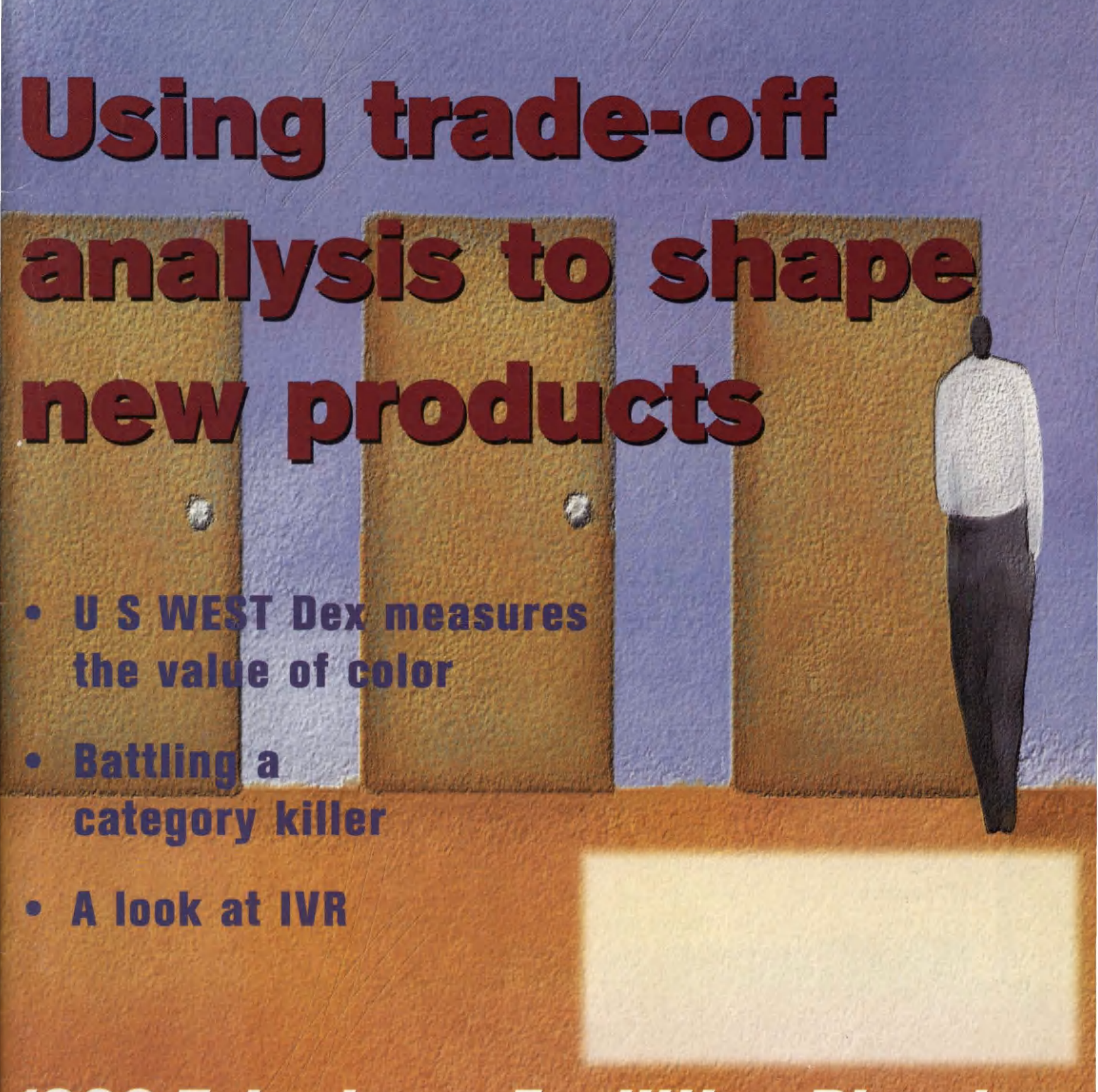
QUIRK'S Marketing Research Review

Volume XIII, Number 5 May 1999



Using trade-off analysis to shape new products

- U S WEST Dex measures the value of color
- Battling a category killer
- A look at IVR

1999 Telephone Facilities Directory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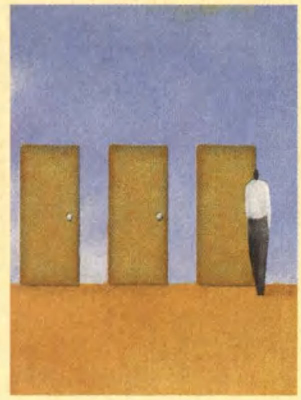

C O N T E N T S

F E A T U R E S

Case histories

Techniques

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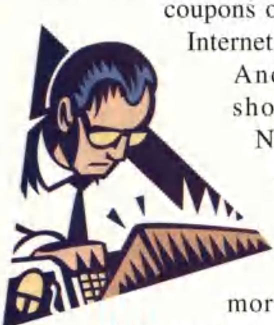
D E P A R T M E N T S

Internet users are cutting and using electronic coupons

Nearly half (49 percent) of Internet users who use coupons said that they are aware of on-line coupons, according to a recent survey conducted by NPD Online Research, Port Washington, N.Y.

Thirty-one percent of participants said that they obtain coupons on-line, and 23 percent reported actually using coupons retrieved from the Web. Forty-five percent of NPD respondents who confirmed using coupons obtained via the Internet were male.



And the trend should continue. NPD found that more people are already planning to use coupons more often and in increased quantity. Among those who are aware of on-line coupons, 87 percent said they plan to use on-line coupons in the future, and 80 percent reported that their use of on-line coupons will grow in the future. "There are great opportunities for on-line couponing," reports Pamela Smith, vice president of NPD Online Research. "We know that usage and future intentions tend to be overstated somewhat in surveys, but there is clear evidence that consumers are going for on-line coupons. We also see that nearly half of those who are aware of on-line coupons are using them. Since only half of Internet users know about on-line coupons, there is a lot of room for growth. Awareness should increase with Internet organizations like America Online starting to promote relationships that will help consumers more easily take advantage of coupons on-line. Manufacturers and retailers are going to need to be on top of this."

Surfing is the primary way of discovering coupons on-line, with half of survey respondents reporting that they first became aware of Web-related coupons through general browsing. On-line advertising sparks the interest of 23 percent, with males slightly more likely than females to respond to Internet ads. Recommendations from friends and relatives influence on-line coupon awareness for another 10 percent of those surveyed. Promotions not

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Spending for athletic footwear dipped in 1998

Consumer spending for athletic footwear declined 6 percent in 1998, due largely to a weak third quarter, according to a national survey that has tracked the market since 1992. Consumers reported they spent $13.804 billion for athletic footwear in 1998, compared to $14.732 in 1997. The number of pairs purchased also fell by 6 percent, to 325.4 million from 346.6 million. The 1997 figures were the highest reported during the study period.

"The results in the third quarter told the story of the year," says Gregg Hartley, executive director of the Athletic Footwear Association (AFA), North Palm Beach, Fla., which announced the findings. "This is normally the industry's strongest sales period, but consumer spending fell 20 percent. For the rest of the 1998, sales were roughly the same as 1997.

"The industry may have recovered somewhat in the last quarter of 1998 in the sense that the sharp third-quarter slide did not carry over," Hartley says. Sales for October through December were $3.739 billion in 1998, compared to $3.751 the year before.

The survey, by the NPD Group, Port Washington, N.Y., found that running shoes took over first place as the most popular category, barely edging out basketball. Running shoe sales rose 1 percent to $2.355 billion from $2.332 billion. Basketball shoes sales fell 22 percent to $2.328 billion from $2.985 billion

"It's tempting to blame the NBA lockout for a decline in the popularity of basketball shoes," Hartley says, "but the fact is that a fashion swing to running has been going on for at least three years. This probably would have happened in any event."

Hiking shoes, up 13 percent to $969 million from $858 million, and walking shoes, up 1 percent to $1.228 billion from $1.216 billion, were the only other categories to show gains. Sales of cross-training, "athleisure," tennis, aerobic, baseball and soccer shoes and sports sandals all declined.

The average price paid for a pair of athletic shoes dipped fractionally in 1998, to $42.42 from $42.50 the year before.

Spending for men's athletic shoes dropped 7 percent, to $5.671 billion from $6.087 billion in 1997. Sales of women's athletic shoes fell 5 percent to $6.316 billion from $6.681 billion. Sales of children's athletic shoes were down 7 percent to $1.587 billion from $1.715 billion. For more information call 561-842-4100 or visit the AFA Web site at www.sportlink.com/sport.

Names of Note

Debra Portz has joined *Taylor Nelson Sofres Intersearch* in Chicago as a vice president.

Terri Maciolek has been promoted to vice president at *Strategic Marketing Corp.*, a Bala Cynwyd, Pa., pharmaceutical research firm.

Lisa Wood has joined Arlington, Va.-based *Hagler Bailly* in its market and survey analysis group, PHB Hagler Bailly, Inc., Madison, Wis., as principal.

Fred Bove has joined San Francisco research firm *Socratic Technologies* as executive vice president and account executive.

Kelly Purselley has been promoted to product manager at *Decision Analyst*, an Arlington, Texas, research firm. In addition, **Melissa DeLoach** has been named project director.

Joe Toole has been promoted to vice president at Cincinnati, Ohio-based *Burke Customer Satisfaction Associates.*

Toole Fishken

David Fishken has joined the Sensory Services Division of Boston-based *Shuster Laboratories* as its lead sensory specialist and market researcher.

Arthur Zimbalist has been appointed president of *Meyers Research Center*, New York.

Irwin Broh & Associates, a Des Plaines, Ill., research firm, has promoted **David Waitz** to president and CEO. **Irwin Broh** remains chairman. In addition, **Robert Rowe** has been promoted to executive vice president, **Michael Saletta** has joined the firm as vice president, and **Louis Cassuto** has been named controller.

Steve Cheren has joined *Brintnall & Nicolini*, a Philadelphia health care consulting and research firm, in the new position of director of new business development and planning.

Linda Waldman has joined *FRC Research Group*, New York, as a senior vice president with client service responsibilities.

Eric Halata has joined New York research firm *Schulman, Ronca & Bucuvalas, Inc.*, as vice president and lead strategist in its Customer Loyalty Research Group.

Delice Bolotin has been promoted to vice president in Toledo, Ohio-based *NFO Research's* Greenwich Marketing

Bolotin Schweizer

Group, Greenwich, Conn. In addition, **Terry Schweizer** has been promoted to vice president in the company's Chicago Marketing Group.

Digital Research, Kennebunk, Maine, has named **Robert Cuzner** research director.

Sky Alland, a Columbia, Md., customer relationship management firm, has named **Jeanne Hoover** vice president in the firm's new West Coast office in Laguna Hills, Calif.

David Fenichell has been named senior vice president for online research at New York-based *Roper Starch Worldwide*. In addition, Josephine Holz has been appointed vice president in the firm's custom research division.

Elrick & Lavidge Marketing Research, Atlanta, has named **Burr Brown** senior vice president and director of its Business Development Group.

Gregg Lindahl has been promoted to executive vice president and COO at *The Eagle Group*, an Atlanta research, software, consulting and business services firm.

Jeanine Douglas and **Nan Martin** have been promoted to senior vice president at Market Facts, Inc., Arlington

Douglas Martin

Heights, Ill. In addition, **Larry Labash** has been promoted to executive vice president.

Labash Day

Memphis, Tenn., research firm *Message Factors* has named **Mary Day** president.

Information Resources, Inc., Chicago, has named **Steven Aase**, **Michael McDonald**, and **David Paragamian** senior vice president.

J. Brad Wilson has been elected president of the **Society of Insurance Research.**

Software organizes audio from qualitative sessions

DocuMat, LLC, New York, has released InterClipper, software that allows interviewers to record, scan, sort and present significant audio quotations by participants in qualitative research studies. When recording a session, the interviewer presses a button to mark key statements. The button can be unobtrusively located on a cordless remote in face-to-face situations like focus groups. After the session, the interviewer can scan through these audio clips to review the highlights. Both the clips and topic sections marked during the session can be easily sorted on screen to locate the most interesting or relevant clips to include in the final report. Excerpts can be presented as sound clips or translated into text for final reporting. Clips can also be transferred to audiotape to support presentations, or can be embedded in multimedia reports or e-mails. The program is now available on a demo CD featuring the 1999 InterClipper Qualitative CD Survey, including interviews with 24 market researchers indexed using the software. For more information or to order a demo disk call 908-273-4036 or visit the company's Web site at www.interclipper.com.

Conjoint-based research tool for concept screening

Moskowitz Jacobs Inc., a White Plains, N.Y., research firm, has introduced IdeaMap Wizard, a conjoint research-based, multimedia, computerized research tool for idea/concept screening and development. The product can be used to test stand-alone concepts or evaluate systematically designed combinations of ideas. It comes complete with everything a user

Research Calendar

MYSTERY SHOPPING CONFERENCE: On May 12-15, the Mystery Shopping Providers Association (MSPA) annual conference will be held in Scottsdale, Ariz., at Doubletree's La Posada resort. "Network '99 - Partners in Service Quality" is the theme for the conference, which features experts in the mystery shopping industry covering topics such as: improving customer service through mystery shopping; how to give effective presentations; selling mystery shopping services and closing the sale; defining what clients are really looking for in mystery shopping programs; challenges and rewards of quality management in mystery shopping; and understanding the difference between integrity shops and customer service evaluations. For more information call 847-375-4743 or visit the organization's Web site at www.mysteryshop.org.

INSURANCE RESEARCH WORKSHOPS: The Society of Insurance Research will hold its spring workshop series at the Loews Le Concorde Hotel in Quebec on May 24-26. Featured workshops include Internet technology, new tactics in the war on insurance fraud, competitive intelligence, primary market research, integrated research and action for product development. For registration information call Stan Hopp at 770-426-9270.

MRA ANNUAL CONFERENCE: The Marketing Research Association will hold its 41st annual conference, themed "Framework for the Future," in Boston at the Boston Park Plaza Hotel on June 9-11. For more information call 860-257-4008 or visit the organization's Web site at www.mra-net.org.

RADIO RESEARCH SYMPOSIUM: The European Society for Opinion and Marketing Research (ESOMAR) and Advertising Research Foundation (ARF) are co-sponsoring the Radio Research Symposium and Exhibition at the Marriott Long Wharf Hotel in Boston on June 13-15. Scheduled topics include advertising effectiveness, programming research, and a look at how radio measurement is adapting to the changing media environment. For more information, call the ARF at 212-751-5656 or visit its Web site at www.arfsite.org or visit the ESOMAR Web site at www.esomar.nl.

PHARMACEUTICAL RESEARCH CONFERENCE AND EXHIBITION: From June 23-25, the European Society for Opinion and Marketing Research (ESOMAR) and the European Pharmaceutical Marketing Research Organization (EphMRA) are co-sponsoring the Pharmaceutical Marketing Research Conference and Exhibition, themed "Building a Competitive Culture through Shared Responsibility," at the New York Hotel in Marne la Valee (Paris), France. For more information visit the ESOMAR Web site at www.esomar.nl.

NATIONAL DECISION SYSTEMS CONFERENCE: San Diego-based National Decision Systems will hold its annual users conference on July 24-28 at Loews Coronado Bay Resort in San Diego. In addition to industry and application-specific breakout sessions, the conference will highlight the company's new products and services. Industry tracks will include retail, restaurant, real estate, non-profit and more. Breakout session topics will range from site selection and merchandising to database marketing and intranet initiatives. For more information contact Melissa Barry at 800-866-6510 ext. 575, or at melissa.barry@natdecsys.com.

ANNUAL ESOMAR CONGRESS: The European Society for Opinion and Marketing Research (ESOMAR) will stage its 52nd annual Congress and Trade Exhibition from September 5-8 at Le Palais des Congres de Paris, France. For more information visit the ESOMAR Web site at www.esomar.nl.

needs to design a study, collect interview data, process models and run customized reports. It is designed to take product descriptors, selling points, competitive challenges and next-generation ideas and sort them with the help of consumers. For more information call 914-421-7400 or visit the company's Web site at www.mji-designlab.com.

New syndicated study of lifestyles

Harris Black International, Rochester, N.Y., has launched a new syndicated media-marketing research offering, Intermedia Pulse. This syndicated Internet-based market research service helps marketing and advertising decision makers measure and assay consumer lifestyles — including media usage, entertainment and work-related activities, among others. Drawing from Harris Interactive's cooperative database of more than 2.5 million on-line consumers, Intermedia Pulse enables marketers to obtain insights linking category-product purchasing behaviors, advertising effectiveness and media usage patterns. The product lets marketers and advertisers isolate and track media usage and effectiveness measures and helps pinpoint when the consumer is available to receive an advertising message (i.e., by medium, time of day and day of the week). Each monthly survey "takes the pulse" of more than 9,000 participants. Harris Interactive's established cooperative panel of on-line consumers represents all major demographic groups and geographic regions.

The on-line survey makes data available for adults, 18 and over, for the entire U.S. population including individuals who use the Internet at home and/or at work and is based on an individual's recent (yesterday) recall of time-of-day related activities. The methodology permits a comparative analysis of individual consumers' lifestyle patterns — encompassing all major media, Internet usage, entertainment, and work-related activities. In addition, the interactive and cooperative nature of the on-line surveys allows for tracking trends and changes among individual groups, at the respondent level.

The monthly surveys are currently conducted over three consecutive days and have daily completion increments of 3,000 unique participants. The interviewing periods are rotated to reflect different days of the week each month, to ensure the ability to track day of the week, as well as monthly trends. In addition, HBI periodically conducts parallel survey administration through traditional telephone-based methods to calibrate the on-line sample to reflect the U.S. population. A total of 25,000+ adults age 18+ have already completed the Intermedia Pulse questionnaire during a two-phase pilot study conducted between December 1998 and

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Research Industry News

Evan Tweed has been named associate publisher of **Quirk's Marketing Research Review**. He will retain the title of advertising sales manager.

ACNielsen Corporation, Stamford, Conn., posted higher earnings in the first quarter, as the company continued its growth in the U.S. and improved its operating efficiency in Europe and Asia Pacific. Income, before the cumulative effect of an accounting change, reached $6.0 million, or $0.10 per diluted share, up from $1.8 million, or $0.03 per share, in the prior year. The 1999 results include a negative impact of $0.01 per share from foreign currency translation. Reported revenue increased 8.6 percent, to $354.0 million, reflecting continued growth in the U.S. and the addition of ACNielsen BASES, which was acquired at the end of last year's second quarter. With all regions delivering improved profits, reported operating income reached $7.4 million, up from $0.2 million in 1998. Current-year results include $1.4 million in negative foreign currency translation impacts, as well as $3.8 million in Year 2000 software modification costs, up from $3.3 million in the prior year.

Winners of the **Advertising Research Foundation's 1998 David Ogilvy Research Awards** were announced at the ARF's annual conference in New York in March. The awards recognize the most effective use of research for developing successful advertising campaigns. The Steel Alliance (Washington, D.C.), GSD&M (Austin, Texas), and Wirthlin Worldwide (Orem, Utah) won the David Ogilvy Research Trophy for the best example of research contributing to its advertising campaign, "The New Steel. Feel the Strength."

Two Gold Medallion winners were announced:

Chevrolet Motors research team (Detroit, Mich.), Campbell-Ewald Advertising (Warren, Mich.), and Cultural Dynamics (Westport, Conn.), for its "Chevrolet Venture Let's Go" campaign;

Colgate Palmolive Company (New York), Young & Rubicam (New York) and ICON (New York), for the "Colgate Total Toothpaste Brushing" campaign.

Four Bronze medallions were awarded to the following teams:

Frito-Lay (Plano, Texas), Dieste & Partners (Dallas), and Market Segment Research (Coral Gables, Fla.), for "Doritos/Subor a Todo Volumen";

Kraft (Glenview, Ill.), Foote Cone & Belding (Chicago), ACNielsen (Deerfield, Ill.), Millward Brown (Naperville, Ill.), and SMI Alcott (Chicago), for "Digiorno Rising Crust Pizza";

Lee Company (Shawnee Mission, Kan.), and Fallon McElligott (Minneapolis), for "Lee Dungarees Buddy Lee";

Shell Oil Company (Houston), Ogilvy & Mather (Houston), Cambridge Reports/Research International (Cambridge, Mass.), and The BRS Group, Inc. (Mill Valley, Calif.), for the "Count on Shell" campaign.

Five Silver medallions were given to the following groups for campaigns that displayed excellence in their use of research for the various phases of campaign development:

Campbell Soup (Camden, N.J.), and ACNielsen Bases (Parsippany, N.J.) for their "V8 Splash Introductory" campaign (in the "Shaping Strategy" category);

Key Bank (Cleveland), and The Lord Group (New York), for "Key Small Business" campaign (in the "Development of an Execution" category);

Kraft Foods (Glenview, Ill.), Leo Burnett (Chicago), and Loran Marketing (Chicago), for Velveeta Cheese Loaf-Chili Dip Recipe "Meltin' Love" (also in the "Development of an Execution" category);

Johnson & Johnson Personal Products Company (Skillman, N.J.),

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Focus groups are an excellent way to see what your clients think of your product or service. But to get the most benefit, you need to observe the group. All too often, schedule, budget, travel, or timing constraints can prevent you or others from seeing the groups firsthand. And while traditional videoconferencing allows you to observe the groups without going to the group facility, you may have to go to a videoconferencing location or use special hardware and phone lines to take advantage of it from your office, and still pay a fee for the actual viewing time.

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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 reports noticing a disclaimer at the bottom of an ad touting a readership study for a local business newspaper in Georgia.

Greater than 1% response rate. This survey is not scientific but it is accurate.

—Publisher

The ad mentioned neither the data gathering technique, the sample size, nor the sampling error.

Nelems could not resist writing the editor. Referring to the accuracy mention, he wrote, "I guess this means that you correctly wrote down the actual numbers that came from a survey that is not projectable."

The editor replied, "What it means is that if a survey had been done according to more formal standards, the results would have been the same."

Nelems says he was tempted to write back, "How do you know?" but he thought better of it.

Gail Fleenor, research manager for a regional southeastern supermarket chain, thought she had heard every possible story from interviewers as to why they were having difficulties when conducting interviews.

One interviewer, a young woman in her 20s, told Fleenor after being hired for an in-store survey that she was going to have, "The rest of my teeth" extracted the day before the survey started. However, she thought it wouldn't affect her performance since, "It didn't bother me the last time I had teeth pulled." She told Fleenor she would be fitted for an upper plate and have it prior to the survey.

Later, as Fleenor began the training session, this woman proudly tapped her new upper plate to show that she had indeed had all her upper teeth extracted and a shiny new plate installed.

When Fleenor actually visited the store where interviewing was taking place, the woman came over and showed her her gums. It was, Fleenor reports, a scary sight. The woman said the dentures were hurting her gums so she took them out and put them in her pocket.

Over the next four days of the survey, the woman rarely wore her top plate. So, each time Fleenor entered the store she was greeted with a view of the woman's gums. The woman would pull up her upper lip for an inspection, which Fleenor studiously avoided. And each time Fleenor visited the store, the woman proudly proclaimed, "I've got my dentures in my pocket!"

A few weeks ago I conducted focus groups on new advertising executions designed for a company that advertises in the AARP's *Modern Maturity* magazine. I arrived a couple of hours early to set up, and was told by the hostess that one of the respondents was already waiting in the lobby. Curious, I ventured out and saw a kindly-looking elderly woman, who I estimated to be about 75 years old, sitting peacefully, a pocketbook resting across her lap.

I approached her and introduced myself as the moderator for the group discussion and commented on her arriving so early. Apologetically, she explained, "I came early because I was afraid of traffic in the rain."

"It's not raining," I pointed out.

"But they said it might."

As fate would have it, one of the executions tested that night included an ad featuring an elderly woman sitting in an easy chair, sipping tea from a dainty cup. The photo had a startling resemblance to our respondent. (No, it wasn't her.) Virtually all respondents in the group loved the ad. The only exception was our kindly old woman, who said, "That's just ridiculous. No one would believe that ad. People like that don't exist!"

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.

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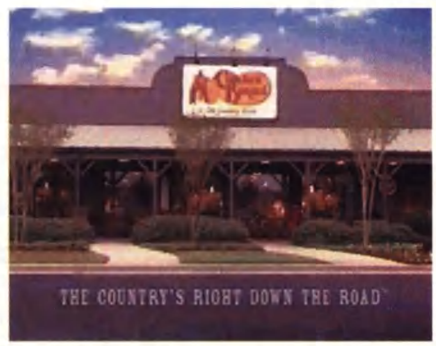

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A survey of multivariate methods useful for market research

By Susie Sangren

Editor's note: Susie Sangren is president of Clearview Data Strategy, an Ithaca, N.Y., consulting firm. She can be reached at 607-256-3297 or at ss@clearviewdata.com.

Most researchers are already familiar with univariate statistical methods. Multivariate statistics are developed for analysis of data which has more complex, multi-dimensional, dependence/interdependence structures. For example:

• Data is divided into a dependent group, as well as an independent group of variables. Researchers are interested in finding the causal relationship between the independent and dependent groups of variables. They would choose such multivariate methods as: multivariate multiple regression, discriminant analysis, conjoint analysis, crosstab ANOVA analysis, categorical analysis, and logistic regression.

• Data may be viewed as one big group of variables serving the same purpose. Researchers are interested in the interdependence structure of the data. Their focus is to restate the original variables in an alternative way to better interpret the meaning, or to group observations into similar patterns. They would choose such multivariate methods as: principal component analysis, factor analysis, canonical correlation analysis, cluster analysis, and multidimensional scaling.

• Data may not be normally distributed. Researchers are not concerned about making broader inferences about the population, but about the analysis of the specific data at hand. They would need multivariate methods that are tolerant of non-standard, non-metric data which is less likely to be normally distributed.

Multivariate methods are derived from univariate principles, but are more empirical because they work backward from data to conceptualization. For many marketing applications, multivariate methods can outperform univariate methods.

Marketing problems are inherently multi-dimensional, and solutions often inexact. For example, customer types are classified along a range of customer characteristics; stores and brands are perceived and evaluated with respect to many different attributes; creditworthiness of a credit card applicant is judged on a variety of financial information. Multivariate methods are versatile tools allowing researchers to explore for fresh knowledge in huge consumer databases. They are used for market segmentation studies, customer choice and product preference studies, market share forecasts, and new product testing. Results are used in making decisions about: strategy for target-marketing campaigns, new product or service design, and existing product refinement.

Multivariate methods are popular among marketing professionals also because of their tolerance of less-than-perfect data. The data may violate too many univariate assumptions; they may be survey data with too much variable information and not enough observations (e.g., researchers ask too many redundant questions with too few respondents); or they may have problems resulting from poor sample or questionnaire designs.

Key characteristics of multivariate procedures

The research objective should determine the selection of

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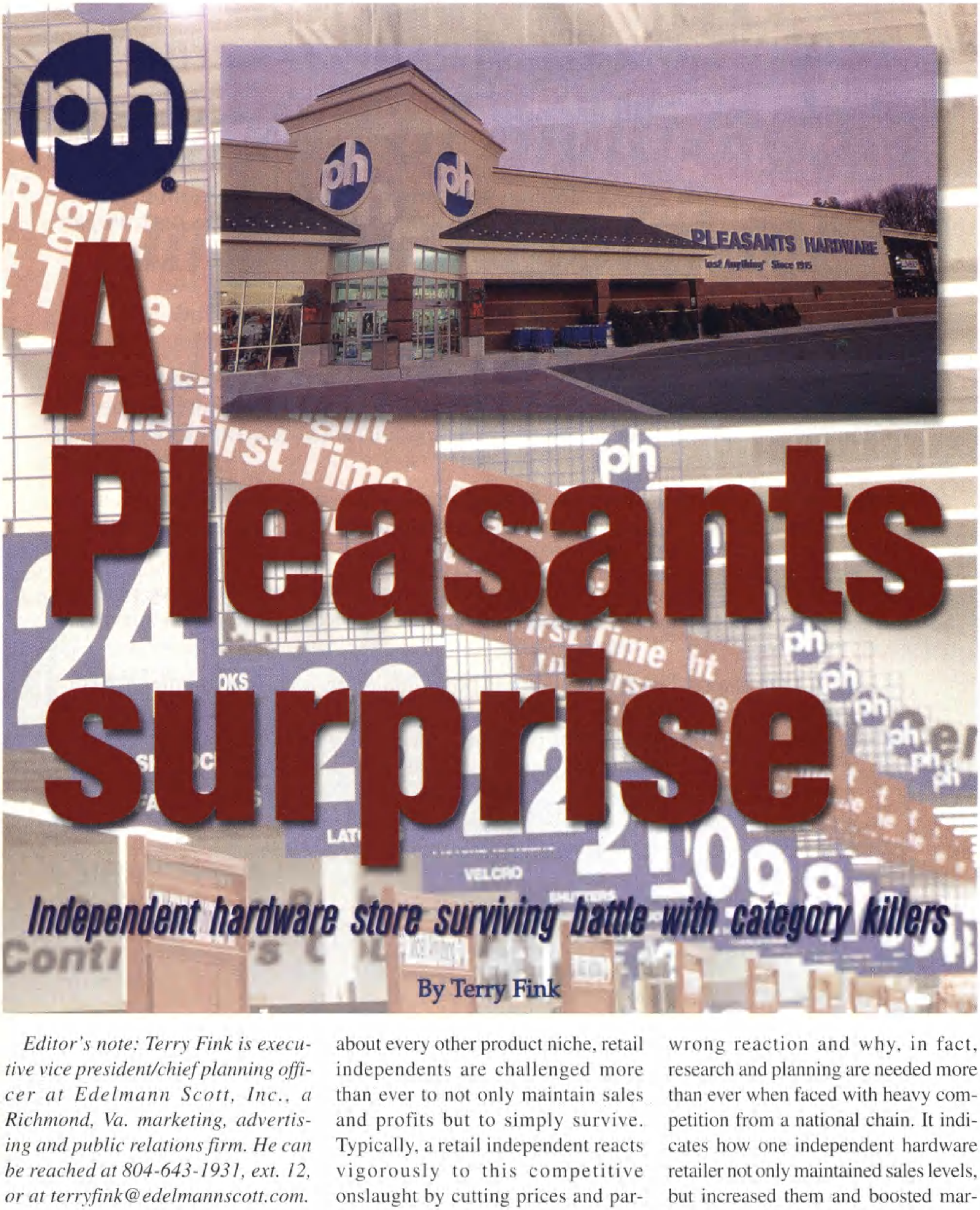

A Pleasants surprise

Independent hardware store surviving battle with category killers

By Terry Fink

Editor's note: Terry Fink is executive vice president/chief planning officer at Edelmann Scott, Inc., a Richmond, Va. marketing, advertising and public relations firm. He can be reached at 804-643-1931, ext. 12, or at terryfink@edelmannscott.com.

With the continued onslaught of "category killers" in automotive, home improvement, electronics, banking, crafts and just about every other product niche, retail independents are challenged more than ever to not only maintain sales and profits but to simply survive. Typically, a retail independent reacts vigorously to this competitive onslaught by cutting prices and paring the organization. Research and deliberate strategy often go by the wayside as the local retailer's survival instincts kick in.

This article points out why this is the wrong reaction and why, in fact, research and planning are needed more than ever when faced with heavy competition from a national chain. It indicates how one independent hardware retailer not only maintained sales levels, but increased them and boosted margins in the face of substantial national competition by employing a strategic process and consumer research.

Richmond, Va.-based Pleasants Hardware has served the greater

The idea for the "Get It Right The First Time" tagline arose from frustrations expressed by focus group respondents. Nothing is worse, consumers said, than getting home and finding out you bought the wrong supplies.

Richmond area since 1915. While Pleasants is local, with 175 employees, it is not a small "mom and pop" hardware store. Historically, its customer base consisted of a blend of professionals (builders, subcontractors, property maintenance staff, etc.) and a small but growing consumer homeowner base. In 1996, the company opened a second, 110,000-square-foot store in the affluent and burgeoning west end of Richmond to capture the increasing consumer homeowner segment and take advantage of heavy building in the area.

Results after the first year were not good. The new store had not taken root: sales fell well short of company goals. Moreover, it was announced that not only was Home Depot (the largest home improvement chain) moving into the Richmond market, it was building a store within 1/4 mile of the struggling Pleasants store. Lowes — the number two home improvement chain — already had a very strong presence in Richmond, was publicly committed to the market, and had a store located within a mile of Pleasants. In addition, Home Quarters, another competitor, remained in the market with a store just down the road.

In the past, Pleasants had used television, radio, newspaper and select local magazines as advertising vehicles. Its positioning had been "We know our stuff" — which alluded to the extremely knowledgeable employees of Pleasants. The positioning was true. Pleasants employees did and do know their stuff, as research later showed. However truthful, though, this advertising just wasn't pulling in traffic.

Yet, what was the correct course of action? To determine this, Pleasants agreed to a strategic process which included four essential steps:

1) a visioning session involving the entire management team and other stakeholders within the organization;

2) qualitative research;

3) quantitative validation of the direction; and

4) implementation.

Visioning session

Our firm conducted a visioning

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Image enhancement

U S WEST finds that color in yellow pages ads does more than just capture a shopper's attention

By Robert Batemarco, Cynthia Ziment Schlegel and Jane Dennison-Bauer

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Since telephone directories first started offering to print ads in color, the chief benefit of color ads was considered their ability to catch the reader's eye. Over time, more and more ads have come to be displayed in color. Clearly, when an ad is the only one on the page in color, it will stand out. However, at the other extreme, when all ads on a page are in color, none of them will stand out by dint of color alone. Thus, as the penetration of color in directory ads increases, the ability of color to catch the reader's eye becomes a less and less viable selling point, limiting directory publishers' ability to sell color ads, which are more profitable than black and yellow ads.

To justify to advertisers the higher price they will pay for color ads, one must show them that increased color penetration does not reduce the differential impact of color on customer response to those ads. Once higher levels of color penetration have been reached, perhaps in a few years (a random sample of a current Manhattan directory shows 29 percent penetration), successful marketing of color ads will require additional rationales.

Faced with this situation, U S WEST Dex, a Denver-based yellow page publisher, sought to reposition the marketing of its color ads by touting the ability of color to communicate key messages more effectively than standard black and yellow. To confirm that such an approach was realistic, it turned to Ziment Associates, a New York research firm.

Precise quantification

Proving that color ads are more effective than black and yellow ads, even at higher levels of color penetration, requires precise quantification of the importance of color on response to those ads. This requires isolating the impact of color from other factors influencing readers' response to particular ads. Levels of ad color, color penetration on the page, type of product or service advertised and specific copy of the ads themselves must all be taken into account.

A commonly used technique for this kind of a problem is conjoint analysis. However, the complexities of this problem render conjoint inappropriate for a number of reasons. First, conjoint designs do not allow for differences in competitive products, which prevents them from handling the differences in color penetration among competitive ads which share the page, one of the main variables we need to examine. Second, conjoint requires scales in order to permit calculation of utilities. The decision to select an ad to call from a directory is an either/or choice, which is better modeled dichotomously than by scales. In addition, because the color level of specific ads was not independent of color penetration of the pages on which they appeared, the problem contains interactions which conjoint is unable to handle.

Finally, the conjoint design would result in too many combinations – 288, to be exact. Even with an incomplete factorial design, each respondent would have to look at 32 different stimuli. By generating respondent overload, this type of design would jeopardize the quality of the data ultimately collected.

It is important to keep the respondent interested throughout the interview. This can be accomplished by presenting the respondent's task as concretely as possible and by keeping manageable the number of choices the respondent must make. At the same time, modeling the impact of color penetration properly requires testing at least three levels. Otherwise, we would have no way of knowing if the relationship between color penetration and ad selection is linear. (By linear we mean that the rate of ad selection changes at a constant rate for any change in the level of penetration — as opposed to the impact changing at different rates over different ranges of penetration levels.) Assuming linearity when it is not present impairs our ability to interpolate the effect of intermediate levels of penetration on ad selection.

A multidimensional solution

The solution to these research problems was three-fold. It consisted of an original experimental design, real-world props and use of a logit model.

A. Experimental design

The experimental design chosen was a full factorial design with incomplete blocs (i.e., respondents were only shown a fraction of the possible concepts). With that design, 36 concepts were tested. For each of three types of advertisers (florists, locksmiths and dentists), we tested three levels of color penetration (25 percent — i.e., two color ads out of eight on a page, 50 percent and 75 percent) and four levels of ad color (process photo, multiple color with graphical picture, knockout and yellow & black). For each of these concepts, two of the ads were test ads.

Since making selections among ads 36 different times would have proven beyond the tolerance of most respondents, each respondent actually was questioned about 12 of the concepts.

Figure 1 - Levels of color

Knockout

Yellow & Black

Multiple color

Process photo

As we noted previously, three levels of penetration were offered to determine if the relationship is linear or if indeed there are diminishing returns to color ads as penetration increases beyond a certain point.

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From research to loyalty marketing: the many uses of telephone interviewing

By Rich Hebert

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Over the last decade, competitive forces in the automotive, utility, health care and financial services industries have prompted corporations to become more customer-oriented. In many product categories, where customer orientation was once thought to be a source of competitive advantage, it has become a requirement for corporate survival.

Consumer research and loyalty marketing are inseparable aspects of customer orientation. Companies intent on generating customer loyalty must develop a corporate culture that is devoted to serving the customer. However, it is seldom recognized that research is part of the customer loyalty equation. Properly executed telephone interviews not only provide management with valuable information, but can leave customers with the sense that the company really cares about them. This not only increases the loyalty of satisfied customers, but can make the difference in keeping disgruntled customers from switching to another brand. Although many companies broadly acknowledge this concept, it is regularly forgotten when performing telephone interviews.

Implementation of a successful loyalty marketing orientation requires that employees are sold on the concept themselves. Service quality — a key driver of loyalty — cannot be treated as just a "program" or "special campaign." It requires a continuous commitment from the entire company and from all of the third-party vendors who support the company. In an age where companies are increasing their use of outside services for many functions that touch their customers, they must ensure that these organizations share a common vision of customer relationships. Anything less can cause serious damage to the com-

pany's reputation and relationships with its customers. Therefore, many companies are implementing full loyalty marketing programs both within their companies and within the service organizations they employ. They are examining all of their interactions with their customers to ensure that they are well-timed, coordinated and consistent in terms of the message, image and relationship being conveyed to customers.

Why the telephone interview?

There are three major options for collecting primary customer data: personal interviews, mail surveys, and telephone surveys. Personal interviews are obviously the closest form of customer contact, and can make the greatest impression upon customers. In addition, they yield deeper qualitative information and more data than telephone or mail surveys. The major drawbacks for personal interviews, however, are the burden on consumers and cost. The expense of collecting a large sample, or a sample spread out over a broad base, can be prohibitive. Therefore, most companies turn to either mail or telephone surveys.

