test statistic, but since other factors enter in as well, the p value should not be used as a measure of the size of the difference.

An example of this misapplication can be seen in a situation where our product was compared to a competitor's product on a series of dimensions, each dimension measured by a question. It would be possible to statistically test the differences in means on each question, and calculate p values for each comparison. It would not be correct to say that our greatest superiority is on those dimensions where we have higher means with the smallest p values, and that we have less superiority on those dimensions with larger p values. While the sizes of the differences do enter into the calculations, larger p values may also be due to more variability in responding to a question (either due to differing understanding of the question or differing expectations of respondents), or they could be caused by reduced sample size, with a larger number of respondents failing to answer a question due to a failure to understand it or a belief that the question did not apply to them.

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vides a threshold that keeps us from being constantly buffeted around by chance variation due to sampling. We realize that a difference we observe may be due to sampling, and that the populations may not really differ. By looking for statistical significance, we are assuring that some threshold has been reached before we act.


We should not mindlessly apply the testing, but adjust it according to the consequences of the actions we may take. If we will use the results of a study to implement a costly change, we should set our threshold high; an alpha of .01 may be appropriate, to reduce the chance of incorrectly rejecting a false null hypothesis. If the gains to be made are large, we may want to set our alpha relatively low, .1 or more, to reduce the chance of failing to reject a false null hypothesis. We should consider the consequences of the types of errors and set our criterion appropriately.

When the results of testing are irrelevant, we should not test. The results will just confuse us. Suppose we are testing 10 potential new product formulations, with the goal of selecting the best three for further development. Assuming there are no cost differences, etc., whether the third-best is significantly better than the fourth-best is irrelevant. Failure to find statistical significance does not tell us that the third-best is no better than the fourth-best, and should not be used as a reason to choose anything other than the three best-performing formulations.

We should use alternatives to statistical testing when they more directly address our concerns. If we are inter-

ested in the precision of our numbers, how close our 3.86 is to the true population purchase intent, we should calculate confidence intervals. The results will tell us that a certain percentage of the time, the true value will be in a given range. For example, that 95 percent of the time the population mean will be in the range 3.66 to 4.06.

If our concern is whether a difference is "meaningful," a measure of association such as eta-squared (η^2) is appropriate. These statistics tell us what proportion of the total variance is explained by our manipulation. For example, if we obtained a value of .37 in a test of purchase intent for two products, it tells us that 37 percent of variability in purchase intent can be explained by which product was being evaluated. This is quite large. On the other hand, if we obtained a value of .01, it tells us that only 1 percent of variability in purchase intent can be explained by which product is being tested. Large sample sizes make it quite possible to achieve statistical significance with eta-squared values this low or lower.

Statistical testing has its place in marketing research, but its proper role is smaller than the role it currently plays. The somewhat convoluted logic of null hypothesis testing fails to provide answers to the questions which interest researchers the most. Failure to understand what these tests really tell us can lead to incorrect and perhaps costly errors in decision making, and can keep us from using the statistics which might provide more meaningful interpretations of our results. 

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Farmers

continued from p. 21

response.

The key was to use a combination of research techniques. Initially, secondary research was conducted in order to decide where to sample. Government statistics on area and yields of corn by geographical region allowed us to home in on the major corn areas at a regent level (equivalent to a group of counties in the U.S.).

A combination of secondary research and trade interviews then allowed us to adapt a U.S.-formulated questionnaire to the local situation. Common English names for diseases and pests had to be translated into their Latin equivalent and then into Bahasa to preserve their meaning. This ensured that there was no disparity between languages whatsoever, as interpretation of the common English name in most cases would not have specified the correct disease. Latin acts as the best medium, for instance:

English

Southern Corn Leaf blight

Latin

Heminthosprium maydis

Bahasa

Bercak daun

The key to doing a good agricultural survey is to have a questionnaire that encompasses every eventuality likely to occur in the field, yet still have the flexibility to adapt the survey tool to the local situation when the interview is in process.

Well-researched questionnaires and good interviewer briefings are critical. This particular questionnaire spent eight weeks in development with back translations (English into Bahasa and then back into English independently), consultations with in-country agricultural experts and questionnaire drafting in Indonesia, Hong Kong and the U.S.

Thorny point

In many ways it was realized that once in the field, the number of widely dispersed interviews would not allow any to be called back or repeated. One thorny point was the concept of area and application, i.e., applica-

tion of seed, fertilizer and agrichemicals per unit area. Corn yield also fell into this category.

Basically, there was no specific formulation in the questionnaire that could encompass these concepts. Only through a rigorous series of interviewer briefings could we relay the importance of trying to communicate area and how it relates to application rates. In many cases we ended up with bags per batu rather than pounds per acre!

In total, five areas and 10 regions were chosen that spanned an area the

size of the European Community. Due to the fact that local dialects were necessary to communicate effectively with the respondent farmers, local agricultural students teamed up with regular interviewers and field controllers. These people knew the local agricultural situation and interviews were conducted in more than five dialects. Local farmers were also less likely to be hostile and more open to discussing the research more freely.

In this case, the qualitative phase of research ran alongside the quantitative

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survey. This was necessary to color in the whole picture and provide an understanding of the underlying factors affecting each farmer in his decision-making process.

Each quantitative section had a qualitative side to it. For instance the farmer may have had an incidence of leaf blight, but why was it this bad? Could he have applied the seed at a

high rate? Why? In each case the reasons could easily fall under one of the five categories stated previously.

It would have been easier to have run the survey and analyzed the results without doing the qualitative, trade interviews and secondary research. However that would have only given half the picture.

For instance, in one area farmers plant two seeds in one planting hole — a practice born out of tradition and low germination levels in local soil. On the quantitative side, when the tables are run it looked as if the seed application rate was double and they are growing twice the density of corn plants. This, of course, was not the case.

In addition, there was not one question that encompassed the level of importance of the village chief and neighboring farmers on product choice. This was only expressed by qualitative coverage at a local level.

Understood in context

In analyzing the quantitative data it became clear that the data could only be understood in the context of each qualitative account of the local situation. We were fortunate in selecting 10 areas that reflected very different situations with respect to the five categories. They ranged from dry areas with a poor socioeconomy to irrigated, large corn farms run as true commercial enterprises.

The complexity of the data itself was also immense, with multiple crops of different brands of corn. Different times of planting and multiple plantings likewise overlap with harvesting! This was coupled with yield and application rates in numerous local units.

In many ways the survey brought to light how complex each local situation was in terms of molding the farmers' usage, attitudes and decision making. The client was also surprised at just how much information there was. More importantly, the client now understood the Indonesian customer more easily, focusing on the real underlying processes applicable to each farmer, and the unique relationship he has with his crop and brand selection. (4)

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Insider's guide

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cultural thing."

The U.S. manager now working in a culturally unfamiliar environment can get bamboozled by these types of comments, but shouldn't be fooled. The best business approach is to always expect top-quality research. In fact, in many developing countries, it is often easier to conduct accurate research than in the West because:

- Populations are generally under-researched, so there is little respondent fatigue. Response rates for door-to-door research often exceed 90 percent.

- Interviewers are relatively cheap and plentiful, so there are few problems getting large numbers of interviews conducted quickly and inexpensively.

- Highly structured local cultures or long-standing bureaucracies provide a great information source for identifying specific types of respondents. In fact, it may be easier to draw a good probability sample in some developing countries than in Western nations where privacy is a growing issue.

Start with a solid design

When designing and executing any research project, the key to success is to allow time for solid design and set up. For research in developing countries this means:

Step 1: Gather basic background information on the market.

Find out about population size, geographic spread, telephone penetration, income per capita, life expectancy, the government, urban-rural split. All of this information is easily available through secondary resources, back issues of research magazines or local libraries. With this basic data in hand, a researcher will be able to frame the study accurately and come across in the local country as knowledgeable and interested.

Step 2: Identify your target group.

The best definition of a respondent

group is one based on behavior rather than the demographic/socio-economic measures used in the developed markets. For example, the equivalent in socioeconomic terms of someone with \$50,000-\$75,000 income in the U.S. might be a person in the developing world who owns a washing machine, stove, and television.

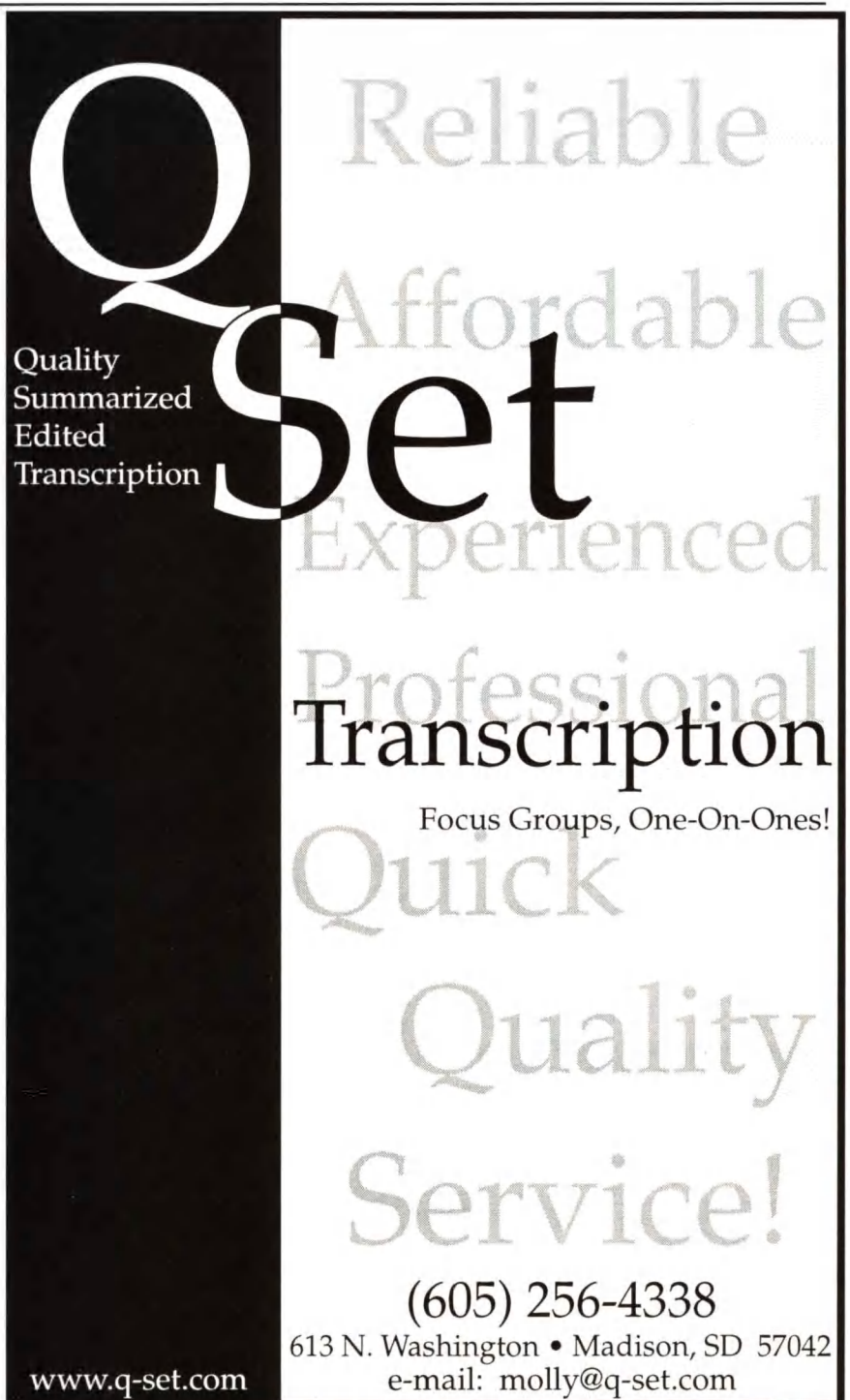
Step 3: Determine the ideal methodology.

Depending on the business issue

being investigated, this could be anything from door-to-door interviews to mail surveys to focus groups. However, some of the usual methodologies used in the West, such as mall intercept interviews, may not work in markets where there are few malls.

Step 4: Compare the ideal methodology to local conditions and tailor it as needed.

The lucky researcher will not need to modify the study design at all.



The advertisement features a large, stylized 'Q' on the left side, with the text 'Quality Summarized Edited Transcription' stacked vertically to its right. The word 'Set' is written in a large, bold, serif font, overlapping the 'Q'. To the right of 'Set', the word 'Transcription' is written in a large, bold, serif font. Below 'Transcription', the text 'Focus Groups, One-On-Ones!' is written in a smaller, bold, sans-serif font. The background of the advertisement is white, with various words in a light gray, serif font scattered across it, including 'Reliable', 'Affordable', 'Experienced', 'Professional', 'Quick', 'Quality', and 'Service!'. At the bottom of the advertisement, the phone number '(605) 256-4338' is written in a bold, sans-serif font, followed by the address '613 N. Washington • Madison, SD 57042' and the email address 'e-mail: molly@q-set.com'. The website 'www.q-set.com' is written in a bold, sans-serif font at the bottom left of the advertisement.

