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Marketing Research Review

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November 2000

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Are you ready for some football?

Three cities top the nationwide standings with the highest percentage of die-hard National Football League (NFL) fans. According to a study by New York-based Scarborough Sports Marketing, the cities containing the highest concentration of avid NFL fans are Milwaukee (38 percent), Jacksonville, Fla. (37 percent) and Kansas City (33 percent). One-third or more of the adult population in these three cities are "very interested" in the pigskin pastime compared to the national average of 23 percent.

How do cities without a home team rank? The NFL scores high in Sacramento, Calif. (30 percent), Las Vegas (29 percent), San Antonio, Texas (29 percent), and Fresno, Calif. (29 percent). However, most cities without an NFL team are not home to football fanatics. In Lexington, Ky. (11 percent), Greenville, S.C. (16 percent), and Portland, Ore. (17 percent), less than one-fifth of residents are die-hard NFL fans.

"Cities with successful teams and high profile players naturally have a greater concentration of avid fans," says Evan Goldfarb, senior vice president, Scarborough Sports Marketing. "Specifically looking at the St. Louis Rams, the 1999 Super Bowl champions, their current ranking is at an average avidity level. This measurement time period includes the 1999 season and I anticipate this percentage to climb in future studies in light of their recent successes."

The Scarborough study revealed that avid NFL fans tend to be between the ages of 18-34 (34 percent), male (69 percent), well over half own their own home (66 percent), and their average household income is $59,585 per year. Avid NFL fans tend to be computer-savvy with 63 percent owning a home computer and almost a quarter of them using the Internet to keep up with sports scores (26 percent).

The data for this report was compiled from August 1999 to March 2000 from release one of the 2000 Scarborough six-month database. Scarborough Sports Marketing measures local market consumer and lifestyle information by interviewing over 85,000 adults (ages 18+) in 64 U.S. markets including all professional sports markets. Scarborough's sports measurements focus on four key areas: fan avidity; multimedia measures including sports viewing and listening; corporate sponsorship information including fans' shopping

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Cleanliness, price top list when choosing lodging

Cleanliness isn't just important, it is the number one feature that travelers look for when deciding where to stay, according to a survey by the American Automobile Association (AAA), Orlando, Fla.

The survey, conducted by AAA Market Research, named the top five factors in choosing an accommodation. Those identified factors are:

• Cleanliness - Guests want rooms and common areas to be thoroughly cleaned and well maintained with all equipment in good working order.

• Price/value - The cost should reflect guest expectations in terms of amenities and decor. Quoted rates should match advertised discounts and benefits.

• Location - Proximity to business or leisure-related activities is highly valued.

• Room amenities - Movies, coffee maker, hair dryer, and iron and ironing board were mentioned most often by survey respondents.

• Professional, friendly service - Housekeeping and other reasonable needs should be provided on request, and the staff should have a neat appearance, operating professionally and ethically.

Survey respondents stayed in Diamond Rated accommodations an average of 3.3 times in the last 12 months and 84 percent of them used AAA's TourBook guides to choose those accommodations. Additionally, 95 percent of respondents agreed with the assigned AAA Diamond Rating. For more information visit www.aaa.com/news.

Modalis Research Technologies, San Francisco, has named **Scott Worthge** vice president/account executive, Silicon Valley. In addition, **Donna Victoria** has been named vice president/account executive, Washington, D.C., and **Mary Monroe** has been named vice president/account executive, Seattle.

Victoria **Monroe**

Warner Music Group, New York, has named **Jane Clarke** senior director of market research.

Interviewing Service of America, Inc., Van Nuys, Calif., has named **Tom McNiven** vice president, business development, and **Keith Kang** controller. In addition, **Sarah White Phillips** has been promoted to account services manager, **Donna Hunt** to director of human resources, and **John Fitzpatrick** to vice president information systems and technology.

David Bradford has joined Saskatoon, Saskatchewan-based research software firm *Interactive Tracking Systems* as vice president, international sales and marketing, in the firm's new in Fairfield, Conn., office.

Alliance Research, Inc., Crestview Hills, Ky., has named **Dick Chay** executive vice president.

Jerry Thomas, president and CEO of *Decision Analyst Inc.*, Arlington, Texas, was among 11 graduates of the University of Texas at Arlington to be honored by the Alumni Association at a Distinguished Alumni Gala in October. Separately, **Michelle Castillo** has been named director of medical research at Decision Analyst.

Merle Holman, president of Bala Cynwyd, Pa.-based *Group Dynamics in Focus* has been named a state winner of the *Blue Chip Enterprise Award*. The annual award, co-sponsored by the United States Chamber of Commerce and the MassMutual Financial Group, recognizes small businesses that have overcome challenges, seized opportunities, creatively utilized resources and achieved success.

Holman **Dewey**

Helen Dewey has joined *Knowledge Systems & Research*, Syracuse, N.Y., as a senior research analyst.

Kyle Langley has been named director of product management at *Simmons Market Research Bureau*, New York. In addition, **Chris Wilson** has been named president.

Technology Forecasters, an Alameda, Calif., research firm, has named **Bruce Spivack** to its manage-

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New version of Perception Analyzer

Portland, Ore.-based MSInteractive (formerly Columbia Information Systems) has released an update to its Perception Analyzer software. The new 6.2 software includes several features and enhancements to the system, including ease of use features that automate and simplify the data collection and troubleshooting processes. In addition, the new software integrates PowerPoint 2000, allowing moderators to focus on the Analyzer software, and making presentations easy to use for questioning. Internet capabilities have also been added to the Analyzer software - it is now possible to create Web-based surveys utilizing the same Analyzer questions used for live audiences. The data may be aggregated and viewed in conjunction with dial-collected data or as a stand-alone, Web-only survey. For more information visit www.cinfo.com.

WinCross, WinQuery updated

The Analytical Group, Inc., Scottsdale, Ariz., has released WinCross 3.0, an updated version of its crosstabulation system. New features and enhancements include: charting; data editing; an "edit selections" feature for easier table selection; a threshold for "other" rows; comments for tables; an increase in the maximum number of rows to 3,000 per table; and support for long-character file names. The company has also released version 2.0 of its WinQuery market research interviewing software. New features include: a Windows-based interviewing/Web module; a never-call list; voice capture; audio playback during the interview; auto-dialing, optional power-dialing and predictive dialing; enhanced long answer lists; wide area network (WAN) support; and integration with WinCross. For more information visit www.acsinfo.com or call 800-946-3767.

SmartViewer from SPSS

SPSS Inc., Chicago, has introduced SmartViewer Web Server 2.0, which enables information workers to publish, store and distribute

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Research Calendar

INSURANCE RESEARCH CONFERENCE: The Society of Insurance Research will hold its annual conference on November 12-15 at the Hyatt Regency Riverwalk Hotel in San Antonio, Texas. For more information contact Stan Hopp at 770-426-9270 or at stanhopp@mindspring.com or visit www.sirnet.org.

ESOMAR ADVERTISING CONFERENCE: The European Society for Opinion and Marketing Research (ESOMAR) will hold its Advertising 2000 conference on November 12-14 in Rio de Janeiro. For more information visit www.esomar.nl.

SEGMENTATION CONFERENCE: The Institute for International Research (IIR) is sponsoring SCOPE 2000, a customer segmentation and relationship marketing conference with the theme "Integrating Customer Knowledge Across the Organization to Build Profit," on November 12-15 at the Hyatt Regency Scottsdale at Gainey Ranch, Scottsdale, Ariz. For more information call 888-670-8200 or visit www.iir-ny.com.

ASIA MARKETING CONFERENCE: The European Society for Opinion and Marketing Research (ESOMAR) ESOMAR will hold a conference on marketing in Asia-Pacific on November 26-28 in Bangkok. For more information visit www.esomar.nl.

SAWTOOTH TECHNOLOGIES SEMINARS: Sawtooth Technologies will hold the following seminars near the company's offices in Evanston, Ill.: conjoint analysis: theory and practice, December 4-5; introduction to the ACA System, December 6; introduction to choice-based conjoint, December 7. The seminars are designed for researchers who have had little or no practical exposure to the techniques. For more information call Sue Tavitas 847-866-0870 or visit the company's Web site at www.sawtooth.com.

ONLINE RESEARCH STRATEGIES: The International Quality & Productivity Center will hold a conference titled "Strategies to Improve Online Market Research" on December 12-13 at the Hyatt Regency, New Orleans. For more information call 800-882-8684 or visit www.iqpc.com.

DeepCanyon.com, an online source of market research reports and information, closed in October after it failed to secure a second round of financing.

Rochester, N.Y.-based **Harris Interactive** announced that all federal claims against America Online, Inc. (AOL) in conjunction with its July 31 lawsuit have been dropped. The suit contends Harris Interactive's name was unfairly and arbitrarily placed onto Mail Abuse Prevention System, LLC's (MAPS) Realtime Blackhole List (RBL), a list of companies accused of electronic mail abuse. MAPS' action prompted the named ISPs to block Harris Interactive from corresponding with many of its registered subscribers.

Since legal proceedings have commenced, Harris Interactive has been in communication with AOL and, as a result, Harris Interactive has voluntarily agreed to drop AOL as a defendant in the litigation. Harris Interactive's dropping of AOL from the litigation is not contingent upon any agreement between AOL and Harris Interactive regarding the delivery of Harris Interactive's e-mail to its AOL members. However, Harris Interactive believes that it is now able to fully communicate with all of its registered respondents who have AOL e-mail addresses.

Separately, Harris Interactive, in conjunction with 3Com Corporation, will stage The Planet Project: Your Voice, Your World, beginning November 15. The Planet Project is a four-day online poll (at www.planetproject.com) which will give people around the world the chance to share their thoughts and opinions in real time.

Preliminary data from the latest **ESOMAR** (European Society for Opinion and Marketing Research) study show that the total market for market research worldwide in 1999 was $14.643 billion, an increase of $1.233 billion or 8.3 percent over the previous year.

The European Union accounted for 39.2 percent of the total world market and Europe as a whole 42.3 percent. The U.S. accounted for 37.1 percent of the total world market and Japan 7.3 percent.

The European share of the total world market declined from 43.5 percent in 1998 to 42.3 percent in 1999. This arose primarily because of the fall in the value of the euro against the dollar over the period in question. In terms of euros, the market in Europe rose by 10.7 percent over the level reported in 1998 - a comparable rate of growth to that achieved in the U.S. (10.1 percent in terms of dollars). However, the rate of growth in the European Union calculated in euros continues to decline as the market matures.

The apparent high rate of growth in Japan (18.9 percent) is largely a result of the appreciation of the yen against the dollar. In local currency the rate of growth was a much more modest 3.4 percent. The improvement in Japan is mirrored by the recovery of the Asian market for research in general with an overall increase in the region of 18.8 percent.

Note: The 1998 data take into account more accurate information from countries received since the last report was published. As this is a preliminary report, changes in the information might be included with the full details of the results of the 2000 ESOMAR Study of the Worldwide Market for Market Research, which will be published later in the year. For more information visit www.esomar.nl.

Brigham Young University's NewsNet service has cited Provo, Utah-based research firm **Western Wats Center** (WWC) for its help in the NewsNet service winning a second straight EPpy Award for Best College Newspaper Online Service. The award is given by *Editor and Publisher Magazine*. WWC has provided online research for NewsNet since 1999 and provided the NewsNet staff with audience statistics that helped NewsNet meet the needs of its users.

Menlo Park, Calif.-based marketing information firm **Knowledge Networks** has acquired Cincinnati-based **Promotion Decisions Inc.** (PDI), a consumer purchase tracking firm.

MarketTools, Inc. a Sausalito, Calif., application service provider, and **Sawtooth Software, Inc.**, Sequim, Wash., have formed a partnership that will enhance MarketTools' zTelligence system through the development of Web-based conjoint analysis modules based on Sawtooth Software's research software products.

Separately, Sawtooth Software and **Online Insight Inc.**, an Atlanta eCRM technology firm, have signed an exclusive contract to accelerate development of guided selling and customer insight applications for e-commerce, including enhancements to Online Insight's existing products, Precision Choice and Precision Insights.

ESOMAR and the **Advertising Research Foundation** have released the ESOMAR/ARF Guideline on Conducting Marketing and Opinion Research. Specifically, the Guideline sets out the following ethical and professional standards to be observed by all those conducting online research:

- Respondent cooperation is voluntary and no personal information should be sought from or about respondents without their prior knowledge and agreement.
- The researcher's identity must be disclosed to respondents.
- Respondents' rights to anonymity and adequate security of data must be safeguarded.
- Survey reports should describe the methods used.
- Special care must be taken when interviewing children and young people.
- Researchers should not send unsolicited messages online to respondents who have indicated that they do not wish to receive such messages relating to that specific research project.

ESOMAR issued a first guideline on Internet Research in 1998. This updated ESOMAR/ARF version is endorsed by the ICC (International Chamber of Commerce), WAPOR (the World Association of Public Opinion

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War Stories

True-life tales in marketing research

By Art Shulman

Editor's note: "War Stories" is a semi-regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. If you have a funny tale to tell, contact Art at 818-782-4252 or at artshulman@aol.com. Contributors may remain anonymous.

Measuring opinions is so prevalent these days. You never know where you might be interviewed - including the emergency room of a hospital I recently was admitted to. I was having severe abdominal pain and couldn't help but constantly moan loudly while awaiting the clerk to complete the paperwork. I apologetically explained to other patients and their families, in between moans, that this was not really a ploy for attention.

Finally, I was taken to an examining room where I saw something comforting hanging on the wall, just next to me: a colorful smiley-face scale! The scale was on a plastic chart, with the headline, "Universal Pain Assessment Tool."

Along with the 0-10 numbers across the top, six smiley faces illustrated the even numbers on the scale. For example, the "0" smiley had a large curvy smile and bright, wide-open eyes. The face was dark green, but I disregarded that.

On the "10" end of the scale a crimson face wore a severe frown. He was crying, poor guy, and small lines near the nose and lips suggested he was quivering. His eyelashes were formed into some Chinese word-like characters.

Then the interviewer - er, nurse - directed my attention to the chart and asked, "Using this 0-to-10 scale, where 0 represents no pain and a 10 represents the worst possible pain, how would you rate your pain?"

"Ten," I blurted, even though my face wasn't crimson (it was no doubt rather pale, actually), I didn't have an inverted smile, and my eyelashes weren't displaced across my brow.

Having gathered this important information, the medical staff proceeded with other, more conventional evaluations, such as blood analysis, EKG, etc. They also listened to my explanation that I probably had pancreatitis, since I'd had this ailment 15 years ago, with similar symptoms.

Soon I was wheeled up to a room, and treatment began both for the pain and the ailment. To my amazement, hanging on the wall was the identical Universal Pain Assessment Tool chart, still bright with green, blue, purple, orange, and crimson faces. The chart sure was universal: It seemed to be hanging in every room I went into.

As I glanced at the lower end of the scale I was especially intrigued by the light green face, number 2 on the scale, which signified mild pain. He still wore a smile - What a trouper! - though not as broad a smile as the dark green "no pain" smiley. The light green guy having a smile was a bit odd, I thought, but perhaps understandable, given the day-to-day hospital experience, where mere mild pain seems to be grounds for a smile.

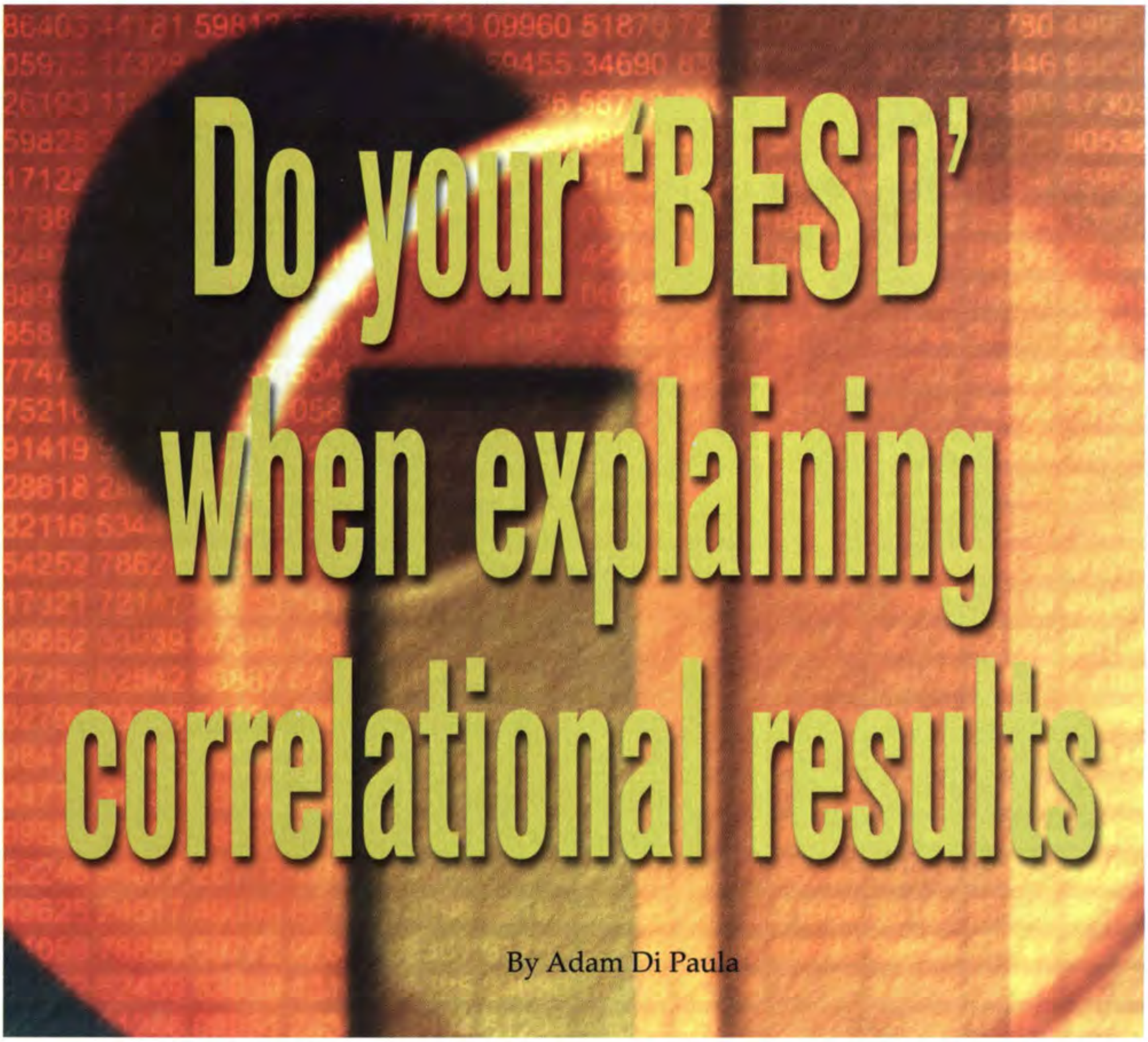
One morning a few days later, my wife brought in several get-well cards, each of which was bright, colorful, and cheery. I decided to hang them on the wall.

The get-well cards reminded me to, well, get well, to feel appreciated and liked. One of my favorite cards was signed by a friend. It said, "Hi, Art! A BIG HUG to make you feel better." This was followed by the writer's name (which happens to be Joy), and a hand-drawn smiley face.

In contrast to that wonderful smiley face, the ones on the Universal Pain Assessment Tool hanging next to the cards reminded me only of misery. So I ripped the chart from its Velcro moorings and decided not to return it to the hospital. Let the next person in my room ponder positive thoughts of wellness rather than indicators of pain.

So there it is, my written confession: I'm a crook. But I'm not totally to blame. A smiley scale made me do it.

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. You may remain anonymous!



Do your 'BESD' when explaining correlational results

By Adam Di Paula

Editor's note: Adam Di Paula is project director at CGT Research International, Vancouver, B.C. He can be reached at adipaula@cgtnet.com.

One of the most difficult challenges facing market researchers is to explain the practical importance of statistical results. Undoubtedly, many researchers can recall instances when their presentations of statistical results were met with blank stares, glazed eyes and uncomfortable silence. The difficulty is not limited to explaining results based on complex statistical procedures. The correlation coefficient (r) is a case in point. In this article I will discuss how using a technique called the binomial effect size display can aid in communicating the importance of correlational results.

A correlation coefficient is a number that tells us how strong the relationship between two variables is. The number can range from -1 to 1, with higher numbers (in either the positive or negative direction) indicating a stronger association between variables. Correlations are used for a variety of purposes, e.g., to determine drivers of overall satisfaction or to predict purchase behavior.