There are several major issues to consider when comparing mail surveys to telephone surveys. Foremost among these are speed of data collection, response rates/bias, cost, and the communication style desired. In speed of data collection, telephone survey methodologies hold a clear advantage over mail surveys. There is also serious potential for nonresponse bias in mail surveys. Although mail surveys have traditionally been considered the least expensive form of collecting survey data, the rising costs of mailings and the improved technology of telecommunications have changed the situation. Since the mid 1990s, the decreasing cost of telephone surveys has rendered them quite comparable to mail surveys. Growing customer aversion to paper surveys has caused companies to move to the telephone interviews. More importantly, paper surveys lack the interactive element that telephone research provides.

Creating a relationship

From a customer's point of view, the critical difference between one product and another often lies not in the product itself, but in the company that makes it. More and more, customers are seeking relationships with companies from which they purchase important products or services. Nowhere in the sales process is the company closer to the customer than in the call center. This not only includes the customer service department, but also the inbound and outbound sales desks.

Take advantage of this opportunity by creating relationships over the phone that can mean the difference between making a sale and creating a loyal customer. Following the four guidelines below will put you on your way to developing customer relationships that could last a lifetime.

1. Know the difference between customer relationship management and telemarketing. Customer relationship management is not about cold calls, and is more than "smiling and dialing." It's a coordinated effort that combines all phases of the customer relationship — including lead generation, acquisition, satisfaction follow-up calls, marketing channel management, customer service, and cross-selling — into one intelligent and integrated process. For instance, the call-center screen should show every contact that has been made with the customer, through mail, phone, or any other method. This prior knowledge shows that the customer service associate knows the person he or she is calling and is prepared to prioritize what is important and relevant to that person, thereby limiting wasted time for the customer.

2. Identify your high-value customers on-screen. First, establish criteria for identifying your most valuable customers. Do they make regular purchases? Do they buy high-end items? Do they pay their invoices or bills on time, or early? Once the prof-

itability criteria are determined, identify their priority status on-screen, then provide them with personalized interactions by offering products or services that meet their specific wants or needs. Remember that selling to an existing customer costs a lot less than winning a new one.

3. Train your customer service associates in how to engage in two-way dialogue and concentrate more on listening than talking. Customers usually appreciate a contact who remembers the little things about them and makes them feel special. Through interactive dialogue, make individual customers feel that they are in a class by themselves, and their happiness, satisfaction, and repeat business matters to you. For example, ask if the order they received last week was satisfactory, or say something like, "It's about three months since you last ordered X, and I see that that's about how often you reorder this product. Would you like me to go reorder that for you today?" Any customer feedback resulting from such interactions should be captured in the database and built upon for future interactions.

4. Take action. Capturing customer data is important, but that data is worthless if you don't use it. Data needs to be processed and analyzed in real time so that it can be applied during future customer contact to personalize interactions, positively influence satisfaction levels, and sway ongoing purchase decisions. For example, if a customer mentions in June that your product might make a good gift for her husband in December, follow up in November to let her know the product is available in her husband's favorite color.

Outsourcing the telephone interview and other telephone interactions

Many managerial benefits of telephone interviewing come with outsourcing the effort. Outsourcing must be done carefully, systematically, and with explicit goals. Companies that rush into outsourcing without fully understanding what they hope to gain may find themselves either mired in a contractual battle with a chosen vendor, or the recipient of services that decline over time. Sensible reasons to consider outsourcing include both strategic and tactical considerations on both a departmental and organizational level.

For example, at the tactical level, outsourcing might be justifiable for a company with comparably high costs of delivering telephone interactions or lacking competency in implementing the interactions that foster customer loyalty. Strategic considerations might include the need to immediately improve customer retention and compete on the basis of service in a highly competitive and commoditized environment. The primary business needs for call center outsourcing include lead management, customer satisfaction, channel management, churn management and cross-selling.

Outsourcing the customer communications associated with these critical business functions to a single, competent provider will improve the quality of the communications stream with customers and through consolidated reporting provide company management with the consumer insights it requires to stay on top of these processes and customers' needs.

Scripting telephone interactions

Regular consumer interactions should be scripted, to ensure consistency and fulfillment of objectives. Scripts do not mean that interactions have to be cold; rather, they should serve as a conversation guide. Before developing a script, the company should undertake a needs assessment program to define business objectives. Questions to address during needs assessment include: what is the company trying to learn from its customers and what is the company's main objective in making the call? For example, is the company trying to understand its customers' attitudes towards the company or their satisfaction with a particular product? Is the company trying to make its customers feel good about the brand, or is the company trying to inform its customers about a particular service? Identifying the demographics of those interviewed is part of the needs assessment process also, as scripting may vary depending on the profile of the consumer.

Scripts are developed to help the customer service associate engage the customer in meaningful dialogue. The script should incorporate transitional phrases to avoid dead air and anticipate customer needs and attitudes.

The interaction should be carefully scripted so that it doesn't sound like a sales call or a research interview (even if it is). The number one goal of every script is to leave the customer with a first-class impression of the company.

Logistics of telephone interviewing

Mature, articulate, educated people, with neutral accents should conduct telephone interactions. The quality of the interaction, including a courteous tone, knowledge of the company's business and the ability to solve problems, is essential to successful consumer interactions. Regardless of a call center's objective — whether it is to measure satisfaction, fulfill literature requests, or handle customer service — an overriding index of success is the impact it has on customer relationships. In its capacity as a communicator between a company and its customers, call center activities present a crucial — and sometimes the only — opportunity for interactive dialogue with customers.

Professional interviewers specifically trained in loyalty marketing techniques should conduct telephone surveys and interactions. This means that rather than maintaining a strict script in the interview process, which can seem cold and uncaring to customers, the interviewers are trained to respond sympathetically and reassuringly to customer concerns and complaints.

The customer service associate conducting the call should be up-front about the amount of time the conversation will last; length and format depend on the type of call. For example, welcome calls tend to be about two minutes in duration. In a welcome call, the customer service associate does more of the talking, providing information and thanking customers for their business. For customer satisfaction survey calls, the conversation should also be brief, aimed at a range of three to four minutes. In-depth research calls are typically longer and can take from five to 10 minutes — be sure to gain customers' up-front consent on these. (These are average ranges; interview objectives should dictate length.) Customer satisfaction and research calls involve more listening and conversation documentation; be sure the customer service associates have those skills.

The successful conversation is conducted with enthusiasm and the ability to mirror the customer's rate and tone of speech. The customer service associate should empathize and sympathize with the customer, when appropriate. Pure researchers will argue against this method because it could lead to a bias in results. However, customer service associates can be trained to use this methodology consistently, so that there is no bias in results. It is appropriate for the customer service associate to react to customers' feelings because one of the goals of consumer interactions is to build relationships that create bonds between a company and its customers.

Leverage each interaction

In today's business environment, it is more important than ever that companies leverage each interaction with the customer to gather competitive data and maximize profit opportunity. Telephone interviewing is a cost-effective, efficient, and personal way for companies to get to know their customers and establish relationships that will last a lifetime.

IVR: How is it different from telephone interviewing?

By Rajan Sambandam

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While traditional data collection methods (such as mail and phone) continue to be widely used, lately other data collection methods based on new technologies have started making their presence felt. These include survey methods using e-mail, Web site and interactive voice response (IVR) technologies. IVR has been used for sometime in the area of customer service by a number of companies, but only recently has been introduced as a tool for marketing researchers to collect data.

The introduction of any new method raises the question of how it compares with existing and established methods. In particular, a comparison of phone and IVR-based surveys is relevant because of their external similarity and the increasing use of the latter. In this article we will consider the relative operational and empirical merits of the two methods.

Phone surveys

Phone surveying has been around long enough to develop a good understanding of its advantages and disadvantages. The primary advantages of phone surveys are the representative nature of the sample, the ability to probe open-ended questions, the reduction of self-selection bias and the ability to efficiently handle quotas. The last is particularly useful when very specific (and small) segments of the population need to be adequately represented. But the advantages of phone surveys are also tempered by their biggest disadvantage: cost. Phone surveys are almost always more expensive than mail surveys and this creates budget problems for managers who may otherwise want to use this method.

Next, we will consider various ways of conducting IVR studies and then use a case study to examine the similarities and differences between the phone and IVR methods. The study was conducted in the financial services market and hence the results may not directly translate to other markets.

IVR surveys

IVR surveys can, in general, be administered in two ways. In the first method (pure IVR) there is no live component. Prospective respondents are transferred to an IVR system after a customer service call or are given a phone number to call (usually a toll-free number) which hooks them into an IVR system. In the second method (hybrid IVR), the respondent is screened by a live interviewer and then transferred to an IVR system. Let's

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examine these two methods in more detail.

A. Pure IVR

The pure IVR method is particularly useful in measuring customer satisfaction with call centers and can be done either by direct transfer or by using a toll-free number. In the direct transfer method, a customer who contacts a call center to talk to a rep is transferred into the IVR system by the rep. This is usually done after the customer's questions have been answered and his permission obtained for the transfer.

Once the customer is transferred, the automatic voice takes over by welcoming the customer to the system. Pre-programmed questions are asked to which the customer can reply by using the keys on his telephone. Open-ended questions can also be included for which the responses can be recorded. A variation to this method is when the customer calls in to a company's interactive voice response system to obtain information in the form of account balances, stock quotes etc. At the end of the call, the customer is asked to answer a survey (usually about the interactive system he is currently using) and is then transferred to an IVR survey.

This method has a significant cost advantage because live interviewers are never used. But the absence of a live interviewer also leads to a higher incidence of respondents terminating the interview by simply hanging up. Hanging up on a live interviewer is more difficult than on an IVR system. The varying termination points also mean that each question may have a different base size. To remedy this, the customers could be called back (if the system tracks their phone numbers), but this would obviously increase the cost of the study.

Another potential problem is selection bias. If reps who answer questions are responsible for transferring customers to an IVR system, there is no guarantee that they will transfer dissatisfied customers. This problem can be particularly thorny if the results of the study are in some way tied to compensation. A monitoring system or an automatic sample selection system needs to be in place to address this problem.

The second way of conducting a pure IVR survey is to give the customer a toll-free number to call after his questions have been answered (this can be done both when there is a live rep and when an automated voice is used). The toll-free number leads directly into the IVR system. This also has the same problems of hang-up and selection bias (in the case of a live rep) that we saw previously. There is also the problem of the onus being on the respondent to call the toll-free number. Hence there is a good chance that the response rate could be considerably lower than otherwise and that the sample may not be representative.

B. Hybrid IVR

The hybrid IVR method can be used for most types of studies. In the call center example, the customers are called back by a live interviewer who screens them to verify that they indeed had contact with the call center. They are then transferred to the IVR system to complete the interview. This method also works for other standard surveys which do not involve a call center. Prospective respondents are called, screened, asked for their permission and transferred to the IVR system.

The hybrid IVR method avoids the selection bias that could be introduced by the rep because the rep is not involved in the transfer process. The hang-up problem may be as severe as in the pure IVR method. However, this problem is tempered in the hybrid IVR method by the fact that respondents who are unavailable at a particular time can always be called back as in a regular phone interview.

The main disadvantage with the hybrid IVR method is that it is more expensive than the pure IVR method, because the live interviewer has to spend some amount of time on the phone to screen the respondent.

Case study

Recently we conducted a comparative test between the live phone and hybrid IVR methods for a financial services company. The company was interested in identifying the appropriate method to use for a tracking study with the same population. This test and its implications are discussed here in detail.

The client company provided us with a sample of customers who had recently liquidated all of their assets with the company. The sample was randomly divided into two halves, with one allocated for the phone portion of the study and the other for the hybrid IVR portion of the study. Using this sample, in the phone method 100 full interviews were obtained, while in the hybrid IVR method 104 full interviews were obtained.

The most important difference between the two methods is the age of the respondents. Phone respondents (average age = 55 years) are statistically older than IVR respondents (average age = 50 years). This could be due to the fact that older respondents are less comfortable with technology and may not want to answer an IVR-based survey.

There were differences between the responses on some other questions also and it is possible that these arose because of age differences.

• Phone respondents have higher satisfaction ratings (mean on a 7-point scale = 5.8) compared to IVR respondents (mean = 5.0). As seen from other research, older respondents tend to be more satisfied and this could be the reason why phone respondents are more satisfied.

• IVR respondents are more likely to have drawn out their money for some type of purchase (65 percent to 46 percent). Previous results from the same population indicate that older respondents are less likely to take the money out for some type of purchase. Younger respondents do so because of their life cycle stage.

• The proportion of phone respondents who say that they are Very Unlikely to invest with the company in the future is much higher (20 percent to 5 percent). Previous tracking results indicate that older respondents are more likely to say this because of age related reasons.

• A larger proportion of phone respondents are retired (30 percent to 14 percent) and this is obviously an age related issue.

The difference in satisfaction ratings was particularly interesting because of the large number of customer satisfaction studies that are conducted by companies and the question of suitability of the hybrid IVR method for such studies. Therefore, to examine this issue further, we conducted an analysis of covariance

(ANCOVA). An ANCOVA is usually conducted when it is necessary to study the relationship between two variables while controlling for the influence of a third variable. A simple example would be the positive relationship between the damage caused by a fire and the number of fire trucks at the scene. When we control for the size of the fire, the relationship disappears, indicating that the size of the fire was the true cause of the damage.

The ANCOVA was run with satisfaction as the dependent variable, method of data collection as the predictor variable and age as a covariate. If in fact age was the true cause of the difference in satisfaction scores, then this difference should become statistically non-significant in the ANCOVA. However, while the difference in satisfaction between the methods was less than before, it was still statistically significant. This implies that age alone cannot account for the significant satisfaction difference between the two methods. It may be that IVR respondents are inherently less satisfied or that phone respondents simply provide higher satisfaction ratings.

Other than the age-related differences, the data from the two methods are quite similar on issues like reasons for closing the account, talking to a rep before closing, investing in other financial products after closing, reasons for doing so and on other demographic variables. The one exception was the proportion of refusals on questions related to income and assets. In both cases the refusal rate on the phone study is higher, although the differences are not statistically significant. It is possible that the IVR respondents felt more comfortable revealing this sensitive information to an automated system rather than to a live interviewer. But, given that the finding is not statistically significant, further research is required before any firm statements can be made.

Both the phone study (average length = 6.7 min.) and the IVR study (average length = 6.4 min.) were of the same length. There were no differences in the number and type of open-ended responses, which were recorded using voice-digitized software. This may be because we started out with a somewhat small sample and the open-ended question was based off a skip pattern further reducing the base size. With larger base sizes (say, a few hundred) it may be possible to examine in more detail the differences in open-ended questions between these two methods.

A note on response rates

Response rates for IVR studies are hard to generalize at this early stage in the evolution of this technology. They can vary based on a number of factors such as whether it is a live or hybrid IVR study, the length of the study, the type of respondent, the nature of the study, and the possible use of incentives. In this study, we had many factors working against us in that the respondents were older, had liquidated all their accounts and were answering questions of a sensitive nature (on their personal finances). Still, 90 percent agreed to be transferred to the IVR system, of whom 50 percent went on to complete the entire interview. We consider this to be the lower end of the response rate spectrum and are exploring situational variations that would lead to higher response rates.

Conclusions

The conclusions from this test have to be qualified by the fact that the industry used, financial services, is unique in some respects. Specifically, the average age of the survey respondent in this industry tends to be quite high. Further, this study was conducted on ex-customers of the company who may have less commitment to completing a survey that would benefit the company. Hence any generalization of the results should be undertaken with caution.

- IVR respondents tend to be younger and this may affect the responses to some questions.
- It appears that IVR respondents are less satisfied than phone respondents even after controlling for the effect of age. Thus, tracking studies that change methods from phone to IVR may need to account for this difference.

Other than this, there appear to be no other significant differences between the two methods. Sample bias (other than the age bias) seems to have been averted to a large extent because this was a hybrid IVR study. This could be a reason why the samples are similar demographically and attitudinally. It is possible that there may be more differences if this had been a pure IVR study.

Practical sampling methods for

low-incidence populations

By Kevin J. O'Donnell and Peter Brownstein

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The best marketing researchers we know are also some of the most pragmatic practitioners of their craft. That's no coincidence. They understand which rules are more flexible than others, and under which circumstances.

For instance, take the case of sampling low-incidence populations. Until recently, most marketing researchers had adhered to the law of randomness (mostly random-digit dialing), remaining safely within the defensible - albeit expensive - method. As a result, researchers (and their clients) paid hefty field bills for screening through thousands of randomly generated numbers to find qualified respondents.

But as long as the client had enough budget and time (and you designed the right screener), one could be highly confident of finding the correct target population. Completing an RDD study with an incidence of 5 percent or less was something of a hard-earned — if bruising — badge of honor. Though marketing researchers are near-masochistic (almost by definition), low-incidence studies are almost always inefficient.

(A distinction here is important: *Market* research often demands RDD sampling for objectives like broad census-taking [e.g., "adoption" and "penetration" of new technology]. *Marketing* research, however, most often is directed toward highly actionable marketing solutions, such as changing consumer attitudes and behavior. The latter often studies very specific populations that are narrowly defined by behaviors, attitudes, inclinations, demographics, and so on.)

	March 1999	January 1998
Completes	600	250
Selected Screens		
Age Screen	4%	7%
Not Wine/Alcohol Drinker	3%	20%
Final Incidence	18%	8%

Real-world solutions

Samples of low-incidence populations have made unnecessary much of the pain. Broad databases of consumers with recorded behaviors, interests, demographics, etc., can yield highly productive marketing research results. A comparative real-world example of two similar studies of consumers of premium wines is illustrative.

• Study "A" was conducted in January 1998, with an RDD sample.

• Study "B" was conducted in March 1999, with a sample of records randomly selected from a database of listed households with a self-reported interest in wine.

Accuracy and efficiency: pragmatic equals

A critical difference between the relative efficiencies of these samples is found in the proportion of consumers in the category "wine and alcohol users." The RDD sample in 1998 screened out one-in-five (20 percent) contacts who did not consume wine or alcohol — six times greater than the one-in-thirty-three (3 percent) in 1999.

As important in a practical sense, the 1999 study yielded .64 completed interviews per hour compared with .46 in 1998 — a 39 percent increase in productivity. From a time- and cost-efficiency standpoint, the improvements are significant. Yet, savings of time and money are indicative of how well the sample accomplishes its functional objective.

Keep in mind that any sample drawn from a self-reported database is subject to sampling frame error and there is no way to weight or adjust responses to compensate for such an error. In the case of most databases of this nature, certain elements of the real population are systematically excluded in the questionnaire-derived databases because they did not respond or were not given the opportunity in the first place. The important consideration here is the fact that this study did not attempt to make inferences about the entire universe of wine drinkers. It had an objective to provide marketing direction and a course of action, and that's what it accomplished.

Determinant considerations

Two questions weigh on the decision to use listed database sampling methods:

1. Does the database contain elements that most nearly match the definition of "population under study"? For example, the interest categories of cultural events/classical music merged with household income above $50,000 can approximate the market of high propensity symphony attendees.

2. Is the database large and recent enough? Fast-growing markets like on-line subscribers may not be represented adequately in the database. As that market segment grows rapidly, it also changes demographically quarter-to-quarter. A listed sample of on-line subscribers more than one year old is hopelessly unrepresentative.

Samples from listed databases of consumer behavior and preferences relieve much of the pressure on screening and qualifying vast numbers of randomly selected households, but it does not eliminate the need altogether. Though these samples draw from self-reported sources, common sense and the production numbers above underscore the importance of careful screening. The listed database and careful screening combine to yield more meaningful results for practical researchers who are at the headwaters of the marketing decision-making process.

Database sources

Samples of this sort are usually created from databases compiled by questionnaires delivered by direct mail, magazine insert and other vehicles. In many cases different databases are being developed from different sets of questionnaires that cover the same or similar selections. A skilled sampling vendor understands the subtleties of question language, distribution, response and other items that distinguish the databases so they can offer the most appropriate solution. They also control the freshness of demographic data and maintain the accuracy of the phone and/or address information. The best sources work with multiple databases to create the most representative samples possible, while still within the world of highly targeted samples drawn from compiled databases. These samples offer significant practical advantages in the field.

Cost and time savings alone are not adequate justifications to abandon RDD methods. The fact is, most often marketing researchers are highly interested in narrowly defined populations and those who are like them in some measure. The concept is self-evident: Investors in mutual funds are highly likely to invest in other securities. A random selection from large database of mutual fund investors is a more relevant and useful representation of that market.

Selecting a sample source

There are only three criteria for selecting the source of a listed database sample:

1. Credibility and integrity of the firm and its methods.

— How frequently do they update files?

— Are they thorough and vigilant in seeking new databases?

— Can they merge databases efficiently?

2. Credibility and integrity of the individual pulling the file.

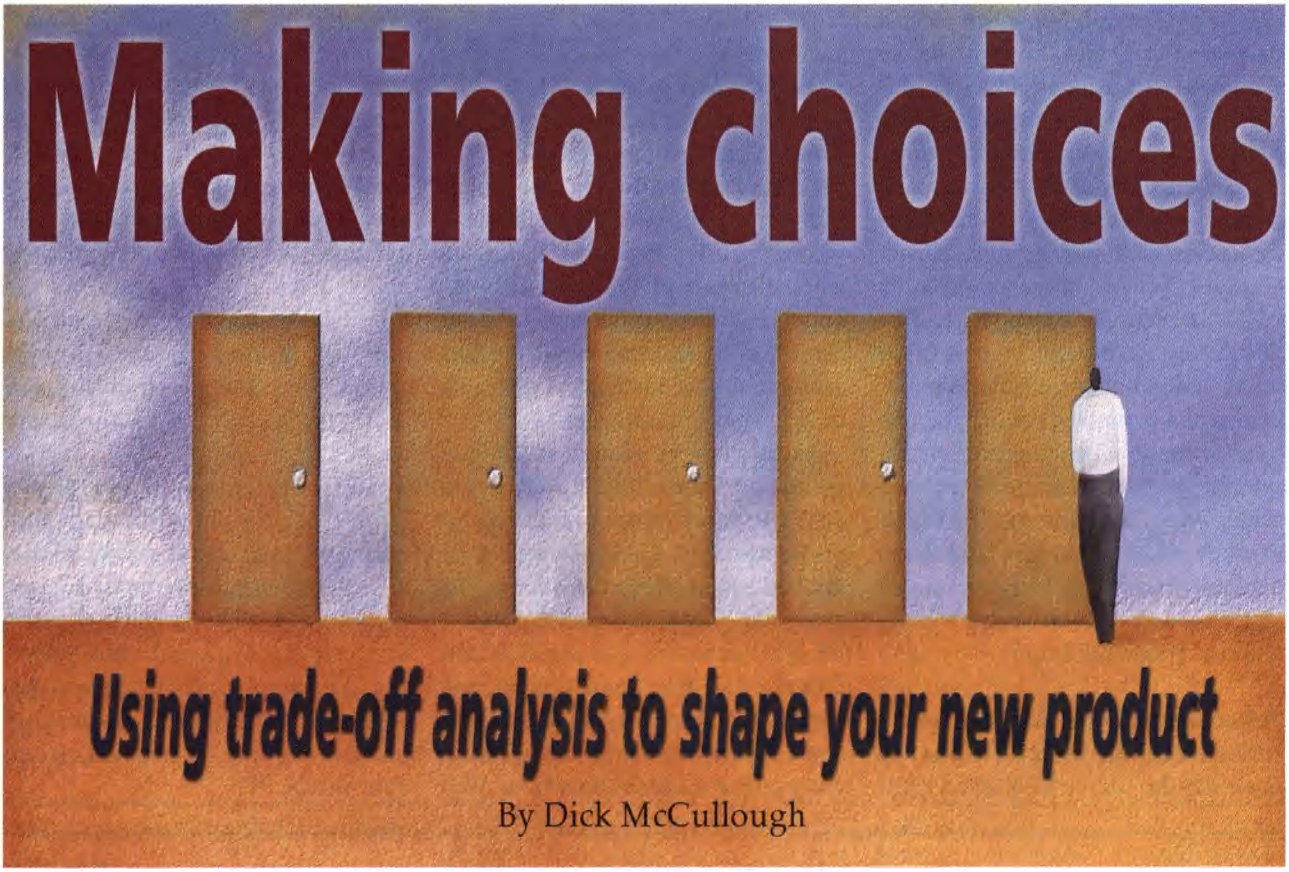
3. Credibility and integrity of the original source of the database.

— *Caveat emptor*: be thorough and ask lots of questions (the tone and consistency of responses will also help in answering #1 and #2).

As always, feel free to discuss these issues with your colleagues. AAPOR.net (a service to the members of the American Association for Public Opinion Research), for example, is a collegial roundtable with many experienced and helpful individuals. Ask for their opinions and experiences. You'll get it. Advice can also be obtained by posting questions on research bulletin boards at Web sites such as www.quirks.com or www.worldopinion.com.

Cost is not usually a factor. Listed database files are often twice as expensive as RDD samples. But those costs are negligible compared to the savings in the field. Consider that 15,000 RDD numbers costs approximately $1,500, compared to 10,000 records of listed database sample at a cost of $2,500. Further consider the efficiency of completion indicated above, and you have some idea of the relative cost consequences for each sampling method. The most significant difference stems from the fact that you need to make far fewer phone calls.

All marketing researchers should think critically about the appropriateness of methods for sampling each and every study. Sometimes a highly targeted sample will be in the best interest of the project. Sometimes not. You simply have to address the task at hand and select the best method, all things considered, to suit your needs.



Making choices

Using trade-off analysis to shape your new product

By Dick McCullough

Editor's note: Dick McCullough is president of Macro Consulting, Inc., Mountain View, Calif. He can be reached at 650-964-9707 or at dick@macroinc.com.

How would you like to have a crystal ball that would tell you which three of the 30 or 40 product features you could build into your new product would generate the most sales? Or which price would maximize gross profit? Or market share? How would you like to have a crystal ball that would tell you who would be your core customer for this new product and how many you would sell in its first year?

And wouldn't it be ideal if such a crystal ball would foresee the answers to all these questions (and many more) well before launch date? Before test market? Even before beta testing had started?

Well, there is such a crystal ball. It is called trade-off analysis.

Trade-off analysis is a family of marketing research techniques that began with a technique named conjoint analysis back in the '70s. It has proven itself to be so profoundly useful that it has produced numerous offspring, all of which derive from one of four basic approaches.[1]

Essentially, trade-off analysis allows the marketer to throw all of his or her options — such as various product features, a range of prices and even pricing structures, brand names, packages and who knows what else — into a carefully constructed questionnaire. Respondents are then asked a series of product purchase interest questions. The data are subjected to some very advanced statistical procedures which yield mathematical models. These models allow us to simulate the marketplace in great detail and, if we do our jobs right, with surprising accuracy.

These models are also extremely flexible and useful. With them, we can answer many practical questions, such as:

- Which product features should I include in the final product or stress on the package?
- What price should I charge?
- Who should I sell it to?
- What will first year sales be? Market share? Gross profits?
- Who will I steal sales from, my competitors or my own existing products?
- Is there a strategy that protects me from anticipated or potential competitive actions?

Trade-off analysis allows us to build mathematical models which simulate the marketplace. By simulating the marketplace under a variety of scenarios, we can answer any of the above questions. For example, if we want to know what would happen if our chief competitor dropped their price by 10 percent, we run a model under that condition. We compare the results from that model to one where their price

remains constant. We end up running lots of models (sometimes hundreds) but we learn a lot, too. Not too fancy, when you come right down to it, but extremely effective.

Pricing, profits and competitor response

For example, one of our first trade-off projects many years ago involved an extensive product line in a fragmented category, men's jeans. The client wanted to determine if there was an opportunity to increase gross profit without sacrificing market share. After collecting the data, building the models and running well over a hundred market simulations (involving approximately 50 different styles and brands of jeans) we discovered that they could raise the price of their fashion styles with relatively little loss of unit sales. And most of those who deserted the product with the price increase migrated to another, less fashionable product within the brand family. The net result was an increased gross profit contribution of roughly $9 million dollars with almost no loss in net market share. Further, we discovered that our client was vulnerable to a competitor's price decrease in the less fashionable products. The price increase in the fashion styles generated resources that could be used to fight off a price war in the lower end. The new pricing strategy not only increased profits and maintained share but also provided a defense against potential competitor actions.

Consumer segmentation and multi-product strategies

Trade-off analysis can also provide insights into the structure and segmentation of the customer base. We conducted a trade-off study for a videophone product that answered a variety of questions long before prototypes had been built. In fact, the research was done to determine if the expense of prototype development would be justified. Using trade-off analysis, we segmented the marketplace and discovered some very interesting information. The market segmented into three distinct segments. One segment didn't want to buy a videophone no matter what we did. Of the other two segments, however, both were of significant size and both wanted to buy a videophone in some form. One segment was extremely keen on the concept, wanted every bell and whistle we could provide and was not price-sensitive at all. The other segment liked the concept but was very price-sensitive. They would prefer to buy a bare bones product at a low price.

Given this segmentation, an obvious marketing strategy presented itself: Introduce a Cadillac version initially and pick up all the price-insensitive consumers at a high margin. Establish brand equity and imagery at the high end while familiarizing the rest of the marketplace with the concept. Offer a second-generation low-end product to the bare bones group after the high-end group had been fully exploited.

Our models suggested that roughly 300,000 units could be sold first year. Given these results and forecasts, the client did fund prototype development and eventually brought a product to market.

Product features and pricing structures

Oftentimes, a basic question that we are asked is, What features do consumers want? The product team usually has 30, 40 or even more feature candidates that they could build into the final product. Each feature generally has a marginal production cost associated with it, however. So the easy answer — put them all in — doesn't normally suffice. Further, even it you could put them all in, which ones would you stress in marketing communications? Humans can't ponder more than four to six features at a time anyway. When it comes to making decisions, humans simplify. Marketing communications need to be focused on the few, most important features.

Another common question is not just the simple, What price should I charge? but also, What pricing structure should I use? Cell phones, Internet services, cable TV, electricity and a variety of other products and services have numerous potential pricing structures. There may be a monthly flat fee, an initial capital investment fee, a flat hourly fee, a time-of-day hourly fee, a pay-per-use fee, etc. Product manufacturers and service providers want to know which pricing structure will optimize sales, share and/or profits as well as which actual price within the selected structure will optimize sales, share and/or profits. And they generally don't have the time or the budget to run a series of sequential studies. They need to answer everything in one shot.

Most common forms of trade-off don't accommodate a large number of features and complex pricing issues simultaneously. Because we work so often with high-tech products that have a large potential feature set as well as extremely complex pricing structures, we've developed two trade-off approaches specifically for these types of situations.[2]

A client that makes a type of network computer recently approached us and asked if we could help them determine what features from a list of about 20 were most important to their customers. They also had four different ISP (Internet service provider) pricing structures they needed to evaluate and price to optimize within each pricing structure. Further, they also had fairly complex branding issues to wrestle with (hardware brand, service brand and corporate endorsement).

Using one of our trade-off techniques, we were able to design a study which would answer all of the above issues as well as a few others I haven't bothered to list. We included four different ISP pricing structures in the model, an unlimited use flat rate and three other versions that all included some usage cap or limitation. We discovered that consumers strongly preferred unlimited usage. In fact, they would be willing to pay significantly more for the service if priced in a flat-rate format than they would if any of the other three pricing formats were offered.

Corporate endorsement was also an issue we included in the model. The question we wanted to answer was whether we would sell more products with corporate endorsement or without. In this case, the corporate endorsement proved to have substantial equity.

Rich information

Trade-off analysis can't correct basic errors in judgement. But it can provide an amazingly rich information source that the intelligent product developer, marketer, and strategic planner can use to profitable benefit. Trade-off analysis is no panacea. But it can be a crystal ball.

[1] For a non-technical review of the basic forms of trade-off analysis, refer to the author's article "Trade-off Analysis: A Survey of Commercially Available Techniques", *Quirk's Marketing Research Review*, February 1998. *(Editor's note: Visit the Quirk's Article Archive at www.quirks.com to view this and other articles from 1992-1998 issues of QMRR.)*

[2] For more information about these techniques, the Cake Method© and Logit-Cake Method©, please visit the Articles and White Papers section of www.macroinc.com.

Major markets – major mistakes?

How preconceived notions about markets can devalue your research

By Carl Iseman

Editor's note: Carl Iseman is president of Assistance in Marketing, Inc., a Baltimore, Md., qualitative and quantitative data collection firm. He can be reached at 410-337-5000.

The "value" of a market to the researcher rests on a sliding scale. Depending on the research objectives and information needs, cities are selected according to the likelihood that they contain adequate samples of the sought-after population. BDI's, CDI's, demographic profiles, census data, are all used to substantiate the use of one city or market over another.

On its face, this seems a perfectly legitimate approach because the presumption is that all the facts have been considered and given the appropriate weight. But sometimes, behind all that empirical wisdom, lurks the very unscientific and substantially unsound, "preconceived notion."

Pre-existing opinions about markets aren't new but they're not always an accurate or suitable compass for quality research. Quality research requires that there be a match between the sample taken and the characteristics of the market surveyed. This means that the characteristics of a market have to be known and routinely reviewed and updated.

Unfortunately, this is not always the case. In fact, I experience this frequently at trade shows and professional research conferences and I see it in very practical terms as I attempt to market my own facility: corporate researchers and full-service firms opt for major markets like New York, Los Angeles and Chicago because they feel sure that they will get a nationally representative sample of a population with their desired characteristics.

Enough needles

The prevailing logic (it seems) is that if the haystack is big enough there will be enough needles. However, the rationale upon which the use of these markets has traditionally been based isn't as valid as it once was. It isn't good enough any more that the haystack be big enough to generate a lot of "needles." The haystack also has to have the right mix of values and lifestyles because, as Judith Waldrop has written, it is these critical features of a market that "predict consumer behavior better than demographics." ("Markets With Attitude," *American Demographics*, July 1994.)

In her article, Waldrop recounts a telephone conversation she had with the representative of a major network

newscaster who had contacted the magazine to recommend a city where the demographic profile was most representative of national averages. She recommended Tulsa, citing the magazine's national profile studies based on census data. The representative then wondered about Indianapolis and Waldrop told them that Indianapolis was among the Top 20 in national profile, but that the city of Tulsa ranked No. 1. The newscaster's representative thought for a moment and then replied, "Can you tell me more about Indianapolis?"

This scenario is all too common. Despite demographic and psychographic information to suggest otherwise, Indianapolis was probably the market surveyed for the newscaster's office because they probably found it unbelievable that a town in Oklahoma would have more all-American attitudes and be closer to a national representative market than would Indiana's heartland capitol. Or, that it would be easier or more convenient to travel to Indianapolis.

Humorous though it may be, Waldrop's anecdote provides a wonderful example of how a preconceived notion can devalue a study — making it less representative and, more importantly, less accurate and actionable. I have a lot of experience with preconceived notions and feel well-qualified to speak to the issue. As the owner of a data collection firm in the Baltimore metropolitan area, my company has felt their effect.

Beer and baseball

Over the years, I have come to regard Baltimore as the Rodney Dangerfield of research markets because we seem to command such little respect. Corporate marketers and research project managers have widely regarded Baltimore as a city whose population is too blue-collar, too Democratic, too lower middle-income, and whose people are undereducated and too committed to beer drinking and baseball. They seem to view Baltimore as a dingy little port city with no culture to speak of that's located too close to more sophisticated markets like Washington, D.C., Philadelphia, and Wilmington, Del. None of these preconceived notions are true.

Boasting over 2.5 million residents, Baltimore is one of the largest metropolitan areas in the U.S. — a big haystack in its own right. According to the 1997-98 findings of the Maryland Department of Business and Economic Development, Baltimore's per capita income is the fifth highest in the United States. Of Maryland's population (age 25 and over) 32.5 percent hold a bachelor's degree or above. This is the highest percentage in the nation! Baltimore also boasts one of the highest concentrations of scientists and engineers; some of the nation's finest hospitals and health care institutions; and one of the nation's highest concentrations of computer service and emerging communications technologies professionals.

In Waldrop's article, to determine which cities best matched the national profile, the magazine built an index "of dissimilarity to compare the national percentages of households in each of these VALS2 segments with the percentages of each metropolitan area. The index value indicates the share of households that would have to change categories in order for the metropolitan area to perfectly match the national distribution."

The index for Baltimore was 1.95. This means that fewer than 2 percent of Baltimore households would have to alter their lifestyles and values in order to make Baltimore perfectly representative of the U.S. as a whole. And guess what: This is as near to ideal as you get. Guess what else: New York, Chicago and Los Angeles were not among the Top 25 metropolitan areas identified on the list. Baltimore; Wilmington, Del.; Brazoria, Texas; Richmond-Petersburg, Va.; and Evansville, Ind. round out the Top 5 "Well Balanced American Metros."

Garnering more respect

So, armed with this wonderful information, and shouting it from the rooftops, you would think that Baltimore (and other markets in a similar predicament) would surely be garnering more respect (and more visitations) from the corporate and full-service market research communities. But they're not. You would think that qualitative researchers would be actively evaluating more "virgin" territories, offering fresh respondents, in fresh markets for their focus groups. But they're not.

One reason may be that the list of so-called tried and true research markets — that is, markets that have historically yielded good, reliable, projectable results — are no longer necessarily markets representative of the U.S. population. Researchers seem to go back to them, however, out of comfort, like an old shoe. They don't seem to want to waste valuable time re-evaluating markets that have served them well in the past. They're comfortable with the facilities; they know the cities, restaurants, attractions. Besides, new markets are such a hassle. They don't know what to expect, who to work with, etc. It can be a lot of work to challenge those pesky preconceived notions.