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However, in most cases some changes will have to be made to accommodate local conditions. For example, in the developing world, mall intercept-type interviews can be conducted instead at bus depots. Methodological fine-tuning often occurs within multi-country studies where comparisons need to be made between markets. The most accurate worldwide view will come if you can keep the study design as standard as possible between Western and developing markets.

Build a local relationship

Once the design is laid out, the best way to conduct a successful study is to select and stay in constant contact with a local partner in the developing country. If possible, go and visit. There is nothing as good as walking around with local interviewers, visiting the areas where customers live and work, to get an understanding of the local research environment. Second best is to call, but be aware that the cost of outgoing calls from developing markets can be much higher than in the U.S. and can be a higher proportion of study costs in markets where labor is extremely cheap. I recall one supplier in India frequently complaining about the cost of faxing daily

progress reports. Also, understand that it may take several calls to get through to your local supplier, as connections can be slow in Azerbaijan.

Finally, bear in mind that many local suppliers in developing countries are top professionals, so U.S. researchers should try not to come across as the "Western expert." As in any business relationship, local researchers like talking to colleagues and sharing experiences, so use this natural inclination to build rapport and relationships to help get things done.

Create the best questionnaire

Again, the best approach is to write the most accurate questionnaire possible, then check its design and wording against local cultural conditions. Most designs and questions translate well from one language to another. Even complex conjoint designs have been conducted in fairly primitive markets. However, there are certain hazards to be aware of.

• Scales: Scales are probably the biggest discussion point in any international study, both in their use and in their interpretation. Verbal scales can cause problems as there is little or no difference between "excellent" and "very good" in some languages.

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Numeric scales are probably better to use, with some written description at each extreme such as "most likely" and "least likely." I personally favor 11-point scales from 0-10 as almost all schoolchildren are marked on this scale from Wuhan to Washington.

- Sensitive questions: Income is a sensitive question anywhere, but particularly so in countries where a lot of the money changes hands at a "gray" (i.e., bribery) level and where governments are intrusive. Respondents may be afraid of answering or will simply lie. Most countries have some adapted system of determining social class and it is probably best to use this. If you are particularly interested in income then you can ask, but consider supplementing those responses with questions on expenditure and ownership of household items.

- Lifestyle issues: In politically repressive countries beware of asking "lifestyle" questions that border on the political. Do not simply delete these questions, but work with the local research firm to get as close to the intended meaning as possible without causing offense.

- Translations: Once the questionnaire has been translated, get it back-translated, i.e., from the local language back into English. This is an important quality control step and helps prevent any sloppiness on the part of local suppliers. Beware of words that mean similar things even in English, such as "masculine" and "macho." There may be no way of differentiating them in the local language. If the back-translation disagrees with that of the original, be careful. The local language may have changed and new words may have developed. The local research firm should help explain any discrepancies.

Fieldwork and analysis

Having selected the ideal respondents, methodology, and questionnaire and tailored them to local conditions, the fieldwork and analysis now needs to be done. Here, standard

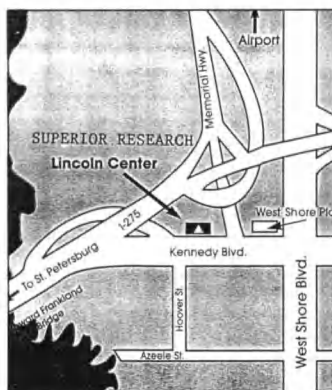
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research rules and quality control procedures apply. If the local supplier has been selected well, you should be dealing with someone who knows research and can speak to you "in

your own language" should trouble arise.

One concern that can be infuriating when doing quantitative research is data processing incompatibility. Check what DP system each supplier uses up front and do a dummy data transfer using the first few questionnaires. This simple systems test helps avoid annoying time delays at the end of a study.

The main problem usually experienced during the analysis has to do with responses to scales. Each culture answers scales differently. The Southern Chinese are far less generous than the Filipinos when rating any product or advertising. In addition, different groups within a single country can answer scales differently. Frequent travelers among Thailand's upper class may respond to scales differently than their lower-class compatriots. In fact, they may respond more like frequent travelers from the U.S. than like any other group in their home culture.

There are several different ways of standardizing such divergent data, such as weighting responses or adjusting the scales up or down for a given market. International research companies often keep databases of results for the purpose of adjusting

scales, but the key is to be aware of the problem in the first place when reporting results.

Troubleshooting

Examples of the more obvious research problems that occur in developing countries include:

— Inappropriate data collection method: In a market with 15 percent telephone penetration, you would not consider a telephone survey of the general population. Door-to-door interviews would be more productive. However, if your audience is upscale consumers or businesspeople, then a telephone survey may still be appropriate.

— Wrong sample design: Doing a nationally representative survey may be inappropriate. If all the wealth and 80 percent of your client's sales are in the top three cities, then stick to those locations. For example, trying to do a nationally representative study in China would be very costly and take forever. There are over one billion people to represent and most of them have little or no money. Research must be tailored according to local realities.

— Unreasonable quotas: If your study requires quotas for each decile up to age 65, but life expectancy in the market is only to age 50, you will have problems. Quotas need to be adjusted to match local demographic profiles.

It can be done

Overall, conducting insightful market research in developing countries is not that difficult to do. With some knowledge of the local culture, a good relationship with a reliable supplier, and some forethought regarding possible pitfalls, it can be done. By using an international market research firm, U.S. managers can shorten the learning curve and get data from a developing market more quickly and effectively. But the ultimate keys to success are an inquiring mind and adherence to the pragmatic rule "make no assumptions." (4)



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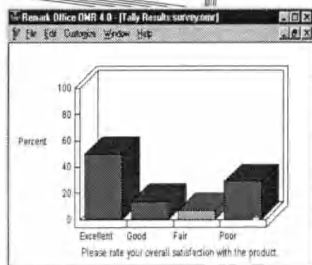
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Research Industry News

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acquired **AFFINA**, a Troy, Mich., research firm. Ruppman's board of directors has voted to adopt AFFINA as the company's new name, with the full transition accomplished by 1999.

J.D. Power & Associates, an Agoura Hills, Calif., research firm, has launched a proprietary customer satisfaction research study of the recreation vehicle (RV) industry. The research, endorsed by RV industry associations, will provide an overview of RV consumer satisfaction by quality of vehicle, dealership and campground experiences.

Under a new agreement, **Ceres Integrated Solutions**, Raleigh, N.C., will incorporate SPSS Components from SPSS Inc., Chicago, to provide the analytical basis of the automated modeling module within the Ceres Intelligent Operational Systems for Targeted Marketing and Merchandising.

CulturalAccessWorldwide, Arlington, Va., has formed a joint venture to create a consumer panel to measure Hispanic consumer purchase behavior. The service is being tested in 800 Los Angeles households and will track 120 product categories.

Market Facts, Arlington Heights, Ill., has acquired **Product Intelligence Inc.**, a Rockville Centre, N.Y., firm that operates a national network of consumer interviewing stations in 35 markets under the name Interactive Opinion Network. Terms were not disclosed. Product Intelligence will operate as a subsidiary of Market Facts under the direction of its current management team.

tk associates of Minneapolis,

Inc., and **N.K. Friedrichs & Associates**, Hamel, Minn., have merged to create a new research firm, **The Market Solutions Group, Inc.** The firm's address is 2500 Centre Village, 431 South 7th St., Minneapolis, Minn., 55415. Phone 612-333-5400. Fax 612-344-1408.

SOFRES Intersearch and **Chilton Research Services** has launched its new identity as **Taylor Nelson Sofres Intersearch** (TNS Intersearch). SOFRES Intersearch was acquired in February 1997 by the French-based SOFRES Group and in late 1997, SOFRES merged with U.K.-based Taylor Nelson AGB. In May 1998, SOFRES Intersearch announced acquisition of Chilton Research Services.

Clearwater Research, Boise, Idaho, has reached an agreement with **Sawtooth Technologies, Inc.** (STI), an Evanston, Ill., designer of CATI systems, to work with STI as its primary testing facility and provide programming resources for future software development. In addition, Clearwater has joined its two data collection centers in Idaho through a wide-area network.

Savitz Researcher Center, Dallas, has reorganized its operations into two distinct companies. The current Savitz companies providing customized primary research and strategic counsel will be consolidated as Savitz Research Solutions. Field research activities and focus group facilities will operate as Savitz Field & Focus.

The Marketing Research Association (MRA), the European Society of Opinion and Marketing Research, and the University of Georgia Center for Continuing Education have signed an agreement in principle to form a worldwide education alliance. The alliance will introduce an education

program, the Principles of Marketing Research, which is designed to give researchers working in marketing research companies and client companies easy access to a program teaching the core body of knowledge of marketing research through 10 study modules. For more information call 860-257-4008 or visit the MRA Web site at www.mra-net.org.

Arbitron NewMedia, New York, has acquired a majority stake in Northstar Interactive, an Internet research firm.



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Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 612-854-5101. Fax 612-854-8191.

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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

Alabama

Birmingham

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: birmingham@consumerpulse.com
 www.consumerpulse.com
 Connie Glass, Director
 Income: H-30% M-50% L-20%
 Stations: 8 C K P O

Facts

Div. of Graham and Associates, Inc.
 Century Plaza
 7580 Century Plaza, Ste. 266
 Birmingham, AL 35210
 Ph. 205-985-3099
 Fax 205-985-3066
 Becky South, Supervisor
 Income: H-20% M-50% L-30%
 Stations: 6 C K P O
 (See advertisement on p. 83)

Gadsden

Facts

Div. of Graham and Associates, Inc.
 Gadsden Mall
 1001 Rainbow Dr.
 Gadsden, AL 35901
 Ph. 205-985-3099
 Fax 205-985-3066
 Cora Wilson, Supervisor
 Income: H-25% M-50% L-25%
 Stations: 5 C K
 (See advertisement on p. 83)

Huntsville

Facts

Div. of Graham and Associates, Inc.
 Madison Square Mall
 5901 University Dr., #86
 Huntsville, AL 35806
 Ph. 205-985-3099
 Fax 205-985-3066
 Terry Wood, Supervisor
 Income: H-50% M-30% L-20%
 Stations: 5 C K O
 (See advertisement on p. 83)

Mobile

Facts

Div. of Graham and Associates, Inc.
 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. 83)

Montgomery

Nolan Research
 Montgomery Mall
 East-South Blvd.
 Montgomery, AL 36110
 Ph. 334-284-4164
 Fax 334-286-9788
 Deidra Nolan, Partner
 Income: H-20% M-70% L-10%
 Stations: 4 C

Nolan Research
 Lecroy Shopping Village
 3655 Debby Dr.
 Montgomery, AL 36111
 Ph. 334-284-4164
 Fax 334-286-9788
 Deidra Nolan, Partner
 Income: H-20% M-70% L-10%
 Stations: 2 C P

Arizona

Phoenix

Car-Lene Research, Inc.
 Arizona Mills Mall
 5000 Arizona Mills Cir.
 Tempe, AZ 85282
 Ph. 602-839-4606
 Fax 602-839-4619
 Income: NA
 Stations: NA K P O

Car-Lene Research, Inc.
 Arrowhead Towne Center
 7700 W. Arrowhead Towne Center
 Glendale, AZ 85308
 Ph. 602-486-1050
 Fax 602-486-2425
 Connie Nipp, Manager
 Income: NA
 Stations: NA K P O

Cunningham Field & Research Service

Metro Center Mall
 9606 Metro Center Pkwy. E.
 Phoenix, AZ 85051
 Ph. 904-677-5644
 Fax 904-677-5534
 E-mail: PHOM@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: NA
 Stations: 5 C K P O
 (See advertisement on p. 89)

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. 101)

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. 101)

Friedman Marketing Services

Paradise Valley Mall
 4550 E. Cactus, #416
 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. 101)

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
 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
 1017 S. Gilbert Rd., #202
 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
www.ccmrresearch.com
Craig Cunningham, President
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. 101)

California

Fresno

Bartels Research Corp.
145 Shaw Ave., Ste. C1 & C2
Clovis, CA 93612
Ph. 209-298-7557
Fax 209-298-5226
E-mail: bartels1@compuserve.com
Patrick Bartels
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
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.
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.
Puente Hills Mall
386 Puente Hills Mall
City of Industry, CA 91748
Ph. 626-964-4589
Fax 626-964-4809
Income: NA
Stations: 6 C 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: losangeles@consumerpulse.com
www.consumerpulse.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. 446
San Bernardino, CA 92408
Ph. 904-677-5644
Fax 904-677-5534
E-mail: LOSA@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-70% L-10%
Stations: 5 C K P O
(See advertisement on p. 89)

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

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
Valencia Town Center Mall
24201 Valencia Blvd., Ste. 2317
Valencia, CA 91355
Ph. 805-222-2278
Fax 805-222-2287
Ned Christiansen, Office Manager
Income: H-40% M-40% L-20%
Stations: 6 C K P O

Friedman Marketing Services

Stonewood Center Mall
404 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. 101)



THE VOICE OF THE SOUTH FOR OVER THIRTY-TWO YEARS!