Calculating the coefficient is easy (usually a matter of point-and-click). Problems arise when we want to explain the meaning of the results. Two oft-used methods of explanation often fall short of providing clients with a clear understanding of what the results mean (and why the client should care).

One way that researchers attempt to explain the importance of correlational results is by computing the "percent of variance accounted for," which is done by squaring the correlation coefficient. Thus, if the correlation between two variables, say education and income, is .5, we can conclude that 25 percent of the variance in income can be

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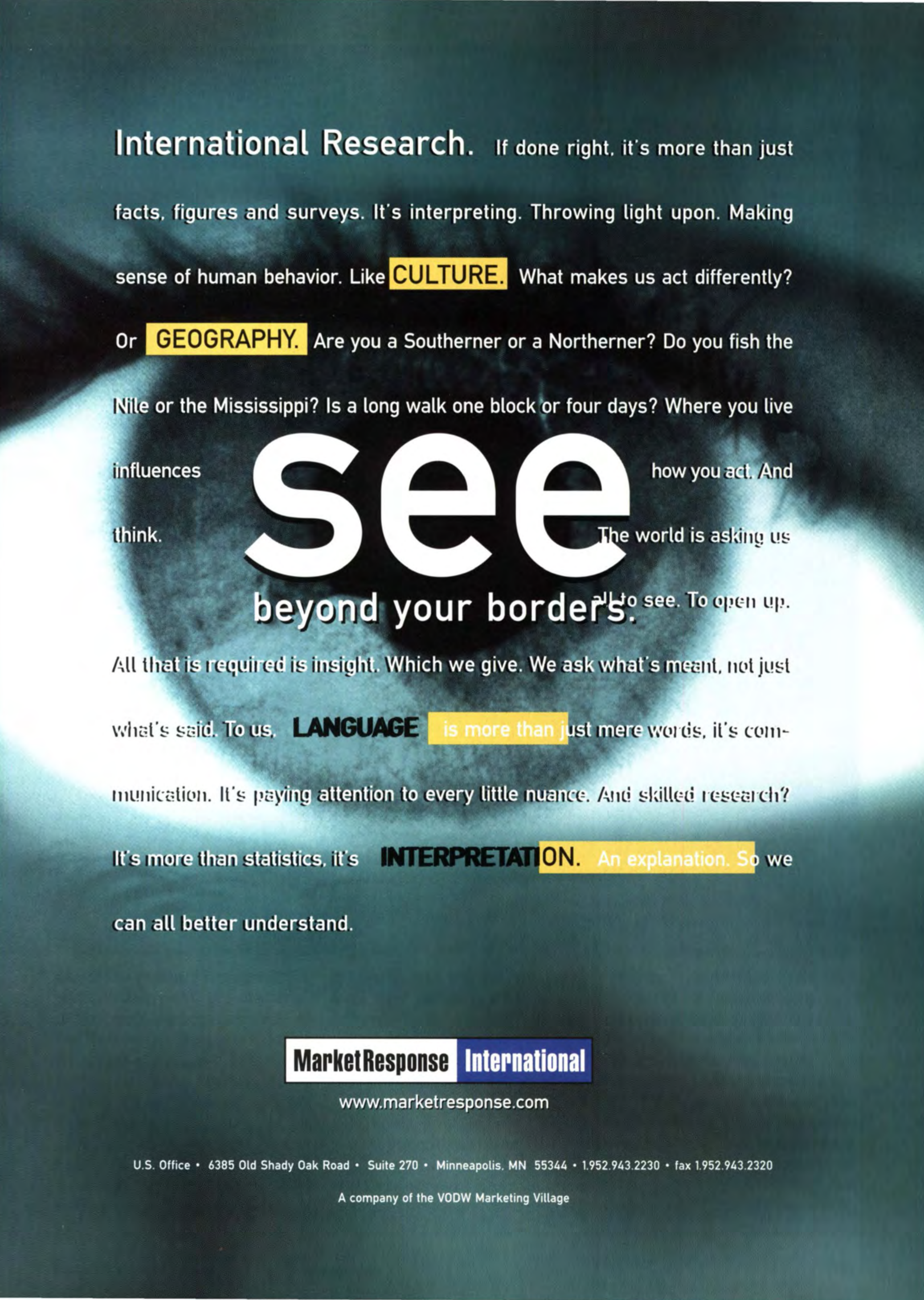
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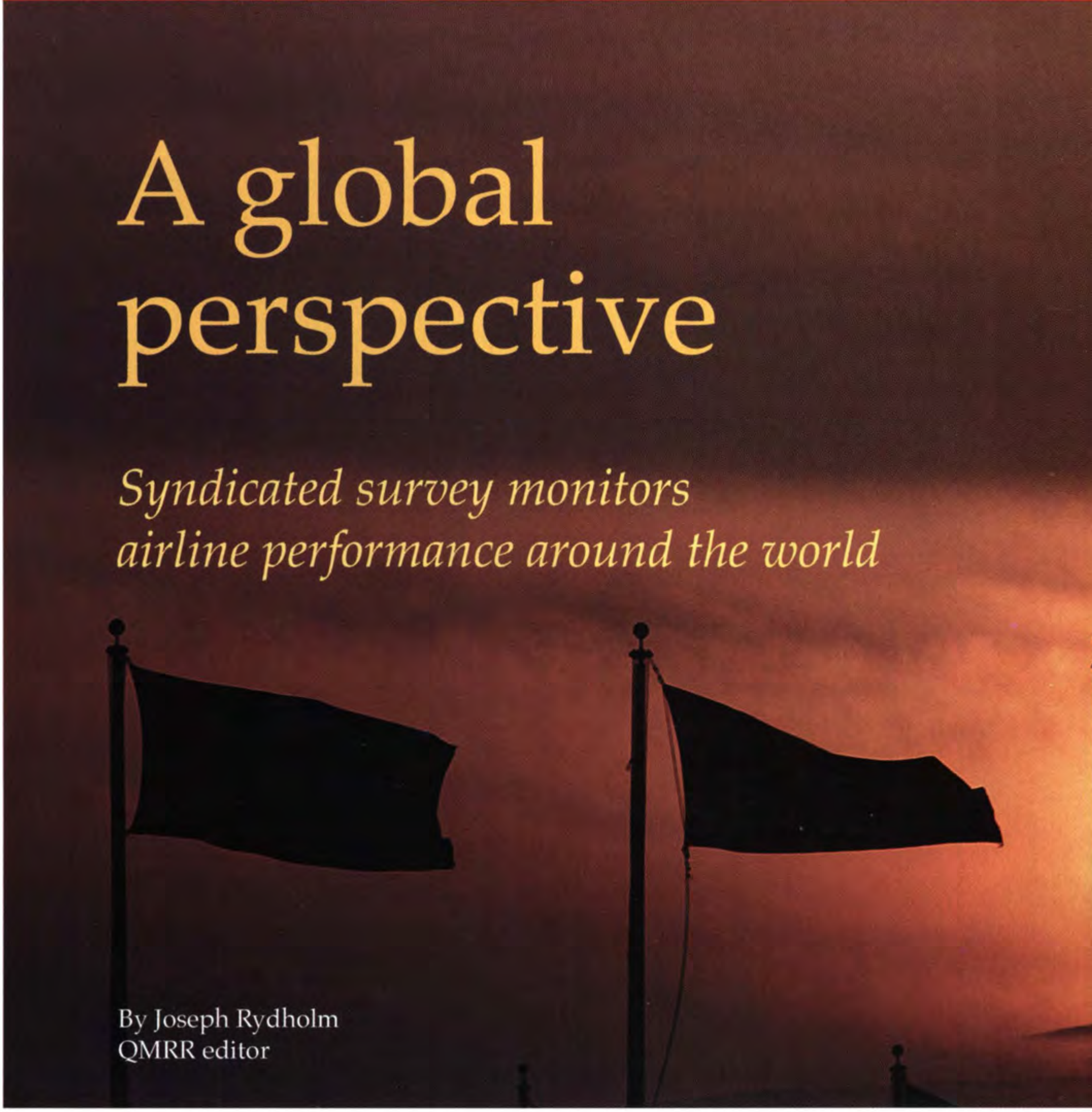


A global perspective

Syndicated survey monitors airline performance around the world

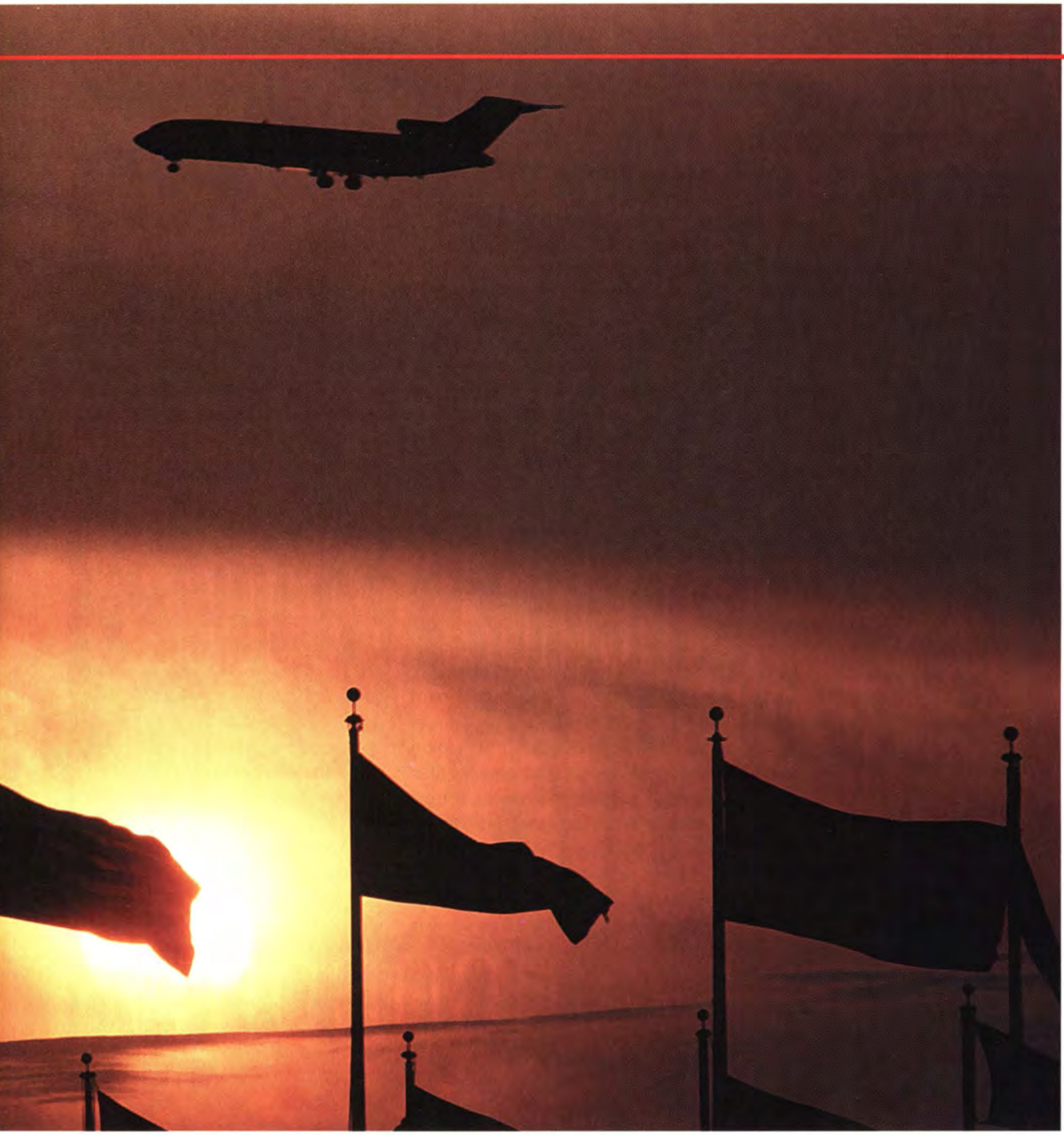
By Joseph Rydholm
QMRR editor

The Global Airline Performance (GAP) study is a joint venture between P. Robert and Partners (PRP), a Swiss research firm, and the London-based Aviation Information and Research unit of IATA, the International Air Transport Association.

The syndicated study uses a two-part survey to measure the opinions of air travelers on 22 airlines departing from 30 airports in North America, Europe, and Asia. Each year, 240,000 passengers are interviewed. Depending on the airline routes being researched, the survey can be conducted in seven languages: English, French, Dutch, German, Swedish, Chinese, or Japanese.

GAP Transatlantic (operating since July 1999) covers 16 airlines, 15 airports in North America and 10 in Europe. GAP Transpacific (October 1999) covers 12 airlines, 15 North American and four Asian airports. GAP Europe to Asia (April 2000) encompasses 12 airlines, six European airports and four Asian airports.

No airline or airport personnel are involved in the survey distribution process, which eliminates any potential for airline employee-introduced bias and also frees cabin crews from an extra burden. Instead, GAP inter-



viewers in each airport approach air travelers at their gate or in the departure lounge to engage them in the survey process, which entails completing a four-page questionnaire prior to departing and a second, shorter form at the conclusion of their flight.

"We interview them when they are the most available: before the flight," says David Perroud, GAP manager, P. Robert and Partners. "Many people at that time are just waiting for the flight to board so anything that can distract them from waiting is welcome. We have very few refusals."

The respondent gives the completed first part to the GAP representative, who then instructs him or her on how to return the second part, either by the postage-paid mailer, by fax or by telephone.

In 20-some questions, part one of the survey examines the performance of airline staff during reservation and check-in, the respondent's impression of the airport facilities, and gathers other information about flying habits, frequent flyer program membership, and demographic data.

Part two looks at the boarding process, the airplane's cabin comfort and features, the cabin crew, food and beverage service, onboard amenities, and post-flight impressions in addition to overall assessment of the air-

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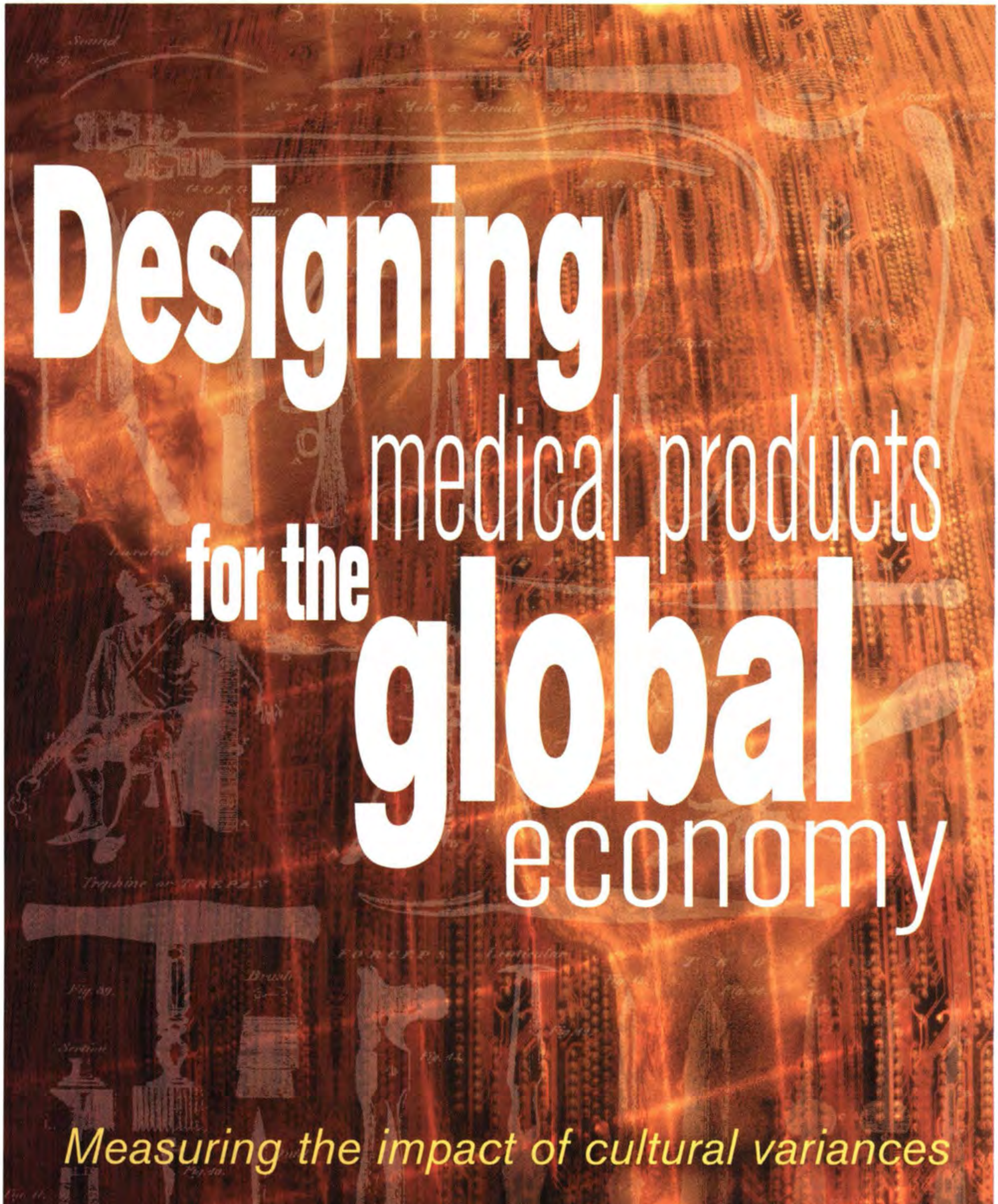

Designing medical products for the global economy

Measuring the impact of cultural variances

By Bryce G. Rutter and Tammy Humm Donelson

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Studies show that 80 percent of a product's cost is determined in the first 20 percent of development. Make a few wrong turns in this early stage and soon your product development costs are skyrocketing. One of the keys to eliminating unnecessary costs in product design is conducting design research early in the development stage. When the product is entering the global market, the variances of each country must be considered. In today's global economy cross-cultural research is fast becoming the technique of choice to determine product viability. At the very simplest level, cross-cultural research involves studying respondents from more than one culture. The dilemma is that "culture" is a very large variable, and interpreting cultural differences is vulnerable to subjectivity.

Medical products are particularly sensitive to cultural influence because the differences in medical practices throughout the world are considerable. Private practice vs. socialized medicine; holistic vs. clinical approach; environments from doctors' offices to urban hospitals to rural clinics. These are just a few of the cultural differences in medical treatment. Cross-cultural research provides the steps to overcoming these potential marketing barriers.

Like all research, cross-cultural studies provide qualitative and quantitative data that can be translated into an analysis of user needs. Quality cross-cultural research assesses and analyzes differences in perception, context and use in selected countries or geographic locations. Just as successful product developers wouldn't attempt a new product without comprehensive research, a global enterprise shouldn't enter the world market without proper cross-cultural research. Information on how products are perceived in different geographic locations greatly increases the likelihood of global success.

Avoiding the pitfalls

Once armed with the right information, it is much easier to penetrate the global market. Unfortunately, in the rush to get to market, some manufacturers take the global plunge and then find out that the lack of cultural information creates a virtual minefield of potential marketing disasters. Here are some of the most common mistakes:

Boardroom design

Boardroom product design usually revolves around marketing, engineering or product aesthetics without involving consumers. The problem with creating the widget and then looking for a market is obvious. Research should test every assumption so that product viability is based on quantitative results. Design by the consumer vs. design by the corporate boardroom ensures greater product acceptance and longevity because the consumer input determines the product outcome.

The "me, too!" mentality

Another tendency of boardroom product design is the "me, too" product that mimics the competitors. This stifles creativity and is a death knell for company growth. Resigning a company to the "me, too" mentality automatically puts it in the role of industry follower, not industry leader. Products are relegated to a commodity market where real differences are hard to find and price becomes the deciding factor. Obviously this is not where manufacturers want to be because it means constantly reducing profit margins to stay competitive. A better option is to differentiate a product through usability and functionality. A comprehensive research matrix that includes cross-culture work, design research, and examinations of ergonomics, marketing, and perception and usability provides a basis for creative thinking that's grounded in reliable data. Creating a product that captures the market requires out-of-the-box thinking that's based on consumer input.

Feature creep

Features are not synonymous with functionality. In fact, unnecessary features can be detractors instead of benefits. Feature creep is the result of trying to make one product fit all. One client says they need a particular feature. Another client wants a different feature. Eventually all the features overwhelm the usability. Feature creep happens in every product category; however, medical products are particularly susceptible because they need to work in a host of different medical environments and cultures. Features necessary in one country may not be important in another. Instead of adding different features for each country, cross-cultural research discovers which features can be distilled down into one solution, which can be eliminated and which are required, country-specific variances. The goal is to get this information early in the product development process when all possibilities are open.