Clients have notions too

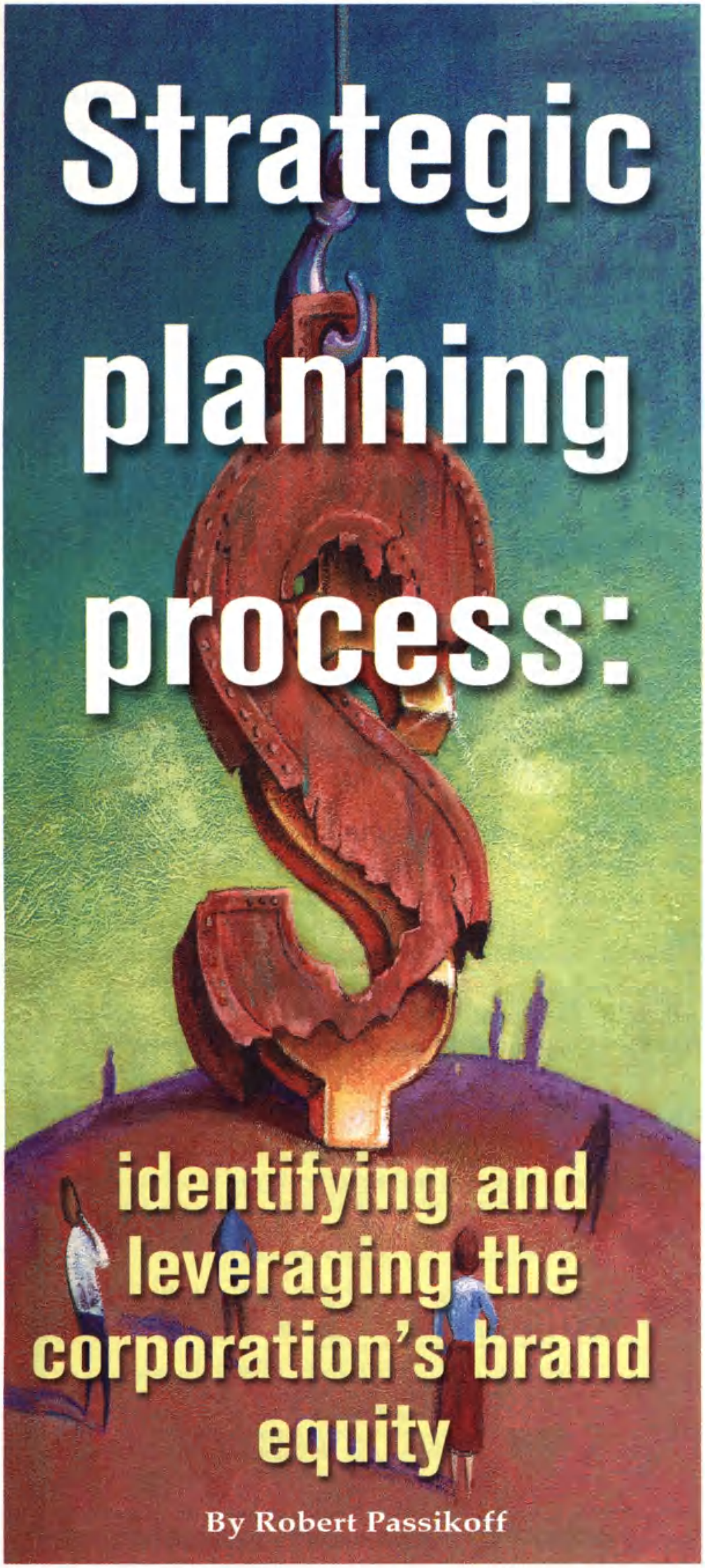
And it's not just researchers, it seems that their clients also have a few notions of their own. I routinely hear that our clients' clients dictate not only the general geographies, but also the specific cities in which data is collected. The clients are telling the research firms where they need to go in order to find large populations of the target sample. They often base these decisions on buying indexes, sales data, and other primary and secondary resources and, in some instances, this information is just not available. When it isn't available, clients tend to fall back on their own opinions. For example, Pacific Bell isn't likely to conduct market research in Miami to find out how well its customer service is being perceived. Absent this kind of obvious circumstance, I think researchers have to ask themselves to what extent they are serving their clients by not insisting that updated and objective criteria be applied to market selection.

Sometimes, I wonder if professionally trained market researchers are unable to guide and educate their clients according to the research objectives because of the clients' preconceived notions. Could it be that we are not challenging our clients — allowing them to opt for markets that are less than optimal — because we, as businesses, are wary of questioning their choice? It is, after all, the quality of the data and the suitability of the market in which it was collected that is paramount. We shouldn't compromise on this. Never.

Limit investigations

Preconceived notions about markets will compromise data because these notions shrink the research universe and limit investigations into the true suitability of an old market over a new one. New York, Los Angeles and Chicago are excellent research markets. However, there are other fine markets that are rated as far more desirable, All-American venues in which to do research.

Of course, I'd like to see more researchers in Baltimore. But if I don't, let it be because our market was realistically reviewed and discarded for reasons relevant to the study and not, as is my great fear, for preconceived notions and a general lack of awareness. I welcome your suggestions and comments on my hypothesis.



Strategic planning process:

identifying and leveraging the corporation's brand equity

By Robert Passikoff

Editor's note: Robert Passikoff is president of Brand Keys, Inc., a New York brand equity and customer loyalty consultancy. He can be reached at 212-532-6028 or at brandkeys@worldnet.att.net. This article is adapted from a speech given to the American Marketing Association on February 24, 1999.

What is the definition of brand equity? Most of the definitions you'll hear are abstract and elusive: things like image, personality, essence, affinity, identity and position. Sometimes you'll even hear that a brand's equity is synonymous with its name.

What do these vague definitions have in common? They all come from the world of advertising, and they're all in the aid of communication development rather than strategic brand management. A brief trip in the Way-Back Machine can explain that.

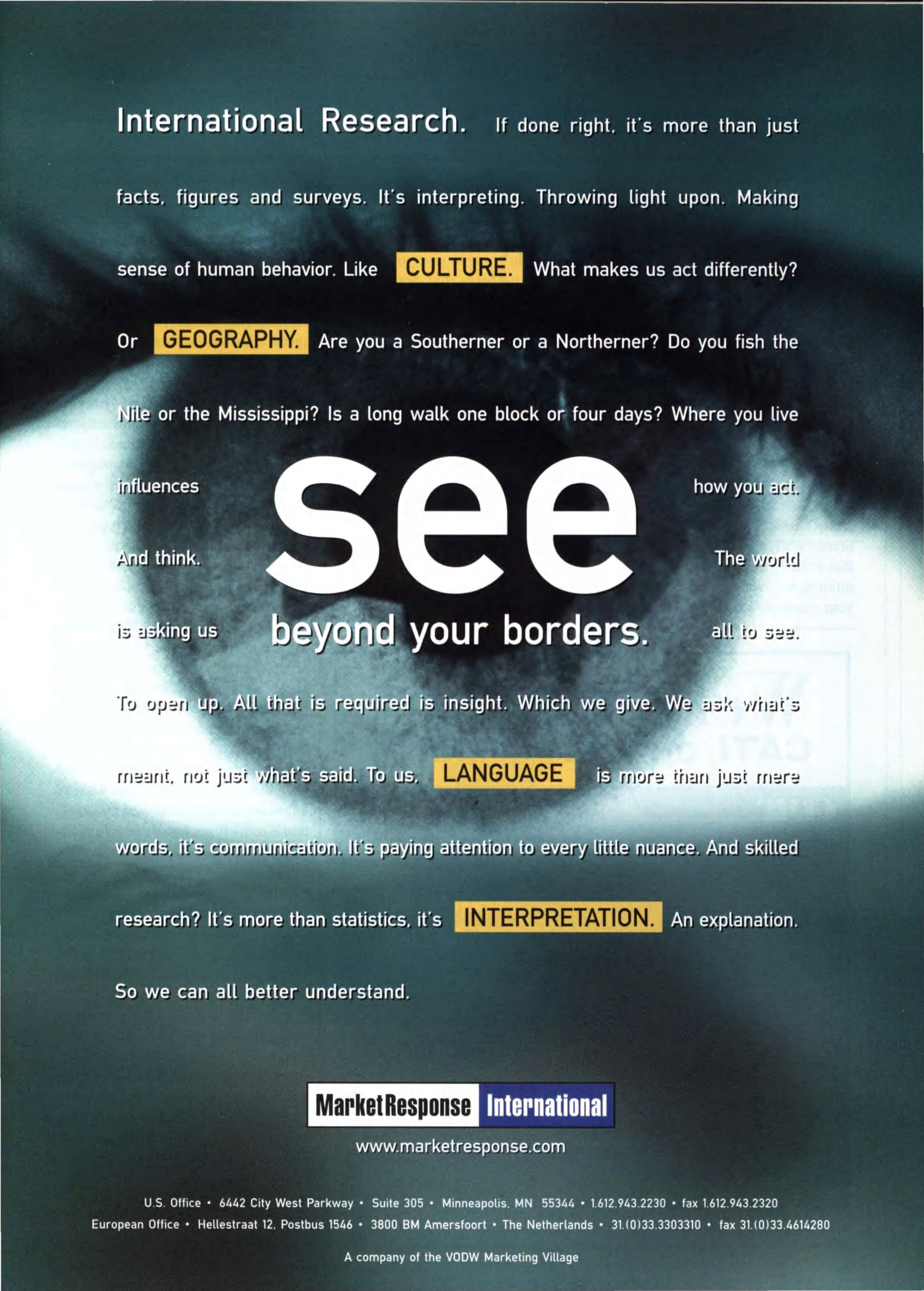
Any real research having to do with marketing — outside of product formulation — began in the ad agencies in the late 1950s. And most of that stemmed from the desire to avoid being sued for communicating false and misleading information provided by their clients. When the world got more and more complex (sound familiar?), the agencies looked to differentiate products and services with added layers of discriminators, coining terms like "brand image" and "brand personality." Forty-plus years of having that injected into the mix makes it sound pretty familiar and comfortable, and tends to take on a meaning which is ethereal, and not something you can sink you teeth into.

And let's be honest. Talking about "brand equity" in those terms is easy.

But if we define the central goal of strategic brand management and planning as the creation of an expanding pool of loyal customers, then, clearly, talk is cheap. If every conception of brand management (and their related advertising campaigns) yielded loyal customers, there would be a lot more loyal customers in the world.

And, if we revisit the ways in which most companies identify brand equity and the part it plays in the strategic brand management planning process, we would suggest that most of the definitions and examples offered up would, once again, refer back to image and positioning, which are the advertising agencies' best attempts at creating manifestations of a brand's equity.

Listen carefully to an advertising person describe brand equity! You'll hear phrases like "When we


International Research. If done right, it's more than just facts, figures and surveys. It's interpreting. Throwing light upon. Making sense of human behavior. Like CULTURE. What makes us act differently? Or GEOGRAPHY. Are you a Southerner or a Northerner? Do you fish the Nile or the Mississippi? Is a long walk one block or four days? Where you live influences how you act. And think. The world is asking us all to see. To open up. All that is required is insight. Which we give. We ask what's meant, not just what's said. To us, LANGUAGE is more than just mere words, it's communication. It's paying attention to every little nuance. And skilled research? It's more than statistics, it's INTERPRETATION. An explanation. So we can all better understand.
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came into the picture the market/competitive situation was . . ." or, "We conducted focus groups and came up with the following imagery." You almost never hear "We took the brand's equity and. . ."

These are, admittedly, part of the marketing process, and when all too infrequently circumstances come together just right, what you end up with is a pretty good creative expression of a brand's equity.

More often than not, however, you end up with a too-hollow creative shell — entertaining, perhaps, but not making much more of a contribution in moving a brand closer to strategic goals, outside of increasing awareness, and don't get me started on that! (Everyone in the world has heard of Tang, but no one knows anyone who had it for breakfast today!)

I'm here to say that until now there really hasn't been a good definition of brand equity, or at least a definition that actually means something, a definition you can actually use to improve your company's bottom line.

A definition is required which is:

• better established within the context of the actual product/service category;

• better captures and imparts the direction and velocity of customer values in that category; and

• far better correlates with the market activities and loyalties of the customer.

And I'm going to give you a definition of the term that actually can become a tool in the hands of a strategic brand manager. Here it is:

"Brand equity is the set of points where a brand exceeds customer expectations."

What do I mean by this? Correctly measured, customer expectations identify how the customer and category values come together to form the dimensions of purchase and loyalty. Correctly measured, customer expectations identify precisely "how high up" is to the customer. And correctly measured, customer expectations provide a yardstick against which your brand can be measured. All this is pretty complex, but then again, so is the world marketers will have to work in over the next decade.

Let's roll up our sleeves and see what we need to do. To accomplish this of, course, one needs to possess statistically reliable customer perceptions of customer expectations and we have come to recognize that different companies will attempt to take these measures in different ways.

This would normally bring us to a fundamental discussion of the benefits and deficiencies of various research systems but that is not my topic today. Suffice to say, however, that most research systems have certainly not kept pace with the changing dynamics of customer values and are oftentimes inadequate to the task at hand.

Let's examine the three key required measures and their import in the identification and planning process:

1. Category purchase drivers. We hear talk of changing marketplaces and the need to meet and adapt to customers' needs and values before the competition, yet most of the traditional research methods are not leading indicators of customer purchase, let alone accurate portrayals of how the customer views the category, makes brand comparisons in that category, and — ultimately — makes purchases in that category.

2. Real levels of customer expectations about these drivers. That is to say, expectations unconstrained by reality and a reflection of what people really think (as opposed to what they say they think).

3. A precise measure of a product's or service's brand equities.

This is not, of course, meant to suggest that one should ignore traditional, reliable and valid marketing and research techniques. They are generally quite helpful in identifying an opportunity for a company.

And that is the difference between marketing research and brand research.

Most of the traditional research applications — reliable and statistically valid — are not brand-equity based and will not reveal what the customer is willing to believe about your brand except in the broadest of inquiry circumstances. They may show you what a customer thinks is missing in a particular category, but it doesn't indicate if they think you are the brand who can deliver what they most desire!

Examining the brand from this perspective requires the creation of a new planning foundation or infrastructure from which to actually brand plan. And a really good initial step would be to first acknowledge that a brand's equity acts as the engine that drives customer loyalty, sales and profits.

Even better would be to recognize that every brand has its own Brand Equity Infrastructure[SM] which is based upon the configuration of category purchase drivers, real levels of customer expectations about these drivers, and a brand's true equity.

Examined from this perspective it provides a consumer/customer-acknowledged, organic, interior support system for the brand which acts as a leading indicator of what kind of marketing opportunity can actually be sustained by the brand, and what/which marketing option will best support the brand within that opportunity.

Isn't this just a given? All of the traditional elements can be in place (acceptable product, adequate distribution, financial wherewithal, best hopes and desires of the marketing professionals, etc.) yet we know that some brands can't fulfill the marketing proposition.

Here are two failures: Failure No. 1: McDonald's introduction of the Arch Deluxe. Failure No. 2: AT&T's leap into the computer marketplace with the acquisition of NCR.

One can reasonably assume these companies did research before they threw their money away. One can also assume that they did the wrong kind of research — traditional research which indicated, respectively, market opportunities for getting more bodies into the outlets, and for entering into the computer marketplace.

The lesson to be learned is that a market opportunity is not a brand opportunity. If customers are not willing to believe that McDonald's is qualified (by product formulation or venue) to make an adult hamburger, or that the AT&T logo belongs on a personal computer, then no amount of image advertising and market positioning is going to change their minds.

If McDonald's Arch Deluxe and the AT&T acquisition teach us anything it should be that there really is a need to understand the difference between what appears to be a really good marketing opportunity and, what is, in fact, an inferior brand strategy, and the fact that few of the so-called brand planning or testing systems manage to do so.

A really good foundation is provided by measuring a brand's Equity Infrastructure which shows which customer values are of greater or lesser importance to customers and where the brand's equity lies. It should indicate a brand's strengths and weaknesses relative to the competition and strategically point to what are the best opportunities for the brand.

A Brand Equity Infrastructure is a map of what customers are willing to believe about your brand. As with any map, it helps your brand keep going in the right direction — and prevents you from wandering down a dead-end street.

And because the Brand Equity Infrastructure does, in fact, identify what people are willing to believe about the brand and which of the most important values (think traditional attributes and benefits) will best translate into the myriad tactical delivery programs currently available, it can be powerful in evaluating the brand and attendant equity.

More importantly, highly evolved customer-listening systems provide the wherewithal to effectively track the velocity and direction of customer value — the key element in being able to actually measure a brand's equity.

By doing so, it will allow a brand's planners to determine its trajectory as it enters into the world of tomorrow, which might, strangely enough, include more powerful and sustaining creative opportunities in the promotion or sponsorship arenas.

By basing planning upon what customers are willing to believe (as opposed to what a company would like them to believe) you end up with a more successful, profit-based strategic planning system, and still provide your advertising agency with fodder for the creative mills. In fact, it may even provide horizons — rather than the traditional boundaries — for creative development which will result in even more strategic creative executions.

In summary, the three key required measures in the identification and planning process are:

• leading-indicator category purchase drivers;

• real levels of customer expectations about these drivers — that is to say expectations unconstrained by reality and a reflection of what people really think (as opposed to what they say they think);

• a precise measure of a product's or service's brand equities.

The secret to success: A highly evolved customer-listening system which provides accurate measures of:

• the relationship between the customer and brand equity by identifying the difference between what people think and what they say they think,

• how your brand "fits" within those expectations — an identification of the Brand Equity Infrastructure; and

• what customers and prospects are willing to listen to about the brand, believe about the brand and, ultimately, purchase from the brand.

Bear in mind the customer loyalty/profitability mantras:

• It takes seven to 10 times the cost and effort to gain a new customer than it does to keep one.

• In some sectors, an increase in the customer base by just one percent is otherwise equivalent to a 10 percent cost reduction program.

• Depending upon the category, a 5 percent increase in customer loyalty will lift the lifetime profits per customer by up to 95 percent.

It is, therefore, incumbent upon strategic planners to capitalize upon the power of their brand's equity in its definition and in its application.

Research on the witness stand: conducting surveys for use in litigation

By Larry Herman

Editor's note: Larry Herman is vice president at BAIGlobal, Inc., a Tarrytown, N.Y., full-service market research firm. He can be reached at 914-332-5300.

When quantitative research is presented as evidence in the courtroom, it comes under a different and more meticulous scrutiny than when it is used in making business and marketing decisions. Research for litigation is literally cross-examined on the witness stand.

Opposing lawyers examine every detail involving the execution of the project with the explicit intention of questioning your research and undermining the findings. Even the smallest mistake in the research process can destroy a study's validity. And, once a survey has been discredited, the expert testimony and sometimes the case can be too!

Given such a hostile environment, researchers who enter this arena must follow precise rules and procedures to eliminate all error and produce clear, defensible results. Having managed hundreds of legal surveys over the past 15 years, and having conducted my own study at my firm, BAIGlobal, of lawyers who commission such research, I offer the following insights, cautions and rules-of-the-road for those who venture into this treacherous niche of the research marketplace.

A new and unfamiliar cast of characters

When embarking on a legal research assignment it's important to know the wide range of players involved in using your research, both behind the scenes and in the courtroom.

First are the corporation's attorneys and management executives who articulate the legal claims to be resolved. Legal disputes usually involve business issues such as:

- intellectual property disputes regarding trademark or copyright infringements;
- claims substantiation for advertising and marketing materials;
- misleading advertising involving consumer confusion issues.

If a trial is anticipated, each side will hire their own outside trial lawyers to develop and argue their case in court. These lawyers, in turn, hire their own expert witnesses, usually well-known marketing experts or business school professors, to provide an objective opinion about the subject matter in question. The expert witness custom designs a research study for the trial and, finally, a market research firm with legal research expertise is hired to execute the study.

To make the best case possible, both the expert witness and the market research firm must be legal research specialists:

- The expert witness is the design specialist and "testifying" professional. He or she must create an unbiased methodology, questionnaire, and sample design for the study, so that the research results are viewed as truly objective evidence in court. Then he or she must be able to testify and

explain the survey results articulately and concisely on the witness stand, holding up graciously under cross-examination by opposing counsel.

• The person on staff at the research firm is the expert involved with the execution of the project, with extensive experience directing and coordinating all aspects of legal research. He or she must ensure that the data is collected and processed without any question regarding its accuracy. Although the market research firm's legal specialist rarely appears on the witness stand, his or her work will be subject to meticulous examination by opposing counsel as well.

Hostile environment

The clients in a legal assignment have an attitude towards research that is radically different than business clients in a typical research project. Trial lawyers tend to be suspicious and distrustful of research, viewing surveys as a necessary evil. They know that opposing counsel will be looking to discredit their survey's findings wherever possible, and they want to ensure that their study will stand up under fire in cross-examination. In our recent study conducted among lawyers who use research in the courtroom, we heard the following comments and attitudes:

"We attack the methodology . . . try to break the study down. We typically ask for copies of every survey filled out and re-code it ourselves to see whether or not our figures concur with the expert's report."

"The individual questionnaires are the Achilles' Heel of the expert. That's where any weakness in the survey design or its execution can be uncovered and attacked."

"We attack our own research . . . look at each questionnaire and try to find any problems ourselves."

These hostile attitudes, coming not just from your opponent's counsel but from your own side as well, reinforce the need for precision research. Such an environment compels the expert witness designing the survey and the research firm executing it to be extraordinarily attentive to detail in order to survive unscathed.

Under the legal microscope

The same study identified the parts of the research process that are particularly vulnerable in the courtroom: the questionnaire, the data collection process and coding procedures.

In the questionnaire designed by the expert witness, proper wording of questions is key. In particular, the lawyers who participated in the study identified "leading" and "vague" questions as the most frequent flaws they focus on to attack a survey's validity. "Leading" questions designed to elicit a specific response and "vague" questions whose responses can be easily misinterpreted will be attacked in the courtroom, accused of producing biased results, and used to punch holes in the survey's validity.

It is the expert witness's responsibility to write clear, simple and unambiguous questions and the task of the expert executing the project at the

Advertorial

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.

Sorensen Associates has available over 40,000 retail locations in the U.S., and the technology to execute fieldwork in a few days. This infrastructure is at the foundation of the firm's reputation for conducting demographically structured studies at the neighborhood level.

Researchers now have new and better options for collecting consumer information - *at the point of purchase.* ■

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

research company to field the questions appropriately. Sometimes a pilot survey is conducted to help identify any problems with wording ahead of time and prevent any issues from coming up in court.

Attention to detail is critical

Even with the perfectly designed survey, problems can arise. During a trial, every detail in the data collection process will be subjected to scrutiny. All types of problems must be looked for ahead of time and eliminated during fielding of the study. The expert executing the research project must make sure no problems arise during the fielding and data processing steps that could be used to undermine the survey's findings.

For example, one of the lawyers in our study made the following comment about his opponents in a trademark case:

"We were able to show, through the actual questionnaires filled out, that there was a discrepancy in one survey center. The interviewers were supposed to take down verbatims, but it strained credulity that five people in a row would say the same thing."

Because the lawyer was able to show that the data from that one center was suspect, the survey's results were discredited.

Breakdowns in double-blinding procedures also undermine the results of legal research. If an interviewer or respondent can guess the sponsor of a study, their answers may be biased, attacked in court, and can result in your case being discredited. For example, in one study mentioned by the lawyers, all materials were appropriately labeled with a project code name, but the code included the client's corporate name – discrediting the study's results.

Also, a consumer's shopping experience needs to be accurately duplicated if you are using visual displays to present products for evaluation in a study. For example, for two products to be compared in a trademark infringement dispute, the two packages should not appear on the same shelf in a display during a study, if in fact they appear in different aisles of the supermarket. The actual consumer experience needs to be recreated as closely as possible in order for the survey's results to be accepted.

Any of these data collection problems, such as interviewer fraud, breakdowns in double-blinding procedures, and inaccurate displays, may be discovered and revealed in court by opposing counsel. The lawyers will quickly point out how this introduces bias to the surveys results, and will use their discoveries to undermine the expert witness's testimony.

Proper coding is key

Another area of vulnerability in the data collection process is coding. Whenever open-ended questions are used in a survey, the opposition will usually re-examine and attack the coded results. Typically, opposing lawyers will ask for copies of every questionnaire filled out and re-code the answers themselves.

If a respondent's verbatims are ambiguous or unclear, the opposing lawyers may interpret the responses differently. For example, in a claims substantiation dispute regarding two beverages, one coder may consider "sweet" and "sugary" to be the same, while another coder may see these as different answers.

Such differences in coding should be resolved before the survey is presented. Otherwise coding differences may be brought up during the trial, explored on the witness stand, and used to undermine the credibility of the findings.

Several steps can be taken to avoid coding problems. First, the expert witness can design the survey to only ask open-ended questions when necessary. Second, these open-ended questions can be worded carefully to focus on a very specific point. Third, the research firm executing the study can have two people code the responses to each question and verify each other's work to help eliminate different interpretations before the results are presented on the witness stand.

A checklist for executing legal research

To avoid these and other data collection problems, our firm uses a special checklist for fielding and processing legal research studies. The purpose of the checklist is to eliminate the element of human error. Some of the rules we follow are:

• To help reduce the potential of fraudulent responses occurring, no interviewer completes more than one-third of the interviews in a given market.

• All interviewers conduct a "practice" interview which is documented, signed and returned to us, to confirm that every interviewer is well trained and understands the survey procedures.

Other more obvious rules include: using only pens on questionnaires to prevent erasures which may imply changed answers; creating truly neutral project code names; and removing all references from all materials that may identify the client sponsoring the study to prevent any breakdown in double-blinding. Special quality control procedures are implemented as well, including the minimum validation requirement of 100 percent attempted and 75 percent respondents reached, and 100 percent keypunch verification.

For the expert executing the project at the research company, the checklist of rules, regulations and procedures can go on and on. The overall imperative is to have no errors in data collection or processing. Any problem can be brought up in cross-examination and used to challenge the survey's findings. The testifying expert witness will have to defend any survey irregularities on the witness stand.

Given the hostile environment and rigorous conditions of conducting research for litigation, it's not surprising that research firms consider this type of quantitative research to be a specialized niche. However, for market researchers who do conduct legal research, it can be very gratifying to meet the exacting demands of expert witnesses and legal minds and help resolve immediate and important legal disputes in the business marketplace.

Survey Monitor

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linked to the Web, such as in-store or point-of-sale advertising (7 percent) and newspaper ads (4 percent), also raise awareness. Others reported that they learn about on-line couponing from direct mail, e-mail and news articles.

When asked which Web sites they went to for on-line coupons, respondents reported two clear leaders. Forty-six percent of the participants said they go to coolsavings.com and 41 percent cited valuepage.com. Other sites mentioned included valpak.com (12 percent) hotcoupons.com (12 percent) and directcoupons.com (10 percent). On-line coupon users tend to be between the ages of 25-44 (55 percent). A third of the on-line coupon redeemers have household incomes over $75,000, 36 percent have incomes between $45,000 and $75,000, and 31 percent earn under $45,000.

Looking at those who used coupons in the last month, on-line coupons already capture a 3 percent share of total coupon use among respondents, according to NPD. Newspapers dominate with a 48 percent share, followed by store circulars (26 percent), mail packs (12 percent), magazines (4 percent) and other sources (7 percent).

The NPD coupon survey was conducted as part of an NPD Online Research omnibus survey. In early March, 2,673 individuals from NPD's Online panel, a Web-representative sample of consumers pre-recruited to participate in surveys, responded to the questionnaire. For more information call 516-625-0700 or visit the company's Web site at www.npd.com.

Toll-free numbers used in 58 percent of magazine ads

Fifty-eight percent of magazine advertisements contain a toll-free number, with 82 percent using the 800 prefix, according to a new Response Marketing Group study of magazine advertising. A sign of Internet popularity, 58 percent of magazine advertisements also contain an Internet address.

Overall, 78 percent of advertisements feature either a toll-free number or an Internet address, or both, and 82 percent of magazine ads use some form of direct response. "Magazine advertisers know the value of direct response," says Sandra Murray, president of Response Marketing Group. "Consumers may be ready to learn more or to buy immediately after seeing an ad. Without a direct response mechanism, they have no way of acting on their impulse."

Thirty-four percent of advertisements with toll-free numbers display the number prominently, the study found. Only 15 percent with Internet addresses display the address prominently. "URLs in magazine ads are clearly secondary response mechanisms," says Murray. "Toll-free numbers are still the response device of choice."

The flood of 888 and 877 numbers has had little impact on magazine advertisements. "Consumers have had 30 years to get familiar with 800," Murray says. "They've only been exposed to 888 for the last two years — advertisers see this as a big risk. They can't afford to gamble on consumers misdialing their phone numbers."

Industries using toll-free numbers in ads most often are home improvement, attorneys, lodging, and sports. Ads in sports, automotive, and computer magazines contain toll-free numbers most frequently.

Industries using Internet addresses in ads most often are real estate, water, delivery service, and computers. Ads in computer, news, and financial magazines contain Internet addresses most frequently.

After toll-free numbers and Internet addresses, the next most frequently used response mechanism is a street address, found in 17 percent of ads. E-mail addresses are found in only 4 percent of ads. Coupons are found in 1 percent of ads.

The study, Toll-free Numbers in Magazine Advertising, analyzed over 4,000 advertisements. A similar study, Toll-free Numbers in Television Advertising, released in September 1998, found 24 percent of television commercials containing a toll-free number, and 19 percent containing an Internet address. Both studies are available for on-line viewing at www.800response.com.

You mean they don't grow bananas in the U.S.?

Where's it from? That's the question consumers are asking about their produce. Eighty-five percent of consumers agree the government should require country of origin labeling on produce. And although they say they want to know where their produce is from, consumers are uninformed about the origin of their produce.

Just 63 percent of consumers say the grocery stores where they shop carry imported produce. However, 94 percent of consumers said they have bought bananas. Bananas aren't grown in any commercial quantity in the United States, so consumers are either not aware of where their produce is grown or they're all shopping in that rare grocery store that doesn't carry bananas.

Those are some of the findings of Fresh Trends 1999, an ongoing study of consumer trends in the produce industry. Fresh Trends 1999 is conducted by *The Packer*, a business newspaper serving the fresh produce industry, and Vance Research Services, each a part of Vance Publishing Corp., Lincolnshire, Ill.,

In addition to the findings about consumers and imported produce, Fresh Trends 1999 also discovered that consumers are buying more packaged produce, are eating more produce at breakfast and dinner than at lunch, are holding steady in their purchases of prepared meals and are purchasing new varieties of fruits and vegetables.

Consumers are interested in how the package looks, as well as the information the packaging contains. Ninety-two percent of consumers said the visibility of produce in a package is highly important to them. Consumers also want the package to have a purchase-by or use-by date, a clearly stated quantity or weight and nutrition information.

Nearly 60 percent of consumers say they are purchasing more packaged fresh produce than they were a year ago. However, 48 percent of consumers say they prefer to buy bulk produce because they are able to handpick their fruits and vegetables.

Consumers are most likely to eat fresh produce during breakfast and dinner. Forty-five percent of consumers typically including produce in their breakfast, and 48 percent with dinner.

Fresh Trends 1999 also discovered consumers think they are eating the same or more produce compared with 12 months ago. Fifty-five percent of consumers said they are eating about the same amount of fresh produce, and 30 percent said they are eating more produce than 12 months ago.

Reasons for eating more fresh fruits and vegetables include diet, health and lifestyle changes.

While home-meal replacement seems to be a growing trend in supermarkets, it appears consumers are holding steady in their purchases. Thirty-eight percent of consumers said they purchased a prepared meal in the past six months, the same as in Fresh Trends 1998.

Consumers are showing a willingness to try something new — buying more varieties of apples, including fujis and gala apples and lettuce. In 1995's Fresh Trends, just 10 percent of consumers purchased fujis apples. In only four years, the figure rose to 29 percent of consumers in Fresh Trends 1999. Likewise, the purchase incidence of galas has increased from 13 percent in Fresh Trends 1995 to 30 percent in Fresh Trends 1999.

The two apple varieties also made the "first time purchased" list with 11 percent of consumers buying fujis for the first time in the past year and 9 percent buying galas.

Consumers also are experimenting with their salads. Both spinach and romaine have grown in popularity, with more than half of consumers purchasing them this year alone. Fifty-two percent of consumers said they have ever purchased spinach and 51 percent said the same about romaine. Both are up from two years ago with romaine gaining with a seven-point increase. For more information call Carol Cox at 913-438-8700.

Colleges encourage on-line applications

An estimated 39.7 percent of American colleges enable applicants to the college to apply directly through the college Web site. Of the 60.3 percent of the colleges that do not currently enable applicants to apply through their Web site, 51.4 percent plan to do so within the next year, according to a study of college marketing practices published by Primary Research Group in New York.

The study — The Survey of College Marketing Programs — is based on data from a random sample of 68 North American colleges, with full time enrollments ranging from 250 to 41,000 students, and a mean of 5,450 students. The data in the report is presented by type of control of the college (public/private), level of the college (two-year/four-year), and enrollment size.

Other findings of the study include:

• 56.25 percent of the colleges in the sample conduct focus groups; 65.71 percent of the colleges that conduct focus groups use in-house resources only to do so. The most common type of focus group involves high school seniors that are current or potential applicants to the college.

• 43.28 percent of the colleges have a director of marketing on staff; 36.07 percent of the colleges describe their marketing efforts as decentralized.

• The colleges in the sample print a mean of 19,270 viewbooks per year, a minimum of 500 and a maximum of 100,000. On average, private and four-year colleges and colleges in the larger two size groups (3,501-6,000 students and 6,000 or more students) print more viewbooks than do their counterparts.

• 70.97 percent of the colleges conduct direct mail campaigns. (In 1997-98, the colleges that conducted such campaigns sent promotional materials to a mean of 48,540 households, at a mean cost of $24,344.)

• 39.3 percent of the colleges produce videos about the college to send to prospective students; 16.7 percent of the colleges produce videos to show to send to high school guidance counselors or to show at college fairs.

The report comprises three volumes: Management Practices, Print Advertising, and Electronic Advertising. Each of the volumes may be purchased individually. For more information visit the company's Web site at www.primaryresearch.com.

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February 1999. For more information visit the company's Web site at www.intermediapulse.com.

StatSoft introduces STATISTICA Neural Networks, version 4

StatSoft, Inc., Tulsa, Okla., has released STATISTICA Neural Networks, version 4, featuring the Intelligent Problem Solver (IPS) network wizard and several new statistics, charting options, and training algorithms. The main new feature, the new IPS wizard, automates feature selection and network architecture selection in neural network analysis.

STATISTICA Neural Networks features new statistics such as sensitivity analysis, new charts such as ROC curves and response graphs for what-if analyses, and new training algorithms like Quasi-Newton and Learned Vector Quantization.

The IPS wizard operates in two modes, basic or advanced, depending upon the level of control desired. It also allows the user to specify the breadth of the search in terms of the range of networks tried or explicitly in the duration of time. The IPS wizard also saves a number of networks discovered during its search. The user can build a candidate set of network solutions, with options for a range of network types and sizes, from which an appropriate selection is made.

The IPS wizard displays results of the search and then assists in the interpretation of those results. For every search, the wizard provides suggestions, a summary of goodness of the solution, and automatically displays a set of appropriate statistics and graphs to help gauge network performance. The IPS wizard offers a plain language search summary that includes recommendations about the interpretation of results and warnings about potential pitfalls (e.g., overfitting).

The product offers a selection of network architectures (Multilayer Perceptrons, Radial Basis Function, Probabalistic, Kohonen, Regression), an arsenal of training algorithms (Back propagation, Quasi-Newton, Levenberg-Marquardt, Kohonen, Learned Vector Quantization, Principal Components, and more), effective statistics and charts to gauge network performance and make predictions (response surfaces, what-if analyses, regression statistics, sensitivity analysis, ROC curves), and complete API (Application Programming Interface) support within external applications (custom C++ or VB programs, MS Excel, etc.). For more information or to download a demonstration CD, visit the company's Web site at www.statsoft.com.

Survey gathers Czech attitudes toward advertising

Prague-based MARKTEST is now conducting a regular, representative survey of the Czech public's attitudes toward advertising. The survey is focused on the following issues: 1) opinions of intensity of advertising run in the particular media (TV, radio, periodicals, billboards, point-of-sale, direct mail); 2) general requirements on the attributes of advertising; 3) influence of advertising on the shopping behavior of the population; 4) attitudes toward using sexual and/or erotic elements, or the motive of a naked body for the purpose of advertising; 5) attitudes toward advertising on tobacco products; 6) attitudes to ads for medicines; 7) liked and disliked TV commercials. For more information contact Jitka Vysekalova at 420-2-2409-7241-3 or at marktest@csvts.cz.

New Net-based customer feedback product

Decisive Technology, Mountain View, Calif., is now offering MarketView, an Internet-based decision support solution for real-time wide-scale market and customer attitudinal feedback and analysis. MarketView leverages Internet technologies to help companies communicate with large numbers of their customers worldwide. The customer feedback that is generated is continuously collected and published on a password-protected Web site, Decisive's WebView, which graphically displays data for company management to access and analyze on a real-time basis. Company management can drill down into the data to determine respondent demographics and specific feedback. For more information visit the company's Web site at www.decisive.com or call 800-987-9995.

Data Use

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a multivariate method. In this article, "observations" refers to entities such as people, subjects; "variables" (sometimes called "dimensions") is the characteristics of these entities measured in quantitative or qualitative terms. Data consists of both observations and variables.

1. Principal component analysis

Principal component analysis restates the information in one set of variables in an alternate set of variables on the same observations. Principal components are linear combinations of the original variables such that they are mutually independent. This method applies orthogonal rotation of data along the axes that represent the original set of variables. Orthogonality ensures the independence of all components, while preserving 100 percent of the variance (synonymous with information) in the original variables. There can be as many variables as there are principal components.

1.1 Applications

• Variable reduction. Because principal components are extracted in decreasing order of variance importance, much of the information in the original set of variables can be summarized in just the first few components. Therefore you can often drop the last few components without losing much.

• Principal component scores can be used as independent predictors in regressions, thereby avoiding collinearity problems. Because principal components are orthogonal to (independent of) each other, they are an excellent choice for regressions where the original independent variables may be highly correlated.

• Outlier detection. Outliers are observations with different behavior from the rest of the observations. They may be caused by measurement errors, but they can exert undue influence on the regression. It is easy to find outliers in a one- or two-dimensional space defined by one or two variables. With higher dimensions defined by more variables, it becomes difficult to find their joint outliers. Principal components analysis can help locate outliers in a higher dimensional space.

1.2 Example

Do a regression analysis predicting the number of baseball wins from the following baseball statistics (many of them redundant), from the 1990 professional baseball season:

Dependent variable - number of wins.

Independent variables - batting average; number of runs; number of doubles; number of home runs; number of walks; number of strikeouts; number of stolen bases; earned run average; number of complete games; number of shutouts; number of saves; number of hits allowed; number of walks allowed; number of strikeouts; league.

1.3 Limitations

It is impossible to interpret the principal component scores computed for the observations. They are merely mathematical quantities for variable transformation. In regression, use of principal components in place of original variables is solely for prediction purposes. The resulting R^2 and coefficients may be significant, but the principal component scores do not have clear meanings themselves. If you want to give meaningful interpretation to the components, you are better off doing a factor analysis instead.

2. Clustering of variables or observations

Clustering is a collection of ad hoc techniques for grouping entities (either observations or variables) according to a distance measure specified by the researcher. The distance measure is a pairwise proximity between observations based on all available variables. If this distance measures similarity, such as the squared correlation, then it is the "similarity proximity." If this distance measures dissimilarity, such as the Euclidean distance, then it is the "dissimilarity proximity."

Once the choice of distance measure is made, a clustering algorithm groups members in all possible ways, each round calculating the values for an objective function (e.g., sum-of-squared-error, SSE, between clusters) using the predetermined distance measures. Finally it settles on a cluster configuration that optimizes this objective function (e.g., giving the highest SSE between clusters for separating them).

2.1 Variable clustering method

Variable clustering, like principal components analysis, is a technique for investigating the correlation among variables. The goal is to reduce a large number of variables to a handful of meaningful, interpretable, non-overlapping ones for further analysis. Clustering uses an oblique rotation of the variables along the principal-component axes to assign each of the variables individually to one of the rotated component axis-clusters with which it has the highest squared multiple correlation. Oblique rotation, contrary to orthogonal rotation, permits variables to be somewhat correlated.