ALABAMA'S ONLY STATEWIDE MARKET RESEARCH SERVICE

4 focus group facilities • executive interviewing • computer interviewing
• central location testing • central telephone bank - 25 monitored lines • one-on-one
interviewing • door-to-door interviewing • indepth interviewing • statewide
mystery shopper network • audits

PERMANENT
MALL FACILITIES:
EASTWOOD MALL Birmingham
MADISON SQUARE MALL Huntsville
BEL AIR MALL Mobile
GADSDEN MALL Birmingham

**Polly Graham
& Associates Inc.**
3000 Riverchase Galleria, Suite 310
Birmingham, Alabama 35244
(205) 985-3099 • Fax (205) 985-3066

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.
 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

L.A. Research, Inc.
 9010 Reseda Blvd., Ste. 109
 Northridge, CA 91324
 Ph. 818-993-5500 or 800-760-9040
 Fax 818-993-5664
 Income: H-30% M-50% L-20%
 Stations: 7 C P O

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

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
 Terri Thomas, 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. 626-856-3883
 Fax 626-856-3886
 E-mail: pkmcov@aol.com
 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
 www.quicktest.com
 Lisa Fleming, Manager
 Income: H-32% M-36% L-32%
 Stations: 7 C K

SCIS
 Encino Center
 17277 Ventura Blvd., Ste. 200
 Encino, CA 91316
 Ph. 800-872-4022 or 818-783-7700
 Fax 818-783-8626
 E-mail: scis@scis.com
 www.scis.com
 Margie Evans, Manager
 Income: H-40% M-40% L-20%
 Stations: 6 K P O

Suburban Associates
 Sherman Oak Galleria
 15301 Ventura Blvd., Ste. 386
 Sherman Oaks, CA 91403
 Ph. 818-906-8036
 Fax 818-906-2539
 E-mail: shermanoaks@subassoc.com
 www.subassoc.com
 Susan Wisniewski, Manager
 Income: H-20% M-60% L-20%
 Stations: 10 C P O

U.S. Research Co.
 Montclair Plaza
 2188 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)

Car-Lene Research, Inc.
 (Opening Spring 1999)
 Temecula Town Center
 Temecula, CA
 Ph. 847-564-1454
 Income: NA
 Stations: NA

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
 www.quicktest.com
 Carol Fry, Manager
 Income: H-20% M-60% L-20%
 Stations: 4 C K P O

Quick Test
 Westminster Mall
 2009 Westminster Mall
 Westminster, CA 92683
 Ph. 714-891-2111
 Fax 714-891-8985
 E-mail: info@quicktest.com
 www.quicktest.com
 Rosemary Sandoval, 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
 E-mail: arr@quiknet.com
 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 Mall
 Ontario Mills Cir., #508
 Ontario, CA 91764
 Ph. 909-481-7666
 Fax 909-481-7706
 Tracy Nuno, Manager
 Income: NA
 Stations: NA K P O

Heakin Research, Inc.
 Galleria at Tyler, Ste. 1042
 Riverside, CA 92503
 Ph. 909-637-1100
 Fax 909-637-1191
 Joanna Walb, Manager
 Income: H-25% M-55% L-20%
 Stations: 12 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

San Diego

Jagorda Interviewing Services
 Plaza Bonita Mall
 3030 Plaza Bonita Rd., #2001
 National City, CA 92050
 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
E-mail: info@luthresearch.com
www.luthresearch.com
Jefi 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 Somersville Rd.
Antioch, CA 94509
Ph. 925-706-9103
Fax 925-706-0437
Olinda 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
Craig 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
www.cosvc.com
Maxine Kuzod, Manager
Income: H-25% M-55% L-20%
Stations: 9 C K P O
(See advertisement on p. 109)

Cunningham Field & Research Service
(Opening December 1998)
Santa Rosa Mall
1071 Santa Rosa Plaza, Ste. 2047
Santa Rosa, CA 95401
Ph. 904-677-5644
Fax 904-677-5534
www.cunninghamresearch.com
Income: NA
Stations: NA
(See advertisement on p. 89)

Field Management Associates-San Francisco
Tanforan Park Center
217 Tanforan Pk.
San Bruno, CA 94066
Ph. 650-588-9500
Fax 650-588-9756
Hal Berke, Partner
Income: H-30% M-50% L-20%
Stations: 7 C K P O

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: 6 C K
(See advertisement on p. 101)

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. 101)

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

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

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

Quick Test
Southland Mall
203 Southland Mall
Hayward, CA 94545
Ph. 510-785-4650
Fax 510-785-0641
E-mail: info@quicktest.com
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
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. 510-522-8600 or 510-521-6900
Fax 510-522-6749
Diane Kientz, Supervisor
Income: H-30% M-50% L-20%
Stations: 7 C K P

Ventura/Santa Barbara

Reyes Research
Esplanade Mall
177 Esplanade Dr.
Oxnard, CA 93030
Ph. 805-278-1444
Fax 805-278-1447
E-mail: am@reyesresearch.com
www.reyesresearch.com
Michele Reyes, Manager
Income: H-25% M-40% L-35%
Stations: 10 C K P O

Colorado

Boulder

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

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

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: coloradosprings@consumerpulse.com
www.consumerpulse.com
Cindy Robinett, Director
Income: H-25% M-55% L-20%
Stations: 8 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

The Springs 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.
 Thornton Town Center
 10001 Grant St.
 Thornton, CO 80229
 Ph. 303-452-2696
 Fax 303-452-2630
 Cindy Rodriguez, Manager
 Income: NA
 Stations: NA K P O

Consumer Pulse of Denver
 Southglenn Mall
 6911 S. University Blvd., #A0730
 Littleton, CO 80122
 Ph. 303-798-7338 or 800-336-0159
 Fax 303-798-8120
 E-mail: denver@consumerpulse.com
 www.consumerpulse.com
 Mary Schneider, Director
 Income: H-30% M-60% L-10%
 Stations: 8 C K P O

Cunningham Field & Research Service

(Opening December 1998)
 Aurora Mall
 14200 E. Alameda, Ste. 1041
 Aurora, CO 80012
 Ph. 904-677-5644
 Fax 904-677-5534
 www.cunninghamresearch.com
 Income: NA
 Stations: NA
 (See advertisement on p. 89)

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. 101)

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: 6 C K P O
 (See advertisement on p. 101)

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
 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

Hartford

Friedman Marketing Services

The Pavillions at Buckland Hills
 194 Buckland Hills Dr.
 Manchester, CT 06040
 Ph. 860-644-9679 or 914-698-9591
 Fax 860-644-9698
 Income: H-25% M-50% L-25%
 Stations: 5 C K P O
 (See advertisement on p. 101)

New Haven

Firm Facts Interviewing
 Chapel Square Mall
 New Haven, CT 06510
 Ph. 203-772-3144
 Fax 203-375-6034
 Harriet Quint, Co-Owner
 Income: H-25% M-55% L-20%
 Stations: NA C K P

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: WATE@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: NA
 Stations: 5 C K P O
 (See advertisement on p. 89)

District of Columbia

Car-Lene Research, Inc.
 Potomac Mills Mall
 2700 Potomac Mills Cir.
 Woodbridge, VA 22192
 Ph. 703-497-4444
 Fax 703-497-0999
 Yvonne Fayson, 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: washington@consumerpulse.com
 www.consumerpulse.com
 Carol Keel, Director
 Income: H-25% M-55% L-20%
 Stations: 8 C K P

Cunningham Field & Research Service

Springfield Mall
 6691B Springfield Mall
 Springfield, VA 22150
 Ph. 904-677-5644
 Fax 904-677-5534
 E-mail: WASH@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-20% M-70% L-10%
 Stations: 3 C K P O
 (See advertisement on p. 89)

Friedman Marketing Services

Landmark Mall
 5801 Duke St., Ste. E110
 Alexandria, VA 22304
 Ph. 703-916-8565 or 914-698-9591
 Fax 703-916-8567
 Income: H-35% M-45% L-20%
 Stations: NA
 (See advertisement on p. 101)

Mid-America Rsch./Facts In Focus
 St. Charles Towne Center
 5000 Rte. 301, Ste. 2006
 Waldorf, MD 20603
 Ph. 301-870-7799
 Fax 301-705-8348
 Income: NA
 Stations: NA

Shugoll Research
 Ballston Common Mall
 4238 Wilson Blvd., #2230
 Arlington, VA 22203
 Ph. 703-841-2414
 Fax 703-841-2422
 E-mail: j.shugoll@shugollresearch.com
 www.shugollresearch.com
 Iris Halako, Manager
 Income: H-20% M-60% L-20%
 Stations: 6 C K O

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

Ft. Lauderdale/Boca Raton

Carolana Research
 Oakbrook Mall
 7207 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

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

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 C K P O

Mar's Surveys
 Plantation Fashion Mall
 321 N. University Dr., Ste. P-3
 Ft. Lauderdale, FL 33324
 Ph. 954-755-2805 or 800-923-MARS
 Fax 954-755-3061
 E-mail: eric@marsresearch.com
 www.marsresearch.com
 Eric Lipson, Vice President
 Lois Stermer, Director
 Income: H-60% M-30% L-10%
 Stations: 4 C
 (See advertisement on p. 87)

Mar's Surveys
 Pompano Square Mall
 One Pompano Square, Ste. D-1
 Ft. Lauderdale, FL 33062
 Ph. 954-755-2805 or 800-923-MARS
 Fax 954-755-3061
 E-mail: eric@marsresearch.com
 www.marsresearch.com
 Eric Lipson, Vice President
 Lois Stermer, Director
 Income: H-20% M-60% L-20%
 Stations: 7 C K P O
 (See advertisement on p. 87)

South Florida Market Research
 The Festival Mall
 2900 W. Sample Rd.
 Ft. Lauderdale, FL 33060
 Ph. 954-975-5982
 Fax 954-984-8963
 E-mail: SFMRS@bellsouth.net
 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
 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: jacksonville@consumerpulse.com
 www.consumerpulse.com
 Christine Rand, Director
 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
 www.quicktest.com
 Kathy Paddock, Manager
 Income: H-20% M-43% L-37%
 Stations: 12 C K P

FORT LAUDERDALE • HOUSTON • SOUTH JERSEY

- Technologically Advanced Focus Facilities
- 70 Station Computer-Assisted Telephone Center
- South Florida Regional Mall Locations
- National Field Service Capabilities

MAR'S
Surveys
 1-800-923-MARS



Dedicated to
 providing high-
 quality marketing
 research services.



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

Melbourne

Quick Test

Melbourne Square Mall
 1700 W. Newhaven Ave., Ste. 203
 Melbourne, FL 32904
 Ph. 407-729-9809
 Fax 407-729-9551
 E-mail: info@quicktest.com
 www.quicktest.com
 Vicki Crosthwaite, Manager
 Income: H-30% M-50% L-20%
 Stations: 10 C K P O

Miami

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: MIAM@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-30% M-50% L-20%
 Stations: 6 C K P O
 (See advertisement on p. 89)

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
 Luis Padron, President
 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
 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 Pines, 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. 88)

South Florida Research Services, Inc..

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

Weitzman & Philip, Inc.