Over-simplifying

When consumer and product studies are conducted among respondents in different cultures they are often done on a superficial level that can only make simplistic cultural attributions explaining the differences. Catastrophic mistakes occur when design, manufacturing, or marketing decisions are made based on over-generalized conclusions about ethnic and national groups. It is not enough to report the differences. You must understand why these differences exist.

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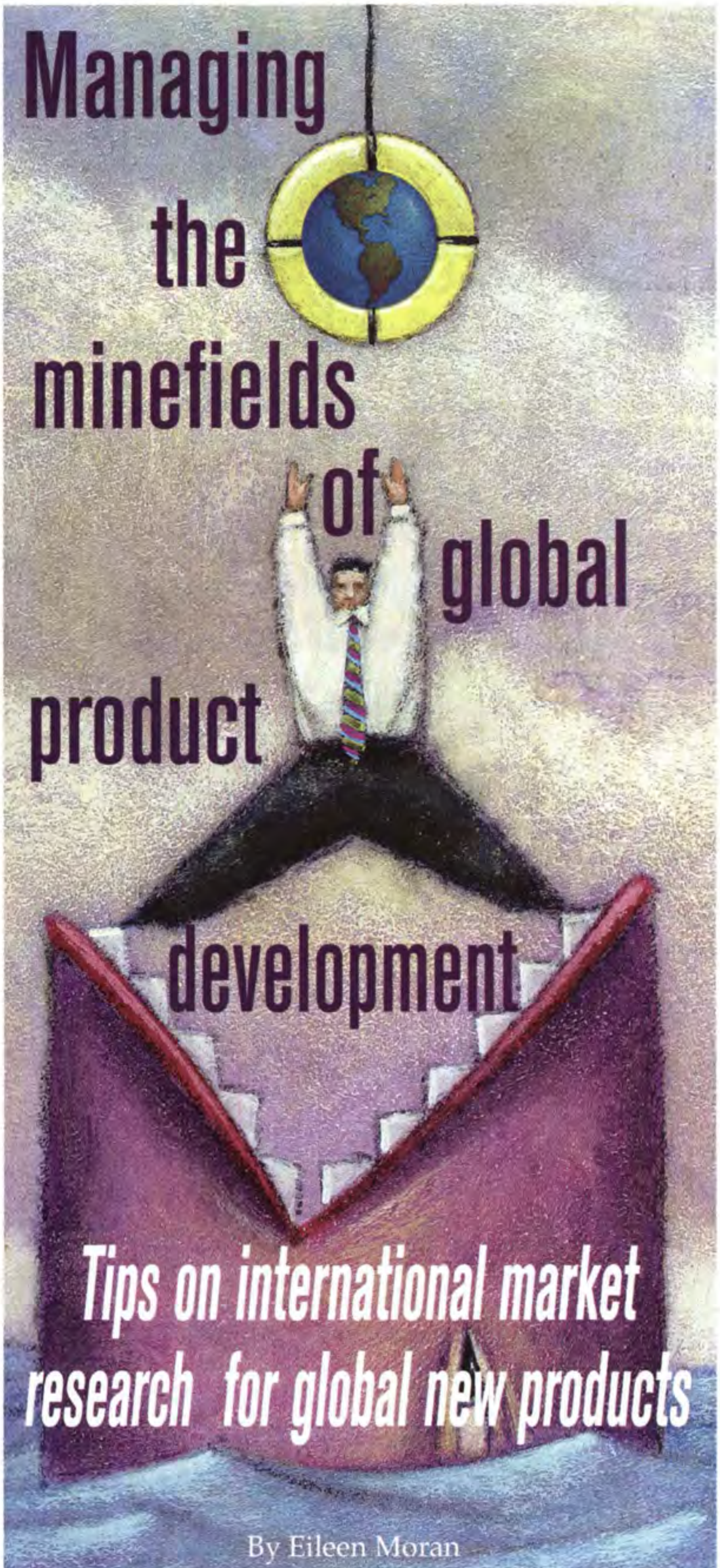

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Most people who are active in international markets are all too familiar with the challenges associated with developing truly global products. There is never (or should I say rarely) an instance when a "one-size-fits-all" product meets the needs of all targeted customers. No matter how hard you try, a marketing manager in one of the regions is likely to be dissatisfied with the new line of products, complaining, "How do you expect us to sell this in our market? This is a product for the American market, not the (fill in the blank) market!" It's this need for international market research, and the intricacies involved in conducting it well, that I'd like to discuss.

"They oughta want what we wanna give 'em!"

This may be preaching to the choir, but let's lay out some of the benefits of including all relevant markets in your research agenda.

First, the main question on most product development managers' minds is: Can we launch the identical product worldwide, should we retool the product on an as-needed basis, or do we need completely separate products for each market? It can mean the difference between a product's success and failure. Collecting data in all major markets will help you decide to what extent you need to customize the product, or, in the case of really unique markets, if you need to go back to the drawing board.

There are also other, more pragmatic reasons to conduct international research. Most global companies suffer through chronic political battles between the home office and the international regional offices. Many companies (and American companies are among the worst offenders) have a one-size-fits-all approach to product development and this is an endless source of conflict

between the international sales organization and the home office. Including all major markets in your research efforts can go a long way in stimulating company-wide buy-in for newly developed products. Not only will local affiliates feel that their customers' voices are finally being heard, but these affiliates can be tremendously helpful to the market researcher in terms of planning and carrying out the research. For example, is there an upcoming conference that would bring many customers together during which the research could be conducted? Can they supply customer lists to help with sample recruitment? Can they help in checking translations? Perhaps they can actually take part in the interview process by observing interviews. Taking these steps will go a long way in creating goodwill between the product development team and the international sales and marketing team.

Let the researcher beware

Once you've taken the leap and decided to collect data globally, there are a few things to beware of when eliciting customer input. First, in many instances, particularly with business-to-business products or services with a complex purchase decision process, the actual decision-maker or influencer may differ significantly from market to market. For example, in complex hospital diagnostic equipment, the purchaser in the U.S. is often the laboratory director. In Europe, however, where testing is more decentralized, the decision-maker is often a nurse manager or department director (physician) on the individual care unit.

Once you've determined the appropriate respondent(s) in each market, you will likely need to tailor your approach and structure the research differently from market to market. For example, central location interviews may be perfectly acceptable and easy to recruit in Germany, while in-person, on-site interviews may be required to gain cooperation from Japanese respondents. Following and respecting the local etiquette for how research is routinely conducted will help your project run smoothly.

Except in very unusual circumstances, customer interviews should always be conducted in the local language by local interviewers. That would include even those interviews conducted with respondents who speak English well. Few people are as at ease or articulate in a second or third language as they are in their own mother tongue. By forcing a respondent to speak a foreign language, you are, from the outset, limiting their ability to express their opinions and needs clearly and articulately. It probably seems very obvious, but there are countless examples when this rule has been violated in the interest of time or simplicity - to disastrous effect. There are certainly those cases when it is either not possible or not feasible to interview each respondent in his or her own language (e.g., an online focus group with hard-to-find respondents scattered all around the globe). We once conducted a focus group with highly specialized designers of massive power plants from all around the world who were gathered in one location for a short period of time. In that case, the default language of communication among this highly-specialized population had traditionally been English, so the group was conducted effectively in English.

One cannot overestimate the importance of being extremely cautious when it comes to translation. Our process involves having original text (for screeners, interview guides, stimuli material, etc.) professionally translated from English into the language in question. We then work with a second independent translator, whose job it is to compare our original English text to the translated version, to ensure that both texts are essentially identical in meaning (this does not mean that they will be word-for-word translations, as that is typically not our goal). The last step is to have the text checked by our client's local affiliate for technical accuracy. We often find that even translators who have specializations in high-tech or medical language cannot be relied upon completely for appropriate translation of highly specialized technical terms. The people at the local affiliate can also check for the naturalness of the translation.

I'm sure this process must sound like a tremendous amount of work and a lot of expense - it is! It's expensive to hire local interviewers and recruit respondents in countries where the market research infrastructure may not be very well-developed. It's costly to have people on your staff who are trained in the complexities of international data collection. And doing translation properly is also expensive. However, without taking these types of precautions, companies can end up with several even more expensive (and painful) problems on their hands:

• A roomful of inappropriate respondents due to an inaccurate screener translation.

• Skewed research results because of respondents' reactions are to the language used rather than the concepts themselves.

• A concept that respondents don't really understand because it's been translated incorrectly. (In one study we did for a camera manufacturer, we found an interesting translation from the English into the Spanish. The customer's sentence was: "I get a good shot every time I use it." The word shot was translated as "gunshot" - an unusual feature for a camera, and definitely not the one we wanted to test.)

Cultural differences can necessitate a different approach to research from country to country. For example, in recruiting business respondents, pay attention to the role of the desired respondent within the organization. In some countries, corporate or organizational hierarchy may make it difficult or even impossible to recruit respondents directly, without first approaching their supervisor.

In one study we conducted on

postage meters, we were interested in talking to the person in small companies who used the postage meter on a regular basis. In most cases, that person was the administrative assistant or mail room clerk. In Germany, this type of person was very difficult to recruit. They were often hesitant to take part without their manager's approval and worried about accepting a cash incentive for their participation. We altered our approach slightly, by faxing letters of explanation to them, which they could show to their manager. We also offered an incentive check, made out to the company, that could be used for an office lunch or something similar, improving our cooperation rate greatly.

Even something as straightforward as rating scales should be given some thought. We have found it best to utilize rating scales that make the most sense to the given population. For example, Americans may be very comfortable giving performance ratings using an A-F "school grade" system. That scale, however, is meaningless to Germans, who are more familiar with a 1-6 rating scale, with 1 indicating the best performance and 6 indicating the worst performance. And of course, the Japanese wouldn't understand our letter grades at all – they generally use a 100-point scale for these purposes. You may even find that different populations use the same rating scales differently. For example, Germans may consistently give lower grades than Italians, while Italians may consistently rate every attribute as more important than Spaniards. These differences need to be factored in during the analysis phase.

Cultural differences can also surface with an issue like participation incentives. The first question is, "Are cash incentives appropriate in this market?" In Japan, for example, incentives for businesspeople often take the form of a gift, rather than cash. We've had success offering gift certificates to major department stores as incentives. Charitable donations might also be an option.

It is worth the effort

While this article has laid out a host of potential problems that one might encounter in conducting international research, our experience has been that it is clearly worth the effort. If you don't have the expertise in-house, it would be worthwhile to create relationships with savvy research partners who have experience in this field.

The main message is that market researchers should examine each component of the research design to determine if it should be altered for international markets. Don't be intimidated by the seeming complexity (and expense!) of including these markets. When you consider the total cost of a global new product development initiative, the cost of correctly-done research is a small percentage. And the benefits usually far outweigh the cost of the added effort.

When in Rome...

Five tips for doing research in Italy

By Raeleen D'Agostino Mautner

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Cross-cultural researchers explain an important local-global distinction by borrowing terms from the field of linguists. They refer to "etics" and "emics," which originally made reference to the variants and invariants of language. When doing business overseas, emics refers to the overt and covert behaviors that are particular to a given culture. Etics refers to universal invariants that transcend the cultures being compared. Both types of information are critical to companies and to their market researchers, whose economic survival depends on gleaning an intimate knowledge of the international consumer population and an ability to interact with overseas colleagues. These skills allow us to modify our products and services – and our behavior - to meet local needs.

Although I was raised in the U.S., I am a citizen of both the U.S. and Italy. I mention this because often, "cross-cultural" tips can appear judgmental, or may carry a certain ethnocentricity. When dealing with different nationalities and cultures, however, one must realize that the familiar way of doing business isn't either best or worst - it simply is the way it is. In addition, one must recognize that although cross-cultural literature discusses "etics" and can give you general pointers based on research and experience, we cannot forget that generality is always laced with individual variation. For example, we can say that, in general, the Italians appreciate classic literature and poetry, but I have worked with an Italian computer specialist who would just as soon use poetry books to stoke his fireplace in the winter. With that in mind, let me summarize some of the most valuable pointers that I have learned when doing business with Italy.

1. Build relationships! When I initially set my sights on doing market research for Italian companies I had little clue that

research in general there does not have quite the stature it has in the U.S. I went to my first trade fair in Milan, full of energy and optimism, business cards and bilingual brochures in hand, only to find that the merchants were more interested in my finding them distributors for their products than in the prospect of spending their money on an intermediary step such as market research. Eventually I came upon an import-export broker who, through a series of contacts and communications, came to trust me and the value of my services, and eventually introduced me to some of his clients who were interested in my services.

In Italy, relationships are vital. Find someone to collaborate with. Show them you are trustworthy and that you keep your word. The contacts you make now may become your friends and colleagues for life, and they too, more than likely, will appreciate your help for research they need to conduct in the U.S. Use the Internet to find colleagues. Check the search engines for other market researchers, especially those with small firms of their own. You can also find market researchers in the business or psychology departments of Italian universities. Usually they are very receptive to collaborative projects, and of course you should assure them you are willing to do the same when they need a favor from you.

In addition to possibly giving you some sage advice about the logistics of your research project, having someone of the mother culture to collaborate with also gives credence to the project in the minds of your Italian respondents, making them more likely to be willing to be interviewed or to fill out your survey. A native can also help you with translations and survey development for inclusion of items you may not have thought of, but which are important points to consider from an emic standpoint. This will give your study some additional expert validity.

2. Make sure you have a valid cross-cultural survey. The business world usually does not afford researchers the time or the budget to pre-test a survey, or perform a factor analysis to find out what items cluster around a particular concept.

If you, like most, cannot develop a norming pre-sample in your target country, then working with an expert of the mother culture becomes even more important. He or she can give you important advice on what works and what doesn't as well as informed opinion about the items you have developed or selected for the survey you will administer in your colleague's country.

In some cases, as with psychographic research, you may find Italian versions of U.S. surveys that are already published. You should always opt for the pre-translated edition if it is appropriate for your investigation. You may pay a small fee for the right to use a foreign published survey, but it is not only the ethically correct thing to do, it also makes for more valid results for your study. You will have the peace of mind of knowing the norming samples were based in the country you are doing research in, and any problems with conceptual translation have been already taken care of.

When there is no existing foreign version of the survey instrument you are about to use, you have no choice but to translate the instrument yourself. In my experience, the back-translation method, which is only one of several methods of arriving at conceptual equivalency, works best. Conceptual equivalency is much different than simple word-to-word translation. For instance, if you wanted to translate the phrase "I feel uncomfortable" into Italian, you can say either "sono scomodo" or "mi sento a disagio." The first refers to a physical discomfort, as you would have if you sat on a chair with a thumbtack facing up; the second refers to the psychological discomfort one would have when asked to answer an embarrassing survey question. While in American English you can use one phrase for either situation, you cannot do so in Italy. You can see why the words themselves mean little. It is the concept that we try to remain true to when translating survey questions.

You need to involve two people in the process of back-translation. The first is a fully bilingual but native-born

American who will translate the questionnaire into the foreign language. This should insure that the English ideas maintain their integrity without being changed. Then a fully bilingual Italian colleague should translate it back and see if there is an equivalency of concepts between the original American English questionnaire and the foreign language version.

By not taking this extra step with the translations you risk respondents answering your questions based on their perceptions of what you meant. This can result in data that has low validity and reliability. A little extra care up front can help you save money, time - and your professional reputation!

3. Be open to experience and think before reacting. Sometimes cultural differences pop out at you like a red flag. This is to your advantage because with awareness, you can at least try to understand and work with them. It is a little harder to make yourself conscious of differences in countries like Italy, which is considered to be a Western culture. In fact serious research attempts that compare survey data among Western cultures are typically avoided by marketers and academicians because the assumption of similarity outweighs the willingness to spend research dollars when we can presume what the outcome will be. The truth is we cannot! Cultural differences do exist and they should be respected and celebrated if you want to build long-lasting relationships and solid business in Italy. Presuming that all industrialized nations think and behave alike or should be like the U.S. almost guarantees a hostile research situation for you and your company.

Recently I sat across from the export director of a chamber of commerce in a very modern city in Northern Italy. We were discussing introducing my services to a consortia of small-business owners who wanted to begin exporting their products to the U.S. In the middle of the discussion this distinguished gentleman, obviously inspired, jumped to his feet and pulled a book of operatic melodies from a large bookcase. He opened to a certain page and began reciting one of the stanzas. As I sat in what psychologists call an "openness to experience," I listened closely to the words. I did not draw unjustified conclusions nor scoff at what was, in essence, a very creative way of getting a point across. The director was reciting words that had to do with food and recipes - all native to his city, all important to the consortia to which he would introduce me.

When you travel abroad to do business, leave all preconceptions at home. Once you get the hang of it, you too will develop an "openness to experience" that will surely facilitate interactions with your Italian clients and colleagues.

I wasn't always this wise. I once made the mistake of sending some surveys to a colleague of mine in Italy who had agreed to distribute them to his students for a survey research project I was conducting on body image. I was grateful for his help and I promised to reciprocate when he needed samples for his research.

Well, I waited and waited for the surveys to be sent back to me. Naturally I had included my Fed Ex number to cover the expense of return shipping. But after several months had passed and my e-mails had been ignored I honestly wondered if my colleague had ultimately left his post at the university. Not realizing the gravity of what I was doing, I dropped a line to the head of his department and explained the situation, and asked if this person was still at the university. A couple of days later I heard from the researcher himself, who was unhappy with what I had done. I didn't understand until much later that my letter to his department head - which to me seemed like a simple inquiry - was equivalent to lodging a complaint with his superior! At the end of the project he wrote me a polite yet somewhat angry letter that made it clear he would be unwilling to do further research with me.

Although I come from an Italian family, I was still raised in the U.S., which led to my being insensitive to a difference in the concept of time between our two countries. In Italy time is not to be rushed and packed and scheduled into modules. One way of thinking is not better, the other is not worse. And that is the point with understanding cross-cultural differences. They are just that: differences. Take them for what they are, talk about them openly with your international colleagues and try to come to a nice middle ground, while always giving the people you are doing business with the edge. It is their country, their culture, and they are doing you a favor by helping with your research, or by buying your product or service. As the saying goes, when in Rome…

4. Be mindful of the testing situation. I use the word "testing" loosely here to mean the interview or survey situation itself. In a foreign country, it is easy to stir up some resentment by the way in which you ask for information. You must make sure that your questions are not perceived as offensive. It is also important that possible participants do not feel imposed upon, especially by someone from a country that is already seen as a cultural and ideological bully. Handle the survey situation with a bit of tact and sensitivity. Make sure you are aware of national holidays (and regional holy days) in Italy, and avoid trying to collect data on these days or on Sundays.

Try to find out the little things about Italy that could make a big difference in the success of your project. For example, how important is it to you that Italians are generally more likely to engage in in-person interviews and less likely to be receptive to telemarketing? How important is it to the sale of your product or service to know that Italians are still very skeptical of giving credit card information over the Internet?

When telephoning your colleagues or clients in Italy, be aware of time differences. Between Italy and the U.S. there are generally six hours difference. If you decide upon e-mail surveys, determine ahead of time if the sample you need to target is one that has access to the Internet - in Italy the use of personal computers is not nearly as common as it is in the U.S.

Make sure you allow time for delays. Distribute your surveys well in advance of the date you need to get them back for analysis. Always aim for a target date in advance that you and your colleague agree upon and that allows plenty of time for you to meet whatever deadlines you have in the U.S.

5. Read between the lines - or in the margins - of your surveys. Analyzing and interpreting data in an international research project is more than a comparison of regression equations or ANOVA results with a post hoc

inquiry. If interviewing in-person or even by telephone, you should be attentive or have your telemarketers make note of all extraneous comments and expressions. When doing paper surveys, no matter how complete you think your survey items are, you will invariably come across some commentary scribbled in between typed survey items or in the spaces in the margins. Analyze what they are telling you! Make sure you always include some open-ended questions, or invitations for general commentary on the survey itself or as part of the interview. These responses will always give you a more complete picture of what the consumer or respondent has on their mind, and if you can capture that qualitative data, solicited or not, it can mean a greater likelihood of success for your company. In the same study on body image I referred to above, one of the questions on the survey had to do with the respondent's perception of how much society influenced one's positive or negative image of how they looked. In the sample from Italy, it was common for a respondent to check off one of the choices on the Likert scale but then write in the margin something that clarified their response even further like: "Society? To heck with what others think of me!" Capturing this feeling can be crucial information for vendors, and yet it could have been missed because of its inability to be coded and punched into a statistical data editor file.