2.2 Clustering applications

• Variable reduction. Variable clustering is often used for variable reduction purposes. After dividing the variables into clusters, you can calculate a cluster score for each observation for each of the clusters. In a regression where you have an inordinate amount of potential independent variables, you can do a cluster analysis first to reduce the number of independent variables. Once the variable clusters are found, you can regress your dependent variable on the clusters instead of the original variables. Better yet, you can even pick the variables that best represent the clusters, and use the reduced set of variables for your regression.

Unlike principal components scores where each score is a linear combination of all variables (and there are many scores), cluster scores are simpler to interpret. A variable either belongs or doesn't belong in a cluster, making the interpretation a lot cleaner.

• Grouping entities. Observations or variables are grouped based on their overall similarity. Although clustering makes no attempt to look inside the cluster members, the resulting clusters need names or labels for identification. It doesn't have to be precise: You inspect the within-cluster values of the variables, and compare them with the between-cluster values of the same variables to differentiate the cluster characters. Since the cluster labels should reflect the larger differences in those variable values, you may even discover interesting patterns in the groupings.

2.3 Example of clustering observations

The Air Force trains recruits for many jobs. It is expensive to design and administer a training program for every job. Therefore, data (variables) is collected on each of the jobs (observations), and then the jobs are clustered. Clustering enables the Air Force to design training programs for the entire clusters of jobs, not just for specific jobs.

3. Factor analysis

Factor analysis is useful for exploring and understanding the internal structure of a set of variables. It describes

the linkages among a set of "observable" variables in terms of "unobservable" or "underlying" constructs called factors.

In principal component analysis, you construct new variables from all the observed variables; whereas in factor analysis, you reconstruct the observed variables from two new types of underlying factors: the estimated common factors (to all observations) and the unique factors (to individual observations). The importance is in the study of the factor loadings — the coefficients for estimating the observable variables from the underlying factors.

The general form for factor analysis looks like a linear ANOVA model:

$$Y_{ij} = \mu_i + E_{ij},$$
$$\mu_i = \beta_k X_{ik}$$

where Y_{ij} is the observed value of subject i on variable j,
μ_i is the subject i mean value for the common underlying factors, X_k
E_{ij} is the error term unique to subject i on variable j, after accounting for μ_i,
β_k is the factor loading estimates for the unknown common factors X_k.
β_k is the same for all subjects on factor k.

In a linear model, you are given the values for X and Y, so that it is possible to solve for a unique ß and E. With a factor model, X (the common factors), ß (the factor loadings), and E (the unique factors) are all unknown and have to be estimated. You can have an infinite number of solutions to factor loadings, all of which fit the data well. There lies the first indeterminacy of factor analysis. To obtain a unique solution, you must impose the constraint that all the common and unique factors be mutually uncorrelated.

After you estimate the factor loadings, any orthogonal rotation of these estimates to derive the X factors would work equally well to preserve the variance information. For convenience, researchers often rotate the factor axes so that they can better interpret the resulting axes — factors. There lies the second indeterminacy of the factor analysis.

Because of the amount of guesswork involved in doing a factor analysis (it is a fishing expedition), you can have different findings with different groups of respondents, with different ways of obtaining data, and with different mixes of variables. The technique should only be used as an exploratory tool to help untangle badly tangled data, which should then be followed up by a confirmatory analysis like the regular ANOVA.

3.1 Application

• Exploratory variable analysis. If you can gain insights into the underlying factors, you may be able to learn something interesting about the observable variables, or you may even derive causal relations of how these factors influence the observed variables. Also, if you can show that a small number of underlying variables can explain a large number of observed variables, then you can significantly simplify your research.

3.2 Example

A car dealer has asked for several customers' preference ratings on a variety of car models made by Mercedes, BMW and Toyota. Using factor analysis, the researcher is able to identify three common factors that underlie all customers' preference ratings for these cars: style-consciousness, price-consciousness, and performance-consciousness. The common factor loadings are estimated for each car showing the extent to which customer ratings for this car depend on the degree of their preferences for these three underlying factors. For example, a researcher may discover that the rating of the Mercedes sedan would load heavily on customers' propensity toward style-consciousness and performance-consciousness.

4. Multidimensional scaling (MDS)

MDS is a descriptive procedure for converting pair-wise proximity measurements among objects (observations mostly, variables occasionally) into a geometric representation in a two-dimensional space. The goal is to plot it.

The method requests one single input variable: a set of pair-wise proximity measures on objects using all the variable information. MDS then applies iterative optimization/transformation procedures to derive new configurations, projecting the proximity onto a lower dimensional space. MDS deals with configurations rather than groupings of the objects. It finds the relative locations of objects in a two-dimension space for plotting purposes.

The proximity measure can take many forms: either as an absolute value (e.g., distance between two points), or as a calculated value (e.g., correlation between two variables). These are examples of proximity measures:

- physical distance between two locations;
- psychological measure of similarity or dissimilarity between two products, as viewed by the objects;
- a measure that reflects how well two things go together; for example, two kinds of foods served in a meal.

4.1 Application

- Geometric representation of objects, and outlier detection. MDS enables you to create a plot of points in a two-dimensional space such that distances between points reflect the degree of their similarity or dissimilarity. These points can be objects representing anything you want (e.g., brands of product, groups of people, geographic locations, political candidates). Data for MDS analysis can be metric or non-metric, and they need not be absolutely precise (in that case, you would be drawing an approximate map).

By studying the spread of the data points on a plane, you may discover unknown variables (or dimensions) that affect the similarity and dissimilarity values, or the outliers that are distant from all other points.

4.2 Example

A market research firm was interested in knowing how customers perceive the similarities between various snack foods. They selected 14 popular snack foods and asked six subjects to rank every pair of snacks. MDS was used to transform the proximity data and plot the points (snacks) on a two-dimensional space. Points that were relatively close represent the snacks that were judged to be similar by the customers.

You can expand the research if you have existing sales data for each of the snacks. You can build a regression model of sales on the properties represented by the two new dimensions (e.g., saltiness and crunchiness). Each snack food receives a score for each of the dimensions. The results of the regression can help you design a new snack food with properties found in an area of the plot where there are no snack foods, but promises high sales as predicted by the regression.

5. Discriminant analysis

Discriminant analysis is a model-based regression technique for classifying individual observations into one of several groups based on a set of "continuous" discriminator (independent) variables. The modeled (calibrated) relationship can be applied to new members to predict their group membership.

In a discriminant analysis, the researcher selects the observations first before measuring their values on the discriminator variables to avoid violations of method assumptions. Discriminant analysis is not appropriate for situations where the researcher wants to select observations to guarantee that wide ranges of values are included for the independent variables (in such a case, use logistic regression instead).

5.1 Applications

• Discovering the discriminant function that optimally discriminates among groups, and learning how they work. Discriminant analysis and cluster analysis both form groups. In a discriminant analysis, the group membership in the sample data is known, and the procedure is concerned with finding the meaningful relationship between group memberships and the discriminators. In a cluster analysis, the groupings are not known ahead of time, and the sole purpose is to find group memberships based on a composite distance measure on all possible variables.

• Grouping of observations. Discriminant analysis uses the linear discriminant function to predict group memberships for a set of data points.

5.2 Example

Before granting a credit card to a customer, a bank would want the assurance that the potential customer is a good credit risk. The bank may build a discriminant model of people whose credit behavior is known, based on such discriminator variables as their income, amount of previous credit, length of time employed. The modeled relationship can be applied to new applicants' values on the discriminator variables, which are known, to predict their future credit behavior.

5.3 Limitations

With discriminant analysis, you can examine the extent to which the groups differ on the discriminators, which you cannot with ad-hoc procedures like cluster analysis.

It is very important to cross-validate the results of a discriminant analysis. A discriminant analysis would give spurious results when it classifies the same observations it used to develop the functional relationship. (The misclassification rate of new data would be higher than what the model predicts.) To properly cross-validate the discriminant function, you should have sufficient observations in your sample so that a portion of them can be used to develop the function, and the other portion used to cross-validate your result.

6. Canonical correlation analysis, or multivariate multiple regression

Like the univariate multiple regression, you have several independent variables in the multivariate multiple regression; however, unlike univariate regression, you have several dependent variables in the multivariate multiple regression. The goal of multivariate multiple regression is to find the joint effect of independent variables on all dependent variables simultaneously.

You can do a separate univariate regression for each of the dependent variables. The problems with this approach are:

• you would have a separate series of prediction equations for each dependent variable;

• you would have no multivariate information about the relationship of the set of independent variables with the set of dependent variables;

• you would have no information about the relationship within the dependent variables or the relationship within the independent variables.

6.1 Canonical correlation analysis

A canonical correlation analysis enables you to discover the linear relationship between two sets of variables, without regard to which set is the independent variables and which set is dependent variables. In a multivariate multiple regression, the canonical correlation (or, multivariate R^2) is equivalent to the correlation (univariate R^2) in a univariate multiple regression.

Canonical correlation analysis is able to simplify the following problems:

• The dependent variables may be measuring redundant information. (A subset of them, or a smaller set of their linear combinations, may be sufficient.)

• The independent variables may be measuring redundant information. (A subset of them, or a smaller set of their linear combinations, may be sufficient.)

• The linear combinations of the independent variables may serve as predictors of the linear combinations of the dependent variables. This would reduce the complexity of the analysis that may actually give you better insights into the data.

Canonical correlation analysis does this by a redundancy analysis, finding successive linear combinations of the variables in each of the two sets such that:

• Each linear combination of the variables in one set is independent of the previous linear combinations of variables in the same set.

• The correlation of any pair of linear combinations between two separate sets is the highest correlation there can be, subject to the constraint that they have to be orthogonal to previously selected pairs.

6.2 Applications of canonical correlation analysis

• Redundancy analysis. The result of the analysis is a set of canonical variables: linear combinations of the original variables that optimally correlate with the corresponding linear combinations in another set. By examining the coefficient and correlation structures of the variables used in forming the canonical variables, you know the proportion of variance in one set of variables as explained by the other set. These proportions, considered together, are called redundancy statistics.

Redundancy statistics are in fact the multivariate R^2 in a multiple multivariate regression. By performing a canonical analysis on two sets of variables, one set identified as independent variables and the other set as dependent variables, you can calculate the redundancy statistics that estimate the proportions of variance in the dependent variable set that the independent variable set can explain.

6.3 Example

A pharmaceutical company is interested in comparing the efficacy of a new psychiatric drug against an old drug, each at three different dosage levels. Six patients are randomly assigned to one of the six drug-dose combinations.

There are a set of three dependent variables: the three sets of gain scores from three psychological tests conducted on the patients before and after the trial. These scores are: HDRS (Hamilton gain score), YBOCS (Yale-Brown gain score), and NIHS (National Institute of Health gain score). There are a set of three independent variables in the model: drug (new or old) and dosage level (50, 100, or 200 mg of the drugs), and prior physical conditions.

7. Conjoint analysis

Conjoint analysis is used to analyze product preferences and to simulate consumer choice. It is also used to study the factors that influence consumers' purchasing decisions. Products can be characterized by attributes such as price, color, guarantee, environmental impact, reliability, etc. Consumers typically do not have the option of buying the product that is best in every attribute, particularly when one of those attributes is price. Consumers are constantly making trade-off decisions when they purchase products (e.g., large car size means increased safety and comfort, which must be traded off with higher cost and pollution). Conjoint analysis studies these trade-offs, under the realistic condition that many attributes in a product are presented to consumers together.

Conjoint analysis is based on an additive, simple main-effect analysis-of-variance model. This model assumes no interactions among the attributes (which may be unrealistic). Data is collected by asking participants about their preference ratings for the overall products defined by a set of attributes at specified levels. Conjoint analyses are performed for each customer, but usually the goal is to summarize or average the results across all participating consumers.

For each consumer, conjoint analysis decomposes his original overall ratings into part-worth utility scores for each of the attribute levels. Total utility for a particular product (viewed as a combination of attributes and their levels) is the sum of the relevant part-worth utilities. Large utilities indicate the preferred combinations, and small utilities the less preferred combinations. The attributes with the widest utility range are considered to be the most important in predicting this consumer's preference. The average importance probability for an attribute across all consumers indicates the overall importance of this attribute.

A consumer's total utilities estimated for each of the attribute-level combinations of a product are then used to simulate expected market share — the proportion of times that a product combination would be purchased by him. The maximum utility model is often used to simulate market share. The model assumes that a customer will buy with 100 percent probability the product combination for which he has the highest utility, and 0 percent for all other combinations. The probabilities for each of the product combinations are averaged across consumers to get an overall market share.

7.1 Example

A consumer is asked to rate his preference for eight chocolate candies. The covering is either dark or milk chocolate, the center is either hard or soft, and the candy does or does not contain nuts. Ratings are on a 1 to 9 scale where 1 indicates the lowest preference and 9 the highest. Conjoint analysis is used to determine the importance of each attribute of the product to the consumer, and his utility score for each level of an attribute.

7.2 Limitations

The deficiency with conjoint analysis is its lack of error degrees of freedom (too few observations, and too many variables). It is like conducting an ANOVA analysis on one subject over all levels of the attributes. The R^2 with data points extracted from one individual would always be high, but that does not guarantee good fit or the model's predictive power. Researchers prefers the main-effects model because it requires the fewest parameters to estimate, alleviating the burden of not having enough error degrees of freedom.

The second problem is the complexity of designing the experiment. The simplest design would be the full-factorial design, requiring all possible combinations of the levels of the attributes given to the consumers for rating. When the number of attributes is large (say six or more), and the number of levels for each attribute is large (say four or more), it is tiring for anyone to rate that many combinations. For a small number of attributes and levels, you can choose an orthogonal design leading to uncorrelated part-worth estimates.

While conjoint analysis is ideal for new product design, researchers are advised to confirm the conjoint analysis result with a standard ANOVA analysis, even though the latter works better with continuous measurements.

Tremendous firepower

There is tremendous firepower in multivariate methods for solving difficult marketing decision problems. However, these methods are theoretically complex and prone to misunderstanding and abuse. Skilled researchers should take special care to avoid pitfalls in analysis and eliminate the erroneous decisions.

Pleasants

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session with senior client management to kick off the process. These discussions provide the management team with a blueprint of the process, timing and issues at hand. This is important as the prevailing response to a major competitive threat is to do something — anything — and do it quickly. Often actions taken in this environment end up misfiring and compounding the problem. The session helps management affirm their commitment to the process and later thwart knee-jerk reactions and suggestions.

PLEASANTS HARDWARE

When properly facilitated the session is also honest, opens up thinking, and spawns new ideas. Yet, a bevy of new ideas which sound good during such a session often disappear during subsequent weeks and months. To be effective, relevant initiatives are consolidated and organized into 10 to 15 key benefit statements. In other words, the session not only opens up ideas and thinking, but begins to whittle down thinking to a manageable number of key customer initiatives and propositions.

Our Pleasants visioning session included the top 15 people in the company including store managers, purchasing agents, finance officers, and of course, marketing staff. The session ended with 11 key benefit statements which ranged from being the "power tool headquarters" to a "satisfaction guarantee," from "only trusted quality products carried" to "free delivery on anything." And from "a knowledgeable sales staff willing to help" to "supporting a hometown community hardware store." The key is that we now had 11 tangible directions to pursue and the agreement from every key manager in the company that these indeed were the correct directions.

Qualitative research

The purpose of our qualitative research was twofold. First, to gain customer perceptions of the competitive landscape with relation to Pleasants. Second, to whittle down the 11 benefit directions for further quantitative exploration.

Recruitment for the qualitative step in the process was fairly straightforward. We selected from homeowners who lived within a three-mile radius of the store and who had shopped the category within the past six months. We ensured balance of age and income among the participants and importantly, an equal representation between men and women. The male/female representation was important as women now comprise half of all hardware and home improvement center shopping, according to MRI data.

To ensure familiarity and unbiased assessment of the shopping experience, we elected to have all participants mystery-shop Pleasants and each competitor with instructions to purchase certain items. Each was given a $50 stipend. Results of the mystery shopping were recorded via a pre-determined handout which the participants took to the focus groups.

The focus groups were segregated into all-male and all-female groups to make sure the men didn't overwhelm the women in the groups. The groups themselves were moderated with roughly one-third of the group totally open-ended and two-thirds devoted to exploring the 11 benefit directions. This is deliberately the reverse of a typical group. Too often we've seen focus groups conducted in a totally open-ended fashion that yield interesting insights but no tangible direction for next steps. We didn't want that to happen. Plus, the mystery shopping results provided even better, untainted, open-ended input.

As expected, Pleasants did extremely well in the areas of customer service, merchandise quality, depth, and store environment. The female group in particular appreciated Pleasants' service and environment. Also as expected, Pleasants fared poorly in price perception, most acutely among men. Even though many items are priced competitively, the high-service nature of Pleasants and the constant low-price message of the home centers had taken its toll. Early in the groups we realized two key things. First, women naturally appreciated our general proposition more than men and second, there was no way we would ever turn around the price perception — so much for the typical local retailer's strategy of cutting prices when a category killer moves in.

Reaction to the 11 benefit directions provided even more insight. The men and women differed in their views — men gravitated more toward the functional benefits of "best power tools selection" and items like equipment rental, assembly and installation, while women chose service and attitudinal benefits of "helpful" or "having experts on the staff." However, when it came time to select the most compelling proposition for Pleasants, both the women and even the men selected a soft benefit of, "The difference at Pleasants is their people. They are friendly, very knowledgeable, and really go the extra mile to help me." Surprisingly this benefit fared better than hard propositions such as money- back guarantees, higher quality products, more selection, convenience, and so on.

At this stage, we had a primary benefit that was believable and motivating. But it was not unique. Lowes had, and still does, an advertising campaign called "Lowes Knows." Home Depot also alludes to its helpful and knowledgeable people in its advertising. Had we concluded the research there, we would have simply reached parity. And, when being consistently outspent, Pleasants loses with a parity proposition.

How important are the following service benefits to you?

Top 1 Box	Benefit
84%	Get what I need the first time
69%	Save me money
62%	Save me time
50%	Help with ideas to get the project done right

As we reviewed the focus group tapes, the solution started to emerge. Participants touched on why they preferred Pleasants. One said, "I can go there and someone helps me get the right things so I can go home and not spend all weekend on a project." Another said, "There's nothing worse than going through that crowd at Lowes and then finding out I bought the wrong thing when I get home." In other words, they began to get at the true benefit of great service in the category.

Having the best in knowledgeable and helpful people is not a benefit. It should be viewed as a feature. The benefit of having knowledgeable and helpful people in this category was saving time, frustration, and money when doing one's own home project.

Quantitative research

Nothing in research has been more abused than the focus group. And perhaps the largest abuse is making major decisions based exclusively on focus group research. A couple of participants say something that the highest ranking client agrees with and — poof! — a conclusion is drawn and campaigns are changed.

We view the quantitative step in the process as validation. In Pleasants' trading area in the west end of Richmond, we determined that 150 qualified and completed phone surveys would be enough upon which to base decisions.

While we were looking for specific items in our quantitative research, we were also able to add aided and unaided awareness questions, primary and secondary shopping questions, and advertising questions. Yet, the key ingredient of the research was the question relating to the benefits of high service, defined as knowledgeable and helpful, in the hardware and home improvement category. (The chart above shows responses to one key question.)

We also slipped in a question on whether the respondent shopped at a very reputable high-service/high-perceived-price grocery store in the area. This particular store commands a 50 percent market share in Richmond. We wanted to find out if people who shopped this grocery store view the world differently in relation to our category.

The answer was yes. The importance of having a knowledgeable and helpful staff increased by over 10 percent among this universe while the importance of low prices decreased by 20 percent. In fact, price fell in overall importance to third place behind "knowledgeable sales staff" and "staff willing to help."

At the conclusion of our quantitative research we summed up the findings in order to set a strategic foundation for our advertising and promotional plan:

• Who is Pleasants? The consumer said they are knowledgeable and willing to help with good selection and quality items. But, it costs more to shop there.

• Why does the customer care? They can get what they need to get it right the first time, saving time, money, and frustration.

• Who cares the most? The busy, more upscale homeowner, who is more likely to be female.

Implementation

A branding line was developed for all of our external communications, "Get It Right The First Time." This theme was a very natural and consumer-friendly way to bring our positioning to life.

Our overall plan consisted of brand television advertising where we illustrated familiar and humorous situations of folks not getting it right the first time; periodic instructional events (how to refinish furniture, power wash decks, etc.) to build traffic and reinforce the positioning; cooperative product advertising which tied into the branding advertising; in-store signage and promotions to bring the message into the store; and public relations such as a Pleasants "Get it Right" speakers bureau and newspaper how-to articles to help people get it right the first time.

Results

Pleasants purchases some items through the Ace Hardware co-op and is therefore privy to consultation from Ace. Our Ace representative rightfully indicated that Pleasants should expect a 25 percent decline in sales once Home Depot opened its doors. We contacted many local hardware stores around the country where a Home Depot had opened and confirmed these expectations.

PLEASANTS HARDWARE

After the first seven months of the campaign launch, Pleasants may be the only local hardware store in the nation that actually experienced a gain in overall sales upon a Home Depot opening. Importantly, it did so without discounting heavily: margins actually increased vs. the same period a year ago. Moreover, this was not a result of a tremendous advertising budget increase; the overall media budget was constant vs. the prior year.

In addition to gaining sales and margin, Pleasants as an organization raised the bar by implementing the "Get It Right The First Time" campaign. The employees grabbed this customer promise and made it a mission — one that the consumer believes and appreciates and that the home centers could never implement.

Customer insights

We would recommend that any local retailer facing new and heavy national chain competition work through a quality strategic process driven by customer insights. And, at all costs, avoid the traditional reaction of immediately cutting costs and playing defense. After all, as Napoleon once said, "The logical outcome of a defensive strategy is defeat."

Dex

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B. Real-world stimulus materials

To solve the problem of respondent boredom, the decision task they were asked to complete was made as real-world as possible. We did this by using simulacra of actual directory pages, printed by R.R. Donnelley & Sons Company on the same type of paper used in directories. (R.R. Donnelley & Sons Company is one of the two companies that prints the yellow pages for U S WEST Dex.) Each page included eight 2-3/8" x 6" ads plus two columns of additional listings. Respondents were then asked which of the eight ads they would be most likely, second-most likely and third-most likely to call. They performed this task 12 times on 12 different pages. After doing this, respondents then were shown nine of the ads separately (outside the context of the page) and asked to rank those individual ads overall and to rate each one on a battery of seven image attributes.

The use of these props made a straight phone interview impossible. Between the alternatives of mall intercept interviewing and phone-mail-phone, the latter was chosen since it is able to accommodate probability sampling. Thus, it was projectable to U S WEST Dex's 14-state territory. In phone-mail-phone, the respondent is contacted by phone and the first part of the interview is completed. At that point respondents are asked if they are willing to continue the interview at a later date. If they agree, they are sent a package of materials by overnight courier, which they refer in completing the interview.

Figure 2 - Sample directory page

C. Logit model

Given the wealth of data collected in this study, several findings were arrived at through basic cross-tabular analysis. However, use of a logit model is what made this study unique and permitted it to determine if consumers are more likely to select products advertised in color. The logit model (also known as logistical regression) is a variant of multiple regression able to deal with non-metric variables and possessing certain features of discriminant analysis. It enables one to predict the value of a dependent variable based on various levels of a number of independent variables.

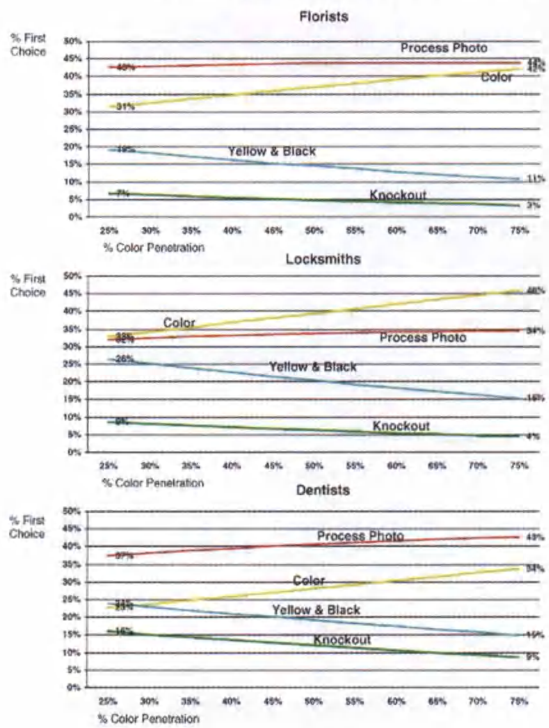
In the model for this study, the dependent variable was the color level (process photo, color, knockout and yellow & black) of the ad selected first. The independent variables were the heading (type of business advertised — florist, locksmith or dentist) and the degree of color penetration (25 percent, 50 percent or 75 percent) and the specific ad (two for each heading). The position of the ads on the page was held constant across all pages.

The regression coefficients (beta weights) derived from this model quantify how much better different levels of color perform. Headings and specific ads are non-metric data, so that their only allowable levels are on or off. Because penetration has a numeric value, even though respondents were only shown levels of 25 percent, 50 percent and 75 percent, the model will yield coefficients for that variable which let us interpolate how they would behave at intermediate levels.

IV. Results

Results were based on 600 interviews, in each of which 12 of the 36 total directory test pages were seen.

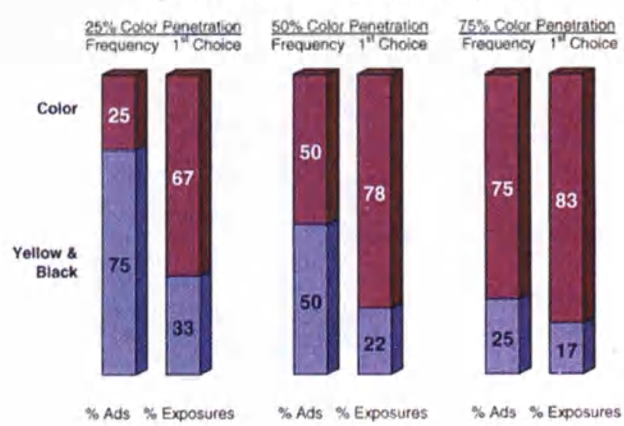
Figure 3 – Proportion of Time Color Level Chosen First



Several important findings emerged from this study. The most important finding is that color increases ad selection even in the presence of high levels of color penetration. This can be seen in Figure 3. It shows the share of the times ads of each level of color were chosen first. For instance, when color ads (either multiple color or process photo) for florists make up 75 percent of all ads on a page, those color ads are chosen first 86 percent (44 percent for process photo and 42 percent for multiple color) of the time. Regardless of the level of color penetration or heading, color ads are selected first at least 60 percent of the time.

Of course, it is no great accomplishment for more color ads to be selected first when more of the ads on the page are in color. However, the other major finding yielded by this model is that color ads are selected first in greater numbers than the proportion of color ads on the page would lead one to expect. The extent to which the first-place selection of color exceeds color penetration does, of course, decline as color penetration increases. Figure 4 makes this clear. For instance, when only 25 percent of ads on the page were in color, 67 percent of the ads chosen first were in color, a 42 percent difference. At 75 percent penetration, 83 percent of ads chosen first were in color. This difference, although smaller in absolute terms, was still statistically significant at the 95 percent confidence level.

Figure 4 – Ad Selection v. Frequency of Ad's Appearance



As important as it is to know that more customers patronize advertisers who buy color directory ads, positioning those ads more effectively requires the knowledge of why they do so as well. We were able to answer the latter question by correlating image attributes that play a major role in consumers' decisions to respond to an ad with the color level of the ad.

Respondents were asked about the following seven image attributes of the companies whose advertisements they saw:

1. It is family oriented.
2. It is high quality.
3. It is trustworthy.
4. It has been in business for a long time.
5. It lets me know what to expect from the business.
6. It lets me know what to expect in terms of price.
7. It lets me know what to expect in terms of products and/or services.

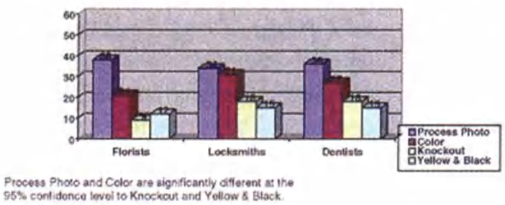
For this exercise, respondents were shown nine of the ads they had seen in the full-page spreads. The nine they saw were rotated on a respondent-by-respondent basis from 24 test ads in total (four color levels of each of the six test ads). In this round they saw the ads individually without any surrounding ads. They were then asked to rank the ads in order of their likelihood of calling that advertiser. They were then asked to rate each of those advertisers on the extent to which the above statements describe them. A four-point scale was used in which 4 means the statement describes them extremely well and 1 means the statement does not describe them at all. By correlating the ads' statement ratings with their likelihood of being selected, we are able to derive how important those statements are to the decision to call an advertiser. Table 1 shows the ranking of the statements by their correlation with the ranking of the ads. It shows that high quality and trustworthiness are the most important drivers of cus-

Table 1
Correlation Between Ranking of Ad and How Well Statement Describes Ad

STATEMENTS	Spearman Correlation Coefficient
High Quality	0.485
Trustworthy	0.354
Lets Me Know What to Expect from Business	0.247
Family Oriented	0.228
In Business a Long Time	0.207
Lets Me Know What Products/Services to Expect	0.201
Lets Me Know What to Expect in Terms of Price	0.081

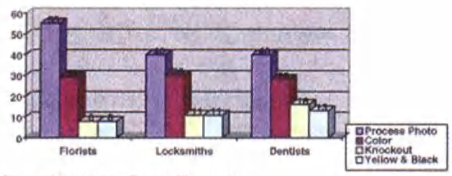
Based on between 5,373 and 5,391 respondents for each statement.

Figure 5 - % Saying "Is Trustworthy" Describes Ad Extremely Well



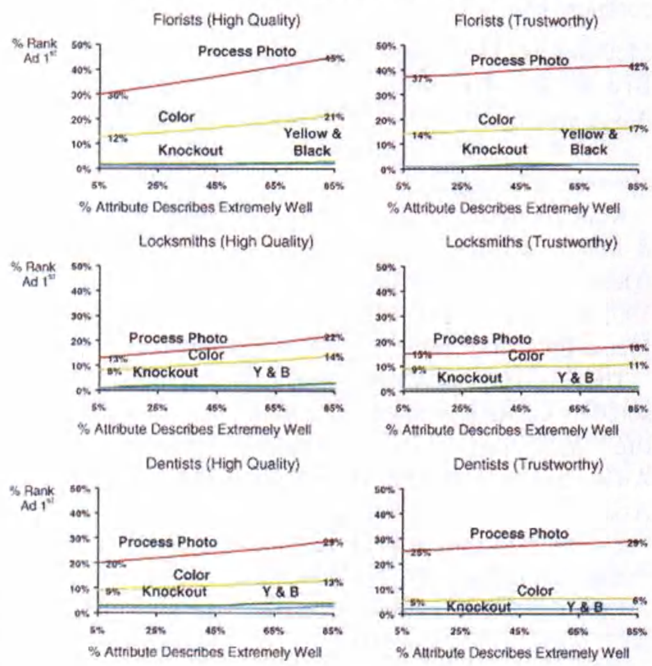
Process Photo and Color are significantly different at the 95% confidence level to Knockout and Yellow & Black.

Figure 6 - % Saying "Is High Quality" Describes Ad Extremely Well



Process Photo and Color are significantly different at the 95% confidence level to Knockout and Yellow & Black.

Figure 7 – Impact of Trustworthiness and High Quality Image on Ad Rankings



tomers' decisions to call directory advertisers.

The differences between color or process photo ads and knockout or yellow and black ads are quite pronounced in terms of these characteristics. This can be seen in Figures 5 and 6.

Having shown that color enhances an image of trustworthiness and quality in an advertiser, it remains for us to quantify the impact of these image characteristics on the selection of an ad. For this, we had three of the image statements (trustworthiness, high quality and family orientation) incorporated into the logit model in place of color penetration. Results appear in Figure 7. These were the only attributes included because the others did not have coefficients that were significant at the 95 percent confidence level. These attributes explained about one quarter of the variance in the data.

Color works

Color ads increase calls from prospective customers (which, one might expect, would generate more sales). And not only do they stand out, they also alter the way potential customers look at advertisers. Those who use color are regarded as more trustworthy and as offering higher quality merchandise or services. Thus, color's impact persists even as greater penetration of color makes individual color ads stand out less. This information will enable directory publishers to position color ads more effectively in order to sell more of them.

The use of an original experimental design and realistic props to collect data, combined with a logit model to analyze the data, were necessary to answer a difficult marketing question. This application of marketing research techniques illustrates the value of research in contributing to the bottom line of corporations who use it.

Research Industry News

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McCann-Erickson (New York), and Bruno & Ridgway Research Associates, Inc. (Lawrenceville, N.J.), for the Monistat campaign (in the "Pretesting" category);

Kraft Foods (Glenview, Ill.), Ogilvy & Mather (Chicago), and ACNielsen (Deerfield, Ill.), for the Shake N' Bake 1998 Kids campaign (in the "Guiding Media Exposure" category).

The David Ogilvy Awards are sponsored by the ARF in cooperation with the Association of National Advertisers and the American Association of Advertising Agencies. For more information about the foundation and the David Ogilvy Research Awards call 212-751-5656 or visit the ARF Web site at www.arfsite.org.

The Center for Marketing and Technology at the University of California, Berkeley, announced its formation and objectives for 1999. As an academic organization established to study the increasing impact of marketing on technology and technology on the practice of marketing, the Center's central objective is to address the issues that occur at the interface between these disciplines. The Center intends to bring together both real-world industry practitioners with expert academic researchers worldwide to address the new dynamics between these two disciplines. "Marketing and technology are becoming linked as never before and the Center aims to confront the cutting-edge issues affecting today's industries by bringing together both providers and users of technology," says Rashi Glazer, co-director of the Center for Marketing and Technology and professor at the Haas School of Business. "Our goal is to help businesses, more of whom now consider themselves in some way to be technologically related, in acquiring the research tools to negotiate the next millennium." To fund its research initiatives and services, the Center is seeking to attract leading firms, both big and small, domestic and international, to become Sponsor Members. Sponsor Members already committed include: Audits & Surveys Worldwide, Carlson Leisure & Travel, Cellular One, Driscoll's Strawberry Associates, IBM, RBI Communications Inc., Round Table Pizza, SBC Communications Inc., United Parcel Service, Visa U.S.A., and Young & Rubicam Inc. The Center's Member Sponsors all hold Board Member positions and help govern and shape the Center's focus. Some initial research projects funded by the Center for 1999 will include: building brand awareness, image and equity on the Internet; creating a competitive edge in high-tech or e-commerce environments; and developing better methods to forecast the success of a product in a technology-based market. The results of these studies will be available first to Sponsor Members and eventually to the entire academic and business communities.

Delphi Market Research, Inc., has moved to 2 - 6 River St., Medford, Mass., 02155. Phone 781-393-6600. Fax 781-393-6666. Web and e-mail addresses will not change.

Eagle Research has moved its Denver facility to 14818 W. Sixth Ave., Denver, Colo., 80401. Phone 303-980-1909. Fax 303-980-5980.

NFO Worldwide, Inc., a Greenwich, Conn., research firm, reported its results for the fourth quarter and twelve months ended December 31, 1998. Revenues for the fourth quarter increased by 83 percent to $94.6 million from $51.8 million for the same period last year. Operating income was up 64 percent to $10.4 million from $6.4 million. As a result of increased interest expense associated with acquisition-related borrowings and a higher effective tax rate, net income increased 20 percent to $5.1 million from $4.2 million. Diluted earnings per share rose by 15 percent to $0.23 per share from $0.20 last year. The fourth quarter's results include for the first time the results of Infratest Burke, which was acquired on November 20, 1998. For the 12 months ended December 31, 1998 revenues increased by 45 percent to $275.4 million from $190.2 million in the same period last year. Operating income increased by 26 percent to $29.3 million. Net income for the year climbed by 16 percent to $14.5 million from $12.5 million a year ago, while diluted earnings per share increased by 12 percent to $0.67 from $0.60.

Moskowitz Jacobs Inc., a White Plains, N.Y., research firm, has teamed up with BroadBand agency, Inc., a relationship - branding agency, to create the Brand/Customer Learning Network, designed to help companies learn from and collaborate with their customers using interactive networks of customers.

National Decision Systems (NDS), San Diego, announced that CB Richard Ellis has signed a multi-year agreement for NDS' market analysis software, imark. In separate news, NDS announced that Federated Department Stores, Inc., has signed an agreement with NDS for its customer and market analysis software and data.

Food Perspectives, a Plymouth, Minn., consumer testing and product development firm serving the food industry, has added a new consumer test site to its headquarters. For more information call 612-553-7787.

ASECOM Latin America has moved to new offices at Av. Belgrano 1255, 1093 Buenos Aires, Argentina. Phone 54-11-4381-1118. Fax 54-11-4381-0234.

The Market Segment Group, a Miami research firm, has a new Web site at www.marketsegment.com.

Digital Marketing Services, a Dallas, Texas, research firm, has renewed and expanded the scope of four charter partnerships formed to conduct on-line custom market research through America Online. The firm has renewed agreements with Norwalk, Conn.-based Ipsos-ASI Market Research; Minneapolis-based Custom Research Inc.; Irving, Texas-based M/A/R/C Research; and New York-based Roper Starch Worldwide.

Langer Associates, a New York research firm celebrating its 20th anniversary, has launched a Web site at www.langerassc.com.

Fuller Research Services, Portsmouth, Va., has changed its name to Fuller Insight, Inc.

ACNielsen Corp., Stamford, Conn., has formed a new operating unit, ACNielsen Media International, to combine into one global organization the company's television audience measurement, advertising expenditure measurement, readership, and other media services. Steven Yung, currently managing director of ACNielsen North Asia, has been named the new unit's president.

The Arbitron Company has chosen U.K.-based Pulse Train Technology's software systems for its Radio Market Reporting system in the U.S. and around the world. Arbitron has acquired a number of customized Pulse Train software modules and is adopting STAR, Pulse Train's professional batch tabulation system, as the underlying engine for its radio diary tabulation. As part of the agreement, Iain MacKay, Pulse Train's technical director, is joining Arbitron as director of U.K. development and strategic planning.

In separate news, software supplier **ATP** has upgraded its table formatting package, WINYAPS, to provide support for Pulse Train's STAR for Windows.

FIND/SVP, a New York research firm, has announced two initiatives aimed at attracting business-to-business and general consumers to use its services. For the business-to-business market, the firm will place banners on business- and research-oriented Web sites that will funnel visitors who need personalized information location help to the FIND/SVP site, where they will be able to pose a question and receive a customized answer from a consultant for a fixed price under $250. For the consumer market, the company plans to place "Ask a Question" icons on Web sites that will enable consumers to ask questions about a specific area and receive free customized answers.