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

Ocala

Cunningham Field & Research Service

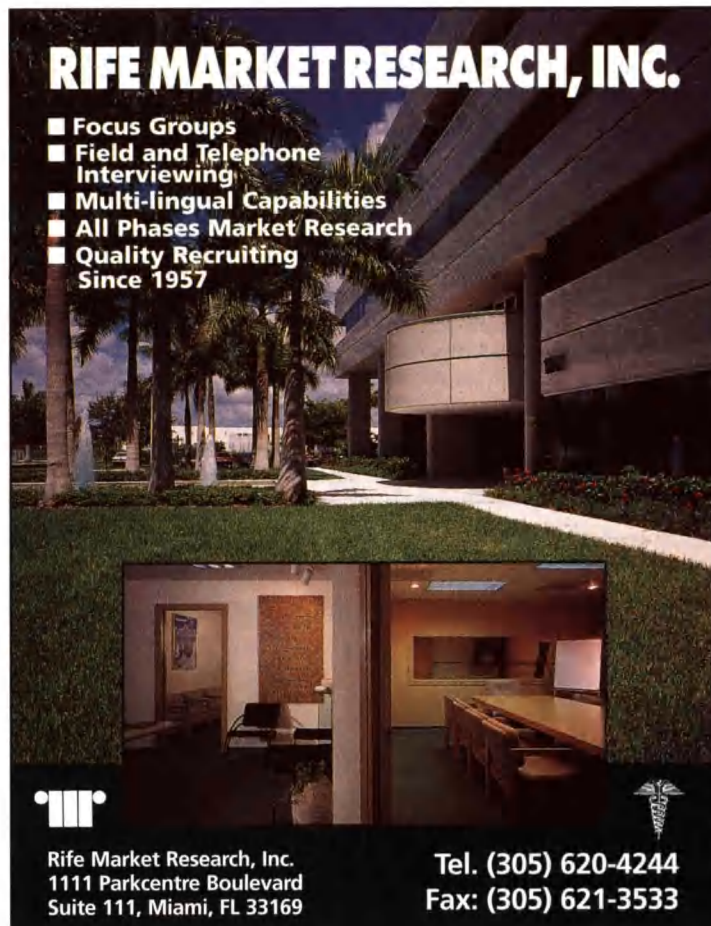
Orange Park Mall
 1910 Wells Rd., Ste. 1002
 Orange Park, FL 32073
 Ph. 904-677-5644
 Fax 904-677-5534
 E-mail: JACK@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-20% M-70% L-10%
 Stations: 6 C K P O
 (See advertisement on p. 89)

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 K P O

Barbara Nolan Market Research
 Altamonte Mall
 521 Altamonte Ave.
 Altamonte Springs, FL 32701
 Ph. 407-629-8800
 Fax 407-629-7633
 E-mail: BNMR172@aol.com
 Income: H-60% M-30% L-10%
 Stations: 10 C K P O

Barbara Nolan Market Research
 Florida Mall
 8001 S. Orange Blossom Trail
 Orlando, FL 32809
 Ph. 407-629-8800
 Fax 407-629-7633
 E-mail: BNMR172@aol.com
 Income: H-60% M-30% L-10%
 Stations: 8 C K P O



RIFE MARKET RESEARCH, INC.

- Focus Groups
- Field and Telephone Interviewing
- Multi-lingual Capabilities
- All Phases Market Research
- Quality Recruiting Since 1957

Rife Market Research, Inc.
 1111 Parkcentre Boulevard
 Suite 111, Miami, FL 33169

Tel. (305) 620-4244
 Fax: (305) 621-3533

Getting the facts isn't always easy!

At Cunningham... We ask the right questions, to get the right answers, time and cost effectively, to support your research project.

Cunningham uses all their resources to benefit you and your company. We know the research process is critical to your bottom line. Which is why saving you time and money is our bottom line. **Cunningham** provides the most comprehensive project management services available.

One call to our corporate office and you'll be in touch with a personal project specialist who can coordinate every facet of your mall or focus group project — from start to finish — in one or all of our nationwide locations. Research must be cost effective and results oriented... making **Cunningham** the choice for your next research study.

• Pro Project Management

• **Over 180 Networked Pentium® PCs Compatible with All Industry Software. Programming Available in Quantime, CfMC or HyperQuest Softwares.**

• **T-1 Backbone to the Internet Provides Continuous Connectivity from our Field Locations to our Operations Center.**

• **36 Strategic Locations Nationwide.**



**CUNNINGHAM FIELD &
RESEARCH SERVICES, INC.**

770 West Granada Boulevard, Suite 101 • Ormond Beach, Florida 32174 • 904.677.5644 • FAX 904.677.5534

(33) Mall Locations • (3) Free Standing Focus/CLT Facilities*

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

Barbara Nolan Market Research
Oviedo Marketplace
1700 Oviedo Marketplace Blvd., Space 1005
Oviedo, FL 32765
Ph. 407-629-8800
Fax 407-629-7633
E-mail: BNMR172@aol.com
Income: H-50% M-40% L-10%
Stations: 8 C K P O

Barbara Nolan Market Research
Seminole Town Center
275 Town Center Cir.
Sanford, FL 32771
Ph. 407-629-8800
Fax 407-629-7633
E-mail: BNMR172@aol.com
Income: H-50% M-40% L-10%
Stations: 8 C K P O

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
www.quicktest.com
Koko Gough, Manager
Income: H-9% M-28% L-63%
Stations: 6 C K O

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 C K P O

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 C K P O

Tallahassee

Friedman Marketing Services

Tallahassee Mall
2415 N. Monroe St.
Tallahassee, FL 32303
Ph. 850-385-4399 or 914-698-9591
Fax 850-385-3481
Income: H-25% M-50% L-25%
Stations: 9 C K P O
(See advertisement on p. 101)

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 K P

Car-Lene Research, Inc.
Pinellas Square Mall
7200 U.S. Hwy. 19
Pinellas Park, FL 33781
Ph. 727-527-0113
Fax 727-527-5563
Sharon Brandy, Manager
Income: H-14% M-36% L-50%
Stations: 8 C K P O

Car-Lene Research, Inc.
Tyrone Square Mall
6901 22nd Ave. N., Rm. 698
St. Petersburg, FL 33710
Ph. 727-344-6886
Fax 727-344-6596
Sharon Brandy, Manager
Income: NA
Stations: NA K P O

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 K P O

Cunningham Field & Research Service

Brandon Towne Center
334 Brandon Towne Center
Brandon, FL 33511
Ph. 904-677-5644
Fax 904-677-5534
E-mail: TAMB@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-10% M-80% L-10%
Stations: 5 C K P O
(See advertisement on p. 89)

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: TAMC@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-20%
Stations: 6 C K P O
(See advertisement on p. 89)

Gulf State Research Center

Eagle Ridge Mall
433 Ridge Dr., Ste. 233
Lake Wales, FL 33853
Ph. 800-357-8842 or 941-676-3676
Fax 941-676-0471
E-mail: lvillar@gte.net
Tim Villar, Vice President
Income: H-31% M-49% L-20%
Stations: 6 C K P O
(See advertisement on p. 107)

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
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
E-mail: tampamall@subassoc.com
www.subassoc.com
Barbara Talbott, Manager
Income: H-20% M-50% L-30%
Stations: 5 C K P O

West Palm Beach

Heakin Research, Inc.
Boynton Beach Mall
801 N. Congress Ave., Ste. 283
Boynton Beach, FL 33426
Ph. 561-733-8998
Fax 561-733-9918
Suzann 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
www.jacksonassociates.com
Marisa Pope, V.P. of Operations
Income: H-10% M-40% L-50%
Stations: 6 C K P

Atlanta

Car-Lene Research, Inc.
Market Square Mall
2050 Lawrenceville Hwy.
Decatur, GA 30033
Ph. 404-728-8810
Fax 404-633-9841
Casandra McClain, Office 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: ATLA@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-35% M-55% L-10%
Stations: 7 C K P O
(See advertisement on p. 89)

Heakin Research, Inc.
Gwinnett Place Mall
2100 Pleasant Hill Rd.
Duluth, GA 30136
Ph. 770-476-0714
Fax 770-476-3194
Brad McDonald, 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
Valdrie Owens, Manager
Income: H-20% M-50% L-30%
Stations: 10 C K P O

John Stolzberg Market Research
Outlets Limited Mall
3750 Venture Dr.
Duluth, GA 30096
Ph. 404-329-0954
John Stolzberg, President
Income: H-30% M-60% L-10%
Stations: 4 C P

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

MacConnell Research Services, Inc.
Belmont Hills Center
2040 N. Atlanta St.
Smyrna, GA 30080
Ph. 770-451-6236
Fax 770-451-6184
Terri Clark, President
Income: H-10% M-60% L-30%
Stations: 10 C K P

MacConnell Research Services, Inc.
Cumberland Mall
1000 Cumberland Mall
Atlanta, GA 30339
Ph. 770-451-6236
Fax 770-451-6184
Terri Clark, President
Income: H-30% M-50% L-20%
Stations: 8 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
Terri Clark, 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
E-mail: marrandhurst@att.net.com
Michael Skinner, 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
www.quicktest.com
Leigh Lamb, Manager
Income: H-55% M-35% L-10%
Stations: 10 C K P O

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
www.jacksonassociates.com
Marisa Pope, V.P. of Operations
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
www.cosvc.com
Robert Corbin, Manager
Income: H-15% M-60% L-25%
Stations: 9 C K P
(See advertisement on p. 109)

Illinois**Chicago**

Bryles Research, Inc.
Bremontown 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 Research, Inc.
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.
Lincolnwood Town Center
3333 W. Touhy Ave.
Lincolnwood, IL 60645
Ph. 847-679-4470
Fax 847-679-4472
Nadya Hasselquist, Manager
Income: NA
Stations: NA 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.
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

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.

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

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: chicago@consumerpulse.com
 www.consumerpulse.com
 Steve Lehman, Director
 Income: H-30% M-50% L-20%
 Stations: 8 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

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

Cunningham Field & Research Service

Gurnee Mills Mall
 6170 W. Grand Ave., Ste. 588
 Gurnee, IL 60031-4548
 Ph. 904-677-5644
 Fax 904-677-5534
 E-mail: CHIG@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-25% M-50% L-25%
 Stations: 6 C K P O
 (See advertisement on p. 89)

Cunningham Field & Research Service

Lincoln Mall
 Lincoln Mall, Ste. 146B
 Matteson, IL 60443
 Ph. 904-677-5644
 Fax 904-677-5534
 E-mail: CHIL@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-20% M-80% L-0%
 Stations: 6 C K P O
 (See advertisement on p. 89)

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: 6 C K O
 (See advertisement on p. 101)

Heakin Research, Inc.

Golf Mill Center
 373 Golf Mill Center
 Niles, IL 60714
 Ph. 847-824-6550
 Fax 847-824-6552
 Susan Habel, Manager
 Income: H-22% M-65% L-13%
 Stations: 10 C K P O

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.

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 C K P O

Heakin Research, Inc.

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

Mid-America Rsch./Facts In Focus

Fox Valley Mall
 2260 Fox Valley Center
 Aurora, IL 60504
 Ph. 630-898-2166
 Fax 630-898-2172
 Walt Nakapsuka, Manager
 Income: NA
 Stations: NA 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

Randhurst Center
 999 N. Elmhurst Rd., Ste. 17
 Mt. Prospect, IL 60056
 Ph. 847-392-9770
 Fax 847-259-7259
 E-mail: marrandhurst@att.net.com
 Income: H-33% M-52% L-15%
 Stations: 20 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
 www.quicktest.com
 Amy O'Callaghan, Manager
 Income: H-9% M-44% L-47%
 Stations: 12 C K P O

Quick Test

Hawthorn Center
 429 Hawthorn Center
 Vernon Hills, IL 60061
 Ph. 708-367-0036
 Fax 708-367-4863
 E-mail: info@quicktest.com
 www.quicktest.com
 Ann-Marie Hogan, Manager
 Income: H-60% M-30% L-10%
 Stations: 11 C K 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
 www.quicktest.com
 Harriet Roth, Manager
 Income: NA
 Stations: 13 C K P 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
 www.researchgroupinc.com
 Income: H-30% M-50% L-20%
 Stations: 5 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

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: surveyc@mcs.com
 Carol Tobler
 Income: H-40% M-50% L-10%
 Stations: 5 C K P O

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, Owner
 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 Research, Inc.
 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

Herron Associates, Inc.
 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
 www.herron-research.com
 Paul Jorgensen
 Income: H-35% M-48% L-17%
 Stations: 10 C K P O
(See advertisement on p. 93)

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
 www.herron-research.com
 Paul Jorgensen
 Income: H-30% M-44% L-26%
 Stations: 8 C K P O
(See advertisement on p. 93)

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

Terre Haute

Gore/Knauff Research & Associates
 Honey Creek Mall
 3401 S. U.S. 41, Ste. E 9
 Terre Haute, IN 47802
 Ph. 812-485-2160
 Fax 812-485-2164
 E-mail: jknauff@evansville.com
 Jim Knauff, Owner
 Income: H-25% M-55% L-20%
 Stations: 8 C

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
 Cathy Boire, Supervisor
 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 515-698-5573
 Vada Grantham, CEO
 Income: H-15% M-65% L-20%
 Stations: 2 C K P O

EXPERIENCE THE MALL DIFFERENCE

• Quality • Experience • Dedication

**Two Indianapolis regional mall locations:
 Greenwood Park and Washington Square**

- Enclosed interviewing rooms
- Client viewing facilities
- Full test kitchens
- CAPI interviewing
- *Independently owned research firm*



Herron Associates Inc.
 (317) 882-3800 • (317) 882-4716 FAX
 E-mail: herron@iquest.net • www.herron-research.com
Market Research the right way...since 1958.