Road to success

Being attentive to the differences in culture and respectful of them can help speed you along the road of success. All it takes is a bit of awareness in order to become culturally sensitive and non-imposing. In exchange for your effort you will safeguard you most valuable resource: your international customer and colleague. Very often you will be repaid not only with their business, but also with their reciprocal respect and willingness to collaborate on future projects. Pay attention to the emics as well as the etics and you will find you yourself with a strong international foothold.

The Internet sector in Turkey

Market experiences U.S.-style growth and growing pains

By Tim Sevenoaks

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Many to its west suffer from misconceptions about Turkey. Six hundred-odd years of intermittently suspended political and cultural antipathy to the Ottoman Empire, spiced with fascination for some of its more outré practices, and lousy PR that has been comprehensively extended into the republican period, have contributed to this. The recent burgeoning of its Internet sector is evidence that Turkey is not the place you may believe it to be. The Internet and the business models it enables have been hot subjects for the last couple of years in Turkey's commercial capital, Istanbul. Dot-com start-ups and tech subsidiaries are proliferating there, often headed by foreign-educated Turks. Their amplified tones at the several e-business-related conferences hosted recently in Istanbul dispel much of what the West believes about Turkey: These business leaders are young, they speak MBA American, they wear DKNY suits and subscribe to *Red Herring* magazine. Some of them are even women. It's all a long way from carpet dealers and apple tea.

Such young entrepreneurs have long led a chorus, with descants added by brokerage houses and some research companies, whose main theme has been something along the lines of: how great the Internet sector is in Turkey, how much it has grown, how much more it will grow and just how much money will be made.

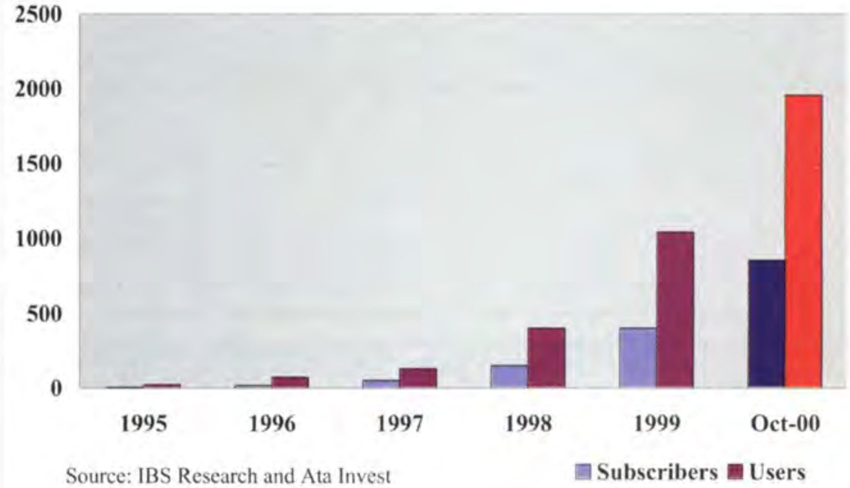
While in essence true, such noise was often premature; the sound of the market talking itself up. The pity of it was that it obscured from more conservative types the real, and quite impressive enough, revolution that was taking place. Now, anyway, reality is catching up. You still hear no less blarney in Istanbul than you would in, say, Seattle, but the fact is that Turks really are going online in larger numbers, and that the recent

expansion of its telecommunication and PC markets seems finally to have given Turkey the critical mass needed to enter the New Economy.

After the forgoing, a note is perhaps in order on the numbers that follow. It is difficult, in the absence of an independent watchdog, accurately to estimate Internet penetration in Turkey. These figures are the result of many interviews with major ISPs, Turk Telekom (the largely monopolistic state telco), and companies involved in the construction of TTNet, Turk Telekom's Internet infrastructure provider. Additionally, for its End User Survey, IBS visited 4,700 homes across Turkey in order to interview a representative sample of the Turkish Internet user population. For a full explanation of the methodology and sampling employed, please see the survey itself. Details are available at www.IBSResearch.com.

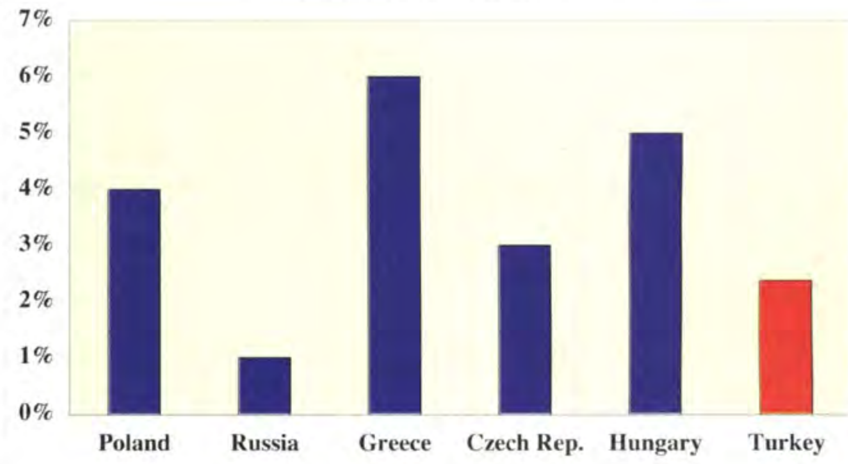
In the first nine months of 2000, the number of subscribers to ISPs rose by about 110 percent to 850,000. We believe that the end-year total will be around 1 million, representing a subscriber penetration rate of 1.5 percent of Turkey's forecast population of 66 million. The user per subscriber rate is shrinking, from well over 3:1 in the past, it is approaching 2:1 as 2000 unwinds. This would imply a

TURKISH INTERNET USER AND SUBSCRIBER GROWTH, 1995-2005



Source: IBS Research and Ata Invest

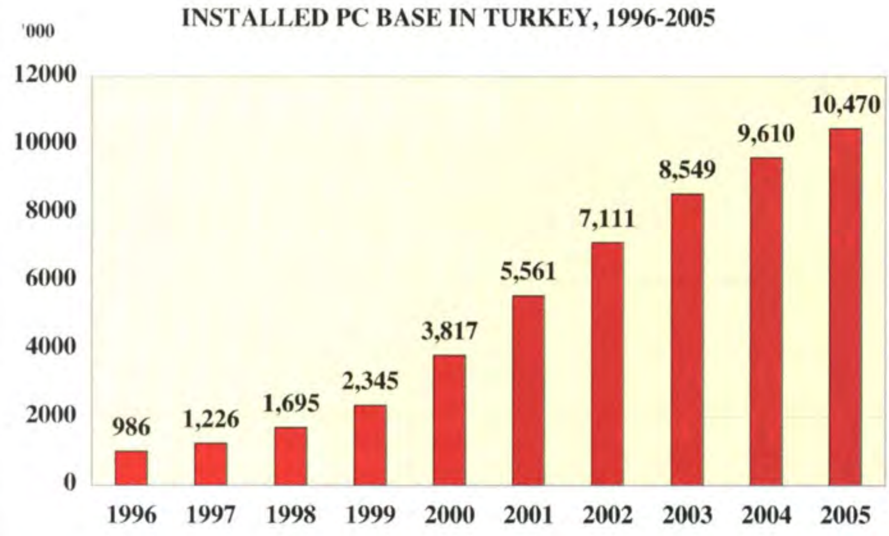
INTERNET PENETRATION IN SELECTED EMERGING EUROPEAN MARKETS, 2000



Source: Salomon Smith Barney, IBS Research growth of Turkey's home-accessing[1] online population from 1.35 million at the end of 1999 to around 2 million at the end of 2000. This would represent a penetration rate of some 3 percent.

This is still lower than some other emerging European markets, but Turkey's large population, approximately 37 million of whom are under 24, should be borne in mind here.

What, then, is holding things back? The main problem has been low PC penetration levels, because of low spending power and highly uneven income distribution, and a frustratingly poor Internet backbone.



Source: Ata Invest

In Turkey, only around 14 percent of the population have the income levels required, at present prices, readily to buy PCs. Beyond this, the sector will develop as fast as social pressures prevail over low purchasing power. The cost of a new PC ($1,600) in Turkey represents five months' wages for the statistically "average" Turkish citizen.

That said, the Turkish GSM (global system for mobile communications) experience - subscribers have leapt from around 7 million to about 14 million in the first nine months of 2000 - teaches us that Turks are fond of technology, are status- and fashion-conscious, particularly in urban areas, and are willing to pay for the privilege. Turkish buyers are in fact inclined to spend a far higher proportion of their income on communications technology than would seem plausible in a plain reading of income statements.

Moreover, PCs are becoming more available to upper-middle- and middle-income groups with new promotions for both generic and branded hardware. The campaigns of several companies, who have taken to bundling ready-to-go PCs with ISP subscriptions with long-term repayment schemes at low or zero interest, are also driving PC ownership. Currently, PC sales are concentrated in Turkey's three metropolitan cities, Istanbul, Izmir and Ankara. In 2005, we assume that overall PC penetration in Turkey will be a little over 14 percent.

Digital TV and wireless access is expected to become increasingly significant in Turkey over the coming 12 months and beyond. However, the public's response to a vigorous marketing campaign from GSM operators and handset manufacturers, extolling the virtues of - thus far slow and expensive - WAP (wireless application protocol, the universal standard for bringing Internet content to mobile phones and other wireless devices) has been underwhelming, in Turkey as elsewhere. But:

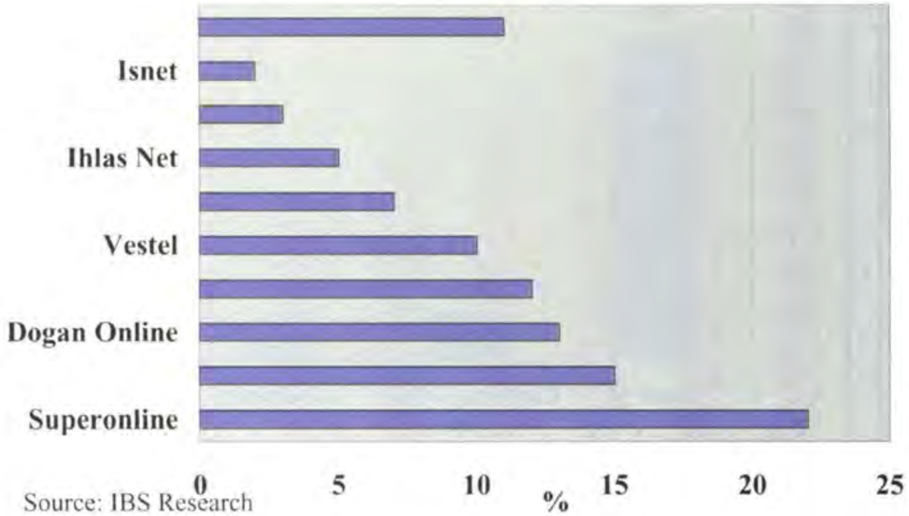
- Sales of mobile telephones are growing rapidly. Turkish consumers across the social spectrum have taken to mobile telephones in a big way.
- Turkish GSM operators have already begun implementing new technologies like GPRS (general packet radio service) (Telsim claims to be only the third operator in the world to set up a - very limited - GPRS network) that will eventually facilitate cheaper Internet access.
- The entry of two further GSM operators, namely the Isbank-Telecom Italia consortium (Is-Tim) and Turk Telekom, is likely to stoke competition, bringing down prices and connection charges.

The poor backbone may be blamed on the slow pace of telecom liberalization. In Internet sector offices all over Istanbul, the mere mention of Turk Telekom, the state telco, brings an almost unanimous and withering response. "If Turk Telekom didn't monopolise Net infrastructure, there would be better service quality, higher penetration, and lower fees," is a polite summary, from Beyza Isik, CFO at VestelNet. Among the most vociferous of TT's critics are the Turkish ISPs, many of whom are well-enough funded, and strategically inclined, to lay their own fiber optic networks. What frustrates the industry is that until, at the latest, 2004, nobody but TT is allowed to lay cable. And TT has been unwilling - or unable – to do a decent job of it itself.

Among ISPs, Superonline currently dominates the market, though tough and well-funded competition is catching up fast. There are about 80 ISPs in Turkey, but the top five command a combined 72 percent share of the market as of October. Consolidation is expected, leading to the long-term presence of possibly five companies competing for residential and corporate access, the latter, evidenced by the considerable ignorance of Turkish companies exposed in IBS's Business User Survey[2], a niche with considerable growth potential. "The corporate market will grow in an incredible way. Companies will soon have to

Sales of mobile telephones are growing rapidly. Turkish consumers across the social spectrum have taken to mobile telephones in a big way.

DIAL UP ACCESS MARKET SHARE IN TURKEY, SEPTEMBER 2000



Source: IBS Research

have a Web site and will have to provide services on that Web site. Furthermore, they must go beyond presenting their products on the Web to selling their products there," says Ahmet Dalman, CIO at Dogan Online.

But currently dial-up access fees constitute the vast majority of revenue, representing between $80-100 million in 2000.

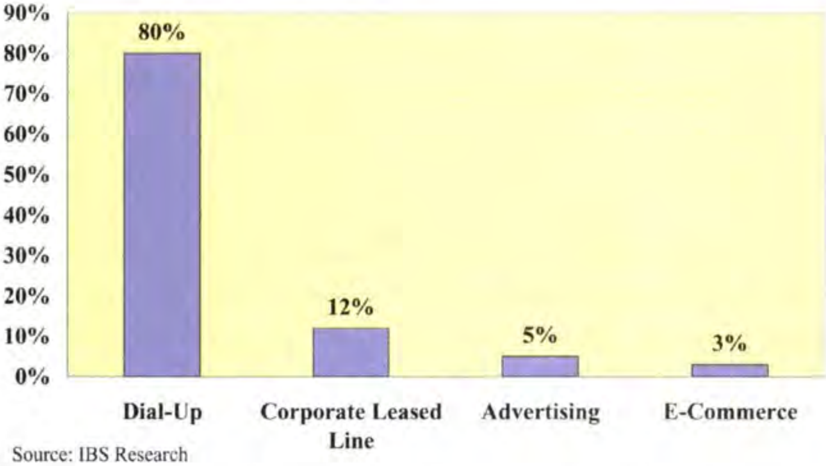
2000 saw the main media groups of the country all start determined efforts to put the same stamp on the Internet as they have on TV and the press. Ixir.net was launched by Dogus Holding (owner of NTV, Turkey's premier news channel, and Kanal E), Turkport by the Sabah Group (Turkey's second largest media group), and E-Kolay.net by Dogan Holding (owners of Hurriyet and Milliyet, Turkey's best-selling daily broadsheets). All have used substantial promotional and advertising campaigns. All are expected to capture a sizeable share through their big marketing, availability and low access fees.

As competition escalates, ISPs are developing new strategies. E-kolay.net, for example, is offering lifetime subscriptions and Ixir.net customised subscription fees. As in the global market, ISPs have started price wars. Many companies are offering value-added services in addition to low-cost connections. Others are cooperating with hardware suppliers, as in the case of Superonline and Hewlett-Packard. Some hardware companies, (e.g., Vestel) have established their own ISPs. Vestel.net launched a new value-added marketing strategy for three-year subscribers, which comprises a low connection fee, a free PC and a credit card from the Group's bank. In less than six months, the company sold approximately 40,000 "Veezy" Internet packages. RTNet, the ISP owned by Rumeli Telekom, itself the owner of Telsim, the country's second GSM operator with 32 percent market share, has an aggressive revenue strategy based almost solely on e-commerce. Its access charge is only around $2 per month, against a break-even point in Turkey of around $6 per month. Other ISPs interviewed were dismissive (but a little uncomfortable?) about the practicability of such a structure in Turkey - yet.

Indeed, in the future, many of the ISPs anticipate e-commerce as their main revenue stream. As of mid-2000, around three-quarters of Turkey's Internet user were aware of e-commerce, but only 3.37 percent of the end users interviewed for IBS's Turkish Internet User Survey had carried out an online transaction. Most, however, were thinking of doing so, and the value of e-commerce transactions in Turkey is forecast to grow exponentially over the next five years.

Current online spending is very low and concentrated on CDs, books and clothing. This is expected to change

REVENUE BREAKDOWN FOR TURKISH ISPs, SEPTEMBER 2000



Source: IBS Research

as the number of retail stores, travel and leisure sites on the Internet increases. In order to project e-commerce revenues, we first forecast online spending per person.

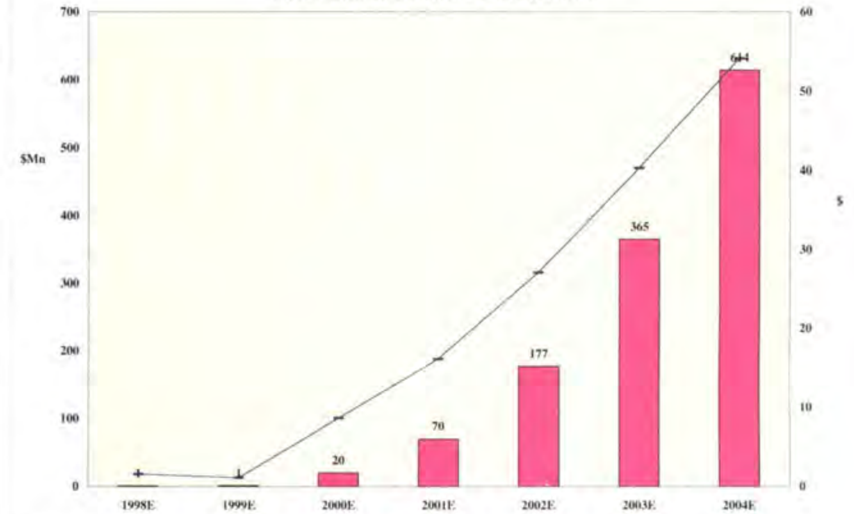
These forecasts suggest that the share of online spending in per capita GDP will be 2 percent in 2005. In 1999, e-commerce spending in Turkey was around $1 million. In 2000, the Koc Group's Kangarum targets earning that revenue each month.

Net advertising, too, is developing at a gentle pace. Turkish Internet advertising revenue was around $500,000 in 1999. As of mid-2000, that figure was being earned every three months, according to one leading ISP.

Turkey is expected to follow the pattern observed in the United States, with the number of companies advertising on the Internet soon greatly to increase. Total advertising expenditure in the United States was $206 billion in 1998, 2 percent of which was spent online. In 2001, this share is expected to rise to 5 percent. A similar trend is forecast for Asia. Considering the lag in adoption and penetration between the Asian and Turkish markets, we project that online advertising expenditure will reach 2 percent of total advertising revenues in 2002 (that is around $25 million and 4 percent in 2005).

Despite - or perhaps because of - its short history and current low pene-

E-COMMERCE EXPENDITURE IN TURKEY, 1998-2004



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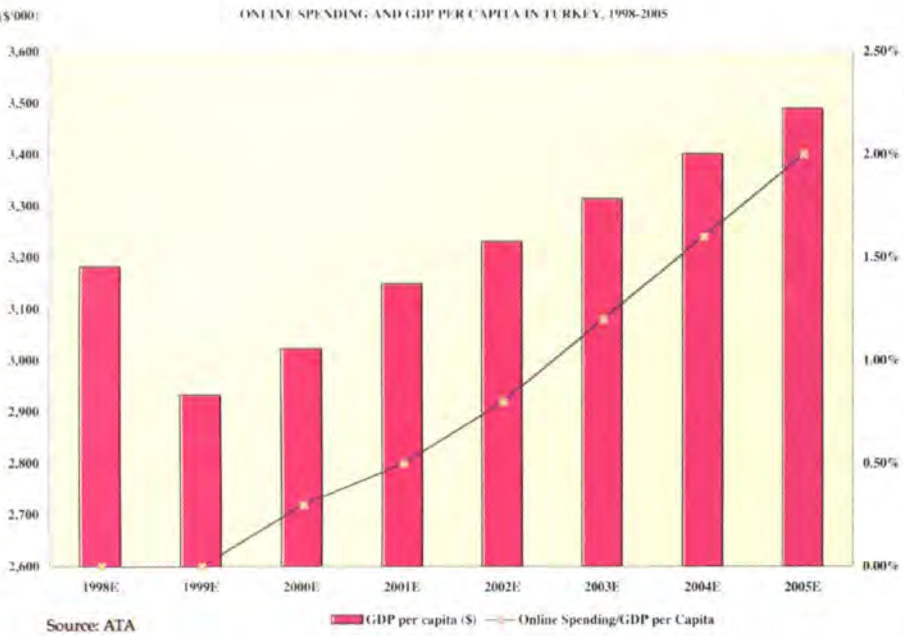


tration, the Turkish Internet sector is growing fast and has tremendous potential for further growth.