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Ph. 520-523-1515
Fax 520-523-6654
E-mail: Fred.Solop@nau.edu
www.nau.edu/~srl
Fred Solop, Associate Director
12-12-12-0

Phoenix

The Analytical Group, Inc.
8687 E. Via de Ventura
Scottsdale, AZ 85258
Ph. 602-483-2700
Fax 602-905-1416
E-mail: lucy@acsinfo.com
www.acsinfo.com
Lucy Haydu
60-60-60-60
(See advertisement on p. 63)

Arizona Market Research Services
Div. of Ruth Nelson Research
10220 N. 31st. Ave., Ste. 122
Phoenix, AZ 85051-9562
Ph. 602-944-8001
Fax 602-944-0130
E-mail: rnncmrs@aol.com
www.ruthnelsonresearchsvcs.com
Lincoln Anderson, Manager
20-0-20-0

Behavior Research Center
1101 N. First St.
P.O. Box 13178
Phoenix, AZ 85002-3178
Ph. 602-258-4554
Fax 602-252-2729
E-mail: brc@primenet.com
www.primenet.com/~brc/
Earl de Berge, Research Director
38-38-38-38

Creative Consumer Research
1017 S. Gilbert Rd., #202
Mesa, AZ 85204
Ph. 602-892-5583
Fax 602-497-3272
Sally Smith, Sr. Vice President
17-10-17-17

Focus Market Research, Inc.
Camelback Executive Park
6991 E. Camelback Rd., Ste. A-110
Phoenix, AZ 85251
Ph. 602-874-2714
Fax 602-874-1714
E-mail: phoenix@focusmarketresearch.com
Ray Opstad, General Manager
12-0-12-0

Higginbotham Assoc., Inc. of Arizona
8010 E. McDowell Rd., Ste. 208
Scottsdale, AZ 85257
Ph. 602-946-7535
Fax 602-946-1170
80-80-80-80

O'Neil Associates, Inc.
412 E. Southern Ave.
Tempe, AZ 85282
Ph. 602-967-4441
Fax 602-967-6122
E-mail: surveys@oneilresearch.com
www.oneilresearch.com
Michael J. O'Neil, Ph.D., President
14-14-14-0

Quality Controlled Services
6350 E. Thomas Rd., Ste. 330
Scottsdale, AZ 85251
Ph. 800-647-4217 or 602-941-0048
Fax 602-941-0949
E-mail: postmaster@qcs.com
www.qcs.com
Jo McCullough, Branch Manager
15-0-15-15
(See advertisement on p. 119)

Research Resources
8800 N. 22nd Ave.
Phoenix, AZ 85021
Ph. 602-371-8800
Fax 602-735-3270
E-mail: rrgroup@researchresources.com
www.researchresources.com
Harriet O'Connor, V.P. Teleservices
300-300-300-300

Response Research
6868 N. 7th Ave., Ste. 110
Phoenix, AZ 85013-1150
Ph. 602-277-2526
Fax 602-247-4477
Shelly Munoz, General Manager
125-125-125-125

Strictly Medical Market Research
2400 E. Arizona Biltmore Cir., Ste. 1100
Phoenix, AZ 85016
Ph. 602-224-7979
Fax 602-224-7988
E-mail: llipsutz@aol.com
Wendy Walker, Exec. Vice President
10-0-10-0

Time N Talent Market Research
2400 E. Arizona Biltmore Cir., Ste. 1100
Phoenix, AZ 85016
Ph. 602-956-1001
Fax 602-224-7988
E-mail: llipsutz@aol.com
Wendy Walker, Exec. Vice President
10-0-10-0

WestGroup Research
2720 E. Thomas, Bldg. A
Phoenix, AZ 85016
Ph. 602-707-0050 or 800-999-1200
Fax 602-707-0055
E-mail: askarizona@westgroupresearch.com
www.westgroupresearch.com
Beth Aguirre-Smith, Vice President
50-50-50-50

Tucson

FMR Associates, Inc.
6045 E. Grant Rd.
Tucson, AZ 85712
Ph. 520-886-5548
Fax 520-886-0245
E-mail: FMRASSOC@aol.com
Sue Lunde, Field Director
55-40-55-55

PhoneSolutions, L.L.C.
1101 N. Wilmot Rd., Ste. 253
Tucson, AZ 85712
Ph. 520-296-1015
Fax 520-296-3393
E-mail: michael@phonesolutions.com
www.phonesolutions.com/solutions/index.html
Mike Schlegel, President
75-75-75-75
(See advertisement on p. 89)

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.ccmarketresearch.com
Craig Cunningham, President
19-8-19-19

Little Rock

Flake-Wilkerson Market Insights, LLC
10 Corporate Hill Dr., Ste. 100
Little Rock, AR 72205
Ph. 501-221-3303 or 800-327-8831
Fax 501-221-2554
E-mail: research@mktinsights.com
www.mktinsights.com
George Wilkerson, COO
35-35-35-35

California

Bakersfield

Marketing Works
425 18th St.
Bakersfield, CA 93301
Ph. 661-326-1012
Fax 661-326-0903
E-mail: ddnacnud@aol.com
Dee Simpson, Owner
19-3-2-0

Fresno

AIS Market Research
1320 E. Shaw, Ste. 100
Fresno, CA 93710
Ph. 800-627-8334 or 559-252-2727
Fax 559-252-8343
E-mail: aisres@psnw.com
Jennifer Nichols, Manager
45-45-45-45

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
Joellen Bartels, President
50-10-50-0

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
15-8-10-0

Los Angeles
(See also Orange County)

Applied Research West, Inc.
11021 Winners Circle, Ste. 208
Los Alamitos, CA 90720-2821
Ph. 800-493-1079 or 562-493-1079
Fax 562-493-6535
E-mail: akantak@appliedmktresearch.com
Dr. Anita Kantak, Principal
15-15-15-15

Area Phone Bank
3419 Burbank Blvd.
Burbank, CA 91505
Ph. 818-848-8282
Fax 818-846-9912
E-mail: Goldbaumer@earthlink.net
Ed Goldbaum, Owner
20-0-20-0

Assistance in Marketing/Los Angeles
949 S. Coast Dr., Ste. 525
Costa Mesa, CA 92626
Ph. 714-755-3900
Fax 714-755-3930
E-mail: AIMLA@aol.com
Cindi Reyes, Manager
23-0-0-0

Assistance In Marketing/Los Angeles
3760 Kilroy Airport Way, Ste. 100
Long Beach, CA 90806
Ph. 562-981-2700
Fax 562-981-2705
E-mail: AIMLA@aol.com
Peter Carmichael, Manager
14-0-0-0

Codes - (e.g. 25-10-25-10)

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3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES- No. of stations which can be monitored off-premises

California Survey Research Services, Inc.
15350 Sherman Way, Ste. 480
Van Nuys, CA 91406
Ph. 818-780-2777
Fax 818-780-0329
E-mail: kgross@calsurvey.com
Ken Gross, President
44-44-44-44

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
20-12-20-20

Creative Data Qualitative Insights
7136 Haskell Ave., Ste. 100
Van Nuys, CA 91406
Ph. 818-988-5411
Fax 818-988-4057
E-mail: cdijvs@earthlink.net
www.isacorp.com
Jennifer von Schneidau, V.P./G.M.
22-0-14-0

Davis Research, LLC
23801 Calabasas Rd., Ste. 1036
Calabasas, CA 91302
Ph. 818-591-2408
Fax 818-591-2488
E-mail: DAVISRESH@aol.com
Carol Davis, President
75-75-75-75

The Dohring Co., Inc.
Trend Trak
550 N. Brand Blvd., 20th fl.
Glendale, CA 91203
Ph. 800-242-8022
Fax 818-242-3975
E-mail: dohring@dohring.com
www.dohring.com
Paul Richter
40-0-40-40

Field Dynamics Marketing Research
17547 Ventura Blvd., Ste. 308
Encino, CA 91316
Ph. 818-783-2502
Fax 818-905-3216
E-mail: fielddynam@aol.com
www.fielddynamics.com
Tony Blass, President
16-3-16-0

Garcia Research Associates, Inc.
2550 Hollywood Way, Ste. 110
Burbank, CA 91505
Ph. 818-566-7722
Fax 818-566-1113
E-mail: info@garciaresearch.com
www.garciaresearch.com
Carlos Garcia, President
24-20-24-24

Ted Heiman & Associates
California Qualitative Center
20350 Ventura Blvd., Ste. 140
Woodland Hills, CA 91364
Ph. 877-254-4747 or 818-712-4920
Fax 818-887-2750
E-mail: tedheiman@msn.com
Ted Heiman, Owner
25-0-19-19

House of Marketing
836 S. Arroyo Pkwy.
Pasadena, CA 91105
Ph. 626-793-9598
Fax 626-793-9624
E-mail: HMResearch@aol.com
Amy Siadak
82-82-82-82

Interviewing Service of America, Inc.
15400 Sherman Way, Ste. 400
Van Nuys, CA 91406-4211
Ph. 818-989-1044
Fax 818-782-1309
E-mail: mhalberstam@isacorp.com
www.isacorp.com
Michael Halberstam, President
200-200-200-200
(See advertisement on p. 90)

Interviewing Service of America, Inc. - Alhambra
200 S. Garfield Ave., Ste. 302
Alhambra, CA 91801
Ph. 818-989-1044
Fax 818-782-1309
E-mail: mhalberstam@isacorp.com
www.isacorp.com
Michael Halberstam, President
60-60-60-60
(See advertisement on p. 90)

L.A. Focus
17337 Ventura Blvd., Ste. 301
Encino, CA 91316
Ph. 818-501-4794
Fax 818-907-8242
Lisa Balelo or Wendy Feinberg, Partners
22-0-22-0

Marylander Marketing Research, Inc.
16055 Ventura Blvd., Ste. 820
Encino, CA 91436
Ph. 818-990-7940
Fax 818-990-5106
E-mail: HMaryland@aol.com
Candace Rueda, Field Director
13-3-13-13

Meczka Marketing/Research/Consulting, Inc.
5757 W. Century Blvd., Lobby Level
Los Angeles, CA 90045
Ph. 310-670-4824
Fax 310-410-0780
E-mail: adiaz@mmrcinc.com
Dona H. Browne, Vice President
15-0-15-15

MSI International
12604-A Hiddencreek Way
Cerritos, CA 90703
Ph. 562-802-8273
Fax 562-802-1643
Richard Hurlburt, President
34-34-34-34

Plog Research, Inc.
18631 Sherman Way
Reseda, CA 91335
Ph. 818-345-7363
Fax 818-345-9265
E-mail: shelly@plogresearch.com
Greg Plog, Field Director
30-30-30-30

Quality Controlled Services
Los Angeles Survey Center
3901 Via Oro Ave., Ste. 200
Long Beach, CA 90810
Ph. 310-525-1300
Fax 310-525-1451
E-mail: postmaster@qcs.com
www.qcs.com
Debra Gamboa-Kosch, Branch Manager
160-160-160-160
(See advertisement on p. 119)

Quality Controlled Services
3440 Torrance Blvd., Ste. 100
Torrance, CA 90503
Ph. 800-448-4414 or 310-316-0626
Fax 310-316-4815
E-mail: postmaster@qcs.com
www.qcs.com
Branch Manager
15-0-15-0
(See advertisement on p. 119)

The Research Line
Div. of C.A. Walker & Assoc., Inc.
11631 Victory Blvd., Ste. 207
North Hollywood, CA 91606
Ph. 323-850-6820
Fax 323-850-7603
E-mail: saweinstein@cawalker.com
www.cawalker.com
Samuel Weinstein, Sr. Vice President
85-85-85-85

Schlesinger Associates West, Inc.
3330 Cahuenga Blvd., Ste. 301
Los Angeles, CA 90067
Ph. 323-876-9909
Fax 323-876-9884
E-mail: SlesWest@aol.com
Debra S. Hellman, Exec. Vice President
14-0-14-14

Orange County
(See also Los Angeles)

Ask Southern California, Inc.
City View Office Plaza
12437 Lewis St., Ste. 100
Garden Grove, CA 92840
Ph. 714-750-7566 or 800-644-4ASK
Fax 714-750-7567
E-mail: Jennifer@asksocal.com
www.asksocal.com
Jennifer Kerstner, President
27-0-27-0

DSG Associates, Inc.
2110 E. First St., Ste. 106
Santa Ana, CA 92705
Ph. 714-835-3020
Fax 714-835-6506
E-mail: donna@dsgai.com
Donna Guido, CEO
50-50-50-0

The Gallup Organization - Irvine
200 Karman Ave., Ste. 1100
Irvine, CA 92612
Ph. 714-474-7900
Fax 714-474-5963
Shannon O'Keefe
240-240-240-240

Inquire Market Research, Inc.
1801 E. Edinger Ave., Ste. 205
Santa Ana, CA 92705-4754
Ph. 714-835-8020
Fax 714-835-8060
E-mail: minchow@kaiwan.com
Don Minchow, President
21-14-21-21

Market Research Associates
2082 Business Center Dr., Ste. 280
Irvine, CA 92612
Ph. 714-833-9337
Fax 714-833-2110
E-mail: bajfoster@aol.com
Barbara Foster, Principal
24-0-24-0

Multicultural Research Center SM
A Division of H&AMCR, Inc.
1540 E. First St., Ste. 200
Santa Ana, CA 92701
Ph. 714-560-1120
Fax 714-560-1121
E-mail: researchcenter@hamcr.com
www.hamcr.com
Wendy Bryan, Facility Manager
50-50-50-50
(See advertisement on p. 27)

Peryam & Kroll Research Corp.
4175 E. LaPalma
Anaheim, CA 92807
Ph. 714-572-6888
Fax 714-572-6808
E-mail: claam@pk-research.com
16-0-16-0

PKM Marketing Research Services
223 E. Imperial Hwy., Ste. 155
Fullerton, CA 92835
Ph. 714-446-6611
Fax 714-446-6622
E-mail: pkmlah@aol.com
Patricia M. Koerner, Principal
25-0-25-0

Codes - (e.g. 25-10-25-10)

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The Polk Company
Polk- Verity
790 The City Dr., Ste. 200
Orange, CA 92868
Ph. 714-591-1800
Fax 714-703-9952
www.polk.com
Joey Harmon
160-160-160-160

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
20-0-20-0

Sacramento

Ask America Market Research
3365 Ridgeview Dr.
El Dorado Hills, CA 95762
Ph. 800-251-3666
Mike Pettengill
20-0-20-0

Elliott Benson
1234 H St., Ste. 200
Sacramento, CA 95814
Ph. 916-325-1670
Fax 916-498-0394
E-mail: ebinfo@elliottbenson.com
www.elliottbenson.com
Jaclyn Elliott Benson, President
15-0-15-15
(See advertisement on p. 91)

EMH, Inc.
1112 21st St.
Sacramento, CA 95814
Ph. 916-443-4722
Fax 916-443-3829
Elaine Hoffman, President
92-10-92-0

J.D. Franz Research
1804 Tribute Rd., Ste. K
Sacramento, CA 95815
Ph. 916-646-5595
Fax 916-646-4839
E-mail: jdfranz@earthlink.net
Jennifer Franz
25-0-25-0

Meta Information Services
9806 Old Winery Place, Ste. 4
P.O. Box 277037
Sacramento, CA 95827
Ph. 916-368-9474
Fax 916-368-0705
E-mail: marston@metasite.com
www.meta-info.com
Judy Marston, Vice President
36-36-36-12

Opinions of Sacramento
2025 Hurley Way, Ste. 110
Sacramento, CA 95825
Ph. 916-568-1226
Fax 916-568-6725
E-mail: opinionsos@aol.com
Hugh Miller, Partner
16-0-12-12

Research Unlimited
1012 Second St.
Sacramento, CA 95814
Ph. 916-446-6064
Fax 916-448-2355
E-mail: research@psyber.com
Joan Smithers, Owner
Amanda LeBlanc, Facility Manager
18-0-18-0

San Diego

Analysis Research
7290 Clairemont Mesa Blvd.
San Diego, CA 92111
Ph. 800-998-4801
Fax 619-268-4892
E-mail: AnlyRsch@aol.com
Carol Gailey, V.P./General Manager
35-0-35-0

Analytique, Inc.
5841 Edison Pl., Ste. 210
Carlsbad, CA 92008
Ph. 760-603-7600
Fax 760-603-7604
E-mail: info@analytique.com
www.analytique.com
Jacqueline Arsivaud, Principal
10-4-10-10

CIC Research, Inc.
8361 Vickers St.
San Diego, CA 92111-2112
Ph. 619-637-4000
Fax 619-637-4040
E-mail: jrevlett@cicresearch.com
www.cicresearch.com
Joyce Revlett, Director of Surveys
24-24-24-24

Directions In Research
8593 Aero Dr.
San Diego, CA 92123
Ph. 800-676-5883 or 619-299-5883
Fax 619-299-5888
E-mail: info@diresearch.com
www.diresearch.com
David Phife, President
100-100-100-100
(See advertisement on p. 93)

Codes - (e.g. 25-10-25-10)

1. STATIONS - No. of interviewing stations at this location
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4. OFF-PREMISES- No. of stations which can be monitored off-premises

Flagship Research
350 W. Ash St., Ste. 1000
San Diego, CA 92101
Ph. 888-849-4827
Fax 619-849-1112
E-mail: sharon@flagshipresearch.com
www.flagshipresearch.com
Sharon Nordine, Director of Operations
20-20-20-5

Fogerty Group, Inc.
5090 Shoreham Place, Ste. 206
San Diego, CA 92122
Ph. 619-550-3878
Fax 619-550-3875
Joan Pietila, President
30-15-30-0

Jagorda Interviewing Services
3615 Kearny Villa Rd., Ste. 111
San Diego, CA 92123
Ph. 619-573-0330
Fax 619-573-0538
Gerald Jagorda, President
12-0-12-0

Luth Research
2365 Northside Dr., Ste. 100
San Diego, CA 92108
Ph. 619-283-7333
Fax 619-283-1251
E-mail: info@luthresearch.com
www.luthresearch.com
Lester Greenberg
49-49-49-49

MDI Interviewing Services, Inc.
1101 Bay Blvd., Ste. D
Chula Vista, CA 91911
Ph. 619-424-4550
Fax 619-424-4501
E-mail: jsuarez@mktdev.com
www.mktdev.com
Jose Suarez, Operations Manager
116-96-116-96

San Diego Surveys, Inc.
4616 Mission Gorge Pl.
San Diego, CA 92120
Ph. 619-265-2361 or 800-895-1225
Fax 619-582-1562
E-mail: SDSURVEYS@aol.com
Jean Van Arsdale, President
28-10-28-0

Taylor Research
1545 Hotel Circle S., Ste.350
San Diego, CA 92108
Ph. 619-299-6368 or 800-922-1545
Fax 619-299-6370
E-mail: mktres@taylorresearch.com
www.taylorresearch.com
Harriett Huntley, Operations Manager
36-36-36-36
(See advertisement on p. 92)

San Francisco/San Jose

ADF Research
1456 Lincoln Ave.
San Rafael, CA 94901
Ph. 415-459-1115
Fax 415-457-2193
Arthur Faibisch, President
30-30-20-0

Asian Marketing Communication Research
a div. of Hispanic & Asian Marketing Communication Research, Inc.
1301 Shoreway Rd., Ste. 100
Belmont, CA 94002
Ph. 650-595-5028
Fax 650-595-5407
E-mail: AsianDiv@hamcr.com
www.hamcr.com
Sandra M.J. Wong, Ph.D., Director, Asian Div.
45-45-45-45
(See advertisement on p. 27)

ConStat, Inc.
135 Main St., 16th fl.
San Francisco, CA 94105
Ph. 415-512-7800
Fax 415-512-9790
E-mail: qualitative@constat.com
www.constat.com
28-28-28-28

Corey, Canapary & Galanis
447 Sutter St., Penthouse N.
San Francisco, CA 94108
Ph. 415-397-1200
Fax 415-433-3809
E-mail: ekcanapary@aol.com
Elizabeth Canapary, President
25-12-25-25

Evans Research Associates, Inc.
120 Howard St., Ste. 660
San Francisco, CA 94105
Ph. 415-777-9888
Fax 415-777-9281
E-mail: evansres@aol.com
Lucinda Gonion, Senior Associate
28-20-20-0

Field Research Corp.
550 Kearny St.
San Francisco, CA 94108
Ph. 415-392-5763
Fax 415-434-2541
E-mail: info@field.com
E. Deborah Jay, Ph.D., President/CEO
85-85-85-85

Fleischman Field Research
250 Sutter St., Ste. 200
San Francisco, CA 94108-4403
Ph. 800-277-3200 or 415-398-4140
Fax 415-989-4506
E-mail: ffr@ffrsf.com
www.ffrsf.com
Andy Fleischman, Principal
Craig Rose
60-10-40-40

Freeman, Sullivan & Co.
131 Steuart St., Ste. 500
San Francisco, CA 94105
Ph. 415-777-0707
Fax 415-777-2420
E-mail: canete@fsc-research.com
www.fsc-research.com
Ann Garbarino, Marketing Director
28-28-28-28

Frost & Sullivan
2525 Charleston Rd.
Mountain View, CA 94043
Ph. 650-961-9000
Fax 650-961-5042
E-mail: sworthge@frost.com
www.frost.com
80-80-80-0

Hispanic Marketing Communication Research
a div. of Hispanic & Asian Marketing
Communication Research, Inc.
1301 Shoreway Rd., Ste. 100
Belmont, CA 94002
Ph. 650-595-5028
Fax 650-595-5407
E-mail: gateway@hamcr.com
www.hamcr.com
Felipe Korzenny, Ph.D., President
45-45-45-45
(See advertisement on p. 27)

M R & A Field & Tab
1300 El Camino Real, Ste. 370
San Mateo, CA 94402
Ph. 610-358-1480
Fax 610-341-2678
E-mail: sfraser@merrill.com
www.merrill.com
Sarah Fraser, Field Director
80-80-80-80

Nichols Research, Inc.
333 W. El Camino Real, Ste. 180
Sunnyvale, CA 94087
Ph. 408-773-8200
Fax 408-733-8564
E-mail: kathryn@nichols-research.com
www.nichols-research.com
Kathryn LaRoche, Operations Manager
40-8-30-0

Nichols Research, Inc.
2300 Clayton Rd., Ste. 1370
Concord, CA 94520
Ph. 925-687-9755
Fax 925-686-1384
E-mail: concord@nichols-research.com
www.nichols-research.com
Sherry Thomas
15-8-9-0

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
Jane Rosen
20-8-15-0

Phase III Market Research
777 N. First St., Ste. 600
San Jose, CA 95112
Ph. 408-947-8661
Fax 408-251-5093
E-mail: npphase3@jps.net
Nancy Pitta, President
15-0-15-0

Q & A Research
64 Digital Dr.
Novato, CA 94949
Ph. 415-883-1188
Fax 415-883-1344
E-mail: wpino@qar.com
www.qar.com
Warren Pino, President
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Berkeley, CA 94704
Ph. 510-540-7200
Fax 510-540-7268
E-mail: vraymonda@qcworld.com
www.qcresearch.com
Veronica Raymonda, Rsch. Ops. Mgr.
33-33-33-33
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San Francisco, CA 94105
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Fax 415-543-3553
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Fax 650-365-3737
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Fax 510-521-2130
E-mail: marge@hooked.net
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Margaret Yarbrough, President
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(See advertisement on p. 96)

Colorado

Boulder

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Ph. 303-786-9500
Fax 303-447-9029
Hank Schaller, President
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Colorado Springs, CO 80909
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Cindy Robinett, Director
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Rachael Webster, Director
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Fax 303-980-5980 or 980-2270
E-mail: christinef@eagleresearch.com
www.eagleresearch.com
Christine Farber, Vice President
96-96-96-96
(See advertisement on p. 97)

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Norm Petitt, President
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Todd C. Jones, President
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Paul Keene, Telephone Ctr. Director
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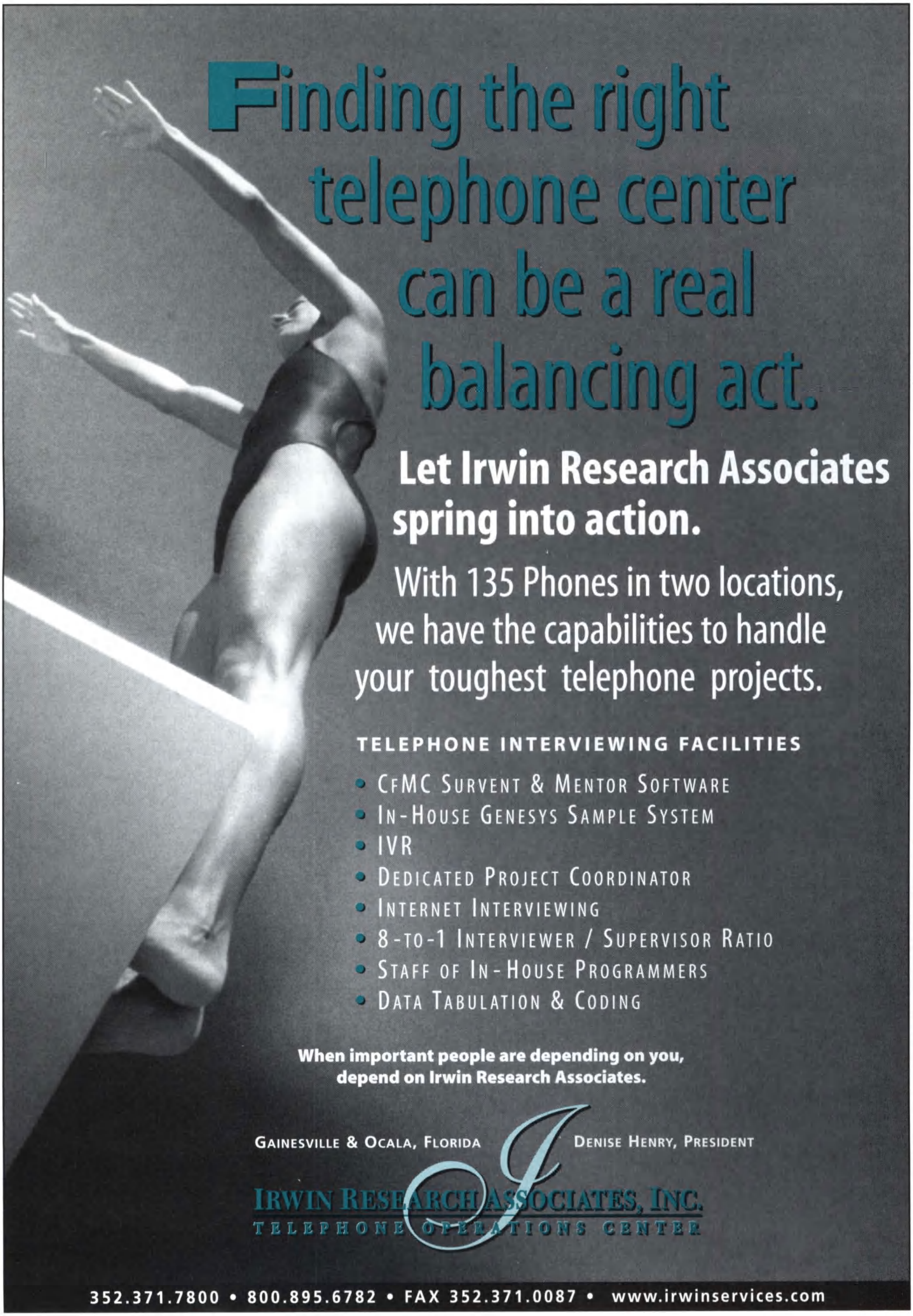
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Christine Rand, Director
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65-52-65-65
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Fax 305-621-3533
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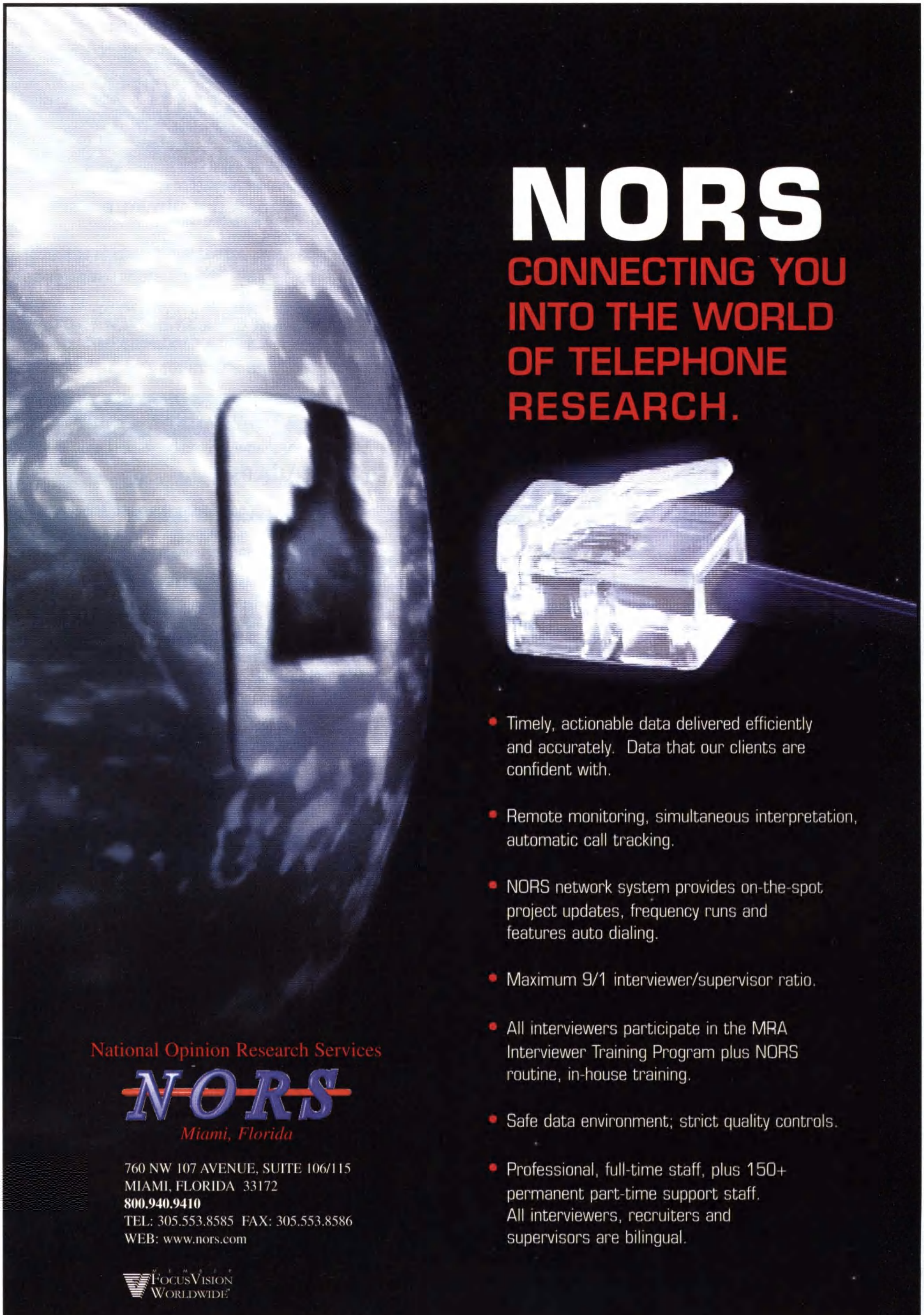
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- Consumers, professionals, executives, technicians, business owners

Our Test Kitchen

State-of-the-Art Focus Group Suites

- Spacious, comfortable, client viewing and respondent rooms
- Connecting, private, client lounges with video monitor
- Separate client, respondent and staff entrances

Focus Group Lounge

Facilities Designed to Meet Unique Research Needs

- ***CRT Telephone Interviewing***: 156 Station Central Telephone Facility
- ***Test Kitchen***: (25 x 24) large refrigeration units, conventional oven, microwave, freezer, warehouse product storage
- ***Display Room***: (25 x 29) wide double doors, drive up ramp to easily accommodate automobiles, recreation vehicles, boats, etc.
- ***Multipurpose Room***: 500 square foot room right off test kitchen ideal for taste tests, theatre seating
- ***One-On-One Rooms***: one-way mirror viewing, audio and video recording

Our WATS Center

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Discover the true course in Data Collection

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1. STATIONS - No. of interviewing stations at this location
2. CATI - No. of stations using computer-aided interviewing
3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES- No. of stations which can be monitored off-premises

Data Research Services, Inc.
3323 Chamblee-Dunwoody Rd.
Chamblee, GA 30341
Ph. 770-455-0114
Fax 770-458-8926
E-mail: tab@dataservice.com
www.dataservice.com
Jon A. Mitchell, Exec. Vice President
40-40-40-40

Eagle Research - Atlanta
One Dunwoody Park, Ste. 128
Atlanta, GA 30338
Ph. 770-395-6090 or 770-677-7970
Fax 770-671-9708
E-mail: jreish@eagleresearch.com
www.eagleresearch.com
Joel Reish, Vice President
96-96-96-96
(See advertisement on p. 97)

The Gallup Organization - Atlanta Downtown
303 Peachtree St. N.E.
One Peachtree Center, 27th fl.
Atlanta, GA 30308
Ph. 404-525-9930
Fax 404-525-8645
150-150-150-150

IMAGES Market Research
1718 Peachtree St., Ste. 650
Atlanta, GA 30309
Ph. 404-892-2931
Fax 404-892-8651
E-mail: imagesusa@imagesusa.net
Robert L. McNeil Jr., President
Deborah White, Director of Field Services
30-30-30-30
(See advertisement on p. 104)

Jackson Associates, Inc.
1140 Hammond Dr., Bldg. H
Atlanta, GA 30328
Ph. 770-394-8700
Fax 770-394-8702
E-mail: research@jacksonassociates.com
www.jacksonassociates.com
Margaret Hicks, President
40-10-40-0

Joyner Hutcheson Research, Inc.
1900 Century Place
Atlanta, GA 30345
Ph. 404-321-0953
Fax 404-634-8131
Glenda McMahon, Study Director
18-0-18-0

MacConnell Research Services, Inc.
10 Perimeter Park Dr., Ste. 110
Atlanta, GA 30341
Ph. 770-451-6236
Fax 770-451-6184
Brian Mitchell
14-0-2-0

The Marketing Workshop, Inc.
3725 DaVinci Ct.
Norcross, GA 30092
Ph. 770-449-6767
Fax 770-449-6739
E-mail: MWIDAVINCI@aol.com
www.mwshop.com
120-110-110-110
(See advertisements on pp. 13, 15)

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
Debra Wilson
8-4-8-0

Nordhaus Research, Inc.
3355 Lenox Rd., Ste. 400
Atlanta, GA 30326
Ph. 404-848-8188 or 800-860-9996
Fax 404-848-8199
Robert Van Dam, Chairman
14-14-14-14

Quality Controlled Services
2635 Century Pkwy., Ste. 100
Atlanta, GA 30345
Ph. 800-227-2974 or 404-321-0468
Fax 404-636-3276
E-mail: postmaster@qcs.com
www.qcs.com
Susan Lipsitz, Branch Manager
14-0-14-0
(See advertisement on p. 119)

John Stolzberg Market Research
1800 Century Blvd., Ste. 1000
Atlanta, GA 30345
Ph. 404-329-0954
Fax 404-329-1596
John Stolzberg, President
15-0-0-0

T & K Research Centres, Inc.
Div. of Homer Market Research Associates, Inc.
Peachtree Center
1501 Johnson Ferry Rd., Ste. 250
Marietta, GA 30062
Ph. 770-578-9085
Fax 770-977-0833
E-mail: tkresearch@msn.com
Andrea Cartier
14-0-14-0

V & L Research & Consulting, Inc.
655 Village Square Dr., Ste. 101
Stone Mountain, GA 30083
Ph. 404-298-0139
Fax 404-298-0026
E-mail: VLResearch@mindspring.com
Dydra H. Virgil, Principal
20-12-12-12

Whaley Research & Associates, Inc.
5001 Riverdale Ct.
College Park, GA 30337
Ph. 800-445-4494
Fax 770-991-6938
Marilynn Whaley, CEO
50-40-40-50

Hawaii

Honolulu

Market Trends Pacific, Inc.
1136 Union Mall, Ste. 310
Honolulu, HI 96813
Ph. 808-532-0733
Fax 808-532-0744
E-mail: mtp@lava.net
Wanda L. Kakugawa, President
14-14-8-0

OmniTrak Group, Inc.
725 Davies Pacific Center
841 Bishop St., Ste. 725
Honolulu, HI 96813
Ph. 808-528-4050
Fax 808-538-6227
E-mail: omntrak@aloha.net
Frances Pirie, Vice President
22-10-22-0

QMark Research & Polling
Pacific Tower, 19th fl.
1001 Bishop St.
Honolulu, HI 96813
Ph. 808-524-5194
Fax 808-524-5487
E-mail: bankersmit@starrtech.com
www.starrtech.com
Barbara Ankersmit, President
16-0-16-0

SMS Research & Marketing Services
1042 Fort St. Mall, Ste. 200
Honolulu, HI 96813
Ph. 808-537-3356
Fax 808-537-2686
Jim Dannemiller, President
24-0-12-0

Ward Research, Inc.
126 Queen St., Ste. 212
Honolulu, HI 96813
Ph. 808-522-5123
Fax 808-522-5127
E-mail: field@wardresearch.com
Rebecca S. Ward, President
11-11-11-0

Idaho

Boise

Clearwater Research, Inc.
2136 N. Cole Rd.
Boise, ID 83704
Ph. 208-376-3376 or 800-727-5016
Fax 208-376-2008
E-mail: info@clearwater-research.com
www.clearwater-research.com
Steve Swann, President
80-80-80-80
(See advertisement on p. 103)

Northwest Research Group, Inc.
225 N. 9th St., Ste. 200
Boise, ID 83702
Ph. 208-364-0171
Fax 208-364-0181
E-mail: lsmith@nwrg.com
www.nwrg.com
Lori Rea Smith, Project Director
20-20-20-20

Codes - (e.g. 25-10-25-10)

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Moscow

Bernett Research Services, Inc.
Moscow Phone Room
1420 S. Blaine, Ste. 14
East Side Marketplace
Moscow, ID 83843
Ph. 800-276-5594
Fax 617-746-2709
E-mail: andrew@bernett.com
www.bernett.com
Andrew Bernett, Brother & Partner
200-200-200-200
(See advertisement on p. 106)

Pocatello

Bernett Research Services, Inc.
Pocatello Phone Room
1800 Garrett Way
Pocatello, ID 83201
Ph. 800-276-5594
Fax 617-746-2709
E-mail: andrew@bernett.com
www.bernett.com
Andrew Bernett, Brother & Partner
200-200-200-200
(See advertisement on p. 106)