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

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

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: MID225@aol.com
 Debbie Gudehus, General Manager
 Income: H-30% M-40% L-30%
 Stations: 6 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
 Bonnie Howard, Manager
 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
 Income: H-20% M-70% L-10%
 Stations: 9 C K P

Barbara Nolan Market Research
 Towne West Square, #804
 Wichita, KS 67209
 Ph. 407-629-8800
 Fax 407-629-7633
 E-mail: BNMR172@aol.com
 Income: NA
 Stations: 8 C K P O

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

Car-Lene Research, Inc.
 Green Tree Mall
 Hwy. 131, Unit 224
 Clarksville, IN 47129
 Ph. 812-284-1770
 Fax 812-284-1655
 Income: NA
 Stations: NA K P O

MRK, Inc.
 Mid City Mall
 1250 Bardstown Rd.
 Louisville, KY 40204
 Ph. 502-458-4159
 Fax 502-456-5776
 E-mail: mcpearl@unidial.com
 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
 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

New Orleans

Car-Lene Research, Inc.
 North Shore Square Mall
 5038 North Shore Blvd., Ste. 5038
 Slidell, LA 70460
 Ph. 504-847-0405
 Fax 504-847-0042
 Terry Harper, 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. 101)

Gulf State Research Center

Clearview Shopping Mall
 4426 Veterans Blvd.
 Metairie, LA 70006
 Ph. 800-357-8842 or 504-454-1737
 Fax 504-454-2461
 E-mail: lvillar@gte.net
 Tim Villar, Vice President
 Income: H-27% M-50% L-23%
 Stations: 6 C K P
 (See advertisement on p. 107)

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

Quick Test
 Lakeside Mall
 3301 Veterans Blvd., Ste. 201
 Metairie, LA 70002
 Ph. 504-828-4354
 Fax 504-828-9757
 E-mail: info@quicktest.com
 www.quicktest.com
 Michael Green, Manager
 Income: H-20% M-40% L-20%
 Stations: 4 C K O

Maine

Portland

Strategic Marketing Services
 5 Milk St.
 Portland, ME 04101
 Ph. 207-774-6738
 Fax 207-772-4842
 E-mail: pmurphy@maine.rr.com
 Patrick O. Murphy, President
 Income: H-40% M-30% L-30%
 Stations: 20 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
www.charm.net/~aim/

Marge Moran, 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
www.charm.net/~aim/

Sylvia Sandler, Manager
Income: H-50% M-30% L-20%
Stations: 6 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: baltimore@consumerpulse.com
www.consumerpulse.com

Kim Colwell, Director
Income: H-30% M-50% L-20%
Stations: 8 C K P

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: baltimore@consumerpulse.com
www.consumerpulse.com

Kim Colwell, Director
Income: H-15% M-55% L-30%
Stations: 8 C K P O

Heakin Research, Inc.

Owings Mills 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 Yeager
Income: H-37% M-45% L-18%
Stations: 10 C K P O

Massachusetts

Boston

Car-Lene Research, Inc.

Silver City Mall
2 Galleria Mall 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 Worcester St., Ste. 1004
Natick, MA 01760-1553
Ph. 904-677-5644
Fax 904-677-5534

E-mail: BOST@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 5 C K P O
(See advertisement on p. 89)

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. 781-393-5588
Fax 781-393-5649

Shirley Shames, President
Income: H-30% M-60% L-10%
Stations: 10 C K P

Performance Plus

Westgate Mall
200 Westgate Dr., Ste. 23
Brockton, MA 02301
Ph. 508-580-2984
Fax 508-587-3082

Shirley Shames, President
Income: H-10% M-70% L-20%
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
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. 781-849-1692
Fax 781-843-5276

E-mail: info@quicktest.com
www.quicktest.com
Jeremy Joblon, 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
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. 101)

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
www.quicktest.com
Debbie Mullaly, Manager
Income: H-15% M-55% L-30%
Stations: 8 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: detroit@consumerpulse.com
www.consumerpulse.com
Clyde Mayberry, Director
Income: H-20% M-55% L-25%
Stations: 8 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

Crimmins & Forman Market Research
 Consumer Research Center
 Westland Mall

35000 W. Warren Rd.
 Westland, MI 48185
 Ph. 734-513-5040
 Fax 734-513-8966

Lois Forman, Partner
 Income: H-25% M-45% L-30%
 Stations: 12 C K P O

Crimmins & Forman Market Research
 Detroit Marketing

Wonderland Mall
 29755 Plymouth Rd.
 Livonia, MI 48150
 Ph. 734-427-5360
 Fax 734-427-5250

Paula Crimmins, Partner
 Income: H-25% M-45% L-30%
 Stations: 7 C K P

Cunningham Field & Research Service

(Opening December 1998)

Great Lakes Crossing
 4144 Baldwin Rd., Ste. 419
 Auburn Hills, MI 48326
 Ph. 904-677-5644
 Fax 904-677-5534

www.cunninghamresearch.com
 Income: NA
 Stations: NA
 (See advertisement on p. 89)

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. 101)

Heakin Research, Inc.
 Eastland Mall

1800 Bernier Rd., Ste. 731
 Harper Woods, MI 48225
 Ph. 313-521-8811
 Fax 313-521-9152

Christin Moore, Manager
 Income: H-30% M-35% L-35%
 Stations: 9 C K P O

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 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
 www.quicktest.com
 Jill Linares, 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

E-mail: BarnesRes@aol.com
 Howard Rozema, Vice President
 Income: H-25% M-50% L-25%
 Stations: 10 C K P

Minnesota**Duluth**

Bryles Research, Inc.

Miller Hill Mall
 1600 Miller Trunk Hwy.
 Duluth, MN 55811
 Ph. 218-722-9274
 Fax 218-722-9327

Beth Johnson, 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

Jamie Rodrigues, 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

Cunningham Field & Research Service

(Opening 1999)

Northtown Mall
 398 Northtown Dr., #J25
 Blaine, MN 55434
 Ph. 904-677-5644
 Fax 904-677-5534

www.cunninghamresearch.com
 Income: H-20% M-80% L-0%
 Stations: 4 C K P O
 (See advertisement on p. 89)

Friedman Marketing Services

Burnsville Center Mall
 25 Burnsville Center
 Burnsville, MN 55306
 Ph. 612-892-5383 or 914-698-9591
 Fax 612-898-2940

Income: H-50% M-40% L-10%
 Stations: 8 C K P O
 (See advertisement on p. 101)

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

Elena Johnson, Manager
 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
 www.quicktest.com
 Lea Sykes, Manager
 Income: NA
 Stations: 6 C K O

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. 101)

Missouri

Cape Girardeau

Ask America Inc.[®]
185 West Park Mall
Cape Girardeau, MO 63701
Ph. 573-332-1332
Fax 573-332-1944
E-mail: ASKAMERICA@aol.com
Income: H-30% M-50% L-20%
Stations: 10 C K P O

Kansas City

C & C Market Research, Inc.
Metcalfe South Mall
9525 Metcalf, #D-6
Overland Park, KS 66212
Ph. 501-484-5637
Fax 501-484-7379
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-40% M-40% L-20%
Stations: 7 C K P O

C & C Market Research, Inc.
Metro North Mall
400 N.W. Barry Rd., Ste. 143
Kansas City, MO 64155
Ph. 501-484-5637
Fax 501-484-7379
www.ccmarketresearch.com
Craig Cunningham, President
Income: NA
Stations: NA C 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

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 C 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 C K P O

Quick Test
The Great Mall of the Great Plains
20383 W. 151st St.
Olathe, KS 66061
Ph. 913-782-5110
Fax 913-782-5506
E-mail: info@quicktest.com
www.quicktest.com
Mirna Tapia, Manager
Income: NA
Stations: 9 C K 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 County Mall
Hwy. 55 & Lindbergh Blvd.
St. Louis, MO 63129
Ph. 314-845-2002
Fax 314-845-6254
Frances Mattox, 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
Income: H-40% M-50% L-10%
Stations: 12 C K P O

Cunningham Field & Research Service
St. Clair Square Mall
134 St. Clair Square, #125
Fairview Heights, IL 62208
Ph. 904-677-5644
Fax 904-677-5534
E-mail: STLO@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-40% L-30%
Stations: 5 C K P O
(See advertisement on p. 89)

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: 10 C K P O
(See advertisement on p. 101)

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

Superior Surveys of St. Louis, Inc.
208 Crestwood Plaza
St. Louis, MO 63126
Ph. 314-918-7460
Fax 314-692-2427
E-mail: SURVEYS4U@aol.com
Carol McGill, Manager
Income: H-60% M-30% L-10%
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 Research, Inc.
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

Midwest Survey & Research
Crossroads Mall
7300 Dodge St., Ste. 20
Omaha, NE 68114
Ph. 402-399-9346
Fax 402-399-9346
Elaine Bosilevac, Vice President
Income: H-12% M-68% L-20%
Stations: 12 C K P O

Midwest Survey & Research
Mall of the Bluffs
1751 Madison Ave., Ste. 708
Council Bluffs, IA 51503
Ph. 712-323-1438
Fax 712-323-1438
Elaine Bosilevac, Vice President
Income: H-29% M-30% L-41%
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

Nevada

Las Vegas

Consumer Research Center
 1370 E. Flamingo Rd., Ste. J
 Las Vegas, NV 89119
 Ph. 702-737-3272
 Fax 702-737-1023
 Steve 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: LASV@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-30% M-60% L-10%
 Stations: 6 C K P O
 (See advertisement on p. 89)

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: CONC@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-20% M-60% L-20%
 Stations: 5 C K O
 (See advertisement on p. 89)

Nashua

New England Interviewing, Inc.
 Nashua Mall
 Rte. 3 & 130
 Nashua, NH 03063
 Ph. 603-889-8100
 Fax 603-883-1119
 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

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 K P O

Cunningham Field & Research Service
 Raceway Mall
 3710 Rte. 9, Ste. 238A
 Freehold, NJ 07728
 Ph. 904-677-5644
 Fax 904-677-5534
 E-mail: FREE@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-50% M-40% L-10%
 Stations: 6 C K P O
 (See advertisement on p. 89)

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
 www.ebonymktg.com
 Rafaela Ramirez
 Income: H-10% M-90% L-0%
 Stations: 8 C P O
 (See advertisement on p. 99)

Focus World International, Inc.
 Brunswick Square Mall
 Rte. 18
 E. Brunswick, NJ
 Ph. 732-946-0100
 Income: NA
 Stations: NA

Focus World International, Inc.
 Consumer Reaction Research
 Seaview Square Mall
 Rte. 66 & 35
 Ocean, NJ 07712
 Ph. 732-946-0100
 E-mail: FocusWorld@worldnet.att.net
 www.focusworldint.com
 Gary Eichenholtz, CEO/CFO
 Income: H-10% M-70% L-20%
 Stations: 8 C K P

Heakin Research, Inc.
 Woodbridge Center
 196 Woodbridge Center Dr.
 Woodbridge, NJ 07095
 Ph. 732-326-9779
 Fax 732-326-9646
 Lydia DuChene, Manager
 Income: H-45% M-35% L-20%
 Stations: 12 C K P O

Mid-America Rsch./Facts In Focus
 Livingston Mall
 131 Livingston Mall
 Livingston, NJ 07039
 Ph. 973-740-1566
 Fax 973-740-0569
 Jennifer Gerlach, Manager
 Income: H-15% M-80% L-5%
 Stations: 12 C K P O

Northeast Data, Inc.
 High Income Mall Testing & Grp. Rsch. Ctr.
 Wayne Towne Center, Rte. 23 S.
 Wayne, NJ 07470
 Ph. 973-785-4449
 Fax 973-785-3679
 Judith Mammolite, Manager
 Income: H-70% M-25% L-5%
 Stations: 8 C K P O

Quick Test
 Menlo Park Mall
 312 Menlo Park
 Edison, NJ 08837
 Ph. 732-548-2900
 Fax 732-549-0026
 E-mail: info@quicktest.com
 www.quicktest.com
 Chad Muney, Manager
 Income: H-70% M-20% L-10%
 Stations: 10 C K P O

Suburban Associates
 Monmouth Mall
 1230 Monmouth Mall - Rte. 35
 Eatontown, NJ 07724
 Ph. 732-542-5554
 Fax 732-389-3921
 E-mail: monmouth@subassoc.com
 www.subassoc.com
 Antoinette Cusack, Manager
 Income: H-10% M-60% L-30%
 Stations: 8 C K P O