Turkey has distinct advantages.

• Lessons learned the hard way in the United States and Western Europe may be applied in Turkey more or less from the outset. Those e-business models that have proved successful in the evolutionary struggle of developed Net economies may be reproduced with relative safety in the Turkish market.

• Telecommunications deregulation, though still slow, is paving the way for improved infrastructure.

• ISP fixed fees are falling, as companies prepare to seek advertising and, primarily, e-commerce revenue generated from traffic rather than subscription fees.

• Strong local companies have been established early, with deep pockets. In addition, the funding of parent companies is not likely to be too fickle, given the high tag on emerging market subscribers in company evaluation, and the increasing share of little-brother Internet companies in their overall corporate value.

Such financial confidence has helped Turkish companies to be innovative in at least two areas in their efforts to generate revenue and improve subscriber levels. One is an e-commerce revenue stream where, instead of taking a commission or percentage from buyer or seller, the portal retains the sale fee for one month for investment. The other, far more important, is the alacrity with which well-funded Turkish ISPs have bundled PCs with ISP services, attempting to spread Internet access infrastructure across the all-too-large Turkish economic divide.

This is why some international investors and financial institutions place Turkey at the top of their emerging European league for Internet investment opportunities.

Analyses by several brokerage houses project for Turkish ISPs the highest future values in the region. Underpinning such valuations are Turkey's large and young population, its overall strong economic growth, and possible access to the further 40 million Turkic-speaking peoples in the Central Asian republics.

A problem for investors into Turkish ISPs and portals may be the entry of international giants such as Yahoo!, who have been looking at establishing a Turkey office. Further - most agree corrective - reverses to tech stock valuations may limit Turkish companies seeking to augment capital and expansion through public offerings. This will give further advantage to those with rich parents - a happy status shared by six large Turkish ISPs.

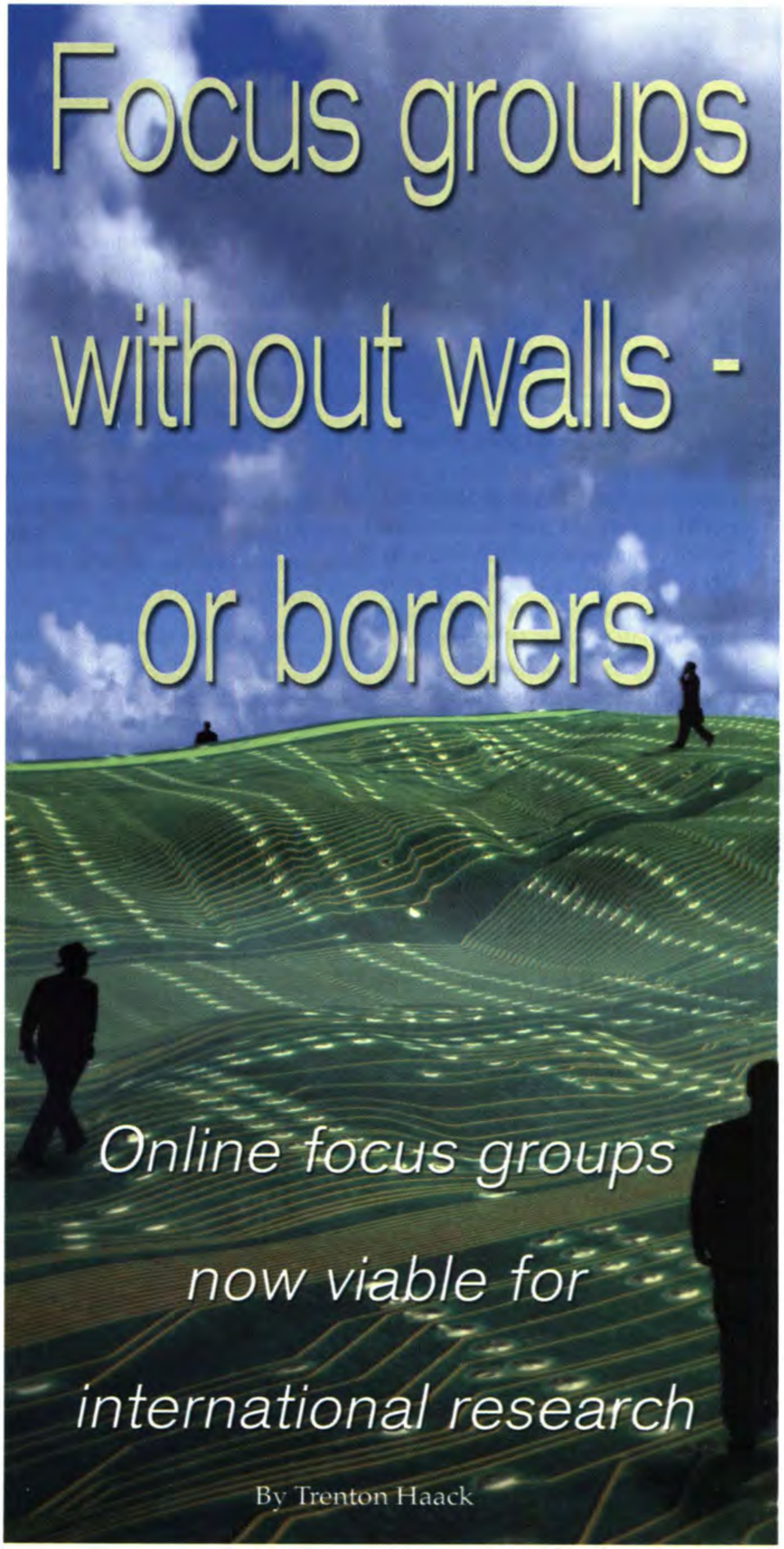
[1] This figure excludes users accessing from Internet cafés and work. Taking into account cafés, the figure could easily rise by over 25 percent, according to the IBS End User Survey. Corporate access is notoriously difficult to calculate on an individual basis, but corporate usage would significantly augment the online population.

[2] Three interviews (with G.M./owner, chief technology officer and one staff member employed for at least one year) at 70 top companies in 16 Turkish sectors.

Focus groups without walls - or borders

Online focus groups now viable for international research

By Trenton Haack



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You don't have to go back too far in history to recall the days when international research meant surveying people in Canada. But with the Internet, the world is at our fingertips - literally. With the click of a button, international communication, and thus international research, is a reality.

Imagine reaching across cultures and borders to tap into a wealth of business-to-business clients. Imagine doing it in real time. Imagine doing it at a reasonable price. Online focus groups need not be limited to the 50 states. International online focus groups are a natural extension of online research, with several key benefits, most notably, a substantial cost savings. In addition, Internet technology levels the field and the price for participating countries, allowing the opportunity to gain insights from countries and regions that are normally not pursued in traditional focus group situations. For example, research can involve countries like Bulgaria and Portugal in addition to oft-researched nations like Germany, France and Japan. In addition to being cost-effective, other key benefits of international online focus groups include availability of immediate transcripts and a tightening of the entire research process - results are seen faster. While online focus groups may not be suitable for all international research, it may be an attractive and viable alternative in certain situations.

There are several factors to consider when deciding to conduct online focus groups internationally.

• The target audience must be rep-

resented in an online environment.

• Similar to traditional online focus groups, it is important to consider the research objective and whether it is straightforward enough to translate online. In other words, the more creative, "out of the box" focus groups are still best conducted in person.

• Online penetration continues to be sporadic in many foreign countries. Business-to-business applications offer the best representation in most countries. International consumer online focus groups are not advised for most research objectives, in most countries at this point in time.

• International online focus groups seem to work best for technology and computer businesses because most respondents speak one common language - English. Common communication remains an important qualification for these groups, whether that be English or another language. While some software packages claim to offer universal translation capabilities, these remain archaic and unreliable.

• Research involving international Web site feedback or improvement can be particularly applicable for both businesses and consumers. Online focus groups can provide an environment where participants can review the current site or react to new sites, all while providing immediate feedback to the researcher.

For example, recent international online focus groups were conducted among software developers. The study was modeled after similar American online research and was very successful due in part to the research objectives and target audience meeting the necessary qualifications. Software developers around the globe commonly speak and communicate in English, thus providing a common language. Additionally, the online medium was not only representative of the software developer population, but also offered a natural environment for them to articulate, interact and provide insights into their experiences and opinions.

Key considerations

Once you decide to boldly go into the arena of international online focus groups, keep in mind several key considerations.

• To conduct an efficient group, the participants need proper Internet access and their computers must meet certain specifications for bandwidth and speed of connections. It is best to address this during the participant screening process.

• If conducting the group in English, don't take for granted that every participant knows English or will understand certain language patterns, although the official language of computer and IT specialists is most commonly English. Be sure to craft questions carefully to ensure comprehension and be aware of slang terms and heavy industry jargon or acronyms.

• It is possible and easy to conduct groups in other languages. The focus group would just be limited to one language. For example, groups can be conducted in French, limiting participants to a French-speaking moderator and French-speaking respondents. Most English-based online facilities are capable of conducting groups in any language rooted in the Latin alphabet. However, it may be more challenging to find facilities that can function in different alphabets (e.g., Arabic, Cyrillic, etc).

• Do some homework! Be wary of cultural differences to avoid potential misunderstandings and misinterpretations of data. For example, Japan remains a country that communicates very formally. Simply recruiting participants through uninvited e-mails (regardless of your companies relationship with them) may prove fruitless with e-mails going unanswered. Instead, potential Japanese participants prefer a phone call introducing the concept, followed by an informational e-mail.

• Choose appropriate incentives for participants. This can be difficult in an international setting because some cultures are affronted by monetary payment. Incentives that have worked well in the past include Amazon.com gift certificates (Amazon.com offers a European version of its gift certificates). The incentives should be discussed during recruiting and the participants should be offered a choice of incentives.

• It is difficult to choose convenient times because of the various time zones, especially if the Asia-Pacific regions are included. Evening times still tend to work the best. A good resource for time zone verification is www.cnn.com/WEATHER/worldtime/.

• There is a concern about the quality of information with this new application of online research. However, initial groups conducted by our firm yielded lengthy transcripts, consistent with American focus group transcripts.

• Exercise caution when conducting international online focus groups to ensure the customer base is represented in an online environment. Again, technology and computer industries have the deepest online penetration internationally. However many of the business sectors in different countries are quickly embracing the Internet and e-mail communication. With English being the international language of business, more areas should be capable of communicating freely.

Save time and money

Online focus groups can dramatically reduce research timelines and costs. High airline prices and hotel costs are erased. Time spent traveling is eliminated, shortening the research timeline. Transcripts can be provided almost instantaneously which provide a quick review of the groups to the entire research team as opposed to videotapes or transcripts from in-person groups which may take days or weeks to arrive. Transcripts also can aid the moderator in producing reports in a quicker timeframe while still offering plenty of verbatim examples for reference.

International online focus groups, if done correctly, can produce valuable data for business-to-business research projects. At the same time it can provide a quick link to international customers often overlooked due to high research costs.

International growth of Web survey activity

By Bill MacElroy

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Judging by the interest in the topic of Web surveying at the recent ESOMAR Congress 2000 in Vienna, there is little doubt that research on the Web has arrived well beyond the shores of North America. Just as it has been in the U.S., the reaction to the use of the Web in many international regions is going through phases.

First, there tends to be resistance to online research due to fear that sampling may be uncontrolled or non-representative and therefore yield bad or unpredictable results. For many countries where the Internet penetration has exceeded 20 percent, the preponderance of evidence suggests that online samples tend to yield very similar results to those found in traditional forms such as telephone or paper-and-pencil survey research. In addition, the low response rate and lack of cooperation found in traditional methods in North America is now impacting survey research the world over – blunting criticisms of Web sampling somewhat. (Of all the people I spoke

with at the ESOMAR conference, there was only one person, a delegate from South Africa, who said that survey response rates employing traditional methods are still as high as they were five years ago.) We estimate that most of the world is still in this phase of pre-acceptance of the Web as a sole information gathering tool.

Secondly, there tends to be a resistance (on behalf of corporate clients) to invest in the experimentation with new technology. Many clients fear that relying on results derived from surveying on the Web will be dangerous without up-front side-by-side studies to provide a proof-of-concept. Such efforts are considered costly (in terms of both time and money) and experimental. This appears to be the stage of acceptance in most of Europe at this time.

Recent survey results released by industry newsletter *Inside Research* show that on a percentage of total research expenditures, Europe trails the U.S. in acceptance by about 12 to 18 months, assuming that the region follows the same growth curve as the U.S. That growth appears to be on track, or perhaps even faster than the original growth in the U.S., in several countries, including Germany, the U.K., and Scandinavia.

The next phase of acceptance has to follow the general population's (either business or consumer) adoption of the Web as a significant communication and transactional medium. The greatest barriers seem to exist here, particularly when e-commerce or transaction-based research is concerned. One of the great points of divergence between North America and the rest of the world is the cultural orientation to credit.

Last fall, I attended a wonderful IIR Internet Research conference in Helsinki, Finland. Finland is the country with arguably the highest per capita Internet access in the world. The attendees were very sharp and completely up-to-date on the latest Web-based technologies and research applications. Although the proportion of activities that the Finnish population does online is high, the level of transactions they conduct is incredibly small in comparison to the U.S. The explanation for this surprised me. The use of credit cards is not a large part of the Finnish culture. Even in Germany, the Internet powerhouse of Europe, the cultural trend has been to adopt debit cards rather than credit cards. This slows down the verification process and makes it more difficult to ship on demand.

Indeed, as one begins to consider regional aggregations (e.g., Europe, Asia, etc.) the profound differences in culture, attitudes and technology-adopting characteristics from country to country lead me to conclude that such multi-country aggregations are fictitious, at least for online research planning purposes. In my opinion, there is no such thing as the "state of research in Europe." The European countries and their development are just too different from one another and are diverging rapidly.

Now this is not to say that one country is better than another; they are just different. Compare Germany and Italy, for example. Germany has, in many ways, leapfrogged the U.S. in terms of the construction of the Internet infrastructure. They may not have as many people online per capita, but the vast majority of those who are connected have a minimum of an ISDN connection with the very latest browsers. Italy, which does not have the optical-cable installation infrastructure, is rushing to adopt wireless technology, perhaps taking the lead in the latest forms of connectivity. Each country's unique characteristics have a tremendous influence on how research will be conducted and the types of research that will emerge.

Although I have been commenting primarily on the U.S. and Europe, I would be remiss in not mentioning that several Asian and South American countries are coming up to speed very quickly, both in infrastructure and in attitudes towards the use of the Web for research. The influence of openness to adopt the use of the Internet for Web research cannot be underestimated in terms of its potential for the global expansion of online research services.

In summary, it is my opinion that a number of issues will influence the growth of Web-based research in the next five years. These include not just the technology infrastructure and the proportion of the population with Internet access, but also the cultural orientation of both the customer populations and the firms commissioning such research. The interplay of these variables may yield some very surprising results when we review the proportion of research budgets being devoted to Web-based research at the end of that period.

Understanding European youth

Survey examines their culture, attitudes and outlook

By Ole Christensen and Carl Rohde

Editor's note: Ole Christensen is director of GfJ Denmark A/S, a Frederiksberg, Denmark, research firm. Carl Rohde is director of Signs of the Time, a Netherlands research firm.

The world of children and teenagers has changed a great deal over the last decade. The variety and number of products targeted directly at young people have developed incredibly, from toys and clothes to music, magazines, TV channels and entertainment such as sports and electronic interactive media. Many companies focusing on children have realized that there is a need for redefining the generally accepted definition of childhood.

As the saying goes, "Children are getting older younger," not least due to the dramatic advances in technology. But there are other aspects that make this target group even more important – also for manufacturers of products traditionally targeted at adults.

Young people have an increasing influence on what their families purchase and there are two main reasons for this. The American futurologist Watts Wacker has said: "One of the most important factors regarding the millennium is that we have the first generations where children from 14 years in many aspects are more knowledgeable than their parents" – not least concerning technologically-based products like PCs, mobile phones, TVs etc., where they tend to take a position as advisors or consultants for their parents.

There is a trend in Europe for young people to leave their home at a later stage in their lives than previously – meaning more influence on what the family purchases over a longer time span.

In order to get a better understanding of how young people are currently handling and evaluating all the influences and alternatives they are constantly confronted with, as well as their

hopes and fears and expectations for the future, GfK Europe Ad hoc Research has established a continuous tracking survey entitled "Hopes and Fears: Young European Opinion Leaders."

Methodology

The first part of this study included 16 European countries: Denmark, Norway, Sweden, Finland, the U.K., Germany, France, Italy, Spain, The Netherlands, Austria, Switzerland, Russia, Poland, Hungary, Czech Republic. In each country four extended groups were carried out (one with girls 14-16 years old, one with boys 14-16 years old, one with girls 17-20 years and one with boys 17-20 years old), each lasting approximately five hours and with seven to 10 participants.

All groups took place either in the capital or one of the major cities in the 16 countries and a total of 523 young persons participated. The fieldwork took place from May to October 1997. The second part was carried out in nine of the previously-surveyed countries (Denmark, Sweden, the U.K., Germany, France, Italy, Spain, Poland, the Czech Republic).

In each country four extended groups, each lasting approximately four hours, were carried out with between seven and 10 participants and with a split between girls and boys and those aged 14-16 years and 17-19 years. A total of 305 young persons participated. The fieldwork took place from April to May 1999.

In connection with the recruitment of these groups in early spring 1999, a panel of 80 teenagers was established in each of these nine countries forming a pan-European youth panel of 720 persons.

In the first study, in 1997, all 523 participants filled in self-completion questionnaires about their relations to nearly 200 international brands and about their favorite sports, actors, TV programs, bands, etc.

In the 1999 follow-up project, the panel members received a similar questionnaire plus an additional one with questions about their usage of mobile phones, the Internet and other media. They also received a diary where all their activities over a full week were registered.

This quantitative part of the project took place in May/June 1999 and 675 of the panel members returned the questionnaire.

Objectives

This research design is aimed at collecting and interpreting data on a continuous basis focusing on new trends, youth culture and language for strategic decision making. It allows us to stay close to this important target group and it forms a basis for a better understanding of how to involve them via advertising, events, promotion activities, etc. but also to bring inspiration and ideas for new product development.

The value of such data for marketers depends on the extent to which the data are able to indicate trends that will have an impact on the target group's attitudes and behavior in the near future instead of just describing the actual status.

To meet the above needs, we decided to base this project on the following conditions:

1. Continuity and similarity in the data collection.

Every six months a qualitative stage is carried out based on between 18 and 36 extended groups in nine countries. The same qualitative techniques and guidelines are employed in order to compare the results across the countries. Twice a year the 700 panel members are involved in tracking of attitudes, activities etc. so as to follow relevant changes over time.

2. Selectivity of the respondents.

All participants are carefully selected to represent opinion leaders within each of the age groups. They are chosen on the basis of numerous interviews in schools, clubs, etc. where we ask for the names of young people who are perceived by their friends to be the most active, most knowledgeable or trendy in relation to sports, fashion, music, technology, etc.

Young persons who are mentioned by several of their schoolmates, club members, etc. are contacted and interviewed by trained interviewers to ensure that the right type is invited. We define these young people as "mainstream opinion leaders" who act as gatekeepers for the majority of other young people. The trends, products, attitudes etc., that the opinion leaders adopt will most likely be mainstream at a later stage.

3. Involvement of the respondents.

When dealing with opinion leaders it is crucial that they describe their lives, their values, beliefs etc., in their own way, without being too influenced or biased by questions which tend to be reflections of what clients and researchers believe is important and relevant to them. It is our experience that it is extremely rewarding to ask them to illustrate their lives via collecting different materials before the group meetings.

At the initial interview after the screening, all participants were given a disposable camera and a brief telling them to take photographs of their families, closest friends, own rooms and houses to obtain an impression of their world.

They were also asked to take photographs of whatever makes them happy or gives them a kick and also what makes them angry or sad. The participants brought these with them to the groups where they were used as a basis for the discussions, together with collages they were asked to prepare to illustrate their way of life.

In the follow-up project, we invited them to bring examples of advertisements which they found especially appealing and to take photos of attractive shopping areas, pictures of industrial design (mobile phones, cars, PCs, TVs, etc.) they especially liked, individuals they admire, etc.