David's Phone Center
505 Pershing Dr.
Pocatello, ID 83201
Ph. 208-232-1818
Fax 208-232-1466
E-mail: dcm@poky.srv.net
David McKamey, President
118-118-118-118

Rexburg Phone Center
A Division of Manhattan Phone Center
72 S. 1st E.
Rexburg, ID 83440
Ph. 212-387-7550
Fax 212-387-8180
E-mail: LSchneider@roper.com
Larry Schneider, Sr. Vice President
50-50-50-50

Illinois

Carbondale

U.S. Research Co.
1620 W. Main
Carbondale, IL 62901
Ph. 618-529-8100
24-16-24-24

Chicago

Adler-Weiner Research/Chicago, Inc.
6500 N. Lincoln Ave.
Lincolnwood, IL 60645
Ph. 847-675-5011
Fax 847-675-5698
E-mail: info@awres.com
www.awres.com
Andrea Weiner, Project Director
20-0-10-0

The Analytical Group, Inc.
640 N. LaSalle Dr.
Chicago, IL 60610
Ph. 312-751-2915
Fax 312-337-2551
E-mail: jennifer@analyticalgroup.com
www.acsinfo.com
Jennifer Cohen
10-10-10-10
(See advertisement on p. 63)

Assistance In Marketing/Chicago
1650 N. Arlington Heights Rd., Ste. 208
Arlington Heights, IL 60004
Ph. 847-392-5500
Fax 847-392-5841
E-mail: AIMChicago@juno.com
Laura Shulman, President
8-0-8-8

The Blackstone Group
360 N. Michigan Ave., Ste. 1500
Chicago, IL 60601
Ph. 312-419-0400
Fax 312-419-8419
E-mail: prindsko@bgchicago.com
Peter Rindskopf, Field Director
60-60-60-60
(See advertisement on p. 107)

C R Market Surveys
9510 S. Constance, Ste. C-6
Universal City Professional Bldg.
Chicago, IL 60617-4734
Ph. 800-882-1983 or 773-933-0548
Fax 773-233-0484
E-mail: CRMS1@aol.com
www.crmarket.com
Cherlyn Robinson, Project Coordinator
10-0-10-0

C/J Research, Inc.
3150 Salt Creek Ln., Ste. 111
Arlington Heights, IL 60005
Ph. 847-253-1100
Fax 847-253-1587
E-mail: tcotter@cjr.com
www.cjr.com
Terry Cotter, President
60-60-60-60

Communications Research, Inc.
233 E. Wacker Dr.
Chicago, IL 60601
Ph. 312-938-0200
Fax 312-938-8711
E-mail: cri77@aol.com
Kathy Beimfohr
25-0-25-0

Consumer and Professional Research, Inc. (CPR)
435 N. LaSalle St., Ste. 210
P.O. Box 10884
Chicago, IL 60610-0884
Ph. 312-832-7744
Fax 312-832-7745
E-mail: info@cprchicago.com
www.cprchicago.com
Peter Morich
15-15-15-15

Consumer Pulse of Chicago
Stratford Square Mall, #D24
152 Stratford Square
Bloomingdale, IL 60108
Ph. 630-894-9103 or 800-336-0159
Fax 630-894-9105
E-mail: chicago@consumerpulse.com
www.consumerpulse.com
Susan Piacenza, Director
9-4-9-9

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4. OFF-PREMISES- No. of stations which can be monitored off-premises

Conway/Milliken & Associates/Research Int'l.
Marketing Research & Consulting
875 N. Michigan Ave.
Chicago, IL 60611
Ph. 312-787-4060
Fax 312-787-4156
E-mail: cma@cmamkting.com
www.cmamkting.com
150-150-150-150

CTIS
318 W. Adams St., 7th fl.
Chicago, IL 60606
Ph. 312-422-0800
Fax 312-422-0343
E-mail: mmondro@surveys.com
Michelle Mondro, Manager
70-70-70-70
(See advertisement on p. 17)

Data Research, Inc.
1319 Butterfield Rd., Ste. 510
Downers Grove, IL 60515
Ph. 630-971-2880
Fax 630-971-2267
Kathie Cowles, Vice President
50-17-20-20

Richard Day Research
801 Davis St., 3rd fl.
Evanston, IL 60201-4472
Ph. 847-328-2329
Fax 847-328-8995
E-mail: RDR@MCS.COM
www.rdresearch.com
Richard Day, President
32-26-32-32

Dimension Research, Inc.
200 W. 22nd St., Ste. 240
Lombard, IL 60148
Ph. 630-916-0040
Fax 630-916-0836
E-mail: ava@dimensionresearch.com
www.dimensionresearch.com
Ava Eakin Powell, General Manager
64-64-64-64

Elrick & Lavidge
Three Westbrook Corp. Center, 6th flr.
11301 Cermack Rd.
Westchester, IL 60154
Ph. 708-449-5300
Fax 708-449-4498
E-mail: lgg@elavidge.com
www.elavidge.com
Larry Gulledge, Exec. Vice President
50-50-50-50

Fieldwork Phone Center
6200 N. Hiawatha, Ste. 700
Chicago, IL 60646
Ph. 773-282-0203 or 888-TO-FIELD
Fax 773-282-6422
E-mail: PhoneRoom@aol.com
www.fieldwork.com
Mary Pedersen, Manager
60-60-60-60
(See advertisement on the Back Cover)

Focuscope, Inc.
1100 Lake St., Ste. 60
Oak Park, IL 60301
Ph. 708-386-5086
Fax 708-386-1207
E-mail: foscope@aol.com
Kevin Rooney, Sr. Proj. Dir.
31-0-31-0

Galli Research Services
3728 Bernard St.
Chicago, IL 60618
Ph. 773-4-SURVEY
Fax 773-478-7899
Paul Galli, President
5-0-5-0

Heakin Research, Inc.
3615 Park Dr., Ste. 101
Olympia Fields, IL 60461
Ph. 708-503-0100
Fax 708-503-0101
Kevin Heakin, Vice President
65-65-65-65

Inform Research & Marketing
444 N. Wabash Ave., Ste. 501
Chicago, IL 60611
Ph. 312-661-0035
Fax 312-670-7259
E-mail: imr2000@aol.com
Bill Drier, President
32-32-32-32

Ingram Research, Inc.
0S 125 Church St.
P.O. Box 175
Winfield, IL 60190
Ph. 630-462-0402
Fax 630-462-7153
http://recall.lib.indiana.edu/~caingram/IR/index.html
Roland G. Ingram, President
20-0-20-20

IRSS - International Research Support Services
30 E. Adams, Ste. 940
Chicago, IL 60603
Ph. 312-553-5353
Fax 312-641-3511
E-mail: maureen@irss.com
www.irss.com
Maureen Clancy, President
34-34-34-34

M.A.B.2 Recruiting Services
4334 N. Hazel St., Ste. 210
Chicago, IL 60613
Ph. 773-296-6222
Fax 773-296-1892
Martin A. Barone II, Owner
10-0-10-0

Market Facts, Inc.
3040 W. Salt Creek Ln.
Arlington Heights, IL 60005
Ph. 847-590-7000
Fax 847-590-7010
www.marketfacts.com
Judy Kemp
225-225-225-225

Mid-America Research/Facts In Focus
Administrative Offices
999 N. Elmhurst Rd., Ste. 17
Mt. Prospect, IL 60056
Ph. 847-392-0800
Fax 847-870-6236
E-mail: marrandhurst@att.net.com
Debbie Ottenfeld
26-10-26-10

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
Lori Tomoleoni
22-16-16-0

National Data Research, Inc.
770 Frontage Rd., Ste. 110
Northfield, IL 60093
Ph. 847-501-3200
Fax 847-501-2865
Val Maxwell, President
18-0-18-0

Peryam & Kroll Research Corp.
6323 N. Avondale Ave.
Chicago, IL 60631
Ph. 773-774-3100
Fax 773-774-7956
E-mail: krolj@pk-research.com
24-0-24-0

Precision Research, Inc.
O'Hare Corporate Towers
10600 W. Higgins Rd., Ste. 100
Rosemont, IL 60018
Ph. 847-390-8666
Fax 847-390-8885
E-mail: saa@preres.com
www.preres.com
Scott Adleman, President
30-6-30-30
(See advertisement on p. 30)

Public Insights, Inc.
825 E. Golf Rd.
Arlington Heights, IL 60005
Ph. 847-364-5133 or 800-292-1852
Fax 847-364-5663
E-mail: valerie@PublicInsights.com
www.PublicInsights.com
Valerie Gassman, President
16-0-16-0

Quality Controlled Services
2311 W. 22nd St., Ste. 100
Oak Brook, IL 60523
Ph. 800-322-2376 or 630-990-8300
Fax 630-990-8188
E-mail: postmaster@qcs.com
www.qcs.com
Candice Wysock, Branch Manager
10-0-10-0
(See advertisement on p. 119)

Questions & Marketing Research Svcs., Inc.
19211 Henry Dr.
Mokena, IL 60448
Ph. 708-479-3200
Fax 708-479-4038
E-mail: supervisor@qandm.com
www.qandm.com
24-0-24-0

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
Charles Orloff, Vice President
35-0-35-35

Research House
6901 N. Lincoln Ave.
Lincolnwood, IL 60646-2605
Ph. 847-677-4747
Fax 847-677-7990
E-mail: RsrchHse@aol.com
Darlene Piell, Partner
24-0-0-0

Smith Research, Inc.
1181-B Lake Cook Rd.
Deerfield, IL 60015
Ph. 847-948-0440
Fax 847-948-8350
E-mail: ksmith@smithresearch.com
www.smithresearch.com
Kevin Smith, President
24-10-24-24

Strictly Medical Market Research
Edens Office Plaza
4801 W. Peterson Ave., Ste. 608
Chicago, IL 60646
Ph. 773-202-3500
Fax 773-202-3511
E-mail: llipsutz@aol.com
Harry Balaban
10-0-10-0

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: sues@ljs.com
Matthew Smith, Director
140-120-140-120

TeleBusiness USA
1945 Techny Rd., Ste. 3
Northbrook, IL 60062
Ph. 847-480-1560
Fax 847-480-6055
E-mail: ceo@tbiz.com
www.tbiz.com
Larry Kaplan, President
120-90-120-120

TeleSight, Inc.
820 N. Franklin St.
Chicago, IL 60610
Ph. 312-640-2532 or 312-640-2500
Fax 312-944-7872
E-mail: jconover@telesight.com
www.telesight.com
Jeffrey Conover, V.P. of Bus. Dev.
144-144-144-144

Time N Talent Market Research
Edens Office Plaza
4801 W. Peterson Ave., Ste. 608
Chicago, IL 60646
Ph. 773-202-3500
Fax 773-202-3511
E-mail: llipsutz@aol.com
Harry Balaban
10-0-10-0

Tragon Corp.
1400 E. Lake Cook Rd., Ste. 105
Buffalo Grove, IL 60089
Ph. 847-808-2080
Fax 847-808-0179
E-mail: tragonbg@aol.com
www.tragon.com
Blaine Etter, Mgr. Phone Services
6-0-6-0
(See advertisement on p. 94)

U.S. Research Co.
300 Marquardt Dr.
Wheeling, IL 60090
Ph. 847-520-3600
Fax 847-520-3621
E-mail: USR142@aol.com
Dennis G. Hill, President
150-40-150-100

Peoria

Scotti Research, Inc.
1118 N. Sheridan Rd.
Peoria, IL 61606
Ph. 309-673-6194
Fax 309-673-5942
Nancy Matheis, President
14-0-14-14

Indiana

Evansville

Product Acceptance & Research (PAR)
9845 Hedden Rd.
Evansville, IN 47711-8905
Ph. 812-867-8600
Fax 812-867-8699
E-mail: par@evansville.net
www.par-research.com
Woody Youngs, Sr. Vice President
40-40-40-40

Ft. Wayne

Dennis Research Service, Inc.
3502 Stellhorn Rd.
Ft. Wayne, IN 46815
Ph. 219-485-2442
Fax 219-485-1476
E-mail: DRSOI@dennisresearch.com
Pat Slater, Director
15-15-15-15

Gary

KLD Marketing Research, Inc.
1603 Lincolnway, Ste. A
Valparaiso, IN 46383
Ph. 219-464-4668
Fax 219-464-7011
E-mail: kathyd@netnitco.net
Kathleen L. DeWitt, President
10-10-10-10

Indianapolis

Circle City Research Corp.
6433 E. Washington St., Ste. 145
Indianapolis, IN 46219
Ph. 317-359-2200
Fax 317-359-2386
Kathy DeMunbrun, President
11-0-11-0

Herron Associates, Inc.
710 Executive Park Dr.
Greenwood, IN 46143
Ph. 317-882-3800
Fax 317-882-4716
E-mail: herron@iquest.net
www.herron-research.com
Sue Nielsen, Vice President
24-12-24-0

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
11-0-11-0

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Stone Research Services
One Park Fletcher
2601 Fortune Cir. E., Ste. C-200
Indianapolis, IN 46241
Ph. 317-227-3000
Fax 317-227-3001
E-mail: stone@indy.net
Toby Stone, President
20-20-20-20

Strategic Marketing & Research, Inc.
9200 Keystone Crossing, Ste. 400
Indianapolis, IN 46240
Ph. 317-574-7700
Fax 317-574-7777
Liz Yeda, Dir. Prod. Svcs.
46-46-46-46

Walker Information
3939 Priority Way South Dr.
Indianapolis, IN 46240
Ph. 317-843-8524
Fax 317-843-8584
E-mail: bmiller@walkerinfo.com
www.walkerinfo.com
Barbara Miller
50-50-50-0

Iowa

Cedar Rapids

Epley Marketing Services, Inc.
3 Quail Creek Cir.
North Liberty, IA 52317
Ph. 319-626-2567
Fax 319-626-8035
E-mail: epleyms@aol.com
www.epleymarketing.com
Steve Epley, President
20-20-20-20

Frank N. Magid Associates, Inc.
One Research Center
Marion, IA 52302
Ph. 319-377-7345
Fax 319-377-5861
E-mail: jane_cook@magid.com
www.magidweb.com/
Jane B. Cook, V.P. Field Services
158-158-158-158

Davenport

PMR-Personal Marketing Research, Inc.
322 Brady St.
Davenport, IA 52801
Ph. 319-322-1960
Fax 319-322-1370
E-mail: permarres@aol.com
Anne King, Vice President
66-66-66-28

Dubuque

Advanced Data-Comm, Inc.
700 Locust St., Ste. 300
Dubuque, IA 52001
Ph. 800-582-9501 or 319-582-9501
Fax 319-582-2003
E-mail: mbudde@advanced-data.com
www.advanced-data.com
Michael J. Budde, President
200-200-200-200

Iowa City

M R & A Field & Tab
230 Plaza Center One
Iowa City, IA 52240
Ph. 319-466-9500
Fax 319-466-9501
E-mail: mraiowa@aol.com
Sarah Fraser, Operations Manager
80-80-80-80

Mason City

Directions Research Corp.
P.O. Box 1731
Mason City, IA 50401
Ph. 515-423-0275
Fax 515-423-8494
E-mail: thultc@willowtree.com
Tom Thul, Partner
30-25-25-25

Shenandoah

Central Surveys, Inc.
111 N. Elm St.
Shenandoah, IA 51601
Ph. 712-246-1630
Fax 712-246-5420
E-mail: csinc@shenessex.heartland.net
www.centralsurveys.com
Robert W. Longman, President
28-24-28-24

Kansas

Kansas City
(See Kansas City, MO)

Wichita

The Research Center
P.O. Box 820
825 E. Douglas
Wichita, KS 67201-0820
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Fax 316-268-6338
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Kentucky

Lexington

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Fax 606-263-1223
E-mail: matre@lex.infi.net
www.tmgresearch.com
Martha L. DeReamer, President
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Louisville, KY 40205
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Fax 502-459-8392
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(See advertisement on p. 113)

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(See advertisement on p. 106)

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Bob Sullivan
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(See advertisement on p. 115)

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Joanne Levin, President
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(See advertisement on p. 119)

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Fax 248-332-4168
www.rdagroup.com
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Fax 810-778-2938
E-mail: STANDERCO@aol.com
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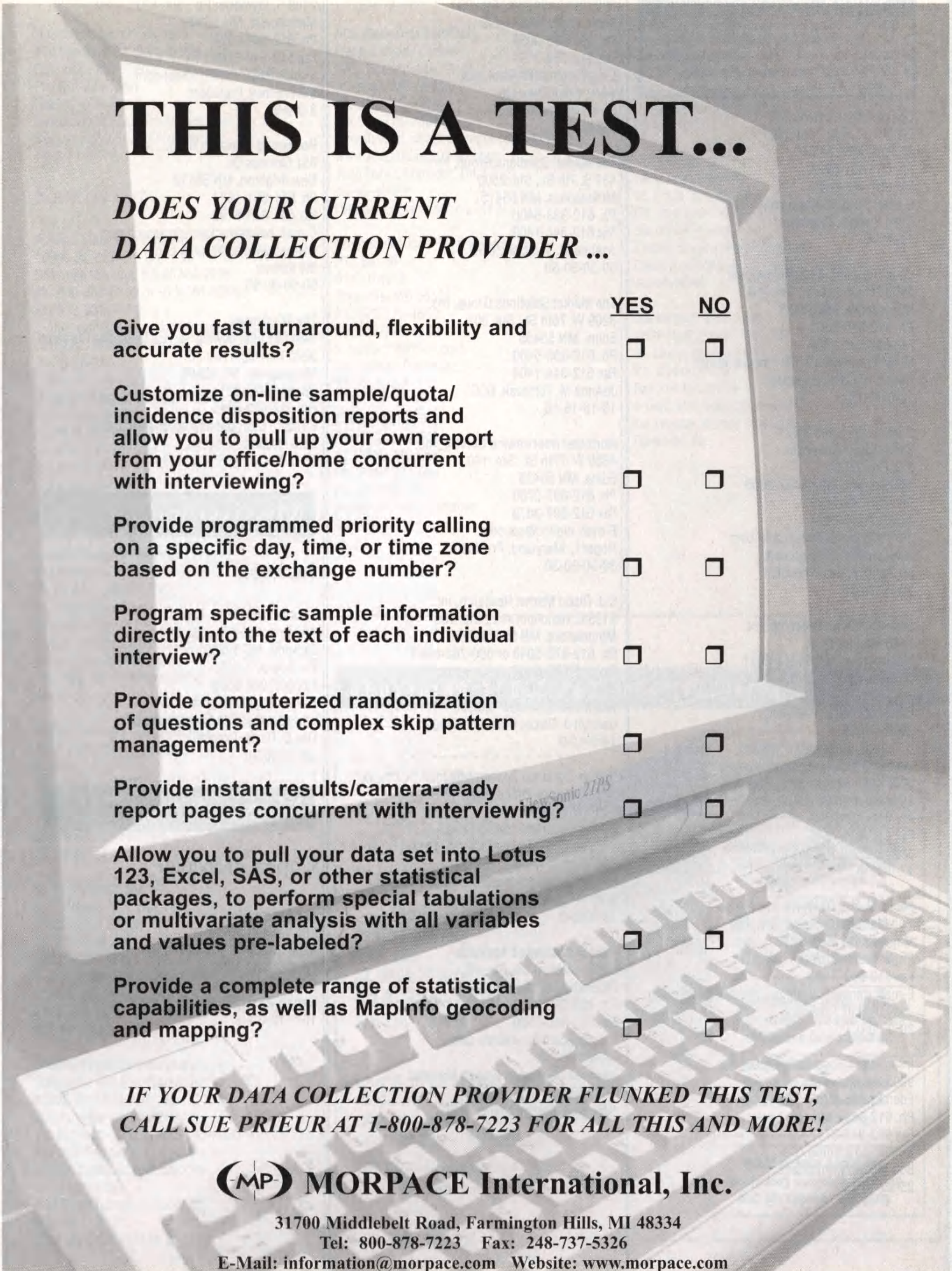
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Fax 913-381-9444
E-mail: dphipps@appliedmktresearch.com
Donald L. Phipps, Principal
25-25-25-25

Decision Insight Field Services
8301 State Line Rd., Ste. A
Kansas City, MO 64114
Ph. 816-333-1515
Fax 816-333-7117
www.decision.net
Betsy Stewart, President
50-50-50-50

Market Directions, Inc.
911 Main St., Ste. 300
Kansas City, MO 64105
Ph. 816-842-0020
Fax 816-472-5177
E-mail: tim@marketdirections.com
www.marketdirections.com
Tim Alex, Dir. Field Svcs/Programming
58-58-58-20

Market Research Institute, Inc.
7315 Frontage Rd., #200
Merriam, KS 66204
Ph. 913-236-6060
Fax 913-236-6094
E-mail: info@mktresearchinstitute.com
Don Weston, President
30-24-30-24

MJM Research, Inc.
5700 Broadmoor, Ste. 710
Mission, KS 66202
Ph. 913-384-9494
Fax 913-677-2727
E-mail: cc@mjmresearch.com
www.mjmresearch.com
Clark Roberts, Vice President
150-24-150-0

Quality Controlled Services
Corporate Woods Office Park
10875 Grandview Dr., Ste. 2230
Overland Park, KS 66210
Ph. 800-525-1952 or 913-345-2050
Fax 913-345-9450
E-mail: postmaster@qcs.com
www.qcs.com
Sue Triplett, Branch Manager
9-0-9-9
(See advertisement on p. 119)

St. Louis

ACG Research Solutions
Pierre Laclede Center
7701 Forsyth, Ste. 1100
St. Louis, MO 63105
Ph. 314-726-3403
Fax 314-726-2503
E-mail: vicki_savala@aragonconsulting.com
www.AragonConsulting.com
Joan Miller, Manager, Field Svcs.
40-40-40-40
(See advertisement on p. 117)

Communications For Research, Inc.
P.O. Box BF
61 E. Hwy. 8
Steelville, MO 65565
Ph. 573-775-4550
Fax 573-775-4560
E-mail: cfri@misn.com
Jim Steber, President
32-32-32-32

Consumer Opinion
10403 Clayton Rd.
St. Louis, MO 63131
Ph. 314-692-2686
Fax 314-692-2427
Kathleen Dunn, Manager
15-5-15-0

Consumer Opinion Council Research Center
200 S. Hanley, Ste. 415
St. Louis, MO 63105
Ph. 314-863-3780 or 800-467-5959
Fax 314-863-2880
E-mail: ds@pragmatic-research.com
www.pragmatic-research.com
Douglas Sinnard, President
24-12-24-24

Fact Finders, Inc.
1852 Craig Park Ct.
St. Louis, MO 63146
Ph. 314-469-7373
Fax 314-214-4138
E-mail: factfinder@primary.net
Claire Bruno Bacon, Sr. Project Director
40-40-40-40

Marketeam Associates
1807 Park 270 Dr., Ste. 300
St. Louis, MO 63146
Ph. 314-878-7667
Fax 314-878-6743
E-mail: vthies@doanemr.com
Liz Wagner, Branch Manager
90-60-90-90

Codes - (e.g. 25-10-25-10)

1. STATIONS - No. of interviewing stations at this location
2. CATI - No. of stations using computer-aided interviewing
3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES- No. of stations which can be monitored off-premises

Marketing Horizons, Inc.
1001 Craig Rd., Ste. 100
St. Louis, MO 63146
Ph. 314-432-1957
Fax 314-432-7014
E-mail: mhorizons@stlnet.com
Stephanie Feeney, Dir. Field Svcs.
12-3-12-12
(See advertisement on p. 118)

Marketing Horizons, Inc.-South
11166 Tesson Ferry
St. Louis, MO 63123
Ph. 314-432-1957
Fax 314-432-7014
E-mail: mhorizons@stlnet.com
Stephanie Feeney, Dir. Field Svcs.
70-70-70-70
(See advertisement on p. 118)

Peters Marketing Research, Inc.
12400 Olive Blvd., Ste. 225
St. Louis, MO 63141-5437
Ph. 314-469-9022
Fax 314-469-7436
E-mail: joyce@petersmktg.com
www.petersmktg.com
Anne Fleming
25-10-25-25

Pragmatic Research, Inc.
200 S. Hanley, Ste. 420
St. Louis, MO 63105
Ph. 314-863-2800
Fax 314-863-2880
E-mail: ds@pragmatic-research.com
www.pragmatic-research.com
Doug Sinnard, President
20-10-20-20

Quality Controlled Services
1650 Des Peres Rd., Ste. 110
Des Peres, MO 63131
Ph. 800-992-2139 or 314-966-6595
Fax 314-822-4294
E-mail: postmaster@qcs.com
www.qcs.com
Deborrah Moore
21-0-21-21
(See advertisement on p. 119)

Quality Controlled Services
St. Louis Survey Center
3701 S. Lindbergh, Ste. 201
Sunset Hills, MO 63127
Ph. 314-822-4145
Fax 314-822-9145
E-mail: postmaster@qcs.com
www.qcs.com
Shirley Plevyak, Branch Manager
70-70-70-70
(See advertisement on p. 119)

Superior Surveys of St. Louis, Inc.
10403 Clayton Rd.
St. Louis, MO 63131
Ph. 800-325-4982 or 314-692-2699
Fax 314-692-2427
E-mail: SURVEYS4U@aol.com
Carol McGill, Partner
25-10-10-0

Westgate Research, Inc.
650 Office Pkwy.
St. Louis, MO 63141
Ph. 314-567-3333
Fax 314-567-7131
Germaine Eley, Vice President
60-48-60-48

Kirksville

Quality Controlled Services
Kirksville Survey Center
R.R. #3 Box 111A
Kirksville, MO 63501
Ph. 660-488-5500
Fax 660-488-6400
E-mail: postmaster@qcs.com
www.qcs.com
Janet Drummond, Branch Manager
60-60-60-60
(See advertisement on p. 119)

Nebraska

Lincoln

The Gallup Organization
300 S. 68th Place
Lincoln, NE 68510
Ph. 402-489-8700
Jean Timmerman, Dir. of Interviewing
184-184-184-184

Service Research Corp.
6201 S. 58th, Ste. A
Lincoln, NE 68516
Ph. 402-434-5000
Fax 402-434-5006
E-mail: srcbritt@aol.com
Mike Britten, President
22-0-22-22

Wiese Research Associates, Inc.
1630 S. 70th St., Ste. 100
Lincoln, NE 68506
Ph. 402-483-5054
Fax 402-483-5259
E-mail: Gary_Lorenzen@wraresearch.com
Gary Lorenzen, Exec. Vice President
54-24-54-54

Omaha

The Gallup Organization - Omaha
10909 Mill Valley Rd., #210
Omaha, NE 68154
Ph. 402-496-1240
Fax 402-496-1062
Matt Kurtz
177-177-177-177

Midwest Survey & Research
9802 Nicholas St.
Omaha, NE 68114
Ph. 402-392-0755
Fax 402-392-1068
E-mail: worick@mwsurvey.com
Dick Worick, President
32-30-15-30

Codes - (e.g. 25-10-25-10)

1. STATIONS - No. of interviewing stations at this location
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3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES- No. of stations which can be monitored off-premises

Wiese Research Associates, Inc.
10707 Pacific St., Ste. 202
Omaha, NE 68114
Ph. 402-391-7734
Fax 402-391-0331
E-mail: Mary_Arkfeld@wraresearch.com
Tom Wiese, President
30-18-30-30

Nevada

Las Vegas

I/H/R Research Group
4440 S. Maryland Pkwy., Ste. 203
Las Vegas, NV 89119
Ph. 702-734-0757
Fax 702-734-6319
E-mail: IHRRRA2@aol.com
Lynn Stalone, Partner
102-102-102-102
(See advertisement on p. 120)

Las Vegas Surveys, Inc.
3405 S. Cambridge St.
Las Vegas, NV 89019
Ph. 702-650-5550 or 800-797-9877
Fax 702-650-0729
E-mail: cke1055623@aol.com
Carlos Kelley, V.P. Research Director
12-0-12-0

MRCPhone
7488 W. Sahara Ave.
Las Vegas, NV 89117
Ph. 702-360-7700
Fax 702-360-7798
E-mail: research@mrcgroup.com
www.mrcgroup.com
James T. Medick, Managing Director
65-65-65-65
(See advertisement on p. 121)

Reno

C/J Research, Inc.
Executive Plaza
1005 Terminal Way, Ste. 202
Reno, NV 89502
Ph. 702-688-3777
Fax 702-688-3788
E-mail: info@cjr.com
www.cjr.com
Lisa Mancini
60-60-60-60

Gaming Research Group
P.O. Box 9058
Reno, NV 89507
Ph. 702-333-1223
Fax 702-333-1224
E-mail: gamingres@aol.com
Katherine Cole, President
7-0-4-0

New Hampshire

Manchester/Nashua

New England Interviewing, Inc.
5 Coliseum Ave.
Nashua, NH 03063
Ph. 603-889-8222
Fax 603-883-1119
Joan Greene, President
14-0-14-0

New Jersey

Northeast Shore

Centrac, Inc.
74 Brick Blvd.
Bricktown, NJ 08723-7920
Ph. 973-575-3200
Fax 973-575-0520
E-mail: RLeeds@centracusa.com
www.centracusa.com
Ronald Leeds, President
100-100-100-100

Northern New Jersey

Bruskin/Goldring Research
100 Metroplex Dr.
Edison, NJ 08817
Ph. 732-572-7300
Fax 732-572-7980
Irwin Korman, Exec. Vice President
150-150-150-150

Business Science International, Inc.
270 Sylvan Ave.
Englewood Cliffs, NJ 07632
Ph. 201-871-0999
Fax 201-871-8757
E-mail: mail@bsiresearch.com
www.bsiresearch.com
Matthew Karp
45-25-45-25

Centrac, Inc.
389 Passaic Ave.
Fairfield, NJ 07004-2415
Ph. 973-575-3200
Fax 973-575-0520
E-mail: RLeeds@centracusa.com
www.centracusa.com
25-25-25-25

Focus World International, Inc.
146 Hwy. 34, Ste. 100
Holmdel, NJ 07733
Ph. 732-946-0100
Fax 732-946-0107
E-mail: FocusWorld@worldnet.att.net
www.focusworldint.com
Paulette Eichenholtz, President
60-24-60-60

Hamilton Phone Center
A Division of Manhattan Phone Center
3635 Quakerbridge Rd.
Hamilton, NJ 08690
Ph. 212-387-7550
Fax 212-387-8180
E-mail: LSchneider@roper.com
Larry Schneider, Sr. Vice President
75-75-75-75

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JDR Marketing, Inc.
500 N. Franklin Tpke.
Ramsey, NJ 07446
Ph. 201-512-2600
Fax 201-818-3157
Jeff Marks, President
24-24-24-24

Q Research Solutions, Inc.
198 Rte. 9 N.
N. Manalapan, NJ 07726
Ph. 732-308-0500
Fax 732-308-1314
Tracey Kacprowicz, Dir. of Ops.
50-35-50-50

Schlesinger Associates, Inc.
Executive Plaza, Ste. 400
10 Parsonage Rd.
Edison, NJ 08837
Ph. 732-906-1122
Fax 732-906-8792
E-mail: sasmktres@aol.com
Steven Schlesinger, President
30-0-30-30

Statistical Research, Inc.
111 Prospect St.
Westfield, NJ 07090
Ph. 908-654-4000
Fax 908-654-6498
E-mail: SRI@sriresearch.com
www.sriresearch.com
Maura Clancey, Dir. Client Services
45-45-45-45

Suburban Associates
579 Franklin Tpke.
Ridgewood, NJ 07450
Ph. 201-447-5100
Fax 201-447-9536
E-mail: info@subassoc.com
www.subassoc.com
Andrew Edwards
35-25-35-35

TMR, Inc.
Two Sylvan Way
Parsippany, NJ 07054
Ph. 973-829-1030
Fax 973-829-1031
E-mail: joec@tmrnj.com
Joe Calvanelli, President
40-40-40-40

The Wats Room, Inc.
18 Railroad Ave.
Rochelle Park, NJ 07662
Ph. 201-845-3100 or 800-724-0222
Fax 201-845-3131
E-mail: louroth@thewatsroom.com
www.thewatsroom.com
Lou Roth, President
160-160-160-160
(See advertisement on p. 122)

Trenton

Response Analysis Corp.
3635 Quaker Bridge Rd.
Trenton, NJ 08619
Ph. 609-587-1022
Fax 609-586-0149
E-mail: diane.linck@response-analysis.com
www.response-analysis.com
Todd Myers
75-75-75-75

New Mexico

Albuquerque

Business Information Group, Inc.
1114-B Pennsylvania St. N.E.
Albuquerque, NM 87110
Ph. 800-321-9244 or 505-265-4760
Fax 505-265-5062
E-mail: big@big-alb.com
Caren Calvin, Project Manager
10-10-10-0

Sandia Marketing Services, Inc.
2201 San Pedro N.E., Bldg. 1, Ste. 230
Albuquerque, NM 87110
Ph. 800-950-4148
Fax 505-883-4776
E-mail: sandiamr@aol.com
Lana Scutt, President
14-14-14-14

New York

Albany

Colwell & Salmon Communications, Inc.
24 Computer Dr. W.
Albany, NY 12205
Ph. 800-724-5318 or 518-482-1596
Fax 518-482-1998
E-mail: jholland@colwell-salmon.com
www.colwell-salmon.com
Jen Holland, Mkt. Rsch Coordinator
73-28-73-73

Colwell & Salmon Communications, Inc.
16 Pearl St.
Glen Falls, NY 12801
Ph. 518-745-6868
Fax 518-745-4470
E-mail: jholland@colwell-salmon.com
www.colwell-salmon.com
Jen Holland, Mkt. Rsch. Coordinator
34-0-34-34

Binghamton

Gordon S. Black Corp.
4401 Vestal Pkwy. E.
Vestal, NY 13850
Ph. 607-729-5000 or 716-272-8400
Fax 607-729-5229
E-mail: rickg@gsbc.com
www.gsbc.com
Rick Geiger
70-70-70-70

Buffalo

Buffalo Survey & Research, Inc.
1249 Eggert Rd.
Buffalo, NY 14226
Ph. 716-833-6639
Fax 716-834-6499
Jeanette Levin, President
8-0-8-0

Goldhaber Research Associates
One NFA Park
Amherst, NY 14228
Ph. 716-689-3311
Fax 716-689-3342
www.goldhaber.com
Paulette A. Faraci, Dir. Client Services
17-17-17-17

I C T Research/VFIS
3332 Walden Ave., Ste. 106
Depew, NY 14043
Ph. 716-651-6004
Fax 716-651-0473
E-mail: vfis@ictgroup.com
Mary Ellen Fasano, V.P./G.M.
120-120-120-120

Marketing Decisions Group, Inc.
9141 Main St.
Buffalo, NY 14031
Ph. 716-634-2045
Fax 716-634-9560
E-mail: mdgarup@aol.com
Arup Sen, President
15-7-15-15

Survey Service, Inc.
1911 Sheridan Dr.
Buffalo, NY 14223
Ph. 716-876-6450
Fax 716-876-0430
E-mail: sservice@surveyservice.com
www.surveyservice.com
Susan R. Adelman, President
60-60-60-60
(See advertisement on p. 123)

Kingston

On-Line Communications, Inc.
291 Wall St., 4th fl.
Ph. 800-483-4581
Fax 918-338-2008
E-mail: askus@on-linecom.com
120-120-120-120
(See advertisement on p. 130)

New York City
(See also No. New Jersey)

Arthur Research
211 W. Chester St.
Long Beach, NY 11561
Ph. 516-432-7733
Fax 516-432-1368
Barbara Ruderman, Partner
20-0-20-20

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Beta Research Corp.
6400 Jericho Tpke.
Syosset, NY 11791
Ph. 516-935-3800
Fax 516-935-4092
www.nybeta.com
Manny Mallo, President
25-20-25-0

BKF North America Inc.
112 Madison Ave.
New York, NY 10016
Ph. 212-779-4600
Fax 212-779-2714
E-mail: info@bkfbkf.com
www.bkfbkf.com
Michael Brown
65-16-35-10

Brehl & Associates, Inc.
11 Grace Ave., Ste. 103
Great Neck, NY 11021
Ph. 516-466-6882
Fax 516-773-0923
18-0-18-0

Central Marketing, Inc.
30 Irving Place, 7th fl.
New York, NY 10003
Ph. 212-260-0070
Fax 212-979-5647
Carol McMahon, Partner
90-50-90-90

CMR Market Research, Inc.
518 Fifth Ave.
New York, NY 10036
Ph. 212-944-4545
Fax 212-944-1969
Joel Brown, Exec. V.P.
20-0-20-0

CTIS
650 Avenue of the Americas
New York, NY 10011
Ph. 212-627-1277
Fax 212-627-2034
E-mail: nmathus@Li.com
Nina Mathus, Exec. Vice President
10-10-10-10
(See advertisement on p. 17)

Diversified Research, Inc.
16 N. Astor St.
Irvington, NY 10533
Ph. 914-591-5440
Fax 914-591-4013
Michael La Velle, President
50-25-50-0

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/
Bruce Kirkland, Vice President
90-0-90-0

Innovative Concepts
200 Stonehinge Ln.
Carle Place, NY 11514
Ph. 516-479-2200
Fax 516-479-2215
E-mail: scott@ic-mr.com
www.ic-mr.com
Scott Sycoff, Vice President
75-75-75-75

IPC (International Point of Contact)
32 E. 31st St.
New York, NY 10016
Ph. 212-213-3303
Fax 212-213-3554
E-mail: RLBIPC@aol.com
Rhoda Brooks, Partner
40-40-40-40

Louis Harris and Associates, Inc.
111 Fifth Ave.
New York, NY 10003
Ph. 212-539-9600
Fax 212-539-9669
E-mail: bleitman@lha.gsbc.com
www.louisharris.com
Bob Leitman
200-200-200-200

Macro International Inc.
100 Avenue of the Americas
New York, NY 10013
Ph. 888-MACRO-US or 212-941-5555
Fax 212-941-7031
E-mail: tduffy@macroint.com
www.macroint.com
Tom Duffy, Director
102-102-102-102

Manhattan Phone Center
Division of Friedman Marketing
115 E. 23rd St.
New York, NY 10010
Ph. 212-387-7550
Fax 212-387-8180
E-mail: LSchneider@roper.com
Larry Schneider, Sr. Vice President
100-100-100-100

MKTG, Inc.
200 Carleton Ave.
East Islip, NY 11730
Ph. 516-277-7000
Fax 516-277-7601
Howard Gershowitz, Exec. Vice President
200-200-200-200

MKTG, Inc.
100 Fire Island Ave.
Babylon, NY 11702
Ph. 516-277-7000
Fax 516-277-7601
E-mail: HowardG3@aol.com
Howard Gershowitz, Exec. Vice President
40-35-40-40

Opinion Access Corp.
31-00 47th Ave.
Long Island City, NY 11101
Ph. 718-729-2OAC (2622) or 888-489-DATA (3282)
Fax 718-729-2444
E-mail: info@opinionaccess.com
www.opinionaccess.com
Joe Rafael, Chairman
140-140-140-140
(See advertisement on the Inside Front Cover)