Suburban Associates
 Willowbrook Mall
 1230 Willowbrook Mall - Rte. 46
 Wayne, NJ 07470
 Ph. 973-785-0770
 Fax 973-785-0771
 E-mail: willowbrook@subassoc.com
 www.subassoc.com
 Cindy Conklin, Manager
 Income: H-25% M-55% L-20%
 Stations: 10 C K P O

Southern New Jersey

(See Philadelphia, PA)

New Mexico

Albuquerque

Car-Lene Research, Inc.
 Coronado Center
 6600 Menaul Blvd. N.E., Ste. K8
 Albuquerque, NM 87110
 Ph. 505-889-3070
 Fax 505-889-3071
 Scott Solis, Manager
 Income: NA
 Stations: NA K P O

Barbara Nolan Market Research
 Cottonwood Mall, D-201
 Albuquerque, NM 87114
 Ph. 407-629-8800
 Fax 407-629-7633
 E-mail: BNMR172@aol.com
 Income: H-25% M-50% L-25%
 Stations: 8 C K P O

Sante Fe

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

New York

Albany

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

J.L. Whalen Markette Research
 The Medical and Executive Center
 421 Clifton Country Mall
 Clifton Park, NY 12065
 Ph. 518-383-1661
 Fax 518-371-0791
 Income: H-60% M-30% L-10%
 Stations: 4 K P O

Buffalo

Buffalo Survey & Research, Inc.
 Lockport Mall
 5737 S. Transit Rd.
 Lockport, NY 14094
 Ph. 716-833-6639
 Fax 716-834-6499
 David Levin, Vice President
 Income: H-20% M-60% L-20%
 Stations: 4 K P

Buffalo Survey & Research, Inc.
 Main Place Mall
 Buffalo, NY 14202
 Ph. 716-845-6262
 Fax 716-834-6499
 Jeanette Levin, President
 Income: H-10% M-50% L-40%
 Stations: 8 K P

Ruth Diamond Market Research Services
 Boulevard Mall
 770 Alberta Dr.
 Buffalo, NY 14226
 Ph. 716-836-1110
 Fax 716-836-1114
 E-mail: RDMKTRSCH@aol.com
 Harvey Podolsky, President
 Income: H-22% M-49% L-29%
 Stations: 6 C K P O

Triangulate the most comprehensive market in America

FROM OUR THREE PRIME LOCATIONS

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

That's where EMR can help

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

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

From any angle you could ask for.

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

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

Email: emr@interport.net Website: ebonymktg.com



Your Key to Ethnic Marketing

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

Marion Simon Research Service, Inc.

C-103 Walden Galleria
 Buffalo, NY 14225
 Ph. 716-684-8025
 Fax 716-684-3009
 Income: H-35% M-35% L-30%
 Stations: NA 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
 www.surveyservice.com
 Susan Adelman, President
 Income: H-25% M-50% L-25%
 Stations: 8 C K P O

Survey Service, Inc.

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

New York City

(See also Northern New Jersey)

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
 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
 www.ebonymktg.com
 Elan Miller, Mall Manager
 Income: H-0% M-55% L-45%
 Stations: 6 K
 (See advertisement on p. 99)

Ebony Marketing Research, Inc.

2100 Bartow Ave., Ste. 243
 Bronx, NY 10475
 Ph. 718-217-0842 or 718-320-3220
 Fax 718-320-3996
 E-mail: emr@interport.net
 www.ebonymktg.com
 Esther Remusat, Mall Manager
 Income: H-5% M-95% L-0%
 Stations: 8 K P O
 (See advertisement on p. 99)

Friedman Marketing Services

The Galleria at White Plains
 100 Main St., Fashion Level 1, Ste. 301
 White Plains, NY 10601
 Ph. 914-328-2447 or 914-698-9591
 Fax 914-328-2977
 Income: H-25% M-50% L-25%
 Stations: 4 C K P O
 (See advertisement on p. 101)

Friedman Marketing Services

Jefferson Valley Mall
 650 Lee Blvd.
 Yorktown Heights, NY 10598
 Ph. 914-962-9400 or 914-698-9591
 Fax 914-962-0091
 Income: H-30% M-50% L-20%
 Stations: 18 C K P O
 (See advertisement on p. 101)

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
 www.quicktest.com
 NancyAnne Canalerich, Manager
 Income: H-20% M-45% L-35%
 Stations: 15 C K P

Quick Test

Sunrise Mall
 855 Sunrise Mall
 Massapequa, NY 11758
 Ph. 516-541-5100
 Fax 516-541-1099
 E-mail: info@quicktest.com
 www.quicktest.com
 Sue Sawin, 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

Financial Focus, 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: eastmeadow@subassoc.com
 www.subassoc.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.

Greece Ridge Center Mall
 150 Greece Ridge Center Dr.
 Rochester, NY 14626
 Ph. 716-225-3100
 Fax 716-225-2834
 Angela Alvarado, Manager
 Income: H-38% M-44% L-18%
 Stations: 6 C K P O

We're The Best In the Field



We Cover All Bases

**Mall Intercept
(30 Locations)
Executive & Medical
Interviewing
Field Management
Centralized Modeming**

Friedman
Marketing Services

**Coding & Tabulation
100 Station CATI
Focus Facilities
Pre-Recruit
Door-to-Door
Multimedia**

Mamaroneck, New York (914) 698-9591 Fax (914) 698-2769

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.

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 C K P O

Car-Lene Research, Inc.

Market Place Mall
 301- Miracle Mile Dr.
 Rochester, NY 14623
 Ph. 716-424-3203
 Fax 716-292-0523
 Income: H-46% M-40% L-14%
 Stations: 6 C K P O

Cunningham Field & Research Service

Eastview Mall
 602 Eastview Mall
 Victor, NY 14564
 Ph. 904-677-5644
 Fax 904-677-5534
 E-mail: ROCH@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-35% M-45% L-20%
 Stations: 5 C K P O
 (See advertisement on p. 89)

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

McCarthy Associates
 Carousel Mall
 9763 Carousel Center Dr.
 Syracuse, NY 13290
 Ph. 315-431-0660
 Fax 315-431-0672
 Income: NA
 Stations: NA

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.
 Great Northern Mall
 4081 Rte. 31
 Clay, NY 13041
 Ph. 315-652-1812
 Fax 315-652-1814
 E-mail: Msrdc@aol.com
 Angie Bradley, Manager
 Income: H-35% M-35% L-30%
 Stations: NA C K P O

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 Bradley, Manager
 Income: H-30% M-50% L-20%
 Stations: NA C K P O

North Carolina

Asheville

Mellon Market Research
 Biltmore Square
 800 Brevard Rd., #516
 Asheville, NC 28806
 Ph. 828-667-0704 or 877-963-5566
 Vicki Phillips
 Income: H-35% M-45% L-25%
 Stations: 4 C K P O

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, Co-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: charlotte@consumerpulse.com
 www.consumerpulse.com
 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: CHAR@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-30% M-50% L-10%
 Stations: 6 C K P O
 (See advertisement on p. 89)

Greensboro/Winston-Salem

Car-Lene Research, Inc.
 Oak Hollow Mall
 921 E. Chester Dr., Hwy. 60, #1130
 High Point, NC 27264
 Ph. 336-882-0992
 Fax 336-882-0999
 Eileen Chestang, Manager
 Income: NA
 Stations: NA K P O

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: RALE@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-30% M-60% L-10%
 Stations: 6 C K P O
 (See advertisement on p. 89)

Homer Market Research Associates, Inc.
 333 Four Seasons Town Centre
 Greensboro, NC 27407
 Ph. 336-294-9415
 Fax 336-294-6116
 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. 336-292-4146
 Fax 336-299-6165
 John Voss, Vice President
 Income: H-33% M-34% L-33%
 Stations: 8 C K P O

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: AKRO@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-20% M-70% L-10%
 Stations: 6 C K P O
 (See advertisement on p. 89)

Rosen Research
 Rolling Acres Mall
 2400 Romig Rd.
 Akron, OH 44322
 Ph. 330-745-8883
 Fax 330-745-7881
 Peggy Elliott, Supervisor
 Income: H-10% M-70% L-20%
 Stations: 6 K

Cincinnati

B & B Research Services, Inc.
 Eastgate Mall
 4601 Eastgate Ave.
 Cincinnati, OH 45245
 Ph. 513-793-4223
 Fax 513-793-9117
 Jim Moler, 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: cincinnati@consumerpulse.com
 www.consumerpulse.com
 Susan Lake-Carpenter, Director
 Income: H-20% M-55% L-25%
 Stations: 8 C K P O

Consumer Pulse of Cincinnati
 Northgate Mall
 9663A Colerain Ave.
 Cincinnati, OH 45251
 Ph. 513-671-1211 or 800-336-0159
 Fax 513-346-4244
 E-mail: cincinnati@consumerpulse.com
 www.consumerpulse.com
 Susan Lake-Carpenter
 Income: H-30% M-50% L-20%
 Stations: 10 C K P

Quick Test
 Florence Mall
 1150 Florence Mall
 Florence, KY 41042
 Ph. 606-282-1333
 Fax 606-282-6333
 E-mail: info@quicktest.com
 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
 Christine Readence, Manager
 Income: NA
 Stations: NA K P O

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

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 C K P

Pat Henry Market Research, Inc.
 Tower City Mall
 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
 Jackie Herman
 Income: H-30% M-60% L-10%
 Stations: 11 C K P O

Questions, Inc.
 Great Lakes Mall
 7850 Mentor Rd.
 Mentor, OH 44060
 Ph. 440-255-9940
 E-mail: wisoron@aol.com
 Ron Weingarten, President
 Income: H-20% M-60% L-20%
 Stations: 7 C K

Rosen Research
 Great Lakes Mall
 7850 Mentor Ave.
 Mentor, OH 44060
 Ph. 440-974-0001
 Fax 440-974-0001
 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. 740-788-8808
 Fax 740-788-8809
 Mike Ingalls, Manager
 Income: H-10% M-60% L-30%
 Stations: 8 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
 www.ruthnelsonresearchsvcs.com
 Bryan Macrory, Manager
 Income: H-30% M-50% L-20%
 Stations: 6 C K P

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

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

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

Tulsa

C & C Market Research, Inc.
 Arrowhead Mall
 501 N. Main St., Ste. 75
 Tulsa, OK 74103
 Ph. 501-484-5637
 Fax 501-484-7379
 www.ccmrresearch.com
 Craig Cunningham, President
 Income: NA
 Stations: NA C K P O

Cunningham Field & Research Service
 Eastland Mall
 14002 E. 21st, Ste. 144
 Tulsa, OK 74134
 Ph. 904-677-5644
 Fax 904-677-5534
 E-mail: TULE@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-10% M-70% L-20%
 Stations: 6 C K P O
 (See advertisement on p. 89)

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

Promenade Mall
 4107 S. Yale, Ste. LA 107
 Tulsa, OK 74135
 Ph. 904-677-5644
 Fax 904-677-5534
 E-mail: TULP@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-30% M-60% L-10%
 Stations: 6 C K P O
 (See advertisement on p. 89)

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: TULW@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-40% M-60% L-0%
 Stations: 7 C K P O
 (See advertisement on p. 89)

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
 www.cosvc.com
 Kelly Pye, Manager
 Income: H-5% M-50% L-45%
 Stations: 8 C K P
 (See advertisement on p. 109)

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
 www.cosvc.com
 Ann Kane, Manager
 Income: H-15% M-55% L-30%
 Stations: 9 C K P O
 (See advertisement on p. 109)

Consumer Pulse of Portland
 Clackamas Town Center
 1200 S.E. 82nd Ave., #D-2
 Portland, OR 97266
 Ph. 503-654-1390 or 800-326-0159
 Fax 503-654-1436
 E-mail: portland@consumerpulse.com
 www.consumerpulse.com
 Marilyn Dent, Director
 Income: H-25% M-55% 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
 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.
 Echelon Mall
 2224 Echelon Mall, Ste. 245
 Voorhees, NJ 08043-1903
 Ph. 609-772-2411
 Fax 609-772-2421
 Income: NA
 Stations: NA K P O

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: philadelphia@consumerpulse.com
 www.consumerpulse.com
 Eleanor Yates, Director
 Income: H-20% M-60% L-20%
 Stations: 7 C P

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

Cunningham Field & Research Service

Deptford Mall
 1750 Deptford Center Rd., #2D-06
 Deptford, NJ 08096
 Ph. 904-677-5644
 Fax 904-677-5534
 E-mail: PHIL@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: NA
 Stations: 6 C K P O
 (See advertisement on p. 89)

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, Inc.