4. Involving experts in youth culture.

From the start of this project we decided to involve experts who specialize in researching trends among the young generation. We chose to cooperate with Signs of the Time, a European-based strategic trend research institute.

Together with the team of psychologists and consultants from GfK Europe, who interpreted the data and wrote the country reports, the team from Signs of the Time prepared additional reports. Here they described which trends could be foreseen and the implications they would have for companies who target their products or services at this young segment.

The following findings are from the first qualitative survey in 1997 based on 64 extended groups.

No belief in politics – or in big companies

In concordance with the postmodern disillusion expressed by the Generation Next respondents is a strong distrust of politicians, who do not deliver what they promise. This is a truth for Generation Next in the past, present and future.

Also big companies are perceived with cynicism and distrust. The respondents believe that the companies show a friendly face, and some of them know how to use good advertising, but the firms are simply in it for the money – and nothing else – and they pollute the environment. It is true that Generation Next is not very involved in the environmental issue, but in their opinion, companies should be.

The generalized home

Home has always been of great importance and the contemporary culture of divorce even adds to its importance. Home comes to stand for a heaven in a heavenless world. It is both a symbol for coziness, warmth and belonging and the actual place where these basic values should be found.

In most countries, however, the mother is out working as well, which makes home a more empty place than the ideal one. All over Europe, Generation Nexters are saying that they do not see much of their parents because apart from the weekends, they work.

As a result of this more or less empty home, "home" is extended to other places as well. Friends for instance mean "home" at least as much as the place shared with their parents. All over Europe Generation Next makes it clear that the importance of friends cannot be over-estimated. Gathering, for instance, with friends at McDonald's even makes McDonald's "home" – in spite of the fact that not all like the food very much.

This is the generalization of home. Of course, home means where they live with their parents. But home, on a more symbolic level, also means where they gather with their friends.

This trend is deepening with Generation Next. In the central region of Europe, we see trendsetters now avoiding crowded and anonymous house parties. They prefer partying with smaller groups of their intimate friends and the friends of those friends.

Friends are there for life or at least, Generation Next is prepared to make an effort to realize this. Sharing problems is mentioned everywhere as the unique thing you can do with friends – less with your parents and not with other people, which means that home is where your friends are.

Characteristics of identity formation

Both the lack of consistent direction and Generation Next's dislike of authority means that the construction of identity is not an easy thing for Generation Next.

Generation Next is a highly social generation. They all have a great capacity to communicate with each other – and they miss no opportunity to do so. Part of all the communication has to do, of course, with creating a proper peer group which you can really feel part of. For Generation Next, however, this is only half the story. Communication is equally meant to make clear to the peer group that you are your own kind of person – that you are not simply part of the group, but also an individual.

This is called the social individualism of Generation Next. It is all about forming a peer group identity on one hand, but continuing to have a clear sense of your own individuality at the same time. Friends play the most important role in both sides of this identity formation process. Generation Nexters want to be unique or at least want to have a sense of uniqueness from time to time. But they want to be unique in a safe group, a safe group of friends who recognize and respect their uniqueness. That is what friends are for.

The new ambitiousness

One of the factors that unites Generation Next all over Europe is their ambitiousness. This ambitiousness works out differently in the eastern region than in the well-to-do west and north of Europe.

In the well-to-do regions of Europe, Generation Nexters simply expect that their high standard of living will stay with them in the future. Looking beyond that for Generation Next means looking for the immaterial values in life. It is important to interpret this disdain correctly. It hardly has anything to do with the wish to refrain from material richness. Material richness is simply a value taken for granted. As with all things taken for granted, it might get a bit boring.

In the eastern region the situation is different. Ambition here means working hard in order to achieve the material things that Generation Nexters elsewhere take for granted.

In the well-to-do regions of Europe, school irritates Generation Next a lot. Authoritarian teachers especially cause anger – besides the boredom that goes along with school in general. In the eastern regions, however, school means the possibility to realize one's ambitions, and also here school generates a lot of irritation. But here it circles around the injustice that many a Generation Nexter does not have the financial means to get admittance to the proper schools.

Work and the need for impression management

While in some countries the economy is booming, job opportunities are not so good in other countries. In all cases it is not easy to get a good job. Generation Next realizes this and understands that it does not have the power to change the conditions. So, everywhere Generation Next is prepared to adapt to it.

This social and communicative generation knows that making a good impression is a vital strategy to force success to come your way. Ambitious brands fit perfectly in this picture.

The shape of stress society

Generation Nexters' lives are filled with stress, and the stress is here to stay. A complex series of multi-leveled factors play a role here.

First of all, living under postmodern conditions is not really easy. It offers freedom and experiences, but also the eternal necessity to reflect on what things mean to you.

Also Generation Next's distrust of society in general and the political world in particular does not make life easy for them. A united Europe does not provoke much interest or emotion among Generation Next. A slight fear that a new and mighty power will intrude on their national and personal lives is expressed in the northern and continental regions. Things might change in a united Europe. The mix of disinterest and slight fear adds to a sense of stress in Generation Next's lives.

Decline of the national welfare state

On a more pragmatic level, the decline of the national welfare state makes life harsher everywhere. The era when the state took care of you from cradle to grave is over. Generation Next understands this completely. They know that they have to live up to new, more competitive conditions.

It is true that in eastern regions, but also in Italy and Spain, there never was a full-blown welfare state. Here life simply stays harsh and competitive as it was before. However, because the aspiration level of Generation Next has run high in these countries, the fact that you are out there on your own adds even more stress.

No one to blame but yourself

Last but not least, stress is mounting because of the fact that Generation Next believes that if you fail, you have no one else to blame but yourself. Generation Next is a self-centered generation. They do not intend to change the world, but rather intend to change their own lives for the better.

As a generation, they do not feel they are the architects of future society. To compensate for this, they aim to become the creators of their own destiny. However, if you fail under these conditions, the consequences are not only yours personally, you can also blame yourself exclusively. Chances are there for everyone. Only losers do not pick them up.

Strategies to overcome stress

Which strategies does Generation Next use to overcome the multi-leveled stress in their lives? If one asks Generation Next about their favorite activities, paradoxically enough, doing nothing rates very high. Being alone from time to time seems to be a life-saving necessity, though the anxiety of missing out should not be underestimated.

Doing nothing with friends, just hanging around with them is also highly valued. Of course, this is not completely about doing nothing. There is a lot of talking and fun involved as well.

Thrill me

The desire for fun and pleasure from new kicks is also a strong feature of Generation Next. Of course, these desires are found in every generation, but especially for Generation Next they are colored by their need to compensate for all the stress.

Thrills and pleasures not only construct a welcome resort for Generation Next but also deliver an intense sense of being alive – fitting into the identity formation need of Generation Next.

Shopping also functions as a therapy against stress, especially for girls. For them shopping is an important exercise in female bonding. All over Europe shopping areas have become temples for consuming, for gathering, for experiences.

Brands and communication

In the extended group discussions in the 16 European countries a lot was said about appropriate branding and communicating towards Generation Next. The following points are an attempt to summarize these inputs into recommendations.

1. First of all, Generation Next is not that easy to fool. They know the ways of the marketing world. Keeping a distance comes naturally to Generation Next. Therefore, showing them that you understand their need and desire for distance is very important. In a lot of popular advertising – Levi's, Diesel, CK – youth show faces and body gestures that clearly suggest the distance Generation Next wants and appreciates.

However, keeping a distance is not enough. An especially cynical Generation Next should be persuaded that this particular brand, but also this particular company behind the brand, can be trusted. After all, "consumer terrorism" is a phrase they use. Therefore, in order to appeal to Generation Next, companies should behave like good citizens. Company strategies for social responsibility appeal to Generation Next. This trend will deepen, because of the new decency which is evolving as a part of Generation Next's overall mentality.

2. Everyone who communicates with Generation Next must respect his or her visual literacy. More than any generation, they can see through what a commercial wants from them. And they demand high standards. Advertising filled with clichés provokes an irritated "don't give me that crap" reaction in all of Generation Next. For that reason stereotypical lifestyle ingredients in advertising are no longer liked by Generation Next. They think the trick is too cheap. The Eastern region, however, seems to be an exception to this rule.

3. One of the outcomes of this study is the immense importance of the (generalized) home for Generation Next. Socializing with friends at home and doing nothing is especially very, very dear to the heart of Generation Next everywhere. Branding and communication should not overlook that atmosphere. Sticking to what is emotionally important is a big trend among Generation Next.

4. The anti-authoritarian inclinations of Generation Next are also important for branding and communicating. No brand communication is in a position to prescribe to them what they should do. Respecting their fickle buying behavior is better than trying to convince them that they really need you.

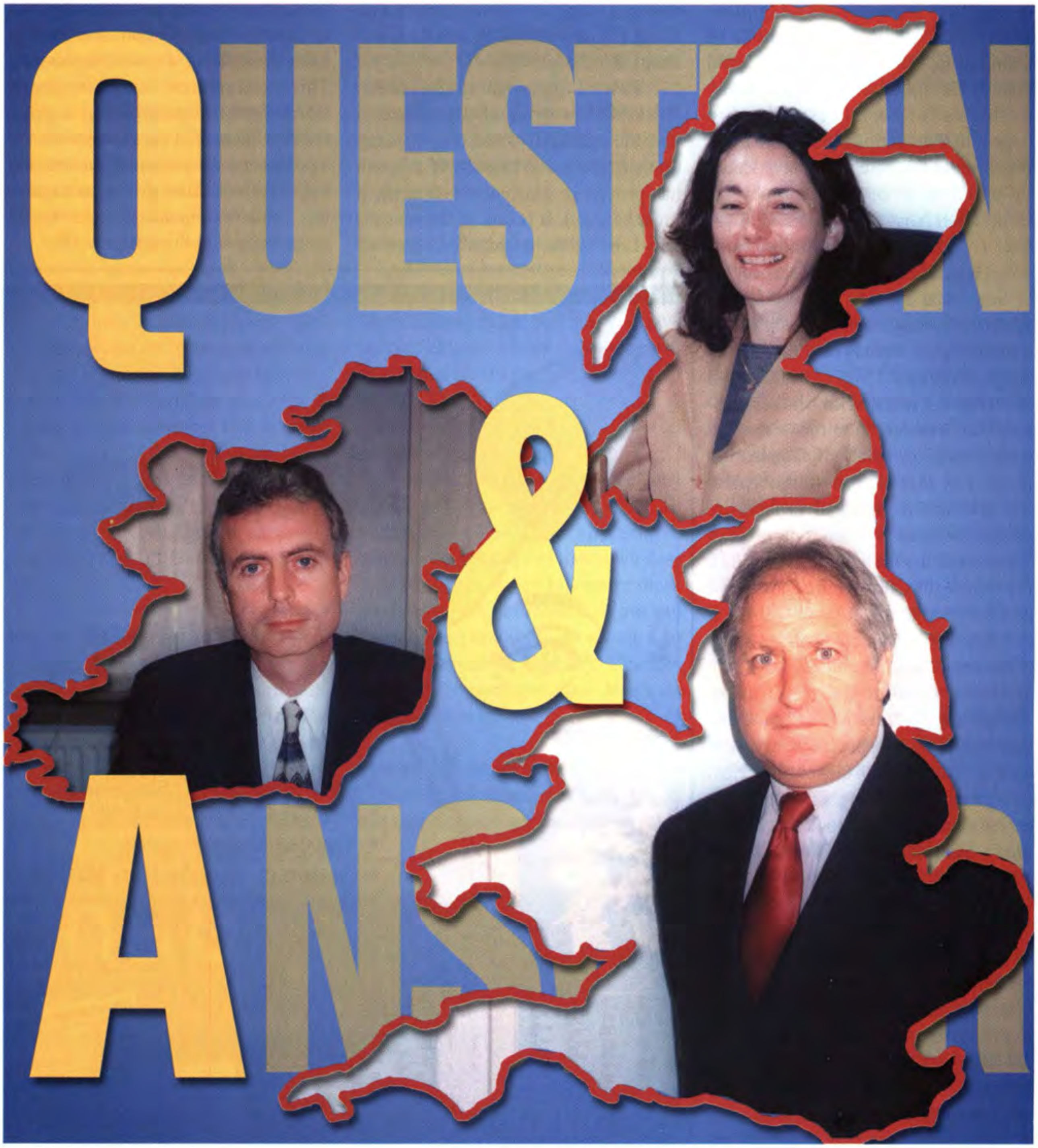
"Don't define us. We'll define ourselves." That is the credo of Generation Next. Any company, any brand that wants to communicate with them should take this credo very seriously.

5. This research also shows that beautiful things radiating rest and even a silent authority are appreciated by Generation Next in their stress-filled society. This is an important insight with regard to designing for Generation Next.

6. And, of course, everything that thrills them, that gives them an experience, a laugh, an interactive moment, is appreciated. Exciting retail experiences also fit into this.

7. Retro is important to Generation Next, both in terms of design and to give the right kind of authority to many of their preferred brands. If a brand has proven its existence over time, it must be good. It is one of the reasons why Levi's ("the original") Coca-Cola ("the real thing"), and Nivea, etc. continue to be liked very much.

8. The new ambitiousness of Generation Next is an issue to consider. Everywhere, Generation Next is keen on making a good impression. This social and communicative generation knows that making a good impression is vital for success, both in a professional setting and in attracting the other sex. Brands that recognize this – ambitious brands themselves – fit completely into this picture.



Editor's note: For his annual contribution to our international research issue, our West Coast ad rep/roving reporter Lane Weiss traveled to England, Scotland and Ireland to interview principals of research firms in those countries. In England he spoke with John Kelly, CEO of IRB International, London. In Scotland he talked to Menekse Suphi, managing director of Scott Porter Research and Marketing, Edinburgh. And in Ireland he interviewed Ian McShane, managing director of Market Research Bureau of Ireland, Dublin.

Quirk's: What are the public perceptions of marketing research in your respective countries?

Kelly: In the U.K., if you asked someone what marketing research was, they might say it was an opinion poll. Or they might now say it's a focus group, since focus groups have had a great deal of publicity as the new Labor government has used them. Opinion polls probably account for no more than 2 percent of research revenues but 98 percent of market research publicity. There have been some issues in the past where pollsters didn't get results right and that has had a negative impact on the reputation of market research

but the vast majority of commercial market research isn't understood by the public.

Suphi: In urban areas in Edinburgh and Glasgow people are much more exposed to it. It's difficult to judge but there isn't a negative impression. People will participate if they have time. There is suspicion about telephone research as there have been a lot of unethical companies using research to get sales information. So they can be difficult to reach that way because people are getting tired of receiving sales calls under the guise of research.

McShane: For many years people would think of marketing research as public opinion polls and over the last 20 years public opinion polls have begun to be taken as gospel. Some members of the public and some pressure groups have problems with public opinion polls and how they influence social change.

In the last five or six years a lot of Irish newspapers and TV magazine shows have started doing stories that focus on consumer marketing, so you will see stories on the latest beer brand or mobile telephony and how research may have played a role in their development.

Quirk's: What marketing research methods are most commonly used in your respective countries and why?

Kelly: If you look at the U.K., the main means of data collection is face-to-face in-home interviews. Phone research is popular and probably accounts for 20 percent of marketing research.

We have an approach similar to mall research which is central location tests or hall tests in which we hire a hall in a village or a township and recruit people to come to the hall for research.

The main difference is that we don't have the issues of personal security that people have in the U.S, so it's still possible for strangers to knock on people's doors and ask them questions and also to stop them in the street.

Suphi: Scottish companies use a variety of techniques. The most popular qualitative techniques are focus groups and depth interviews. On the quantitative side, street interviews and telephone interviews are popular, as are in-home interviews.

McShane: Five years ago the answer to that question would have been face-to-face, probably in-home, accounting for 80-90 percent of the research done. The main reason was that telephone penetration was quite low, maybe 70 percent four to five years ago. Now it's at 90 percent so you can draw representative samples. In Ireland at this stage my hunch is that it's 65-70 percent face-to-face and the rest telephone. Of the face-to-face research, it's mostly in-home with CAPI technology.

Quirk's: Is Internet research becoming more popular and more feasible?

Kelly: It's certainly becoming more popular and, if you're researching a business audience, it's very feasible. For consumers, it's not yet possible to get a representative sample. About 20 percent of homes have Internet access. The figure for people who have Internet access at home or at work is about 40 percent and if you come back in two years it could be 60 percent.

A lot of companies are putting together Internet panels like those in the U.S. and we expect in the next few years to see an explosion in Internet research. It is the hot topic at the moment.

Suphi: At this point, there isn't a big demand from the Scottish customer base for it. But it will come. The focus at the moment is on the drawbacks and the difficulties with the technique. So while it can give you easy access to people it's still very, very new and we're watching it carefully.

McShane: There is some interest in it. In the past 18 months in-home Internet usage in Ireland has gone from almost nothing to 20 percent of the population. Clients will approach us with a view to researching their portal site and we will pull together a Web clinic and have respondents look at the site. We're just now at the point where pop-up surveys are becoming more prevalent.

Quirk's: How will the Internet affect

marketing research?

Kelly: I think first of all we have to determine what approaches we should use. We have to be careful to not merely transfer from one medium to another without using the benefits of the other medium. It is possible to put a paper questionnaire on the Internet but that doesn't take advantage of the Internet's capabilities. The industry has to learn how to use it properly.

Suphi: Potentially it could make marketing research easier. It certainly has the potential to make turnaround quicker and make the research cheaper. It has a lot of potential but it also has a lot of limitations.

McShane: You can approach it from a number of angles. From the broader point of view, the advent of online research has opened the market to a huge range of practitioners who wouldn't previously have been considered marketing research practitioners. As we conduct research online, the issue of self-selection comes up. And internationally more and more people are expecting to be incentivized for online research.

Quirk's: What are some of the problems facing research in your respective countries and around the world?

Kelly: I know what the problems are but couldn't begin to tell you how to solve them! In the U.K. there is the issue of data protection. We have very stringent rules in Europe about what you can and cannot divulge about people. If you hold information about them you can't have their name and address attached to it. We're going through a new round of negotiations with the office of the data protection registrar, which is an official body over here, to ensure that marketing research knows what it can and cannot do and so the registrar knows what marketing research is, which is the anonymous collection of data and the presentation of that data.

Other things are perhaps more parochial, having to do mainly with social chapter legislation coming out of Europe, which affects that way you employ people. The vast majority of marketing research interviewers are self-employed workers and what is happening at present is that European legislation is bringing people in line so that they are entitled to the same holidays and sick pay as full-time workers. This obviously has an impact on the cost of marketing research and the content of marketing research. It could change the relationship of market research firms and their interviewers.

Suphi: From a qualitative perspective, one of the big issues, and this has been ongoing for several years, is recruiting problems and the quality of respondent we're getting. In the U.K. we use a network of recruiters who are contracted to find respondents for us under a specified sample quota. There have been a lot of problems with verifying the quality and genuineness of some of the respondents. I don't wish to tar all the recruiters with the same brush but there are times when you're not sure if the person you're talking to really is buying that brand of coffee and is the right age, etc. It's something that the industry has been looking to address very seriously in the last couple of years.

The recruiting system is a very valuable one because it enables us to reach people we might not otherwise be able to and perhaps the way to address the issue is to look at each company training their own recruiters to their own standards, which is a very tall order.

McShane: One of the areas where I think we face a challenge is the whole area of relationship marketing and the move by some of our larger clients toward database-related relationship marketing and the challenges that that presents us. If we're to, for example, take a client's database and attempt to conduct research on that database with a view to giving them a standard research report, that raises all sorts of ethical issues. We have the data protection act, which means that everybody must be written to beforehand to get their permission to be interviewed. And organizations like ESOMAR will not stand for marketing research being spoken in the same breath with words like telemarketing and database marketing.

It's possible for a researcher to wear a couple of different hats but if we are involved in relationship marketing research whereby we are going to research named individuals who gave their name to the client in the first place, I think it may warrant conducting that research through a separate entity, making it quite clear that it's a marketing or telemarketing organization.

Quirk's: How has the consolidation of marketing research firms affected the industry?

Kelly: The headlong pursuit of consolidation isn't stopping. People see globalization as a thing to aim for. What that means for companies like ours, who are in the middle, is that we are getting squeezed. We're not large enough to be able to compete with the big guys but we have the infrastructure and overhead commensurate to our size so we can't compete with the little guys, the boutiques. I don't think all of this consolidation is necessarily for the good of the industry because you end up really with very few suppliers.