Research Management, Inc.
255 Oser Ave.
Hauppauge, NY 11788
Ph. 516-231-3277
Fax 516-435-3287
E-mail: resmanage1@aol.com
http://busreslab.com/rmi.htm
Stewart Goldberg, Managing Director
40-40-40-40

Roper Starch Worldwide
205 E. 42nd St., 17th fl.
New York, NY 10017
Ph. 212-599-0700
Fax 212-867-7008
E-mail: info@roper.com
www.roper.com
Rachel Watstein
225-100-100-225

Schulman, Ronca & Bucuvalas, Inc.
145 E. 32nd St., Ste. 500
New York, NY 10016
Ph. 212-779-7700
Fax 212-779-7785
E-mail: m.schulman@srbi.com
www.srbi.com
Chintan Turakhia, Vice President
280-280-280-280

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
Andrea Waller, President
25-0-25-25

The Telephone Centre, Inc.
3 Cottage Place
New Rochelle, NY 10801
Ph. 914-576-1100
Fax 914-576-0469
E-mail: ttcnr@aol.com
Adam Fleischer, Vice President
125-125-125-125

U.S. Wats
29 W. 38th St., 10th fl.
New York, NY 10018
Ph. 212-819-1466
Fax 212-819-1813
E-mail: uswats@mindspring.com
Carol McDonald, Executive Director
50-35-46-46

Universal Survey Center
29 W. 38th St.
New York, NY 10018
Ph. 212-391-5243
Fax 212-391-5428
E-mail: universalsc@worldnet.att.net
Leslie Dillon, Vice President
100-100-100-100

Rochester

Gordon S. Black Corp.
76 Carlson Road
Rochester, NY 14610
Ph. 716-482-2210
Fax 716-482-3299
E-mail: rickg@gsbc.com
www.gsbc.com
Rick Geiger
125-125-125-125

The Sutherland Group, Ltd.
100 Kings Hwy., Ste. 2900
Rochester, NY 14617
Ph. 716-586-5757
Fax 716-586-7508
www.suth.com
Richard Taylor, General Manager
380-380-380-380

Syracuse

KS&R's INSITE
5792 Widewaters Pkwy.
Dewitt, NY 13214
Ph. 800-645-5469 or 315-446-3403
Fax 315-446-6719
E-mail: jsnyder@ksrinc.com
www.ksrinc.com
Lynette Van Dyke
75-75-75-75

McCarthy Associates
6075 E. Molloy Rd.
Syracuse, NY 13211
Ph. 315-431-0660
Fax 315-431-0672
John McCarthy, President
10-10-10-10

North Carolina

Charlotte

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
Laura Wright, Director
15-8-15-15

K P C Research
600 S. Tryon St.
Charlotte, NC 28202
Ph. 704-358-5757 or 800-852-2794
Fax 704-358-5745
E-mail: dbolyard@charlotte.com
Joe Denneny, Research Director
60-36-60-36

Leibowitz Market Research Associates
One Parkway Plaza, Ste. 110
4824 Parkway Plaza Blvd.
Charlotte, NC 28217-1968
Ph. 704-357-1961
Fax 704-357-1965
E-mail: teri@leibowitz-research.com
Teri Leibowitz, President
15-10-0-0

MarketWise, Inc.
831 E. Morehead St., Ste. 150
Charlotte, NC 28202
Ph. 704-332-8433 or 800-849-5924
Fax 704-332-0499
E-mail: mwiseinc@aol.com
www.marketwise-usa.com
Beverly Kothe, Principal
22-12-22-22

Greensboro/ Winston-Salem

All Points Research
8025 N. Point Blvd., #215E
Winston-Salem, NC 27106
Ph. 336-896-2200
Fax 336-896-2201
E-mail: allpoints@allpointsresearch.com
www.allpointsresearch.com
Sherrie Aycock, Partner
38-38-38-8

Bellomy Research, Inc.
2150 Country Club Rd., Ste. 300
Winston-Salem, NC 27104
Ph. 800-443-7344
Fax 336-721-1597
E-mail: bellomy@interpath.com
John Sessions or Carol Hefner
150-150-150-150

Codes - (e.g. 25-10-25-10)

1. STATIONS - No. of interviewing stations at this location
2. CATI - No. of stations using computer-aided interviewing
3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES- No. of stations which can be monitored off-premises

CB & A Research, Inc.
1400 Westgate Center Dr., Ste. 200
Winston-Salem, NC 27103
Ph. 336-765-1234
Fax 336-765-1109
E-mail: pamk@cbaresearch.com
Pam Knopf, V.P. Operations
62-62-62-62

Corporate Research Center, Inc.
1 PAI Park
Greensboro, NC 27409-9669
Ph. 800-866-2600
Fax 800-719-0719
E-mail: corporate_research@msn.com
Nicole Scullion, Vice President
40-40-40-40

Survey Partners of America
2150 Country Club Rd., Ste. 300
Winston-Salem, NC 27104
Ph. 800-348-8002
Fax 336-721-1597
Carol Hefner
150-150-150-150

The Telephone Centre, Inc.
1605 Spring Garden St.
Greensboro, NC 27403
Ph. 910-574-3000
Fax 910-574-3007
E-mail: telectr@aol.com
Liz Winter, President
60-60-60-60

Raleigh/Durham

FGI, Inc.
206 W. Franklin St.
Chapel Hill, NC 27516
Ph. 919-929-7759
Fax 919-932-8829
E-mail: apurcell@fginc.com
www.fginc.com
Dino E. Fire, Dir. Data Collection
100-100-100-100

Harker Research
6131 Falls of Neuse Rd., Ste. 112
Raleigh, NC 27609
Ph. 919-954-8300
Fax 919-954-8844
Richard Harker, President
40-0-40-0

Johnston, Zabor & Associates
2222 Chapel Hill/Nelson Hwy.
Headquarters Park, #300
Durham, NC 27709
Ph. 800-735-5448
Fax 919-544-0954
E-mail: bradm@jza.com
www.jza.com
Brad Martin, Field Sales Manager
45-35-45-45

Medical Marketing Research, Inc.
1201 Melton Ct.
Raleigh, NC 27615
Ph. 919-870-6550
Fax 919-848-2465
E-mail: mmrx19@idt.net
www.mmrx.com
George Matijow, President
30-0-30-0

Rocky Mount

21st Century Copernicus, Inc.
P.O. Box 1218
Tarboro, NC 27886
Ph. 919-823-0950
Fax 919-823-7716
E-mail: HowardR@21stcentury-cop.com
www.21stcentury-cop.com
Rawls Howard Jr., President/CEO
52-20-20-20

North Dakota

Fargo

Teleforce, Inc.
601 28th St. S.W.
Fargo, ND 58103
Ph. 800-323-0810
Fax 701-232-3773
96-10-96-96

Ohio

Akron

EBSCO TeleService
2020 Front St., Ste. 206
Cuyahoga Falls, OH 44221
Ph. 800-998-4146
Fax 330-945-4237
E-mail: ken@calltni.com
www.calltni.com
Ken Weitzel, Manager of Operations
48-48-48-48

Goodyear Research Interviewing Center
1144 Market St.
Akron, OH 44316
Ph. 330-796-0102
Fax 330-796-0111
Toya Kelker
30-30-30-30

Cincinnati

Alliance Research, Inc.
2845 Chancellor Dr.
Crestview Hills, KY 41017
Ph. 606-344-0077
Fax 606-344-0078
E-mail: info@allianceresearch.com
www.allianceresearch.com
Clint Brown, President
150-150-150-150

The Answer Group
4665 Cornell Rd., Ste. 150
Cincinnati, OH 45241
Ph. 513-489-9000
Fax 513-489-9130
E-mail: jfeldon@answergroup.com
Joan Feldon, President
40-40-40-40

Assistance in Marketing, Inc.
11890 Montgomery Rd.
Cincinnati, OH 45249
Ph. 513-683-6600 or 888-4AIMFIRE
Fax 513-683-9177
E-mail: Irwin@AIM-Cincinnati.com
Irwin Weinberg
20-20-20-20

B & B Research Services, Inc.
8005 Plainfield Rd.
Cincinnati, OH 45236
Ph. 513-793-4223
Fax 513-793-9117
E-mail: BBRSRCH@aol.com
Jim Moler Jr.
20-6-20-20

Burke, Inc.
805 Central Ave.
Cincinnati, OH 45202
Ph. 513-576-5700
Fax 513-576-5777
E-mail: kcravens@burke.com
www.burke.com
Karen Cravens, V.P. Data Collection
200-200-200-200
(See advertisement on p. 49)

Calo Research Services, Inc.
10250 Alliance Rd.
Cincinnati, OH 45242
Ph. 513-984-9708
Fax 513-792-7404
Patricia A. Calo, Vice President
14-0-14-0

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
12-6-12-12

Convergys Corporation
(formerly MATRIXX Marketing Research)
Convergys Center
4600 Montgomery Rd.
Cincinnati, OH 45212
Ph. 513-458-1590
Fax 513-841-0666
E-mail: research@convergys.com
www.convergys.com
Lynn Grome, Account Executive
85-85-85-85
(See advertisement on p. 127)

Disher Strategic Research, Inc.
873 Fenchurch Ct.
Cincinnati, OH 45230
Ph. 513-232-1603 or 888-9-DISHER
Fax 513-232-8187
E-mail: market_research@bigfoot.com
www.disher.com
40-40-40-40

Elrick & Lavidge
329 E. Kemper Rd, Ste. 4210
Cincinnati, OH 45246
Ph. 513-671-4478
Fax 513-671-4495
E-mail: lgg@elavidge.com
www.elavidge
Larry Gulledge, Exec. Vice President
64-64-64-64

Fields Marketing Research, Inc.
7979 Reading Rd.
Cincinnati, OH 45237
Ph. 513-821-6266
Fax 513-679-5300
E-mail: kenfmr@fuse.net
http://home.fuse.net.fieldsresearch
Bernie Kearney, Vice President
25-25-25-25

Friedman-Swift Associates
110 Boggs Ln., Ste. 200
Cincinnati, OH 45246
Ph. 513-772-9200
Fax 513-772-9207
E-mail: friedswift@aol.com
36-0-36-0

IPSOS - ASI, Inc.
11499 Chester Rd., Ste. 401
Cincinnati, OH 45246
Ph. 513-552-1100
Fax 513-552-1110
www.ipsos-asi.com
125-125-125-125

Market Inquiry LLC
5825 Creek Rd.
Cincinnati, OH 45242
Ph. 513-794-1088
Fax 513-794-1176
E-mail: marketinquiry@fuse.net
Cathy Noyes, Managing Partner
24-15-24-24

Marketing Research Services, Inc.
600 Vine St., #2900
Cincinnati, OH 45202
Ph. 513-579-1555
E-mail: rthaman@mrsi.com
www.mrsi.com
M. Randall Thaman, President
92-92-92-80

MarketVision Research®
Corporate Headquarters
MarketVision Building
4500 Cooper Rd.
Cincinnati, OH 45242-5617
Ph. 513-791-3100
Fax 513-794-3500
E-mail: info@marketvisionresearch.com
www.marketvisionresearch.com
Rex L. Repass, President
50-50-50-50
(See advertisement on p. 70)

QFACT Marketing Research, Inc.
9908 Carver Rd.
Cincinnati, OH 45242
Ph. 513-891-2271
Fax 513-791-7356
E-mail: info@qfact.com
www.qfact.com
Mary Swart, V.P. of Research
22-6-22-22

RDI Market Services
9920 Carver Rd.
Cincinnati, OH 45242
Ph. 513-984-5927
Fax 513-984-9735
Ronald Garner, V.P. Client Svcs.
60-60-60-60

Service Industry Research Systems, Inc. (SIRS)
201 Martha Layne Collins Blvd.
Highland Heights, KY 41076-1750
Ph. 606-781-9700
Fax 606-781-8802
E-mail: sirsinc@aol.com
Scott Martin
36-36-36-0

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4. OFF-PREMISES- No. of stations which can be monitored off-premises

Cleveland

Gordon S. Black Corp.
945 Windham Ct.
Boardman, OH 44512
Ph. 330-758-7300 or 716-272-8400
Fax 330-758-7709
E-mail: rickg@gsbc.com
www.gsbc.com
Rick Geiger
60-60-60-60

Business Research Services, Inc.
Tri Pointe Building, Ste. A
23825 Commerce Park
Cleveland, OH 44122-5841
Ph. 216-831-5200 or 888-831-5200
Fax 216-292-3048
www.marketingresearch.com
Barbara Elioff, Field Service Director
25-25-25-25

Cleveland Field Resources
Subsidiary of National Market Measures, Inc.
25109 Detroit Rd., Ste. 325
Cleveland, OH 44145
Ph. 440-892-8555
Fax 440-892-0002
www.nmminc.com
15-15-15-15

Cleveland Field Resources
Subsidiary of National Market Measures, Inc.
30405 Solon Rd.
Cleveland, OH 44139
Ph. 440-542-2450
Fax 440-542-2455
E-mail: nmmeast@nmminc.com
www.nmminc.com
Kim White, Focus Group Coord.
10-10-10-10

Focus Groups of Cleveland Survey Center
2 Summit Park Dr., Ste. 225
Cleveland, OH 44131
Ph. 216-901-8075 or 800-950-9010
Fax 216-901-8085
E-mail: focusclv@en.com
Amy Morris, Executive Director
12-3-10-0
(See advertisement on p. 128)

The Maffett Research Group
22021 Brookpark Rd.
Cleveland, OH 44126
Ph. 440-779-1303
Fax 440-779-3040
Shelly Entres, Project Supervisor
21-12-8-0

Marketeam Associates
3645 Warrensville Center Rd.
Shaker Heights, OH 44122
Ph. 216-491-9515
Fax 216-491-8552
E-mail: vstakes@doanemr.com
Vaughn Stakes, Branch Manager
36-0-36-36

McCarthy Associates
Eastwood Mall
Unit #911
Niles, OH 44446
Ph. 315-431-0660
Fax 315-431-0672
John McCarthy, President
6-6-6-6

National Market Measures, Inc.
25109 Detroit Rd., Ste. 330
Cleveland, OH 44145
Ph. 440-892-8555
Fax 440-892-0002
www.nmminc.com
15-15-15-15

National Survey Research Center
5350 Transportation Blvd., Ste. 19
Cleveland, OH 44125
Ph. 800-837-7894
Fax 216-518-2903
E-mail: nsrc@nsrc.com
Lauren Wagner, Mgr. Customer Relations
20-20-20-20

Opinion Centers America
22021 Brookpark Rd.
Cleveland, OH 44126
Ph. 440-779-3000
Fax 440-779-3040
E-mail: Opinionctr@aol.com
Karen Cunningham, Field Director
40-20-30-30

OPINIONation
4301 Ridge Rd.
Cleveland, OH 44144
Ph. 216-351-4644
Fax 216-351-7876
E-mail: OPINION@ix.netcom.com
www.opinionation.com
Ron Kornokovich, President
35-35-35-35

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
Richard Kretchmar, Director of Sales
30-25-25-25
(See advertisement on p. 24)

Rosen Research
25906 Emery Rd.
Cleveland, OH 44128
Ph. 216-464-5240
Fax 216-464-7864
Mary Ann Sheets, Field Director
10-0-10-0

Columbus

B & B Research Services, Inc.
1365 Grandview Ave.
Columbus, OH 43212
Ph. 614-486-6746
Fax 614-486-9958
Judy Frederick, Project Director
8-0-8-0

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Focus and Phones, Inc.
One Easton Oval, Ste. 100
Columbus, OH 43219
Ph. 614-583-2100
Fax 614-416-2006
E-mail: fandpinc@infinet.com
Lorne Dillabaugh, Field Director
20-0-20-15

Quality Controlled Services
7634 Crosswoods Dr.
Columbus, OH 43235
Ph. 800-242-4118 or 614-436-2025
Fax 614-436-7040
E-mail: postmaster@qcs.com
www.qcs.com
Judy Golas, Branch Manager
23-0-23-0
(See advertisement on p. 119)

Saperstein Associates, Inc.
4555 N. High St.
Columbus, OH 43214
Ph. 614-261-0065
Fax 614-261-0076
E-mail: research@sapersteinassociates.com
Martin D. Saperstein, Ph.D., President
21-21-21-21

Dwight Spencer & Associates, Inc.
1290 Grandview Ave.
Columbus, OH 43212
Ph. 614-488-3123
Fax 614-488-0923
Betty Spencer, President
45-20-23-0

Dayton

Center For Business & Economic Research (CBER)
University of Dayton
300 College Park
Dayton, OH 45469-2110
Ph. 937-229-2453
Fax 937-229-2371
E-mail: weiler@udayton.edu
www.udayton.edu/~cber
John Weiler, Director
20-0-4-0

QFACT Marketing Research, Inc.
Normandy Square
381 Miamisburg - Centerville Rd.
Dayton, OH 45459
Ph. 937-435-5067
Fax 937-435-3457
E-mail: dayton@cincy.qfact.com
www.qfact.com
Libby Sampsell, Manager
12-0-12-12

Toledo

Barbour Research, Inc.
5241 Southwyck Blvd., Ste. 201
Toledo, OH 43614
Ph. 419-866-3475
Fax 419-866-3478
E-mail: BARBOUREK@aol.com
Emily Barbour, President
53-53-53-53

Creative Marketing Ent., Inc.
1546 Dartford Rd.
Maumee, OH 43537
Ph. 419-867-4444
Fax 419-867-4470
Joyce Clevenger, Exec. V.P.
55-55-55-55

Great Lakes Marketing Associates
3103 Executive Pkwy.
Toledo, OH 43606
Ph. 419-534-4700
Fax 419-531-8950
E-mail: GLMATOL@aol.com
www.greatlakesmarketing.com
Mark Iott, Principal
20-20-20-20

Market Research of Toledo
3103 Executive Pkwy, Ste. 106
Toledo, OH 43606
Ph. 419-534-4705
Fax 419-531-8950
Mark Iott, Principal
20-20-20-20

NFO Research, Inc.
P.O. Box 315
Toledo, OH 43697-0315
Ph. 419-666-8800
Fax 419-661-8595
160-160-160-160

Youngstown

Taylor Nelson Sofres Intersearch
(Formerly Chilton Research)
114 Liberty St.
Youngstown, OH 44505
Ph. 330-759-7878
Fax 330-759-7891
E-mail: bruce.shandler@intersearch.tnsofres.com
www.intersearch.tnsofres.com
Bruce Shandler, CEO/President
110-110-110-110
(See advertisements on pp. 41, 66)

Oklahoma

Oklahoma City

Issues and Answers Network, Inc.
301 N.W. 63rd St., Ste. 140
Oklahoma City, OK 73116
Ph. 757-456-1100 or 516-487-8339
Fax 757-456-0377
E-mail: info@issans.com
www.issans.com
Peter McGuinness, President
67-67-67-67
(See advertisement on p. 141)

Johnson Marketing Research, Inc.
2915 Classen Blvd., Ste. 350
Oklahoma City, OK 73106
Ph. 405-528-2700
Fax 405-528-3238
Patty Nichols-Casteel, President
14-0-14-0

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
Bohn Macrory, Manager
10-0-10-0

Oklahoma Market Research
Data Net
3909 Classen Blvd., Ste. 200
Oklahoma City, OK 73118
Ph. 405-525-3412
Fax 405-525-3419
E-mail: datanet@theshop.net
Deanna Carter, Manager
30-20-30-30

Tulsa

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
10-4-10-0

On-Line Communications, Inc.
401 S.E. Dewey
Bartlesville, OK 74003
Ph. 800-483-4581
Fax 918-338-2008
E-mail: askus@on-linecom.com
Peggy O'Connor, President
120-120-120-120
(See advertisement on p. 130)

Tulsa Surveys
4928 S. 79th E. Ave.
Tulsa, OK 74145
Ph. 918-665-3311 or 800-544-1494
Fax 918-665-3388
E-mail: tsurveys@aol.com
Dan Jarrett, President
28-28-28-28

Oregon

Eugene

Taylor Nelson Sofres Intersearch
(Formerly SOFRES Intersearch)
555 Lincoln St., Ste. C
Eugene, OR 97401
Ph. 541-485-1278
Fax 541-683-4312
E-mail: bruce.shandler@intersearch.tnsofres.com
www.intersearch.tnsofres.com
Bruce Shandler, CEO/President
87-87-87-87
(See advertisements on pp. 41, 66)

Gold Beach

Ask America Market Research
Ask Oregon
P.O. Box 1461
Gold Beach, OR 97444
Ph. 800-251-3666
Michael Pettengil
8-0-8-0

Portland

Bardsley & Neidhart, Inc.
1220 S.W. Morrison, Ste. 425
Portland, OR 97205
Ph. 503-248-9058
Fax 503-222-3804
E-mail: info@bnresearch.com
www.bnresearch.com
Laura Neidhart, President
30-30-30-30

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
8-0-8-0
(See advertisement on p. 56)

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
Vikki Peterson, Director
6-4-6-6

CTIS
8285 S.W. Nimbus, Ste. 180
Beaverton, OR 97005
Ph. 503-644-9036
Fax 503-526-0383
E-mail: tmathes@surveys.com
Tamara Mathes, Facility Manager
60-60-60-60
(See advertisement on p. 17)

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Gilmore Research Group
729 N.E. Oregon St., Ste. 150
Portland, OR 97232
Ph. 503-236-4551
Fax 503-731-5590
www.gilmore-research.com
Denise Bauman, Vice President
28-28-28-28

Griggs-Anderson/Gartner Consulting
308 S.W. First Ave.
Portland, OR 97204-3499
Ph. 503-241-8700
Fax 503-241-8716
www.gar.com
Nandita Stixrud, Field Director
75-75-75-75

InfoTek Research Group, Inc.
4900 S.W. Griffith Dr., Ste. 274
Beaverton, OR 97005
Ph. 503-644-0644
E-mail: Steveb@infotekresearch.com
www.infotekresearch.com
Steve Boespflug, V.P./Principal
59-50-59-59
(See advertisement on p. 131)

Market Decisions Corporation
8959 S.W. Barbur Blvd., Ste. 204
Portland, OR 97219
Ph. 503-245-4479
Fax 503-245-9677
E-mail: info@mdcresearch.com
www.mdcresearch.com
Lester Harman, Field Svcs Acct. Exec.
48-48-48-28

Market Trends, Inc.
1201 S.W. 12th, Ste. 310
Portland, OR 97205
Ph. 503-224-4900
Fax 503-224-0633
E-mail: infomanager@markettrends.com
www.markettrends.com
Nissa Meier
15-15-15-15

Research Data Design, Inc.
55 S.W. Yamhill, 4th fl.
Portland, OR 97204
Ph. 503-223-7166
Fax 503-223-6760
E-mail: jdavid@europa.com
Michael Starec, Project Director
Wade Fickler, Project Director
Angela Gomez, Project Director
210-210-210-210
(See advertisement on p. 31)

Sorensen Associates, Inc.
999 N.W. Frontage Rd., Ste. 190
Troutdale, OR 97060
Ph. 800-542-4321
Fax 503-666-5113
E-mail: linda@sorensen-associates.com
www.sorensen-associates.com
Linda Zinck, Consumer Center Mgr.
25-0-25-0
(See advertisement on p. 55)

Pennsylvania

Allentown/Bethlehem

Integrated Marketing Concepts
3724 Crescent Ct. W.
Whitehall, PA 18052
Ph. 610-437-4000
Fax 610-437-5212
E-mail: info@integratedmc.com
www.integratedmc.com
Robert Williams
101-101-101-101

Erie

Moore Research Services, Inc.
2675 West 12th Street
Erie, PA 16505
Ph. 814-835-4100
Fax 814-835-4110
E-mail: moore@erie.net
www.erie.net/~moore
Colleen Moore Mezler, Vice President
15-5-3-3

Lancaster

Visions Marketing Services
528 W. Orange St.
Lancaster, PA 17603
Ph. 800-222-1577
Fax 717-295-8020
E-mail: allan@vmsmkt.com
Allan Geller, President
35-35-35-35

Philadelphia/Southern New Jersey

Consumer Pulse of Philadelphia
Plymouth Meeting Office Ctr. & Mall, #2145
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
15-8-15-15

CTIS
920 Town Center Dr., Ste. I-10
Langhorne, PA 19047
Ph. 215-752-7266
Fax 215-741-4893
E-mail: mikedutka@aol.com
Mike Dutka, Vice President
60-60-60-60
(See advertisement on p. 17)

M Davis & Co., Inc.
1520 Locust St., 3rd fl.
Philadelphia, PA 19102-4403
Ph. 215-790-8900
Fax 215-790-8930
E-mail: info@mdavisco.com
www.mdavisco.com
Tope Koledoye
35-35-35-10

Delta Market Research, Inc.
333 N. York Rd.
Hatboro, PA 19040
Ph. 215-674-1180
Fax 215-674-1271
E-mail: DMRSUPPORT@aol.com
Linda Celec, President
23-23-23-23

Eastern Research Services
1001 Baltimore Pike, Ste. 208
Springfield, PA 19064
Ph. 610-543-0575
Fax 610-543-2577
E-mail: mail@easternresearch.com
Kean Spencer, President
60-60-60-60

I C T Research/VFIS
584 Middletown Blvd.
Langhorne, PA 19047
Ph. 215-702-9300
Fax 215-702-9366
E-mail: mfasano@ictgroup.com
Mary Ellen Fasano, V.P./G.M.
48-48-48-48

ICR/International Communications Research
605 W. State St.
Media, PA 19063
Ph. 610-565-9280
Fax 610-565-2369
E-mail: icr@mail.icrsurvey.com
www.icrsurvey.com
Steve McFadden, President
250-250-250-250
(See advertisement on p. 57)

Inter-Tel Associates, Inc.
Consumer/Industrial Rsch. Svcs.
P.O. Box 206
Chadds Ford, PA 19317
Ph. 610-459-5969
Fax 610-459-7898
E-mail: EMAILCIR@aol.com
Gene S. Rullo, President
40-25-40-40

JRA, Marketing Research (J. Reckner Associates, Inc.)
587 Bethlehem Pike, Ste. 800
Montgomeryville, PA 18936-9742
Ph. 215-822-6220
Fax 215-822-2238
E-mail: info@reckner.com
www.reckner.com
Frances Grubb, President
75-50-75-75
(See advertisement on p. 132)

JRP Marketing Research Services
100 Granite Dr., Terrace Level
Media, PA 19063
Ph. 610-565-8840
Fax 610-565-8870
E-mail: jrpmark@fast.net
Kathy McCarty
33-15-20-20
(See advertisement on p. 133)

Codes - (e.g. 25-10-25-10)

1. STATIONS - No. of interviewing stations at this location
2. CATI - No. of stations using computer-aided interviewing
3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES- No. of stations which can be monitored off-premises

Market Dimensions, Inc.
176 S. New Middle Town Rd., Ste. 201
Media, PA 19063-5295
Ph. 610-565-9610
Fax 610-565-7293
E-mail: mdimension@aol.com
Peter Haldy, Principal
30-30-30-30

MSI International East, Inc.
860 First Ave., Ste. 860
King of Prussia, PA 19406
Ph. 610-265-2000
Fax 610-265-2213
E-mail: paul_strasser@msimsi.com
Paul Strasser, President
36-36-36-36

NCO TeleResearch
Central Square Shopping Center
2485 Grant Ave.
Philadelphia, PA 19114
Ph. 215-464-7000 ext. 102
Fax 215-602-2354
E-mail: Rmalmud@ncot.com
Robert Malmud, President
200-200-200-200

NCO TeleResearch
6908 Market St., 3rd Fl.
Upper Darby, PA 19082
Ph. 610-352-5700 ext. 3589
Fax 610-352-7381
E-mail: DMargherita@ncot.com
Dan Margherita, Exec. Vice President
100-100-100-100

PhoneLab Research
100 N. 17th St., 4th fl.
Philadelphia, PA 19103
Ph. 800-220-5089
Fax 215-561-7403
E-mail: fholbert@mlr.net
Alfred Holbert, Managing Director
85-85-85-85
(See advertisement on p. 135)

Quality Controlled Services
Two Greenwood Square
3331 Street Rd., Ste. 130
Bensalem, PA 19020
Ph. 800-752-2027 or 215-639-8035
Fax 215-639-8224
E-mail: postmaster@qcs.com
www.qcs.com
Lynne Sitvarin, Branch Manager
12-0-12-0
(See advertisement on p. 119)

Research Incorporated
521 Plymouth Rd., Ste. 116
Plymouth Meeting, PA 19462
Ph. 610-941-2700 or 800-220-1201
Fax 610-941-2711
E-mail: psantoro@survdata.com
www.survdata.com/research
Phyllis Santoro, CEO
15-12-15-15

The Response Center
6908 Market St., 6th fl.
Upper Darby, PA 19082
Ph. 610-352-2800
Fax 610-352-7382
E-mail: admin@response-center.com
Patrick Baldasare, President
130-130-130-130

The Response Center
12320 Academy Rd.
Philadelphia, PA 19154
Ph. 215-305-3750
Fax 215-305-3646
E-mail: pbaldasa@response-center.com
Dawn Marie Braun, Site Manager
70-70-70-70

The Response Center
2485 Grant Ave.
Philadelphia, PA 19114
Ph. 215-934-6767
Fax 215-934-7130
E-mail: pbaldasa@response-center.com
Chrissy Frunzi, Site Manager
88-88-88-88

Ricci Telephone Research, Inc.
2835 West Chester Pike
Broomall, PA 19008
Ph. 610-356-0675
Fax 610-356-7577
E-mail: RTR@fast.net
Chris Ricci, President
50-50-50-50

RSVP/Research Services
1916 Welsh Rd.
Philadelphia, PA 19115
Ph. 215-969-8500
Fax 215-969-3717
E-mail: rsvp@rsvpresearch.com
www.rsvpresearch.com
Neil J. Blefeld, President
65-65-65-65
(See advertisement on p. 44)

Sky Alland Research Division
1400 Union Meeting Rd., Ste. 120
Blue Bell, PA 19422
Ph. 215-619-4900
Fax 215-619-4999
E-mail: marketing@skyalland.com
www.skyalland.com
Bruce Shapiro, Center Manager
300-300-300-300

Survey America
1350 S. Pennsylvania Ave.
Morrisville, PA 19067
Ph. 215-736-1600
Fax 215-736-5984
E-mail: SurveyAmerica@worldnet.att.net
Douglas Elliott, President
35-35-35-35

Taylor Nelson Sofres Intersearch
(Formerly SOFRES Intersearch)
410 Horsham Rd.
Horsham, PA 19044-0189
Ph. 215-442-9000
Fax 215-675-6795
E-mail: bruce.shandler@intersearch.tnsofres.com
www.intersearch.tnsofres.com
Bruce Shandler, CEO/President
112-112-112-112
(See advertisements on pp. 41, 66)

Telespecter Worldwide
Seven Penn Center
1635 Market St., Ste. 200
Philadelphia, PA 19103
Ph. 215-972-1777
Fax 215-972-1788
Mort Reich, President
200-30-200-200

TMR, Inc.
1974 Sproul Rd.
Broomall, PA 19008
Ph. 610-359-1190
Fax 610-359-1824
50-50-50-50

Pittsburgh

Campos Market Research, Inc.
216 Boulevard of the Allies
Pittsburgh, PA 15222
Ph. 412-471-8484
Fax 412-471-8497
E-mail: campos@campos.com
R. Yvonne Campos, President
40-20-40-40

Clark Market Research
5933 Baum Blvd.
Pittsburgh, PA 15206
Ph. 412-361-3200
Fax 412-361-3319
E-mail: jjca5933@aol.com
www.ranlog.com/jjca
John J. Clark, President
40-20-40-40

Customer Contact, Inc. (CCI)
1082 Bower Hill Rd.
Pittsburgh, PA 15063
Ph. 412-279-0909
Fax 412-279-1002
Eugenia Brandemarte, General Manager
38-38-38-38

Direct Feedback
4 Station Square, Ste. 545
Pittsburgh, PA 15219
Ph. 412-394-3676
Fax 412-394-3660
E-mail: amavzdf@aol.com
Alan Mavretish, Project Manager
20-16-20-5

Guide Post Research
21 Yost Blvd., Suite 400
Pittsburgh, PA 15221-5283
Ph. 412-823-8444 or 412-823-3232
Fax 412-823-8300
E-mail: GDE PST@aol.com
Jay P. La Mond, President
15-0-15-0

Noble Interviewing Service, Inc.
1610 Potomac Ave.
Pittsburgh, PA 15216
Ph. 412-343-6455
Fax 412-343-3288
Alma Noble, President
20-0-20-0

The Peer Group
224 Fifth Ave., Ste. 216
McKeesport, PA 15132
Ph. 412-675-5100
Fax 412-672-4406
Fran Leifheit, Vice President
250-125-250-125

PERT Survey Research
2247 Babcock Blvd.wy.
Pittsburgh, PA 15237
Ph. 860-242-2005
Fax 860-242-4857
E-mail: pertsr@aol.com
Joyce Bergeron, Field Director
40-35-40-40

Pittsburgh Phone & Focus, Inc.
300 Mt. Lebanon Blvd., Ste. 2204
Pittsburgh, PA 15234
Ph. 412-341-8770
Fax 412-341-8774
E-mail: womack01@mail.fyi.net
Barbara K. Womack, President
15-2-15-0

Taylor Nelson Sofres Intersearch
(Formerly SOFRES Intersearch)
Townplace Victoria
699 Philadelphia St., Ste. 303
Indiana, PA 15701
Ph. 724-465-1900
Fax 724-465-1904
E-mail: bruce.shandler@intersearch.tnsofres.com
www.intersearch.tnsofres.com
Bruce Shandler, CEP/President
125-125-125-125
(See advertisements on pp. 41,66)

TeleData Research
1500 Ardmore Blvd.
Pittsburgh, PA 15221
Ph. 412-242-6200
Fax 412-731-9510
E-mail: drmtdr@usaor.net
www.ibp.com/pit/teledata
Diane R. Nystrom, Rsch. Unit Manager
50-50-50-50

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State College

Diagnostics Plus, Inc.
1333 S. Allen St.
State College, PA 16801
Ph. 814-238-7936
Fax 814-231-7672
E-mail: paulw@diagnosticsplus.com
http://epicom.com/diagnostics
Paul Weener, President
23-23-23-23

Market Insight
700 E. Beaver Ave.
State College, PA 16801
Ph. 814-231-2140
Fax 814-234-7215
E-mail: insight@penn.com
www.m-insight.com
Brian Hutchison, General Manager
24-24-24-24

Scranton/Wilkes-Barre

Centrac, Inc.
145 W. Broad St.
Hazleton, PA 18201
Ph. 973-575-3200
Fax 973-575-0520
E-mail: RLeeds@centracusa.com
www.centracusa.com
35-35-35-35

Taylor Nelson Sofres Intersearch
(Formerly SOFRES Intersearch)
225 Stewart Rd.
Hanover Industrial Park
Wilkes-Barre, PA 18706
Ph. 717-823-2833
Fax 717-823-3107
E-mail: bruce.shandler@intersearch.tnsofres.com
www.intersearch.tnsofres.com
Bruce Shandler, CEO/President
87-87-87-87
(See advertisements on pp. 41, 66)

Rhode Island

Newport

Advantage Marketing Information, Inc.
7 Main St., Harbor Ste. 3
Wickford, RI 02852
Ph. 401-294-6910
Fax 401-294-6661
E-mail: AdvantageMkt@ids.net
Rick Nagele, President
15-0-15-0

Providence

Alpha Research Associates, Inc.
395 Smith St.
Providence, RI 02908
Ph. 401-861-3400
Fax 401-861-0062
James P. Gaffney, President
22-0-22-0

Connect Teleservices
50 Murray St.
Providence, RI 02909
Ph. 401-275-8500
Fax 401-275-8585
E-mail: conrsrch1@aol.com
www.connect-teleservices.com
Timothy Earnshaw, Director of Research
30-15-30-30

South Carolina

Columbia

Metromark Market Research, Inc.
3030 Devine St.
Columbia, SC 29205
Ph. 803-256-8694
Fax 803-254-3798
E-mail: emsmith@sprynet.com
www.metromark.net
Emerson Smith, President
19-0-15-0

Greenville/Spartanburg

ProGen Research, Inc.
2724-A Wade Hampton Blvd.
Greenville, SC 29615
Ph. 864-244-3435
Fax 864-244-8283
Maxie Freeman, Senior Partner
22-7-22-22

Research, Inc.
211 Century Dr., Ste. 102-D
Greenville, SC 29607
Ph. 864-232-2314 or 770-619-9837
Fax 864-232-1408
E-mail: rigville@mindspring.com
Janiell Johnson, Vice President
28-0-28-0

South Dakota

Sioux Falls

American Public Opinion Survey &
Market Research Corp.
1320 S. Minnesota Ave.
Sioux Falls, SD 57105-0625
Ph. 605-338-3918
Fax 605-338-3964
E-mail: ron@mtcnet.net
www.sdibi.northern.edu/service/Ampublic/Ams_home.htm
27-27-27-27

RMA, Inc.
1208 Elkhorn St.
Sioux Falls, SD 57104-0218
Ph. 605-332-3386 ext. 18
Fax 605-332-8722
E-mail: rickb@rma-inc.com
96-96-96-96

Tennessee

Chattanooga

Wilkins Research
1730 Gunbarrel Rd.
Chattanooga, TN 37421
Ph. 423-894-9478
Fax 423-894-0942
E-mail: Wilkins@voy.net
Lisa Wilkins, Executive Director
40-40-40-40

Knoxville

HMR & Associates
Foothills Mall
2904 A. Tazewell Pike, #A
Knoxville, TN 37918
Ph. 423-281-0038
Fax 423-281-2250
John Myers, Vice President
8-0-8-0

Memphis

AccuData Market Research, Inc.
1036 Oakhaven Rd.
Memphis, TN 38119
Ph. 901-763-0405 or 800-625-0405
Fax 901-763-0660
E-mail: memphis@accudata.net
www.accudata.net
Valerie Jolly, Manager
12-0-12-12

Market Development Associates, Inc.
5050 Poplar Ave., Ste. 920
Memphis, TN 38157
Ph. 800-480-8334 or 901-682-1011
Fax 800-480-0861
E-mail: Mktdevlp@aol.com
www.MDARESEARCH.com
John Choate, President
35-35-24-24

PWI Research
5100 Poplar Ave., Ste. 3125
Memphis, TN 38137
Ph. 901-682-2444
Fax 901-682-2471
E-mail: crreid1@aol.com
www.pwiresearch.com
Pat LaPointe, President
35-35-35-35

Nashville

Elrick & Lavidge
1850 Business Park Dr.
Clarksville, TN 37040
Ph. 931-920-2000
Fax 931-920-2019
E-mail: lgg@elavidge.com
www.elavidge
Larry Gulledge, Exec. Vice President
104-104-104-104