Montgomery Mall, Store 152
 North Wales, PA 19454
 Ph. 215-362-1060
 Fax 215-362-7569
 E-mail: mall@reckner.com
 www.reckner.com
 Barbara Ogrizek, Manager
 Income: H-48% M-28% L-24%
 Stations: 15 C K P O
 (See advertisement on p. 105)

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. 55)

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

Quick Test
 Neshaminy Mall
 109 Neshaminy Mall
 Bensalem, PA 19020
 Ph. 215-322-0400
 Fax 215-322-5412
 E-mail: info@quicktest.com
 www.quicktest.com
 Alice Osborne, Manager
 Income: H-5% M-80% L-15%
 Stations: 11 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 Stanford, 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. 724-728-8463
Fax 724-728-9806
Shawn Bishop, Manager
Income: H-20% M-55% L-25%
Stations: 14 C K P O

South Carolina

Charleston

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. 843-553-0030
Fax 843-553-0526
E-mail: info@quicktest.com
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.
Park Ridge Mall
Sioux Falls, SD
Ph. 605-338-3918
Fax 605-338-3964
E-mail: ron@mtcnet.net
www.sdbi.northern.edu/service/Ampublic/Ams_ home.htm
Ron Van Beek, President
Income: H-50% M-40% L-10%
Stations: 2 C K P O

American Public Opinion Survey &
Market Research Corp.
Western Mall
Sioux Falls, SD
Ph. 605-338-3918
Fax 605-338-3964
E-mail: ron@mtcnet.net
www.sdbi.northern.edu/service/Ampublic/Ams_ home.htm
Ron Van Beek, President
Income: H-40% M-50% L-10%
Stations: 2 C K P O

Tennessee

Knoxville

HMR & Associates
Foothills Mall
2904 A. Tazewell Pike, #A
Knoxville, TN 37918
Ph. 423-281-0038
Fax 423-281-2250
Letha Russell, Office Manager
Income: NA
Stations: NA

Mellon Market Research
2850 Parkway Bldg. 6, Ste. 40
Pigeon Forge, TN 37863
Ph. 423-428-8360 or 877-963-5566
Fax 423-428-6042
Vicki Phillips
Income: H-25% M-50% L-25%
Stations: 4 C K P

J. RECKNER ASSOCIATES, INC.

"I was looking
for more than a
national data
collection company...
I was looking for
a partner."

We understand the value of developing good working relationships. At JRA, we partner with our clients to do more than just meet their expectations...we exceed them.

JRA provides the total solution for all your needs between design and analysis. Our expertise with medical, business to business, and consumer populations insures the successful completion of your quantitative and qualitative studies.

Would you expect anything less from your partner?



Marketing Research

Corporate Headquarters

587 Bethlehem Pike

Suite 800

Montgomeryville, PA 18936

(215) 822-6220

(215) 822-2238 fax

www.reckner.com

info@reckner.com

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

Memphis

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. 101)

Friedman Marketing Services

Mall of Memphis
4435 Mall of Memphis
Ste. 1, Space P-231
Memphis, TN 38118
Ph. 901-368-5549 or 914-698-9591
Fax 901-368-1390

Income: H-25% M-50% L-25%

Stations: 6 C K P O

(See advertisement on p. 101)

Friedman Marketing Services

Raleigh Springs Mall
3423 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. 101)

Heakin Research, Inc.

6080 Hickory Ridge Mall
Memphis, TN 38115
Ph. 901-360-0400
Fax 901-360-8213

Sylvia Sargent, 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

Katy Hagen, Manager
Income: H-61% M-30% L-9%

Stations: 8 C K P O

Nashville

Car-Lene Research, Inc.
Bellvue Center
7625 Hwy. 70 S., #257a
Nashville, TN 37221
Ph. 615-646-7044
Fax 615-646-7062
Toni White, Manager
Income: NA
Stations: NA K P O

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

Cunningham Field & Research Service

Cool Springs Galleria
1800 Galleria Blvd., Ste. 1320
Franklin, TN 37064
Ph. 904-677-5644
Fax 904-677-5534
E-mail: NASH@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-80% L-0%
Stations: 3 C K P O
(See advertisement on p. 89)

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

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
www.quicktest.com
Cheryl Southaid, Manager
Income: H-20% M-50% L-30%
Stations: 7 C K P O

Texas

Austin

Quick Test
Barton Creek Square
2901 Capital of Texas Hwy., P-9
Austin, TX 78746
Ph. 512-327-8787
Fax 512-327-7460
E-mail: info@quicktest.com
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
www.quicktest.com
Lorna Turner, Manager
Income: H-20% M-50% L-30%
Stations: 6 C K P O

Dallas

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

Car-Lene Research, Inc.
Grapevine Mills Mall
3000 Grapevine Mills Pkwy., Ste. 208
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.
North Hills Mall
7624 Grapevine Hwy. N., Ste. 728
N. Richland Hills, TX 76180
Ph. 817-595-3737
Fax 817-595-1988
Lauri Ivey, 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.
Six Flags Mall
2911 E. Division, #409A
Arlington, TX 76011
Ph. 817-633-6020
Fax 817-633-4460
Income: NA
Stations: NA K P O

Heakin Research, Inc.
Hulen Mall
4800 S. Hulen, #202
Ft. Worth, TX 76132
Ph. 817-263-8890
Fax 817-346-0778
Scott Gady, Manager
Income: H-30% M-45% L-25%
Stations: 12 C

Heakin Research, Inc.
Vista Ridge Mall
2401 S. Stemmons Fwy., Ste. 1420
Lewisville, TX 75067
Ph. 972-315-3555
Fax 972-315-8926
Helen Nicholas, Manager
Income: H-46% M-41% L-13%
Stations: 10 C K P O

Probe Research, Inc.
Golden Triangle Mall, 2201
I-35 & Loop 288
Denton, TX 76205
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.
3680 Irving Mall
Irving, TX 75062
Ph. 972-241-6696
Fax 972-241-8513
Income: NA
Stations: NA

Probe Research, Inc.
2211 Northeast Mall
1101 Melbourne Rd.
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

Probe Research, Inc.
#2024 S.W. Center Mall
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.
2090 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

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
E-mail: savitz@swbell.net
Barbara Brodie, Manager
Income: H-30% M-50% L-20%
Stations: 14 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
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

We Can Put You on the Right Track!



**The Only Company That Delivers The Coast
... The Gulf Coast ...
Houston . . New Orleans . . Tampa/Orlando**

Gulf State Research covers the key markets along the Gulf Coast. One call places your projects in our three regional malls or focus groups centers. Call 1-800-357-8842. Ask for Tim Villar, Vice President.

Tired of getting the "run around" on bids, placing projects or trying to determine their status? Tired of not getting your project completed on time or getting only half the quota done? Call Gulf State Research and deal directly with our company's principles. We are a very "hands-on" organization. Our principals will always be available to you on every one of your projects from start to end. We pride ourselves on always finishing on time and completing our assigned quota.

In Houston, our Regional Mall features FIVE anchor stores plus 150 other retailers. The Houston facility also features large multiple Focus Group meeting rooms, Client viewing rooms comfortably seat 10 -12, six permanent interviewing rooms with computers, VCR's and monitors, a complete test kitchen and other features.



RESEARCH CENTER

San Jacinto Mall
1670 San Jacinto Mall
Baytown, TX 77521
(281) 421-7798
Fax (281) 421-1976

Clearview Mall
4426 Veterans Blvd.
New Orleans, LA 70006
(504) 454-1737
Fax (504) 454-2461

Eagle Ridge Mall
451 Eagle Ridge Dr., Ste. 233
Lake Wales, FL 33853
(800) 357-8842/(941) 676-3676
Fax (941) 676-0471

Houston • New Orleans • Tampa/Orlando

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

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 C K P

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: HOUS@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-30% M-60% L-10%
 Stations: 4 C K P O
 (See advertisement on p. 89)

Gulf State Research Center
 San Jacinto Mall
 1670 San Jacinto Dr.
 Baytown, TX 77521
 Ph. 800-357-8842 or 281-421-7798
 Fax 281-421-1976
 E-mail: lvillar@gte.net
 Robert Landsberger, President
 Income: H-34% M-47% L-19%
 Stations: 6 C K P O
 (See advertisement on p. 107)

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

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

Heakin Research, Inc.
 West Oaks Mall, Ste. 547
 Houston, TX 77082
 Ph. 281-531-5959
 Fax 281-531-6233
 Kent Smith, Manager
 Income: H-40% M-35% L-25%
 Stations: 12 C K P O

Houston Certified Research
 Almeda Mall
 730 Almeda Mall
 Houston, TX 77075
 Ph. 713-944-1431 or 800-527-9004
 Fax 713-944-3527
 Income: H-20% M-70% L-10%
 Stations: 5 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
 www.quicktest.com
 Melodie Henderson, Manager
 Income: H-15% M-65% L-20%
 Stations: 8 C K P O

San Antonio

Car-lene Research, Inc.
 North Starr Mall
 7400 San Pedro, #2060
 San Antonio, TX 78216
 Ph. 210-340-3595
 Fax 210-340-3559
 Linda Cameron, Manager
 Income: NA
 Stations: NA K P O

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

Friedman Marketing Services
 Consumer Opinion Center
 Rolling Oaks 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. 101)

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

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

Quick Test
 Windsor Park Mall
 14B Windsor Park Mall
 San Antonio, TX 78218
 Ph. 210-657-9424
 Fax 210-657-9432
 E-mail: info@quicktest.com
 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. 801-778-0380 or 206-241-6050 for bids
 Fax 801-778-0383
 E-mail: cos-info@cosvc.com
 www.cosvc.com
 Income: H-10% M-65% L-25%
 Stations: 9 C K P
 (See advertisement on p. 109)

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: SALT@cunninghamresearch.com
 www.cunninghamresearch.com
 Income: H-10% M-80% L-10%
 Stations: 4 C K P O
 (See advertisement on p. 89)

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: rnnmrs@aol.com
 www.ruthnelsonresearchsvcs.com
 Cheri Ingram, Manager
 Income: H-40% M-40% L-20%
 Stations: 3 C K P

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
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
www.cosvc.com
Maureen Barbee, Manager
Income: H-10% M-65% L-25%
Stations: 10 C K P
(See advertisement on p. 109)

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
www.cosvc.com
Yvone Pecha, Manager
Income: H-10% M-60% L-30%
Stations: 12 C K P O
(See advertisement on p. 109)

Seattle/Tacoma

Car-Lene Research, Inc.
Alderwood Mall
3000 184th St. S.W., #861
Lynnwood, WA 98037
Ph. 425-744-8047
Fax 425-744-7809
Income: NA
Stations: NA K P O

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
www.cosvc.com
Judy Riha, Manager
Income: H-10% M-50% L-40%
Stations: 9 C K P
(See advertisement on p. 109)

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
www.cosvc.com
Judy Eaton, Manager
Income: H-10% M-65% L-25%
Stations: 4 K P
(See advertisement on p. 109)

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: SEAT@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-0% M-80% L-20%
Stations: 5 C K P O
(See advertisement on p. 89)

Friedman Marketing Services
South Hill Mall
3500 Meridian South
Puyallup, WA 98373
Ph. 253-840-0112 or 914-698-9591
Fax 253-840-0131
Income: H-30% M-50% L-20%
Stations: 11 C K P O
(See advertisement on p. 101)

Quick Test
Tacoma Mall Shopping Center, Rm. 699
4502 S. Steele St.
Tacoma, WA 98409
Ph. 253-474-9980
Fax 253-473-1931
E-mail: info@quicktest.com
www.quicktest.com
Marion Stevens, Manager
Income: H-10% M-40% L-50%
Stations: 7 C K P O

U.S. Research Co.
555 Nothgale Mall, Ste. 220
Seattle, WA 98125
Ph. 206-361-8777
Fax 206-361-8778
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
www.cosvc.com
Ruth Rivers, Manager
Income: H-9% M-61% L-30%
Stations: 8 C K P O
(See advertisement on p. 109)

COS In SLC

That's right, we've just opened our newest mall intercept office in the Salt Lake City market. That means we can give you even better coverage from the west coast to the Rocky Mountains. Just add this new one to your alphabet soup.

Consumer Opinion Services

We answer to you

12825 1st Avenue South Seattle Wa. 98168
206-241-6050 FAX 206-241-5213
ask for Jerry or Greg Carter
Http://www.Cosvc.com E-mail COS-info@cosvc.com

Seattle ♦ Portland ♦ Spokane ♦ Boise ♦ San Jose ♦ Salt Lake City

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

Vancouver

Consumer Opinion Services, Inc.