Suphi: What we have here is a number of very large companies with multinational links who have began to dominate the industry in the clients' minds because they can [publicize themselves] a lot and they can offer an integrated network to address client needs across the world. They can also put a lot of money into developing techniques and methodologies. But on the downside it has meant that a lot of the smaller independent companies have closed or been swallowed up by larger firms.

We have seen that some clients are starting to turn away from always choosing the large firm and are starting to look at smaller firms. So it's been good for clients because the larger firms can offer them a network of companies around the world but on the other hand it has focused attention on smaller agencies and the advantages of dealing on a more personalized level. With smaller agencies the client can deal with representatives at a very senior level all the way through their project. They'll be sure that it isn't a junior person who does the work and the senior person who just comes in and presents the results.

McShane: Having come myself from a small agency to a large multinational one, I have to say that from the client's point of view, consolidation has to be good! I know that large groups have inherent problems in terms of efficiencies and bureaucracies. But what has happened in our instance and I presume elsewhere is that the larger the group becomes, the more resources get put into research and development and the more new techniques we're able to offer to the clients.

Quirk's: Do clients seem to have reasonable expectations about what they can do with or learn from research? Do they make effective use of the information they obtain from marketing research?

Kelly: That's a difficult question to answer. If you went back 10-15 years, the person buying the research on the client side would probably be a market researcher so he probably wouldn't know much more about the company's business. But now those who are buying research are not necessarily just marketing research professionals. They are people in these companies charged with buying marketing research and they have a much broader picture of the importance of the data that's been collected. So I would hope that market research is now being more widely used within companies but if it doesn't fit with the story, it doesn't get used.

I think it is incumbent on us as marketing research suppliers to look more into the businesses we're working for to make ourselves more rounded so we can, dare I say it, add value. Everyone is trying to add value, though I'm not sure many people do and I think it's because marketing research has been too concerned with the process rather than the impact of the data.

Suphi: We have a mixed client base. Some are large, sophisticated clients and they have been dong research for a long time so their expectations are very realistic and their appreciation of what they can do with it and expect are fairly accurate and fairly good.

On the other hand, we have small clients who have never done research before. They are just beginning to recognize the value of doing research and they need a lot of handholding.

The less sophisticated clients will put themselves in your hands and let you guide them. There are others feel that they still want to be in control and our role is to provide guidance on how to take the research further.

On the whole we find in Scotland that clients take research seriously and do see the value in it and are often surprised by the added value they get.

McShane: I think the clients would break down into two camps. In Ireland, the economy has taken off in the past few years and people who heretofore hadn't done marketing research are now tripping over themselves to do it. That brings problems in that there are a large number of people who, through no fault of their own, don't understand marketing research and who need a certain amount of basic handholding. Then we have our larger clients who have been doing research for years and have their own departments.

I think it's a matter of setting the parameters from day one. So if someone calls up and says they want to do two or three focus groups to get a little understanding of what the reaction might be to a new concept, you make it clear to them that that's exactly all they're going to get: just a little understanding.

Quirk's: What can research firms do to help clients get more from research data?

Kelly: We really need to know more about the industry we're working for and not be process-driven. We know that we can collect the data and we know how to use it but then it depends on the client allowing us enough information to be able to help. We sometimes suffer from only getting part of the story. So it's two-way street: If they were to impart a bit more information we would certainly be able to make the data we collect for them much more valuable.

Suphi: My view is that there is a lot of value in working on a consultancy basis with clients. Rather than just giving them the data, the research companies are much more integrated into the aims of what the project is trying to accomplish and getting to the point where the client sees you as a part of the team rather than just a supplier of information.

McShane: I think easy-to-use software packages, which are offered to the client as an add-on so they can work with the data themselves, would be helpful. If you are doing a large U&A study of a couple thousand interviews, the chances are that no matter how tuned-in the clients and the researchers are, you're never going to get to the bottom of every single question. So by empowering the client with easy-to-use software packages, especially one available online, they can get more out of the research data.

Quirk's: What are some of the trends you see in the marketing research industry? Are more companies doing research? Are some industries doing more or cutting back?

Kelly: In the past several years we have seen the impact of customer satisfaction research. A lot of banks and other service industries are doing a lot of CSR.

In the U.K., the vast majority of research is bought by a small number of companies so research really hasn't really penetrated the SME (small, medium enterprise) sector. And in way you can understand why because research is expensive and, in the case of these smaller companies, they want a $50,000 project but they only want to pay $5,000 for it.

Food companies, IT, telecom, entertainment industry, high-tech, all are doing a lot of research. But over here the dot com companies aren't doing a lot of research, at least not as commensurate with their value.

Suphi: Over the longer term there has been much more recognition of the value of qualitative research. Traditionally people have been interested in the statistics from quantitative research but over the past 10 years there is a noticeable increase in firms doing qualitative research, not as a precursor to quantitative but as a standalone project that can give them the kind of insights into consumer behavior that they can't get from a bunch of questions over the telephone.

In terms of sectors in Scotland, the financial sector has always been at the forefront and they continue to do a lot of research. The food and drink firms have been doing more marketing research, and that includes a lot of the smaller food producers and manufacturers who are recognizing, either on their own or through their umbrella organizations, the value of marketing research. There is more research being done in the non-profit sector.

McShane: There is a lot of research being dong in the FMCG (fast-moving consumer goods) area on category management. All of the FMCG companies have a category management department, all of whom are developing a colossal amount of resources to defining the categories and the decision tree and applying that to the retail outlet. So that's one area where we are doing a huge amount of qualitative and also quantitative.

Quirk's: Are the research departments in the client companies growing or shrinking? Are clients looking at research companies as partners in information management as opposed to providers of data?

Kelly: In general, in-house market research departments are shrinking. In theory they are looking for partners but in practice I'm not sure they allow us to be that. A lot of the jobs are ad hoc custom research and you may win a project now but not get another one from the same client, so it's very difficult to build up a relationship. What they often miss is that they may save $1,000 on this bid but by taking someone who is $1,000 cheaper they probably wasted the $50,000 they spent with the first company because they've lost all that learning.

Suphi: There is a general move toward partnership-making. There is a lot of value to forming a longer-term relationship so whilst you are not part of the research department as such there is an ongoing working relationship.

McShane: Research departments are growing and that is a function of existing departments growing. But more often than not, client companies which never had a research function are now getting one.

Quirk's: How has the globalization of the world economy affected research? Will more companies use a global research and/or marketing approach or tailor their approach to each country?

Kelly: I think they probably pay lip service to the "think global, act local" idea because you see so many international ad campaigns that have been obviously dubbed and they don't work. They may well have been researched but they don't work.

We in the U.K. have been fortunate because we have been seen as coordinators of international research for years, principally because the biggest buyers of international research have been U.S. companies and since we nearly speak the same language we have had an advantage since we have been able to represent a coordinating facility.

Globalization with carry on. It will be the shibboleth for some time until something else comes along.

Suphi: I can only speak from the perspective of the clients that I work with, but I think there was an initial phase to try to encompass everything with a single brush stroke. But there has been a move toward recognizing the individual markets with their own needs. A number of lessons have been learned in trying to do the same thing in the same countries.

In important overseas markets clients have been moving toward researching them as individual entities and in some cases have been surprised by the differences the research has highlighted and that has had a dramatic impact on their marketing strategies.

McShane: It's difficult to get a sense of where the large multinationals are going. You'll hear that one group is going to roll out a global marketing campaign and you'll hear another group is planning to do localized direct marketing. We have conducted research for multinational companies who are pursuing a global marketing strategy and the research methodologies and approaches have been dictated from on high, right down to the questionnaire design. I know that some clients in those instances have been a bit disappointed that the findings, while directly comparable between France, Belgium, and the States, for example, aren't quite as incisive as they might have been since the questions haven't been tailored for the local marketplace.

Data Use

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accounted for by variation in education. Huh? Not surprisingly, this explanation tends to confuse rather than inform. It is no wonder that researchers continue to argue about the meaningfulness of this calculation.

Somewhat more useful is what I call the "soft drink description." This is the process of arbitrarily dividing correlations into the categories of small, medium and large. For many researchers, correlations below .3 are considered small (and not worth worrying about), correlations of .3 to .5 are considered medium (and of some interest), and correlations of .5 to .8 are considered large (and should be focused on). Note that correlations over .8 (extra-large or "super-size" correlations) are rarely obtained and, if they are, tell you that your two variables are basically measuring the same thing. This way of explaining the practical importance of correlations is easily grasped and does provide some direction for clients. However, the crudeness of this method often falls short of communicating the importance of the result.

Table 1

Example of binomial effect size display for a correlation of Q

		REPEAT PURCHASE?	
		Yes	**No**
CUSTOMER ATTITUDES INDEX SCORE	**Top Half**	50%	50%
	Bottom Half	50%	50%

A third technique developed by social scientists in the 1980s - the binomial effect size display (BESD) - can help bring to life the importance of your results. Suppose that your aim was to predict repeat purchase behavior among a group of customers - half of whom who have made a repeat purchase, half of whom have not - using a customer attitudes index. In correlating the index with purchasing behavior you obtain a correlation of .50. As discussed, we might say "25 percent of the variance in repeat purchase behavior is explained by variation in scores on the index." Aside from being confused, your client might also think that this result is not very important ("Only 25 percent?!"). He or she would be wrong, and the BESD can show why.

We begin by constructing a 2 X 2 matrix as shown in Table 1, with two levels for the customer attitudes index (scorers in the top half and scorers in the bottom half) and two levels for purchase behavior (repeat purchase/no

Table 2

Example of binomial effect size display for a correlation of .5

		REPEAT PURCHASE?	
		Yes	**No**
CUSTOMER ATTITUDES INDEX SCORE	**Top Half**	75%	25%
	Bottom Half	25%	75%

repeat purchase). Computing the cell entries begins with the assumption that there is no correlation between the measures. If this were the case, we would expect that 50 percent of the customers who scored in the top half of the index made repeat purchases and 50 percent who scored in the bottom half of the index made repeat purchases. This would give us 50 percent in each cell, since all rows and columns must add to 100 percent.

To represent the correlation in the matrix, remove the decimal point from the correlation, divide this number by two and add the result (25) to the top left cell. Now adjust all cells so that all rows and columns add to 100 (see Table 2).

The BESD tells us that 75 percent of those who score in the top half on the customer attitudes index made a repeat purchase while only 25 percent of those scoring in the bottom half did so. The meaning of this result is easily grasped and the implications are fairly clear. Moving from bottom to top on the customer attitudes index increases the probability of a repeat purchase by three times - an important result. Indeed, this index will be very useful to the client in understanding the determinants of repeat purchase behavior - much more useful than "25 percent of the variance" makes it sound.

The BESD is a flexible technique because it can be used with any kind of data that can be meaningfully dichotomized. So, the next time you want communicate the importance of your correlational results in a way that is meaningful to your client (and in a way that will keep him or her awake during your presentation) remember to do your BESD.

Product & Service Update

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reports created in SPSS. With SmartViewer Web Server, the same people who create analytical reports in SPSS publish them to a centralized repository without the need for assistance from Web professionals. Information consumers then view these reports using a Web browser. Access to analytical reports via SmartViewer Web Server is controlled by both user authentication and document-level authorization. Users can also interact with the information, controlling how they learn from SPSS by rearranging rows, columns and layers with SPSS' pivoting technology. For more information visit www.spss.com.

Pulse Train launches Bellview 7

U.K.-based Pulse Train Ltd. has launched its new generation of data collection software for public beta release. Bellview 7 CATI software brings together a number of data collection tools under one centralized management system, and integrates with questionnaire design and data analysis tools. The first release of Bellview 7 includes a new version of Bellview CATI, which incorporates all features of the existing system, but includes more tools for managing sample, quotas, surveys, users and multiple sites. For more information visit www.pulsetrain.com.

New Web reporting tool from Maritz

St. Louis-based Maritz Marketing Research Inc. has launched a Web-based reporting tool called eQuest, which will provide users with online access to summarized data and reports from market research studies. It is designed to increase the speed of distribution and accessibility of research findings. For more information call 800-446-1690 or visit www.maritz.com/mmri.

Cardiff upgrades TELEform

Cardiff Software, Inc., San Diego, Calif., has introduced TELEform v7, an upgrade to its information capture and processing application. TELEform automates the processing of paper forms and documents into database and Web-based content management systems. TELEform v7 includes more than 100 new features and enhancements, including improved throughput and performance, a new version of the point-and-click Form Designer, support for color scanners, native XML input and output, as well as support for processing signatures from paper or online forms. For more information visit www.Cardiff.com/Upgrade or call 760-936-4500.

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Survey Monitor

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and product/service usage; and leisure time activities. For more information visit www.scarborough.com.

Weekday meals made in a hurry

Forty-four percent of weekday meals are prepared in 30 minutes or less according to a new study by The NPD Group, Inc., a Port Washington, N.Y., research firm. People are preparing quicker meals and spending less time in the kitchen, confirms NPD's latest Kitchen Audit, a survey of 2,000 nationally representative households.

While younger couples/singles, working parents and the elderly skew to quicker meal preparation (16-30 minutes), traditional families are apt to spend more time preparing an average weekday dinner (31-60 minutes). NPD data show that although people are increasingly simplifying weekday meal preparation, they are willing to spend more time on weekend meals, taking an average of 31-45 minutes for meal preparation.

Weekday Dinner Preparation Time Varies By Lifecycle

(percent of weekday dinners by preparation time and lifecycle groups)

Total	Young Households	Couples /Singles	Working Parents
15 min.	5.8	13.3	4.6
16-30 min.	38.5	41.2	42.3
31-45 min.	34.9	29.1	36.2
46-60 min.	14.8	10.9	12.4
61+ min.	3.6	2.6	2.7

	Traditional Families	Empty Nesters	Elderly
15 min	2.5	2.7	6.7
16-30 min	34.7	34.4	42.2
31-45 min	39.9	37.7	26.7
46-60 min	18.3	16.9	16.1
61+ min	2.5	5.6	3.9

Not surprisingly, some traditional kitchenware is becoming less popular. Since 1993, the percentage of American households with frying pans, saucepans, roasting pans, mixers and popcorn poppers has decreased.

Some Kitchenware is Losing Ground
(percent of households with item on hand)

	1993	1996	1999
Frying pan	99	97	94
Sauce pan	99	96	92
Roasting pan	67	62	57
Mixer	91	89	81
Popcorn popper	52	44	34

As some consumers refrain from purchasing traditional kitchenware, some sexy newcomers such as espresso machines, electric rice cookers, coffee grinders and electric bread bakers are becoming more popular.

Other Kitchenware is Gaining
(percent of households with item on hand)

	1993	1996	1999
Espresso machine	4	6	9
Electric rice cooker	N/A	8	12
Coffee grinder	N/A	18	22
Electric bread baker	6	15	28

Driven by consumers' insatiable appetite for saving time and effort, Americans' use of disposable goods and food storage materials is at an all-time high. NPD reported that of the 2,000 households surveyed, 95 percent contained aluminum foil, 89 percent contained plastic sandwich bags, 87 percent contained clear plastic wrap and 85 percent agreed to having paper plates.

Furthermore, confirming our increasing desire for convenience, as well as our reliance on frozen food, freezer space is at a premium. Seven out of every 10 households polled had primary freezers that were three-fourths full.

The NPD Kitchen Audit is based on surveys of 2,000 households, 500 each quarter (March, June, September and December 1999), and is conducted every three years. The sample is demographically and geographically balanced to U.S. Census Bureau statistics. Each participating household receives a 16-page questionnaire that asks about the presence or absence of particular appliances, cookware, bakeware, utensils, foods and food ingredients. For more information visit www.npd.com.

Teens loyal to companies that support causes

According to the 2000 Cone/Roper Cause-Related Teen Survey, when price and quality are equal, 89 percent of teens report they would be likely to switch brands to one associated with a good cause. This support of cause-related shopping represents a 62 percent increase from 1999. Additionally, 85 percent of teens say they would be likely to switch retailers to one associated with a good cause, up 33 percent from last year.

An increasing number of companies are supporting causes to appeal to and stay relevant with the socially-conscious Generation Y. Teens are responding favorably, accelerating the trend of cause marketing. While 63 percent of teens report they bought a product that supports a good cause in the last year, 80 percent say they are likely to do so in the next year.

From a list of eight purchasing influencers, teens report that after the quality of the product, they consider whether the company makes a donation to a cause (71 percent), and whether the company supports a cause (68 percent) as the second- and third-most important factors when deciding what to buy. A company's support of causes plays a more important role than price (50 percent), advertising (48 percent), and celebrity endorsement (23 percent).

Eighty-one percent of teens believe companies have a responsibility to support causes. Consistent with 1999 data, teens indicate they reward these companies not only with their purchases, but also with their loyalty and advocacy:

• 91 percent value companies and products that support causes (89 percent in 1999);

• 87 percent will continue to buy products from companies that support causes (85 percent in 1999);

• 86 percent will tell their friends about companies that are committed to causes (80 percent in 1999).

Companies that support causes should communicate their efforts - 95 percent of teens say they want companies to tell them about their cause initiatives. Advertising is the most effective communications vehicle, with teens reporting they learn about companies' social commitments through ads on television (70 percent), magazines and newspapers (55 percent), and radio (54 percent). Sixty-five percent of teens say they also learn about cause programs in school.

According to the survey, teens are most concerned about school violence (60 percent), drug and alcohol abuse (55 percent), and crime (42 percent) - the same three issues as in 1999. With 69 percent of teens reporting that companies are not doing enough to help the issues they care about, there is a large opportunity for Corporate America to leverage cause marketing to make their brands more relevant to their teen consumers.

For example, as part of its sponsorship of recording star D'Angelo's summer concert tour, Levi's partnered with anti-gun violence organization PAX to engage and activate youth to take a stand against the gun violence epidemic. In response to teens' top concern for safe schools, Chevrolet is sponsoring S.A.V.E. (Students Against Violence Everywhere), a student-run, student-initiated organization that empowers young people to resolve conflicts peacefully and to become productive contributors in their schools and communities.

A company's commitment to causes is especially influential on girls' purchasing behavior:

• Girls are more likely than boys to switch brands to one associated with a good cause (94 percent vs. 83 percent), when price and quality are equal.

• Girls are more likely than boys to switch retailers to one associated with a good cause (91 percent vs. 79 percent), when price and quality are equal.

• Girls are more likely than boys to consider whether the company makes a donation to a cause (77 percent vs. 66 percent), and whether the company supports a cause (74 percent vs. 62 percent) when deciding what to buy.

• Girls are more likely than boys to shop with a cause in mind in the next year (85 percent vs. 75 percent).

Girls are more likely than boys to feel companies are not doing enough to impact social issues (77 percent vs. 62 percent). However, companies that win over girls' loyalties by supporting causes also gain faithful advocates: girls are more likely than boys to tell their friends about companies that support causes (91 percent vs. 80 percent).

Although 36 percent of teens say they have used the Internet to learn about causes, 61 percent have not leveraged the Internet at all to support social issues. The Internet will play an increasingly important role in empowering teens to make a difference, as many report they plan to use the Internet in the future to learn about causes (71 percent), buy products that support causes (49 percent), and find volunteer opportunities (37 percent).

The 2000 Cone/Roper Cause-Related Teen Survey is commissioned by Boston-based consulting firm Cone, Inc. (www.coneinc.com). Roper Starch Worldwide, Inc., conducted this survey between August 3 and August 9, completing 600 online interviews among AOL users ages 12-17. The margin of error is ± 4 percent. For more information contact Anne Chan at 617-227-2111 or achan@coneinc.com.

Organized office or disaster area?

When it comes to their own personal work area, according to Taylor Nelson Sofres Intersearch, Horsham, Pa., 48 percent of Americans work in "Neatville." Another 39 percent say they work in the bordering territory of "Controlled Mess." Of course, there are always those who exist in the outlying regions. Three percent of office-owners are dedicated Neatniks, describing their personal work space as "so neat it's scary." At the other end of the spectrum are those 9 percent who ride the cluttered trail to disaster. These Chaos Cowboys admit that their office space is "getting out of control" (4 percent), "is just plain messy" (3 percent) or is a "disaster area" (1 percent).

While a combination of files and piles appears in many full-time workers' offices, it is the proportion of each that creates the boundary line between Neatville and Controlled Mess. When the number of piles surpasses the number of files, it's a sign that the office owner is working in Controlled Mess or something worse. Those in Neatville most often corral their documents exclusively into files (65 percent). Few of the Neatnik clan organize through a combination of both files and piles (19 percent pile and file and 11 percent pile only). Conversely, 61 percent of the Controlled Mess clan pile in one form or another (31 percent pile and file and 30 percent pile only). Only about a third of the clan (37 percent) primarily use files for storage.