The Nashville Research Group
1161 Murfreesboro Rd., Ste. 150
Nashville, TN 37217
Ph. 615-399-7727
Fax 615-399-9171
E-mail: TNRG@ix.netcom.com
Glyna E. Kilpatrick, Owner/Field Director
9-0-9-9

Perdue Research Group
21 White Bridge Rd., Ste. 200
Nashville, TN 37205
Ph. 615-298-5117
Fax 615-298-5668
E-mail: gfuson@mindspring.com
Greg Fuson, Acct. Mgr./Cnslt.
20-16-0-0

Prince Market Research
2323 Hillsboro Rd., #500
Nashville, TN 37212
Ph. 615-292-4860 or 800-788-7728
Fax 615-292-0262
E-mail: dprince@PMResearch.com
www.pmresearch.com
8-0-8-0

Texas

Amarillo

Opinions Unlimited, Inc.
8201 S.W. 34th St.
Amarillo, TX 79121
Ph. 806-353-4444
Fax 806-353-4718
E-mail: opinions@arn.net
www.opinionsunlimited.com
Neil Norwood, Vice President
50-50-50-50
(See advertisement on p. 137)

Austin

First Market Research Corp.
2301 Hancock Dr.
Austin, TX 78756
Ph. 800-FIRST-TX or 512-451-4000
Fax 512-451-5700
E-mail: jheiman@firstmarket.com
www.firstmarket.com
James Heiman, President
50-35-50-50
(See advertisement on p. 40)

The Gallup Organization - Austin
1016 LaPosada, Ste. 290
Austin, TX 78752
Ph. 512-454-5271
Fax 512-453-3307
Cathy Langan
155-155-155-155

NuStats International
3006 Bee Caves Rd., Ste. A300
Austin, TX 78746
Ph. 512-306-9065 or 800-447-8287
Fax 512-306-9077
E-mail: carce@nustats.com
http://nustats.com
Carlos H. Arce, President
75-60-60-60

Tammadge Market Research
210 Barton Springs Rd., Ste. 515
Austin, TX 78704
Ph. 800-879-9198 or 512-474-1005
Fax 512-370-0339
E-mail: tammadge@jump.net
www.tammadge.com
Melissa Pepper, CSO
30-20-30-30

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Dallas/Ft. Worth

Decision Analyst, Inc.
604 Avenue H East
Arlington, TX 76011-3100
Ph. 817-640-6166 or 800-ANALYSIS
Fax 817-640-6567
E-mail: jthomas@decisionanalyst.com
www.decisionanalyst.com
Jerry W. Thomas, President/CEO
65-65-65-65
(See advertisement on p. 51)

DSS Research
711 E. Lamar Blvd., Ste. 101
Arlington, TX 76011-3854
Ph. 817-265-2422
Fax 817-261-0707
E-mail: rgates@dssresearch.com
www.dssresearch.com
Dr. Roger Gates, President
75-75-75-75

Fenton Swanger Consumer Research, Inc.
14800 Quorum Dr., Ste. 250
Dallas, TX 75240
Ph. 972-934-0707
Fax 972-490-3919
E-mail: fenton@airmail.net
www.fentonswanger.com
Nancy Ashmore, Vice President
35-35-35-35

Focus On Dallas, Inc.
Alpha Plaza
4887 Alpha Rd., Ste. 210
Dallas, TX 75244-4632
Ph. 972-960-5850 or 800-824-9796
Fax 972-960-5859
Mary Ulrich, President
36-0-36-0

Information Unlimited, Inc.
13747 Montfort, Ste. 218
Dallas, TX 75240
Ph. 972-386-4498
Fax 972-450-8456
Nancy Monnier, Vice President
150-150-150-150

M/A/R/C Research
1700 Wilshire
Denton, TX 76201
Ph. 940-566-6668
Fax 940-566-0671
E-mail: david.johnson@marcresearch.com
www.marcresearch.com
David Johnson
123-123-123-123
(See advertisement on p. 37)

NorTex Research Group/Dallas
8700 N. Stemmons Fwy., Ste. 190
Dallas, TX 75247-3715
Ph. 800-315-TEXX
Fax 214-630-6769
E-mail: tveliz@aol.com
Tony Veliz, Facility Director
20-0-20-0

Probe Research, Inc.
2723 Valley View Ln.
Dallas, TX 75234
Ph. 972-241-6696
Fax 972-241-8513
E-mail: 105361.2600@compuserve.com
Richard Harris, Vice President
25-8-25-25

Quality Controlled Services
2711 LBJ Freeway, Ste. 300
Farmers Branch, TX 75234
Ph. 800-421-2167 or 972-488-9988
Fax 972-488-9997
E-mail: postmaster@qcs.com
www.qcs.com
Lynn Hibben, Branch Manager
12-0-12-0
(See advertisement on p. 119)

Rincon & Associates
6060 N. Central Expwy., Ste. 670
Dallas, TX 75206
Ph. 214-750-0102
Fax 214-750-1015
E-mail: info@rinconassoc.com
www.rinconassoc.com
20-0-20-20

Savitz Field and Focus - Dallas
13747 Montfort Dr., Ste. 211
Dallas, TX 75240
Ph. 972-386-4050
Fax 972-450-2507
E-mail: info@savitzfieldandfocus.com
www.savitz-research.com
Harriet E. Silverman, Exec. Vice President
150-150-150-150

El Paso

Aim Research
10456 Brian Mooney
El Paso, TX 79935
Ph. 915-591-4777
Fax 915-595-6305
E-mail: 76265.2167@compuserve.com
www.aimresearch.com
Linda Adams, Owner/Director
25-20-5-0
(See advertisement on p. 139)

Houston

CQS Research, Inc.
2500 West Loop S., Ste. 300
Houston, TX 77027
Ph. 713-783-9111 or 800-460-9111
Fax 713-789-2020
E-mail: CQSInc@aol.com
www.cqsinc.com
Noel Roulin, President
50-15-50-50

Creative Consumer Research
3945 Greenbriar
Stafford, TX 77477
Ph. 281-240-9646
Fax 281-240-3497
E-mail: ccrhous@insyn.net
Patricia Pratt, Field Director
60-40-60-60

The Gallup Organization - Houston
14405 Walters Rd., #200
Houston, TX 77014-1344
Ph. 281-444-0040
240-240-240-240

Gulf State Research Center
San Jacinto Mall
1670 San Jacinto Dr.
Baytown, TX 77521
Ph. 281-421-7798
Fax 281-421-1976
E-mail: lvillar@gte.net
Robert Landsberger, President
15-10-15-0

InfoPort Research
2221 West Main
Houston, TX 77098
Ph. 713-524-9939
Fax 713-524-4806
E-mail: dp.info@pdq.net
David Parker, Director
10-10-10-10

Mar's Surveys of Texas
3200 Wilcrest, Ste. 100
Houston, TX 77042
Ph. 713-266-6277
Fax 713-266-6276
E-mail: marstx@aol.com
www.marsresearch.com
Deborah Crowther, Telephone Supervisor
30-30-30-30

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
Fay Parker, President
15-6-15-0

Opinions Unlimited, Inc.
Three Riverway, Ste. 250
Houston, TX 77056
Ph. 713-888-0202
Fax 713-960-1160
E-mail: ask@opinionsunlimited.com
www.opinionsunlimited.com
Andrew Martin, Vice President
24-8-24-0
(See advertisement on p. 137)

Quality Controlled Services
17625 El Camino Real, Ste. 100
Houston, TX 77058
Ph. 800-522-2385 or 281-488-8247
Fax 281-486-3831
E-mail: postmaster@qcs.com
www.qcs.com
Diana Reid, Branch Manager
14-0-14-14
(See advertisement on p. 119)

Quest Research
2900 N. Loop W., 10th fl.
Houston, TX 77092
Ph. 713-956-6569
Fax 713-956-2593
E-mail: research@tqba.com
www.tqba.com
Mary Jo Martin, Dir. Rsch. & Database Mkt.
50-50-50-50

Voter/Consumer Research
3845 FM 1960 W., Ste. 440
Houston, TX 77068
Ph. 281-893-1010
Fax 281-893-8811
E-mail: vcr@vcrhouston.com
www.vcrhouston.com
Jerry Goins, Vice President
120-120-120-120

Lubbock

United Marketing Research
1516 53rd St.
Lubbock, TX 79412
Ph. 806-744-6740
Fax 806-744-0327
E-mail: UMR220@door.net
David McDonald, Sales/Marketing Dir.
90-60-80-80

San Antonio

Creative Consumer Research
5411 Bandera Rd., Ste. 307
San Antonio, TX 78238
Ph. 210-520-7025
Fax 210-680-9906
Richard Weinhold, Vice President
50-15-50-0

Galloway Research Services
4346 N.W. Loop 410
San Antonio, TX 78229-5121
Ph. 210-734-4346
Fax 210-732-4500
E-mail: grs@gallowayresearch.com
www.gallowayresearch.com
Linda K. Brazel, General Manager
66-66-66-66

VNU Operations Center
4801 N.W. Loop 410, Ste. 125
San Antonio, TX 78229
Ph. 954-753-6043
70-70-70-70

Waco

M/A/R/C Research
1002 Wales Dr., Ste. 8
Killeen, TX 76542
Ph. 817-634-1118
Fax 817-634-1661
E-mail: david.johnson@marcresearch.com
www.marcresearch.com
David Johnson
164-164-164-164
(See advertisement on p. 37)

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Utah

Provo

BRG Research Services
500 N. 50 E.
Provo, UT 84601
Ph. 801-373-9923
Fax 801-374-2751
Luis Carter, Director
35-27-35-35

Western Wats Data Services Center, LC
288 W. Center St.
Provo, UT 84601
Ph. 801-373-7735
Fax 801-375-0672
E-mail: vic@office.westernwats.com
Vic Walsh
390-390-390-390

St. George

PGM Incorporated
1325 S. 320 E., #4
St. George, UT 84790
Ph. 801-434-9546
Fax 801-434-7304
E-mail: mail@pgmincorporated.com
www.pgmincorporated.com
Todd J. Waters, V.P./Sales
36-36-36-36

Salt Lake City

Discovery Research Group of Utah
2089 E. Fort Union Blvd.
Salt Lake City, UT 84121
Ph. 800-678-3748 or 801-944-0326
Fax 801-944-0550
E-mail: tjbeggs@drgutah.com
www.drgutah.com
Tom Beqqs, Director of Marketing
300-300-300-300
(See advertisement on p. 54)

PGM Incorporated
581 W. 1600 N.
Orem, UT 84057
Ph. 801-434-9546
Fax 801-434-7304
E-mail: mail@pgmincorporated.com
www.pgmincorporated.com
Todd J. Waters, V.P./Sales
114-114-114-89

PGM Incorporated
776 N. 1200 W.
Orem, UT 84057
Ph. 801-434-9546
Fax 801-434-7304
E-mail: mail@pgmincorporated.com
www.pgmincorporated.com
Todd J. Waters, V.P./Sales
51-51-51-45

RTNielson Company
P.O. Box 11481
Salt Lake City, UT 84147
Ph. 801-359-1345
Fax 801-355-6335
E-mail: ron@rtnielson.com
www.rtnielson.com
Ron Nielson, President
120-120-120-120
(See advertisement on p. 9)

Utah Market Research Services
Div. of Ruth Nelson Research
Crossroads Plaza Mall
50 S. Main St.
Salt Lake City, UT 84144-0103
Ph. 801-363-8726
Fax 801-321-4904
E-mail: rnncmrs@aol.com
www.ruthnelsonresearchsvcs.com
Cheri Ingram, Manager
10-0-10-0

Valley Research, Inc.
350 E. 500 S., Ste. 102
Salt Lake City, UT 84111-3351
Ph. 801-907-2000
Fax 801-907-2001
E-mail: valley@valley-research.com
www.valley-research.com
Sheri Guiver, President
20-20-20-20

Venture Data
3320 S. 300 E.
Salt Lake City, UT 84115
Ph. 800-486-7955
Fax 888-522-5498
E-mail: scotts@VentureData.com
www.VentureData.com
200-200-200-200
(See advertisement on p. 140)

Wirthlin Worldwide
1998 S. Columbia Ln.
Orem, UT 84097-8052
Ph. 801-226-1524
Fax 801-226-3483
E-mail: inquires@wirthlin.com
www.wirthlin.com
Kevin Crandall, Director
173-173-173-173

Vermont

Burlington

Action Research
212 Battery St.
Burlington, VT 05401
Ph. 802-862-4370
Fax 802-862-2349
E-mail: samo@actionr.com
www.actionr.com
Samuel P. Osborne, President
14-14-14-0

Macro International Inc.
126 College St.
Burlington, VT 05401
Ph. 802-863-9600
Fax 802-863-8974
E-mail: mahnke@macroint.com
www.macroint.com
Dr. Greg Mahnke, Exec. Vice President
99-99-99-99

Virginia

Newport News/ Norfolk/Virginia Beach

Continental Research Associates, Inc.
4500 Colley Ave.
Norfolk, VA 23508
Ph. 757-489-4887
Nanci A. Glassman, President
14-7-14-14

Eastern Research Services
Pembroke Six, Ste. 318
297 Independence Blvd.
Virginia Beach, VA 23462
Ph. 757-519-9145
Fax 757-519-9685
Nanci Hawkins, Manager
60-60-60-60

Issues and Answers Network, Inc.
5151 Bonney Rd.
Virginia Beach, VA 23462
Ph. 757-456-1100 or 516-487-8339
Fax 757-456-0377
E-mail: info@issans.com
www.issans.com
Peter McGuinness, President
120-120-120-120
(See advertisement on p. 141)

Quick Test
816 Greenbrier Circle, Ste. 208
Chesapeake, VA 23320
Ph. 757-523-2505
Fax 757-523-0463
E-mail: info@quicktest.com
www.quicktest.com
Gerri Kennedy, Manager
20-20-20-20

Richmond

Media General Research
P.O. Box 85333
Richmond, VA 23293-0001
Ph. 804-649-6785
Fax 804-649-6863
E-mail: sshaw@media-general.com
Steve Shaw, Director of Research
15-0-15-0

North American Research
3703 Carolina Ave.
Richmond, VA 23222
Ph. 804-329-4400
Fax 804-329-1681
E-mail: nammails@i2020.net
Amen Kahwajy, Dir. Mktg. Rsch.
32-12-32-32

Southeastern Institute of Research (SIR)
2325 W. Broad St.
Richmond, VA 23220
Ph. 800-807-8981
Fax 800-715-3647
E-mail: SIR@SIRresearch.com
www.SIRresearch.com
Robert Miller, President
49-49-49-49

Roanoke

Issues and Answers Network, Inc.
Russell County Industrial Park
Rural Rte. 2, Box 480
Lebanon, VA 24266
Ph. 757-456-1100 or 516-487-8339
Fax 757-456-0377
E-mail: info@issans.com
www.issans.com
Peter McGuinness, President
120-120-120-120
(See advertisement on p. 141)

Issues and Answers Network, Inc.
Buchanan Information Park
Rural Rte. 3, Box 181A
Grundy, VA 24614
Ph. 757-456-1100 or 516-487-8339
Fax 757-456-0377
E-mail: info@issans.com
www.issans.com
Peter McGuinness, President
90-90-90-90
(See advertisement on p. 141)

Washington

Seattle/Tacoma

Catalyst Research
P.O. Box 19599
Seattle, WA 98109
Ph. 800-918-9301 or 206-281-7111
Fax 206-281-8297
E-mail: info@crni.com
www.crni.com
Evan Reilly, Vice President
120-0-120-120

Consumer Opinion Services, Inc.
12825 First Ave. S.
Seattle, WA 98168
Ph. 206-241-6050
Fax 206-241-5213
E-mail: cos-info@cosvc.com
www.cosvc.com
Jerry Carter, Vice President
17-0-17-0
(See advertisement on p. 56)

Decision Data, Inc.
200 Kirkland Ave., Ste. C
Kirkland, WA 98033
Ph. 425-827-3234
Fax 425-827-2212
Russ Riddle, President
24-24-24-24

First Northwest Group
7907 212th St. S.W., Ste. 200
Edmonds, WA 98026
Ph. 425-775-3500
Fax 425-776-1202
E-mail: 1st.nw.grp@worldnet.att.net
Karen Benedict, General Manager
75-75-75-75

Codes - (e.g. 25-10-25-10)

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3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES- No. of stations which can be monitored off-premises

Gilmore Research Group
2324 Eastlake Ave. E., Ste. 300
Seattle, WA 98102-3306
Ph. 206-726-5555
Fax 206-726-5620
www.gilmore-research.com
Mary Monroe, Sr. Vice President
36-36-36-36

GMA Research Corp.
11808 Northrup Way, Ste. 270
Bellevue, WA 98005
Ph. 425-827-1251
Fax 425-828-6778
E-mail: gma70@aol.com
Richard Secker, Data Collection Grp. Mgr.
34-28-24-24

Market Data Research Corp.
955 Tacoma Ave. S., Ste. 101
Tacoma, WA 98402
Ph. 800-488-DATA or 253-383-1100
Fax 253-383-0852
E-mail: mdrc@aa.net
Gene Starr, Sr. Principal
22-22-22-22

Market Trends, Inc.
(Corporate Headquarters)
375 Corporate Dr. S., Ste. 100
Seattle, WA 98188
Ph. 206-575-1222
Fax 206-575-8779
E-mail: jackie@markettrends.com
www.markettrends.com
Jackie Weise, Exec. Vice President
50-50-50-50

Northwest Research Group, Inc.
400 108th Ave. N.E., Ste. 200
Bellevue, WA 98004
Ph. 425-635-7481
Fax 425-635-7482
E-mail: ethertn@nwrg.com
www.nwrg.com
Mary Kaye O'Brien, V.P. Custom Research
36-21-36-36

Spokane

Communications Center, Inc.
715 E. Sprague, #104
Spokane, WA 99202
Ph. 509-624-8228
Fax 509-624-8341
E-mail: mccarns@comcntr.com
Mike McCarns, Director of Operations
108-108-108-108

KXLY Research Services
500 W. Boone Ave.
Spokane, WA 99201
Ph. 509-324-4200
Fax 509-324-8992
E-mail: stevend@kxly.com
www.kxly.com/research.htm
Steven Dean, Director
20-10-16-16

Robinson Research, Inc.
524 W. Indiana
Spokane, WA 99205
Ph. 509-325-8080
Fax 509-325-8068
E-mail: robinsonresearch@icehouse.net
William D. Robinson, President
30-30-30-30

West Virginia

Charleston

McMillion Research Service
1012 Kanawha Blvd. E.
Charleston, WV 25301-2809
Ph. 304-343-9650
Fax 304-343-6522
E-mail: MCMILLRES@aol.com
http://members.aol.com:/mcmillres/home/index.htm.
Gary or Sandy McMillion, Owners
60-60-60-60
(See advertisement on p. 143)

Taylor Nelson Sofres Intersearch
(Formerly Chilton Research)
1205-1211 Virginia St.
Charleston, WV 25301
Ph. 304-344-4261
Fax 304-344-0745
E-mail: bruce.shandler@intersearch.tnsofres.com
www.intersearch.tnsofres.com
Bruce Shandler, CEO/President
130-130-130-130
(See advertisements on pp. 41, 66)

Wisconsin

Green Bay/Appleton

Leede Research Group, Inc.
1332 S. 26th St.
Manitowoc, WI 54220
Ph. 920-683-5940
Fax 920-683-5950
E-mail: JimD@Leede.com
www.Leede.com
Jim DeZeeuw, Vice President
35-35-35-35

Quality Controlled Services
4330 W. Spencer St.
Appleton, WI 54915
Ph. 800-637-0775 or 920-731-2241
Fax 920-731-2921
E-mail: postmaster@qcs.com
www.qcs.com
Esther Young, Branch Manager
16-16-16-16
(See advertisement on p. 119)

Wisconsin Research, Inc.
1270 Main St.
Green Bay, WI 54302
Ph. 920-436-4646
Fax 920-436-4651
Barbara Smits, President
20-20-20-0

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Madison

Chamberlain Research Consultants
4801 Forest Run Rd., Ste. 101
Madison, WI 53704
Ph. 608-246-3010
Fax 608-246-3019
E-mail: crc@crcwis.com
www.crcwis.com
Nicole Wyrembeck, Project Coordinator
30-10-30-30

Hagler Bailly
University Research Park
455 Science Dr.
Madison, WI 53711-1058
Ph. 608-232-2800
Fax 608-232-2858
E-mail: research@haglerbailly.com
www.haglerbailly.com
Bryan K. Ward, Survey Ops. Manager
36-36-36-36
(See advertisement on p. 73)

Gene Kroupa & Associates
222 N. Midvale Blvd., Ste. 29
P.O. Box 5258
Madison, WI 53705
Ph. 608-231-2250
Fax 608-231-6952
E-mail: gene@genekroupa.com
www.genekroupa.com
Dr. Gene Kroupa, Research Director
20-0-20-20

Quality Controlled Services
Survey Center
702 N. Blackhawk Ave.
Madison, WI 53705
Ph. 608-231-9090
Fax 608-231-6235
E-mail: postmaster@qcs.com
www.qcs.com
Chris Hess-Molloy, Branch Manager
47-47-47-47
(See advertisement on p. 119)

Milwaukee

Advantage Research, Inc.
16875 W. Wisconsin Ave.
Brookfield, WI 53005
Ph. 414-827-7000 or 800-827-1269
Fax 414-827-7010
E-mail: info@ariadvantage.com
www.ariadvantage.com
Maureen Hampel
30-30-30-30
(See advertisement on p. 145)

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
15-8-15-15

The Dieringer Research Group, Inc.
3064 N. 78th St.
Milwaukee, WI 53222
Ph. 414-449-4545 or 800-489-4540
Fax 414-449-4540
E-mail: thedrg@execpc.com
Glen Armstrong, Interviewing Manager
60-60-60-60

Lein/Spiegelhoff, Inc.
720 Thomas Ln.
Brookfield, WI 53005
Ph. 414-797-4320
Fax 414-797-4325
E-mail: LS@EXECPC.COM
www.execpc.com/~LS
Charles Spiegelhoff, President
50-40-50-50

Management Decisions, Inc.
6525 W. Bluemound Rd.
Milwaukee, WI 53213-4073
Ph. 414-774-0623
Fax 414-774-0385
E-mail: MGMTDEC@worldnet.att.net
Ronald D. Bisbing, President
40-20-40-40

Market Probe, Inc.
2655 N. Mayfair Rd.
Milwaukee, WI 53226-1310
Ph. 414-778-6000
Fax 414-778-3730
E-mail: info@marketprobe.com
www.marketprobe.com
Ron Rawski, Co-Manager
Sarah Minear, Co-Manager
75-75-75-75
(See advertisement on p. 142)

Mazur/Zachow, Inc.
1025 S. Moorland Rd., Ste. 300
Brookfield, WI 53005
Ph. 414-938-9244
Fax 414-938-9255
E-mail: mazurzac@aol.com
Diane Zachow, Vice President
15-5-10-0

Milwaukee Market Research, Inc.
10101 W. Innovation Dr., Ste. 350
Woodlake Business & Technology Ctr.
Milwaukee, WI 53226
Ph. 414-475-6656
Fax 414-475-0842
E-mail: mmr@execpc.com
Susan Lehmann, President
17-14-14-0

PERT Survey Research
1209 W. Layton Ave.
Milwaukee, WI 54022
Ph. 860-242-2005
Fax 860-242-4857
E-mail: pertsr@aol.com
Joyce Bergeron, Field Director
40-35-40-40

Canada

Alberta

Calgary

The Advisory Group, Inc.
A Division of Telus Marketing Services
112 - 28 St., S.E.
Calgary, AB T2A 6J9
Canada
Ph. 403-207-2249
Fax 403-207-2275
E-mail: pamela.vanberg@telus.com
www.advisorygroup.com
Pamela Vanberg, Research Administrator
200-65-65-0

Edmonton

Advanis Field Research (AFR)
10123 99 Street, Ste. 1600
Edmonton, AB T5J 3H1
Canada
Ph. 403-944-9212
Fax 403-426-7622
E-mail: info@afr.advanis.ca
www.advanis.ca/afr
Charmaine Symborski
45-45-45-45

British Columbia

Vancouver

Market Facts of Canada - Vancouver
Vancouver, BC
Canada
Ph. 416-964-6262
Fax 416-964-9333
20-20-20-20

Nova Quality Research, Ltd.
2nd fl. - 1622 W. 2nd Ave.
Vancouver, BC V6J 1S5
Canada
Ph. 604-734-2330
Fax 604-734-4725
E-mail: nqr@bc.sympatico.ca
12-12-12-12

Research House, Inc.
Ste. 400 - Hudson House
321 Water St.
Vancouver, BC V6B 1B8
Canada
Ph. 604-687-3714
Fax 604-687-3716
E-mail: vanc@research-house.ca
www.research-house.ca
Tammy Braun, Project Director
20-0-20-20

Manitoba

Winnipeg

Opinion Place
6 - 1146 Waverley St.
Winnipeg, MB R3T 0P4
Canada
Ph. 204-987-1960
Fax 204-987-1928
E-mail: joppenheim@dimark.ca
Jeanne Oppenheim, General Manager
40-18-30-30

New Brunswick

St. John

Com Tel Answering & Telemarketing Svcs., Ltd.
82 Germain St., 3rd level
St. John, NB E2L 2E7
Canada
Ph. 506-634-1267 or 888-351-1111
Fax 506-634-8990
E-mail: comtel@fundy.net
Paula Cormier, President
7-7-7-0

Ontario

Ottawa

Opinion Search, Inc.
1800 - 160 Elgin St.
Ottawa, ON K2P 2C4
Canada
Ph. 800-363-4229
Fax 613-230-3793
E-mail: ehum@opinionsearch.com
www.opinionsearch.com
Janette Niwa, Mgr., U.S. Field Ops.
125-125-125-0
(See advertisement on p. 5)

Toronto

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: kim@canview.com
www.canview.com
Alan Boucquey, V.P. Ops.
40-25-40-25

Consumer Contact
1220 Sheppard Ave. E., #100
Toronto, ON M2K 2S5
Canada
Ph. 800-461-3942
Fax 416-493-0176
E-mail: info@consumercontact.com
www.consumercontact.com
David Black, Exec. Vice President
240-240-240-240

Consumer Vision
1255 Bay St., Ste. 300
Toronto, ON M5R 2A9
Canada
Ph. 416-967-1596
Fax 416-967-0915
E-mail: phyllis.friedman@consumervision.on.ca
Phyllis Friedman, General Manager
40-0-40-0

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Forum Canada Research, Inc.
14 Prince Arthur Ave., Ste. 200
Toronto, ON M5R 1A9
Canada
Ph. 416-960-9600
Fax 416-960-9602
E-mail: forum@pathcom.com
Lorne Bozinoff, President
50-50-50-50

Goldfarb Consultants
21 Randolph Ave.
Toronto, ON M6P 4G4
Canada
Ph. 416-516-5600
Fax 416-250-3610
Zillah Baumal, Vice President
120-120-120-120

Infocus Qualitative Research Services
2300 Yonge St., Ste. 2100
Toronto, ON M4P 1E4
Canada
Ph. 416-487-6251 ext. 215
Fax 416-487-8203
E-mail: infocus@djcresearch.com
Sarah Greenberg, Sr. Vice President
51-51-51-51

Market Facts of Canada
77 Bloor St. W.
Toronto, ON M5S 3A4
Canada
Ph. 416-964-6262
Fax 416-964-9333
36-36-36-36

Market Probe Canada
1243 Islington Ave., Ste. 500
Etobicoke, ON M8X 1Y9
Canada
Ph. 416-233-1555
Fax 416-233-5003
E-mail: b.ritchie@marketprobe.ca
www.marketprobe.com
Bill Ritchie, Director - Field Services
60-60-60-60
(See advertisement on p. 142)

Metroline Research Group, Inc.
22 King St. S.
Waterloo, ON N2J 1N8
Canada
Ph. 800-827-0676
Fax 519-725-5570
E-mail: info@metroline.ca
www.metroline.ca
Dave Kains, Partner, ext. 3003
16-0-10-0

Opinion Search, Inc.
2500 - 2 Bloor St. W.
Toronto, ON M4W 3E2
Canada
Ph. 888-495-7777
Fax 416-962-0505
E-mail: ehum@opinionsearch.com
www.opinionsearch.com
Ruby Huxter, National Field Director
50-50-50-0
(See advertisement on p. 5)

R.I.S. Christie - The Data Collection Co.
14 Verral Ave.
Toronto, ON M4M 2R2
Canada
Ph. 416-778-8890
Fax 416-778-8898
E-mail: ris@inforamp.net
www.rischrisie.com
Olga Friedlander, President
25-25-25-0

Research House, Inc.
1867 Yonge St.
2nd fl. (Qualitative) & 4th fl. (Quantitative)
Toronto, ON M4S 1Y5
Canada
Ph. 416-488-2333 (Quant.) or 416-488-2328 (Qual.)
Fax 416-488-2391 (Quant.)
E-mail: mail@research-house.ca
www.research-house.ca
Paul Gautheir, Vice President
120-110-120-110

Thompson Lightstone & Co., Ltd.
350 Bloor St. E., Ste. 600
Toronto, ON M4W 1H4
Canada
Ph. 416-922-1140
Fax 416-922-8014
E-mail: tlc@tlcl.com
Anne Termaten, V.P. Field Ops. & Tab
210-210-210-210

Walker Information Canada
1090 Don Mills Rd., Ste. 300
Toronto, ON M3C 3R6
Canada
Ph. 416-391-1844
Fax 416-391-3290
E-mail: info@walkernet.com
www.walkerinfo.com
Louis Mosca
110-110-110-110

Quebec

Montreal

Contemporary Research Centre
1250 Guy St., Ste. 802
Montreal, PQ H3H 2T4
Canada
Ph. 800-932-7511 or 514-932-7511
Fax 514-932-3830
E-mail: luc@crcdata.com
www.crcdata.com
Elaine Rioux
44-44-44-44

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
40-30-40-40

Solumar/Market Facts of Canada
1200 McGill College
Montreal, PQ H3B 4G7
Canada
Ph. 514-875-7570
Fax 514-875-1416
28-28-28-28

International

Argentina

ASECOM Latin America
Av. Belgrano 1255
1093 Buenos Aires
Argentina
Ph. 54-11-4381-1118
Fax 54-11-4381-0234
E-mail: research@asecom.com.ar
www.asecom.com.ar
36-36-36-0

Australia

Surveys Australia
5th Floor
168 Walker Street
North Sydney, NSW 2060
Australia
Ph. 61-2-9911-7272
Fax 61-2-9911-7373
E-mail: surveys@surveys.net.au
www.surveys.net.au
Lorna Hall, Exec. Director Operations
80-80-80-0

Surveys Australia
Unit 17, Cavenagh City Centre
24 Cavenagh Street
Darwin, NT 0801
Australia
Ph. 61-8-8941-3955
Fax 61-8-8941-3956
E-mail: surveys@surveys.net.au
www.surveys.net.au
Jennifer Martin, NT State Field Manager
5-0-0-0

Surveys Australia
3rd Floor
349 Coronation Drive
Milton, QLD 4064
Australia
Ph. 61-7-3368-7080
Fax 61-7-3868-7059
E-mail: surveys@surveys.net.au
www.surveys.net.au
Elizabeth Donavon, QLD State Field Manager
35-35-35-0

Surveys Australia
Ground Floor
10 Richardson Street
West Perth, WA 6005
Australia
Ph. 61-9-322-1652
Fax 61-9-324-1130
E-mail: surveys@surveys.net.au
www.surveys.net.au
Laurie Formentin, WA State Field Manager
30-30-30-0

Surveys Australia
479 St. Kilda Road
Melbourne, VIC 3004
Australia
Ph. 61-3-9207-3900
Fax 61-3-9207-3910
E-mail: surveys@surveys.net.au
www.surveys.net.au
Maree Ward, VIC State Field Manager
60-60-60-0

Surveys Australia
135 Fullarton Road
Rose Park, SA 5067
Australia
Ph. 61-8-8364-5518
Fax 61-8-8364-2624
E-mail: surveys@surveys.net.au
www.surveys.net.au
Julie Greene, SA State Field Manager
30-30-30-0

Belgium

COMPASS International
Rue de la Valler 4
1050 Brussels
Belgium
Ph. 612-905-8400 (U.S.)
Fax 612-686-9981 (U.S.)
E-mail: dford@compassresearch.com
www.compassresearch.com
David Ford, Vice President
10-10-10-10

DIMARSO
240 Avenue Rogier
1030 Brussels
Belgium
Ph. 32-2-215-19-30
Fax 32-2-216-13-96
E-mail: info@dimarso.com
96-96-96-0

Brazil

ABACO Marketing Research, Ltd.
Sao Paulo Marketing Center
Rua Minas Gerais, 396
01244-010 Sao Paulo
Brazil
Ph. 55-11-257-0711
Fax 55-11-256-3982
E-mail: abaco@amcham.com.br
Alan Grabowsky, President
6-0-6-0

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Avenida Paulista 2644 - 7th floor
Sao Paulo
Brazil
Ph. 55-11-258-8671
Fax 55-11-255-4350
E-mail: precise@internetcom.com.br
Janice M.B. Grabowsky, Vice President
24-12-12-0

Gazelle International, Inc.
Centro Nacional de Pesquisa Sil Ltda.
Rua Chilon 171
04552-030 Sao Paulo
Brazil
Ph. 55-11-3044-4450
Fax 55-11-3044-4450
E-mail: cnp.king@nw.com.br
Ellen King
25-25-25-25

China

The AMI Group of Companies
9/F, Leighton Centre
77 Leighton Road
Causeway Bay
Hong Kong
Ph. 852-2881-5388
Fax 852-2881-5918
E-mail: info@ami-group.com
www.ami-group.com
60-60-0-0

Asian Commercial Research Ltd. (ACR)
Affiliate of NIPO
15/F Hua Fu Commercial Building
111 Queen's Road West
Hong Kong
Hong Kong
Ph. 852-2516-7835
Fax 852-2516-7105
E-mail: wm_acr@hk.super.net
www.asian-research.com
Wander Meijer
40-40-40-0
(See advertisement on p. 23)

France

Field Facts International
5 rue de Ponthieu
75008 Paris
France
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Fax 31-20-645-59-30
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Fax 44-171-890-9362
E-mail: c.goldsmith@nopres.co.uk
Michael Hague-Moss, Chairman
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Alma McLaughlin, Field Director/Owner
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Customer Satisfaction Research and Consulting
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Fax 612-962-5093
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Sales Offices

Headquarters: Evan Tweed, Quirk's Marketing Research Review, 8030 Cedar Avenue South, Suite 229, Minneapolis, MN 55425. Phone 612-854-5101. Fax 612-854-8191. E-Mail: evan-qmrr@mn.uswest.net.

West Coast: Lane Weiss, Lane Weiss & Associates, 10 Black Log Road, Kentfield, CA, 94904. Phone 415-461-1404. Fax 415-461-9555.

Classified Ads

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important to help shape their attitudes toward research through some of the activities on the legislative end. I think it's critical that the respondent cooperation activities continue to focus on the value of research and the importance of respondent participation in that process.

"In addition, there are a lot of things in terms of technology that will affect cooperation, things like Caller ID. We have to not only be aware of those technologies but also understand who the refusers are and why they refuse. The more we understand who they are the better we can take steps to reach them through some kind of public education programs.

"And the industry must rally behind CMOR and understand that we need to speak with one voice. I keep hearing that term and I think people do have to rally together to define and measure the problem. With the different research methodologies, people approach cooperation rates differently, which is understandable but I think it makes it that much harder to define and measure."

Can exposing people to research via on-line surveys, for example, help show consumers that research can be fun and that it also has value?

"There is an educational quality to some on-line surveying. Providing that there is sufficient information in the survey that talks about the value of the research and what happens to the information and encourages them to participate again. What a consumer needs to know is that there are various ways of collecting data. Yes it's fun get on the Net and do a survey, but there are so many other methodologies that may be appropriate. I could see where on-line surveys may be even more helpful with a younger age group in helping them start understanding what the research process is."

How can the client companies, the research buyers, help to improve cooperation?

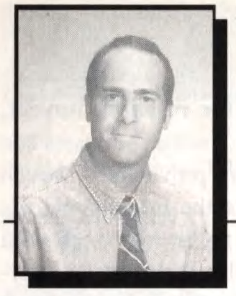
"It's one thing to educate the research providers — we can do that fairly well because we have the inroads and the mechanisms. But we're also going to have to work with clients on survey design issues, the things that really interfere with cooperation, the length of interviews, the introductions, the closings, etc.

"Sometimes I think the clients are focused on getting as much data as possible and the researchers have to educate them on the trade-off between getting more data and what it's doing to hurt the relationship with the potential respondent pool. Clients truly need to be more aware of the issues and understand the issues and their implications. I think they need to be open to allowing the research providers to guide them toward what is best in the industry.

"CMOR has put together a list of recommended industry guidelines to improve cooperation and one of the big initiatives is to get the founding associations to support it and disseminate it to client companies and to the research companies, to show that these are the best practices that will help respondent cooperation.

"It's very difficult to get the industry to agree on what should be included in a survey introduction, or in a closing statement, but the guidelines provide a framework based on research we have done into cooperation. We also need to be able to track the guidelines and make sure they continue to be appropriate.

"Clients know the importance of treating their customers with respect and dignity. I think you can take those same key principles and apply them to respondents as well."



Trade Talk

By Joseph Rydholm, QMRR editor

Operation Cooperation

Jane Sheppard says she likes a challenge. Well, I think she's facing a good one. Sheppard was recently named director of respondent cooperation for The Council for Marketing and Opinion Research (CMOR), an industry-supported association that, in addition to lobbying against legislation that may restrict the research process, works to boost respondent cooperation.

Declining cooperation rates aren't keeping me up at night, but I do worry that the industry is facing a Sisyphean task in trying to surmount the many obstacles between the researcher and the respondent (such as Caller ID and other screening devices; consumers' justifiable right to privacy; telemarketers who sell under the guise of research; federal and state laws that lump legitimate researchers with the aforementioned unscrupulous telemarketers).

In her new position, Sheppard is charged with leading "industry-wide efforts for addressing declining respondent cooperation, protecting respondent rights, and establishing guidelines for interviewing," according to the CMOR press release.

She certainly seems well-qualified. Having spent time on the research company side with stints at Arbitron, Westat, and Birch Radio Research, and on the client side during the past 14 years at Goodyear Tire & Rubber, she knows the research business. She has also been active with local and national Marketing Research Association chapters and with the American Marketing Association.

She will maintain two offices, one at CMOR headquarters in Port Jefferson, N.Y., and one close to her home in the Cleveland area, which is where I reached her by phone in April.

What are the biggest hurdles facing the industry in increasing respondent cooperation?

Sheppard: "An obvious one is legislation that restricts our ability to speak with respondents, restricts who we can talk to and when. There is a fundamental link between respondent cooperation and government affairs. Those lawmakers and their constituents could be potential respondents so it's

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Dilbert

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