Vancouver Mall
 8700 N.E. Vancouver Mall Dr.
 Vancouver, WA 98662
 Ph. 360-254-6650 or 206-241-6050 for bids
 Fax 360-254-6588
 E-mail: cos-info@cosvc.com
 www.cosvc.com
 Alice Hilby, Manager
 Income: H-15% M-45% L-40%
 Stations: 7 C K P
 (See advertisement on p. 109)

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. 304-733-1643
 Fax 304-733-0472
 E-mail: MCMILLRES@aol.com
 http://members.aol.com/mcmillres/home/index.htm
 Mary Burton, 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. 740-695-6288
 Fax 740-695-5163
 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. 101)

Green Bay/Appleton

Friedman Marketing Services

Fox River Mall
 4301 W. Wisconsin
 Appleton, WI 54915
 Ph. 920-730-2240 or 914-698-9591
 Fax 920-730-2247
 Income: H-30% M-55% L-15%
 Stations: 11 C K P O
 (See advertisement on p. 101)

Wisconsin Research, Inc.
 693 Bay Park Square
 Green Bay, WI 54304
 Ph. 920-405-1012
 Fax 920-405-1013
 Randy Hansen, 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: milwaukee@consumerpulse.com
 www.consumerpulse.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
 www.quicktest.com
 Linda Kelly, Manager
 Income: NA
 Stations: 9 C K O

British Columbia

Vancouver

Research House, Inc.
 Metrotown Centre
 454-4800 Kingsway
 Burnaby, BC V5H 4J2
 Canada
 Ph. 604-687-3714
 Fax 604-687-3716
 E-mail: vanc@research-house.ca
 www.research-house.ca
 Tammy Anderson, Manager
 Income: H-35% M-50% L-15%
 Stations: 5 C K P O

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
 www.research-house.ca
 Tammy Anderson, Manager
 Income: H-25% M-50% L-20%
 Stations: 4 C K P

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
 www.research-house.ca
 Paul Gauthier, V.P., Qualitative
 Income: H-25% M-50% L-25%
 Stations: 4 C K

Toronto

Canadian Viewpoint, Inc.
 Centerpoint Mall
 6464 Yonge St., Ste. N5
 Toronto, ON M2M 3X4
 Canada
 Ph. 905-770-1770
 Fax 905-770-1692
 E-mail: cdnview@interloq.com
 Carol Udell, President
 Income: H-30% M-60% L-10%
 Stations: 3 C K P O

Canadian Viewpoint, Inc.
Eastgate Mall
75 Centennial Pkwy. N.
Hamilton, ON L85 2P2
Canada
Ph. 905-770-1770
Fax 905-770-1692
E-mail: cdnview@interloq.com
Carol Udell, President
Income: H-20% M-70% L-10%
Stations: 4 C P

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

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

CanTest Research Services
Lawrence Square
700 Lawrence Ave. W.
North York, ON M6A 1B6
Canada
Ph. 416-4873916 ext. 234
Fax 416-487-5203
Peter Banakos, Project Director
Income: H-20% M-40% L-40%
Stations: 3 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
www.marketprobe.com
Income: H-50% M-30% L-20%
Stations: NA K P O

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
www.research-house.ca
Paul Gauthier, V.P., Qualitative
Income: H-40% M-50% L-10%
Stations: 5 C K P O

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
www.research-house.ca
Paul Gauthier, V.P., Qualitative
Income: H-20% M-55% L-25%
Stations: 4 C K

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
www.research-house.ca
Paul Gauthier, V.P., Qualitative
Income: H-20% M-60% L-20%
Stations: 3 C K P

Research House, Inc.
Portage Place
1154 Chemong Rd.
Peterborough, ON K9H 7J6
Canada
Ph. 416-488-2328
Fax 416-488-2368
E-mail: mail@research-house.ca
www.research-house.ca
Suzanne Lefebvre, President
Income: H-35% M-50% L-15%
Stations: 3 C K P O

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500 Rexdale Blvd., Ste. C1A
Rexdale, ON M9W 6K5
Canada
Ph. 416-488-2333
Fax 416-488-2391
E-mail: mail@research-house.ca
www.research-house.ca
Paul Gauthier, V.P., Qualitative
Income: H-35% M-50% L-15%
Stations: 5 C K P O

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

Quebec Recherches
Centre Commercial, Le Boulevard
4264 rue Jean-Talon est
Montreal, PQ H1S 1J7
Canada
Ph. 514-725-0306
Fax 514-725-0308
E-mail: mtl@research-house.ca
www.research-house.ca
Nancy Lefebvre, Manager
Income: H-25% M-65% L-25%
Stations: 4 C K P O

Quebec Recherches
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Canada
Ph. 514-725-0306
Fax 514-725-0308
E-mail: mtl@research-house.ca
www.research-house.ca
Nancy Lefebvre, Manager
Income: H-55% M-30% L-15%
Stations: 4 C K P O

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Galerias
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Mexico City, DF 11700
Mexico
Ph. 52-5-260-0925
Fax 52-5-251-5431
E-mail: info@epigrupo.com
www.epigrupo.com
Ricardo Escobedo, President
Income: H-0% M-35% L-65%
Stations: 8 K P

EPI Grupo
Interlomas
Blvd. Interlomas 5, Local AZ-022
Mexico City, DF 11700
Mexico
Ph. 52-5-291-9294
Fax 52-5-251-5431
E-mail: info@epigrupo.com
www.epigrupo.com
Ricardo Escobedo, President
Income: H-80% M-20% L-0%
Stations: 6 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
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Please send or e-mail your resume and cover letter, with reference to this ad, to: The Dow Chemical Company, Employee Development Center, Workforce Planning, Dept. 98-312/DCS, Midland, MI 48674 or E-mail: drdittenhafer@dow.com E-mail respondents must list Job 98-312 and their last name as the first and second items on the Subject line. Only those selected for our interview process will be contacted.

We are an equal opportunity employer and offer a competitive compensation and benefits package including 401(k), stock purchase, tuition reimbursement and performance incentives. The Dow Chemical Company is the fifth largest chemical company in the world with annual sales of US\$20 billion. Dow manufactures and supplies chemicals, plastics and agricultural products for customers in 164 countries and employs approximately 43,000 people worldwide. For more news and information about Dow, please visit our web site at www.dow.com



The Dow Chemical Company

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New Product Development Manager needed for Chicago area market research firm.

Write: H.R. Suite 100, 1 South 270 Summit Avenue, Oakbrook Terrace, IL 60181 or Fax 630-889-0972.

Listing Additions

Please note the following corrections to the 1998-99 Researcher SourceBook:

On p. 379, the listings and write-ups for the following Asia Market Intelligence offices should have appeared as:

Asia Market Intelligence Beijing
Rm. 102, Block C, Dart Bus. Centre
20 Guandongdian, Chaowai St., Choyang District
Beijing 100020
China
Ph. +86-10-6503-2153
Fax +86-10-6503-2148
E-mail: ami_beijing@ami-group.com
www.ami-group.com
Jack Yang, General Manager

As one of the operating offices of AMI China, AMI Beijing is a full-service market research agency experienced in both qualitative and quantitative studies. Product area expertise includes automotive, alcoholic drinks, business-to-business, food/soft drinks, pharmaceutical, telecommunications and consumer products.

Asia Market Intelligence Guangzhou
Rm. 108, 1/F, 20 Sa Mian Nan St.
Guangzhou 510130
China
Ph. +86-20-8184-6089
Fax +86-20-8191-5769
ami-guangzhou@ami-group.com
www.ami-group.com
Sylvia Cai, General Manager

AMI Guangzhou was founded in late 1996 as one of the offices of AMI China. We offer full service for both quantitative and qualitative studies, with special expertise in FMCG.

On p. 156, the e-mail address for Via Nova Consulting should read viano.r@mindspring.com.

Please note the following correction to the 1998 Directory of Customer Satisfaction:

The e-mail address for RTNielson Company, Salt Lake City, Utah, should read ron@rtnielson.com.

From the Publisher

continued from p. 114

description on the menu.

The *Norway* offered an opportunity to escape the usual dining-room fare with a separate European-style restaurant, "Le Bistro." When calling for a reservation I was told the only openings for the night we had selected were 6:30 and 9. Our preference would have been 7 or 7:30 but since neither of those were available we took the 6:30 option. The restaurant probably had a capacity of 100. When we arrived at the appointed time there were six other people in attendance. By 7 an additional 12 people had arrived. At 7:30 there were 22 people and our departure about half an hour later reduced the number of patrons to 18. Fellow passengers who had used this restaurant on other evenings had similar experiences. Apparently the concept was to give high visibility to this additional eating establishment but to discourage usage by restricting access.

On the last day at sea passengers were given tags to segregate the luggage according to departure times. As our travel arrangements had been handled by the cruise line, they had the information on our flight's departure time. However when I informed the purser's office that we had received

incorrect tags, the staff member accused me of failing to file the necessary paperwork when we initially boarded. The attitude was "We're right and you're wrong." Apparently they had never heard of the phrase, "The customer is always right" or "Make sure the customer leaves happy."

I spoke with Stephen Suchy, the hotel director of the *Norway*, who claimed that 94 percent of respondents answered "yes" to the question, "Will you cruise with Norwegian Cruise Line again?" on the passenger comment cards which are handed out shortly before disembarking.

If the results of NCL's "research" are to be believed, then the cruise line's satisfaction measurement instrument is badly out of tune. Based on our experience as well as conversations with other passengers, I would wager that fewer than one-third of the respondents would answer "yes" to that question after our September cruise.

The act of measuring customer satisfaction assumes there is a base level of service quality to measure. Rather than spending time and resources on a satisfaction program of questionable accuracy and merit, I believe the cruise line (and its customers) would be better served by replacement or comprehensive retraining of its employees and an overhaul of its equipment and facilities. After completing those efforts, NCL might truly have some satisfaction to measure. **(4)**

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ACG Research Solutions 59 Ph. 314-726-3403 • Fax 314-726-2503	First Market Research Corp. 38 Ph. 800-FIRST-1-1 • Fax 617-267-9080	ICR/International Communications Rsch. ... 53 Ph. 610-565-9280 • Fax 610-565-2369	Precision Research, Inc. 40, 56 Ph. 847-390-8666 • Fax 847-390-8885
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Campbell Goodell Traynor 73 Ph. 877-530-6184 • Fax 604-681-0427	Friedman Marketing Services 101 Ph. 914-698-9591 • Fax 914-698-2769	Mar's Surveys 87 Ph. 609-786-8514 • Fax 609-786-0480	P. Robert and Partners SA ... Back Cover Ph. +41-21-802-84-84 • Fax +41-21-802-84-85
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From the Publisher

By Tom Quirk/QMRR publisher

In satisfaction terms, this ship was the *Titanic*

Customer satisfaction? Customer loyalty? Virtually every organization professes to be interested in maximizing both. Many use evaluation forms to impress customers with their commitment to the process. But for a firm to even consider undertaking programs of this sort it is necessary to have reached a minimum product or service standard.

Most satisfaction programs are run on the assumption that problem areas are finite and can be enumerated, isolated and then worked on. On some rare occasions the product or service level is so low and the problems so broad that it would be a waste of time to go through the motions of measuring customer loyalty and satisfaction. Something much more

basic is required: determine the source of the problems and how to correct them in order to move the product or service level up to a minimum standard.

An abysmal level of service is what my wife and I experienced while on a recent cruise aboard the *Norway*, a Norwegian Cruise Line (NCL) ship. The biggest disappointment was the attitude of the ship's personnel. They were curt, confrontational and inattentive. One passenger commented that they acted as though this was their last cruise and they could hardly wait to get off the boat.

The *Norway* is an older ship (originally launched as the SS *France* in 1960) with a capacity of slightly more than 2,000 passengers. On our cruise in early September there were approximately 1,300 on board, many of whom had been attracted by generous reductions in fares offered by NCL during the summer. After being on the ship a short time it became obvious why the cruise line had been able to recruit relatively few passengers at their published rate: The service was terrible.

On the first night at sea, there were close to 100 passengers lined up at the concierge's office to complain. The reasons were many: accommodations were dated and worn; bathroom tiles were loose and moldy; hot water was sporadic; the air conditioning didn't work; the furniture needed replacing.

Cruise ship dining is often mentioned by passengers as one of the highlights of the excursion and it is said that a passenger can expect to gain anywhere from three to six pounds during the voyage. *Norway* passengers have no reason to fear such a weight increase.

In our visits to the dining room, the noise made conversation difficult, causing diners to spend as little time as possible there. The presentation and taste of the food was very institutional. Menus were apparently recycled from one cruise to the next with little concern as to their accuracy. Very seldom did I get a dinner which accurately matched the

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Farcus

by David Waisglass
Gordon Coulthart



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