The majority of office owners (60 percent) stay off the path to disaster with routine bouts of culling, herding some documents into the files/piles saving scheme and others into the circular file. Some workers (22 percent) are extremely zealous, throwing out as much as possible. On the other side are the 12 percent who cannot bear to part with anything.

The residents of Neatville generally sort and straighten on a daily basis (78 percent). The Controlled Mess clan takes a more relaxed approach, with less than half (41 percent) doing a daily round-up. As a matter of fact, 13 percent of this clan cleans only when they can't stand it anymore. For more information visit www.intersearch.tnsofres.com.

Content drives stickiness of European sites

Many e-commerce Web sites like to boast of low prices and flaunt attention-grabbing graphics, but a new study from Infratest Burke and Burke Interactive suggests that content is king when it comes to making these Web sites "sticky."

The study analysis examined ratings of 36 particular aspects of Web sites along with overall ratings of the stickiness of 25 popular European e-commerce sites. The key finding: The strongest drivers of stickiness include content that encourages site users to explore further, content that is presented in an interesting manner, and content that is relevant to site user needs.

The study takes issue with a common definition of stickiness, which uses only the average time spent at a site as a positive measure. The study, in fact, finds visit duration to be a factor independent of measures that relate to site satisfaction. The stickiness of a Web site is instead here defined as its propensity to get high overall evaluations, high evaluations compared to other Web sites, a high likelihood of being revisited, and a high likelihood of being recommended to others. Responses to four questions relating to these topics were combined into a single stickiness score.

The German music, video, and game site Boxman received the highest stickiness score in the survey, receiving, on average, 17.0 points out of a possible 20.0 from German survey respondents. Among survey respondents in the U.K., the Dell Computer site got the highest average stickiness rating (16.7) among eight British sites included in the survey. The French railway SNCF had the highest average score (15.0) of nine French sites rated by French respondents.

Lowest average stickiness ratings in the three countries were obtained by the German travel site Last Minute (11.5), the U.K. Ticketmaster site (12.3), and the French book, music, and gift site Bol (11.4).

The study was conducted among members of NFO's European access panels. Panelists who had previously bought a product or searched for information in a category were asked to go to a site being rated, then return to another Web site where they were asked to complete an online survey. In Germany, panelists were asked to rate one site, while in France and the U.K. panelists were asked to rate either one or two sites. A total of 411 respondents in Germany, 321 respondents in the U.K., and 1,561 respondents in France completed the survey.

Although survey results were, in general, similar across the three countries, a few differences did emerge when looking at attributes relating strongly to e-commerce site stickiness. In Germany, the visual appeal of sites did emerge as one of the three key attributes driving Web-site stickiness (in place of relevance of site content). In the U.K., being able to easily find items of interest was one of the top three attributes, replacing content being presented in an interesting manner. The impact of particular attributes was determined by looking at the correlation coefficient between attribute performance ratings and overall stickiness scores.

The attribute that had the weakest relationship with overall site stickiness in both Germany and the U.K. was being able to return products to a retail store. (In the U.K., having a reward points or frequent shopper program had an equally weak relationship with overall site stickiness.) In France, the attributes that most weakly related to overall site stickiness were sites greeting users by name and sites offering secure payment. For more information visit www.burke.com/interactive.

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Research) and the WFA (World Federation of Advertisers). It can be downloaded from www.esomar.nl/codes_and_guidelines.html as can the ICC/ESOMAR Code for Marketing, Social and Opinion Research, on which the Guideline is based and which has been adopted by over 60 research and marketing associations worldwide.

Milwaukee-area **Advantage Research, Inc.** has opened a new focus group facility with an 18' x 28' focus group room, an observation room, and adjoining client office. An upper story outside deck is also available off of the client office. For more information call Susan Schwabenlender at 877-477-7001.

Chicago-based **SPSS** has announced that **e-Dialog**, an e-mail marketing services firm, has selected SPSS analytic software, including SPSS' Clementine data mining workbench, and SPSS 10.0 for statistical analysis, to extend its client services.

Separately, SPSS, **NCR**, and **DaimlerChrysler** have published the CRoss-Industry Standard Process for Data Mining (CRISP-DM). CRISP-DM 1.0 is a data mining methodology and process model that provides users a blueprint for conducting a data mining process. Visit www.crisp-dm.org to download a PDF file of the CRISP-DM document.

SPSS also announced that research firms **Market Facts**, **Harris Interactive** and **NFO Research** have selected SPSS's Verbastat to handle the coding of open-ended survey questions.

San Diego, Calif.-based **Salford Systems** won an international Web mining competition organized by the Association for Computing Machinery, the School of Electrical and Computer Engineering, Purdue University, and Blue Martini Software. The two-month-long competition involved analysis of the clickstream and customer data of an e-commerce retail Web site. Contestants were provided data from February and March and were asked to apply their models against the April clickstream. Models were designed to support Web site personalization and to improve the profitability of the site by increasing customer response. Salford Systems won in the category of identifying and characterizing the most valuable customers using its CART, MARS, HotSpotDetector and TreeNet software.

Modalis Research Technologies, Inc., San Francisco, announced that online marketing research revenues at the end of the second quarter of 2000 grew to a record 210 percent of the sales volume compared to the same period in 1999. The growth is evident in both North American and European markets; both regions combined show a 58 percent growth in sales from the first to the second quarter of 2000. The company is on target to meet its sales growth goals that will result in fiscal 2000 revenues in the $13 million to $15 million range, 85 percent of which is derived from online research activities.

Separately, Modalis Research Technologies has opened a new office in Chicago. The office is located at 5315 N. Clark St., Number 183, Chicago, Ill., 60640. Phone 773-561-3949. Fax 773-561-4504. Contact: Ed Erickson. The firm's Boston office also has a new location: Riverside Center, 275 Grove Street, fourth flr., Newton, Mass., 02466. Phone 617-663-5757. Fax 617-663-5377. Contact: Walt Harris. The firm has also opened new offices at 5505 Connecticut Ave. N.W., number 132, Washington, D.C., 20015-2601. Phone 301-439-6004. Fax 301-439-6098. Contact: Donna Victoria. And at 20910 88th Place West, Edmonds, Wash., 98026. Phone 425-775-6460. Fax 425-775-6471. Contact Mary Monroe.

Saskatoon, Saskatchewan-based research software firm **Interactive Tracking Systems, Inc.**, has opened an office, Itracks International, in Fairfield, Conn. In conjunction, David Bradford has joined the company as vice president, international sales and marketing.

Intelligex, a New York-based start-up scheduled to launch in late fall to match buyers and suppliers of custom market research in a new online marketplace, has partnered with Yankelovich's decisionDOMAIN, an ASP offering online tools and services to marketers. The agreement will result in collaboration and cross-marketing between Intelligex and decisionDOMAIN.

The Marketing Research Institute International (MRII), **ESOMAR** and the **University of Georgia Center for Continuing Education** (UGA) have launched a Web-based version of the Principles of Marketing Research distance learning course. The course is designed to teach the marketing research core body of knowledge (MRCBOK). As a result of the strategic worldwide education alliance between MRII, ESOMAR and UGA, the course was recently enhanced to include an international section in each of the 10 study modules. For more information visit www.gactr.uga.edu/is/mr.

Opinion Research Corp. (ORC), Princeton, N.J., has acquired the assets of **C/J Research Corp.**, Arlington Heights, Ill. The total cost of the acquisition was $9.5 million. In related news, ORC announced that an investment fund had purchased $10 million of its common shares at $8.50 per share. The proceeds of this transaction were intended to be used for the C/J acquisition and for future growth initiatives.

Ottawa-based **Manta Corporation** has secured $6 million in first-round venture capital financing to promote its mantaINSIGHT product, a Web-based e-survey tool. The financing will assist with the upcoming launch of an open database compliant (ODBC) version of mantaINSIGHT.

Memphis, Tenn.-based **Food Insights** has moved its corporate office and research center into expanded facilities at 51 Germantown Court, Suite 201, Cordova, Tenn., 38018. Phone 901-755-9911. Fax 901-755-1006. Food Insights now offers clients a new conference-style focus suite facility featuring a full kitchen, video equipment, client lounge/office, and a two-tier observation room. For more information contact Judy Patton at 901-755-9911.

Alliance Research, Inc., the research division of Catalina Marketing Corporation, has acquired **Market Intelligence, Inc.**, a Chicago research company. Market Intelligence will add analytical and client service experience to Alliance Research's capabilities, and will expand the scope of Alliance Research's attitudinal research platform.

MarketingInfo (MI), an online market research information source, and the **ARF** have signed an agreement to build a Web site for the market research industry. Through the collaboration, the ARF will provide MI with content drawn from its publications, and new, original content developed for MI.

RestaurantRow.com, Inc. and **Menus.com, Inc.** have agreed to merge, creating a global information and services network for the restaurant and foodservice industries. RestaurantRow.com is an online and wireless destination for consumer restaurant information and reservations.

Menus.com features a database of restaurant and menu information, and provides market research to the foodservice industry. The new company will focus on three primary lines of business: expanding its restaurant information and reservations network, data mining and research for restaurants and foodservice organizations; and marketing and business services for restaurants.

Survey.com, a Campbell, Calif., research firm, and **OpinionSurveys.com**, the online division of Glendale, Calif.-based The Dohring Company, have formed a partnership to provide Survey.com access to OpinionSurveys.com's consumer panel.

St. Louis-based Maritz, including **Maritz Marketing Research**, ranked 28th on *InformationWeek* magazine's InformationWeek 500 list of innovative users of information technology.

Separately, Maritz Marketing Research has established an office in Sao Paulo, Brazil. Tania Maria will be the country manager for research activities in Brazil focusing on the automotive industry. The office is located at Rua Pavao 605, Moema, Sao Paulo, SP, Brazil, Mail Code CEP 04516-012. Phone 55-11-5096-4523. Fax 55-11-5096-0861.

Clients of ad agencies can visit **www.bmaap.com**, to complete an online survey to receive feedback on how their opinions compare to those of surveyed peers as well as receive a free copy of the results and analysis report. Using the Business Marketer Ad Agency Perception tool, communicators can rate their experience in working with ad agencies against that of other professionals and CEOs online.

Stamford, Conn.-based **Nielsen//NetRatings** has released Internet audience information from six new countries – Denmark, Finland, France, Italy, Norway and Sweden.

Taylor Nelson Sofres Intersearch, a Horsham, Pa., research firm, has announced a new line of products using multiple standard data collection methods for the company's pharmaceutical brand audit subscription service, SampleMonitor.

Arlington, Texas-research firm **Decision Analyst** announced that more than 100,000 Europeans are now members of American Consumer Opinion Online, the firm's global panel of consumers who have agreed to participate in online surveys.

Netherlands-based market research consultants **AWA Alexander Watson Associates BV** have formed a strategic alliance with Chicago-based research and consulting firm **GRFI Ltd**. to establish a presence in North America.

Shugoll Research, Bethesda, Md., has won an Innovation Award in the small-company category of the 2000 Business in the Arts Awards. To give back to the community in which it does business and nurture appreciation for live theater, Shugoll developed Arts for Schools, a three-part program comprising TheaterTrips!, ArtSpeak! and the Performing Artist Support Program. The awards are presented by the Business Committee for the Arts and *Forbes* magazine.

Luth Research Online, San Diego, has launched SurveySavvy, a Web-based data collection service, at www.surveysavvy.com.

St. Louis data collection firm **Quality Controlled Services** (QCS) has signed 15 of its locations to the ActiveGroup Internet focus group broadcasting service of Atlanta-based ActiveGroup.

Technology from **SPSS MR**, Chicago, now enables people to run surveys on Palm Pilots and WAP-compatible mobile phones. WAP, or wireless application protocol, is the universal open standard for bringing Internet content to mobile phones and other wireless devices. SPSS MR is working with MORI and Nokia to test the opportunities that these technologies hold for researchers.

Airline

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line and the flight in question.

Rather than contacting respondents after their flight by phone or mail, the GAP study reaches the passengers while the experience is still fresh in their minds. "We want to capture their opinions very close to the moment of truth," says Paul Lai, general manager - marketing research, Delta Air Lines, Atlanta, a GAP subscriber.

The survey boasts a response rate of better than 50 percent, that is, about 50 percent of respondents who complete part one also follow through and submit part two.

"That response rate is a far cry from the less than 10 percent response rate from previous studies," Lai says. "When the response rate is so low, results could be inconsistent and unreliable. We would see results going up or down without any reasonable explanation. That's when internal customers may question the validity of your research, and rightly so."

While Lai does not want to cite specific examples of issues uncovered by the research, he does offer that the GAP research gives Delta opportunities to benchmark industry leaders in any service area and then act accordingly. "If we see that airline X is doing very well in the area of food and beverage, for example, we may want to find out what is going on there. So then we put our product people on the case and have them do some competitive flying to find out what they are doing to make their rating so high."

As is typical with syndicated studies, participants receive data on their own performance as well as that of competitors. "The first and most important thing with GAP is that it is a benchmark," Perroud says. "Airlines used to have a lot of information about their own passengers. Now they can measure their own performance and compare it to the competitors.

"The other important thing is that it's an ongoing survey, so they can track their passenger satisfaction over time. So if they change something in their in-flight service, the food perhaps, they can see how their rating is affected. They can track quarter-by-quarter."

Study subscribers receive results quarterly, in the form of data tables, raw data in SPSS or Quanvert, etc., and an Excel macro that allows them to produce charts from the data. Every six months a full report is issued.

Active in development

The airlines have been active participants in the development of the GAP study. "The design process has been a long one, involving around 15 airlines," says Perroud. "We have done two different pilot studies and also have analyzed the study to see what is the most effective way of asking the questions. All of these airlines were already asking those kinds of questions so we had a good starting point."

Dissatisfaction with syndicated transatlantic route research brought various airlines together two years ago to discuss development of a new study, Lai says. "Since a lot of airlines felt that need, it was easy to get people together to talk about possible solutions. So taking the first step was not that bad."

While the first step was easy, those that followed were considerably more difficult. The biggest problem was crafting a consensus among the participating airlines during the survey development process, Lai says. "Everything from how a question is worded to how we use the results, even the look of the graphics, has been a bit challenging. There are so many airlines involved, and each has its own quirky preferences. Now, with the survey in full bloom, it is almost a miracle that we were able to pull it off."

Help from the airlines was also instrumental in translating/back-translating the questionnaires into the various languages. Cathay Pacific helped with the translation of the Chinese questionnaire, for example. No matter the language, the survey forms use the same scales and are structured the same way.

Airline involvement in the study is ongoing. For example, Lai and other airline representative members of the GAP Technical Committee met in London in January and in Miami in October to discuss a host of issues pertaining to the survey, from adding new routes to data weighting options.

Integral part

As the link between the survey and the respondent, the interviewers are an integral part of the process and great care is taken to train them, monitor their performance and provide them incentives for doing good work.

"When we started a year ago we had a response rate of 44 percent and now it's up to 52 percent and every quarter it is improving. The interviewers play a key role and they are probably one of our big strengths," Perroud says.

"It is very important that they are smartly-dressed and professional in appearance. And they have to be very easygoing with other people. They are given a script to follow as a guideline but we encourage them to sound as natural as possible and not merely recite the words."

Perroud and other GAP representatives visit the airports to meet with the interviewers. In addition, PRP sends them a quarterly newsletter showing how they and their airport performed compared to others. "We do some contests on the response rates, not on how many surveys they distribute but how many completed surveys they get back. We rate the airports and the interviewers and the three best interviewers [globally] get a check."

Service issues

Lai says there are two main service issues facing airlines today. One is operational reliability – arriving and departing on-time, not canceling or delaying flights. "We have found that that is one of the greatest drivers of satisfaction, especially for domestic service," he says.

The second is the interaction between airline employees and passengers. "This is more a dissatisfier than a satisfier," Lai says. "By that I mean people take for granted a basic level of civility from the staff, whether it's the reservation agent or gate agent. If a representative has an attitude problem, and if a customer doesn't feel special, isn't given the basic courtesy of a smile or a sorry or a thank you, they can become angry."

In Delta's case, with 78,000 employees, Lai says the question is, how do you manage and motivate them to give great, consistent customer service day in and day out? That human element is not as immediately controllable as on-time performance or the quality of in-flight meals. Measuring and monitoring customer service is part of the job of marketing research.

Lai says the GAP study provides good information on how Delta's SkyTeam partner airline Air France is doing. "That does not replace the need for doing alliance-specific research with Air France and other partners but [the GAP study] certainly gives us a good idea of how they are perceived by their customers."

Competitive view

The information from the GAP study affords Delta a one-of-a-kind competitive view, Lai says. "You have to put your performance into perspective, into the context of the other airlines. You might look at your own results and say things are stable or improving compared to last year. But if you find that your slight improvement actually puts you a few notches below other carriers, that is quite a different story. So the information we get from the GAP study is unique and invaluable in that sense."

Medical products

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Culture is a complex and multifaceted phenomenon. Differences in economic, governmental, educational, occupational, ethnic, gender, social class, or family system should be analyzed for their effect on research results.

When should cross-cultural research be used?

To achieve maximum benefit the cross-cultural research team should be included in discussions as soon as there is the desire to pursue a new global product, and should continue to be included at every step of development. Using cross-cultural as well as ergonomic and design research at the front end of the process allows the research team to find value-added opportunities that add little or nothing to the cost but add significantly to the perceived value and profit margin.

Cross-cultural research can uncover the process of interaction between the medical practitioner and the patient. Levels of technological sophistication can vary and the perceived technology interaction must be geared to maximize the process of this interaction. The use of technology needs to enhance the user experience and cross-cultural research can provide the direction.

Define the procedures

By definition, all scientific study requires a precise research methodology consisting of systematic procedures for designing the study, gathering the data, and analyzing the findings. Like other market research, cross-cultural research still uses traditional market slicing by age and gender, but then it goes further to include data on cultural effects, socioeconomic conditions and distribution channels in order to address the concerns unique to each country.

- Begin research planning with project managers by clearly identifying the overall research objective. Confirm the consistency of the objective in each of the national markets.
- Define all aspects of the procedure operations to ensure the reliability in the data collection process. The same instructions should be followed during each interview, questionnaire and observation. Follow a standard questionnaire to collect data on consumer response.

Incorporate study control

The objective of all scientific study is to minimize the variables and exercise as much control as possible to obtain clean, reliable data. The analysis and interpretation of cross-cultural results require a thorough investigation of extraneous factors to minimize impact on results. Study control is difficult to obtain when crossing national borders. Sometimes control is equally difficult when sampling various ethnic groups within national borders. Social variables are often impossible to isolate and therefore difficult to control. With the numerous variables that exist among countries, cross-cultural studies require diligent control of all aspects within the sphere of influence. Control of the methodology and neutralizing the language differences are critical factors in obtaining reliable data.

Training of the researchers and field data collection should be standardized. Researchers should be trained on the project background, product being studied, research objectives, and specific procedures to be carried out during interviews and observation.

Our firm conducted studies of an in-office medical instrument in U.S., Japan, France, Germany, and England targeting users and purchasers. Procedural controls included:

- Identical training for staff design researchers.
- Standardized questionnaires and other research tools.
- Specific format for interviews and observations.
- Native-language speakers. Only individuals whose first language was the required language conducted translations in order to minimize inaccuracies or other confounding factors. (Research materials and questionnaires were also translated by native-lan-

guage speakers to achieve an acceptable level of control.)

• Each researcher personally interviewed respondents with assistance from a national language speaker and citizen when appropriate. Most often these assistants served as interpreters/translators, who were briefed on the project details. (As with most research, cost concerns often require a trade-off with research control. Therefore, one researcher collected data in France and Germany, another in the U.S. and England, and a third in Japan, the U.S., and England. Ideal control would involve utilizing the same interviewer in all countries, or having each researcher do a portion of interviews in all countries to eliminate the effects of individual bias.)

• Translation quality review. The interpreter repeatedly reviewed original translations for accuracy. The researcher reviewed interview details with the interpreter for each country. This review with the assistants confirmed all details required for correct translation during interviews. (Ideal conditions would include money in the research budget for the translated version to be back-translated into the original language by a second individual so the second translation could be compared to the original. The objective is to locate translation discrepancies before data collection begins.)

Different cultures with the same problems

Don't overlook similarities across cultures; and don't assume there will be overwhelming differences. Differentiating a product for a certain group may create more problems than it solves. Adaptations of a current design mean more money spent on retooling, manufacturing and marketing. Research may uncover a universal solution that meets the needs of each culture.

The sales team of a patient-warming system wanted to accommodate a certain international client by adding requested features. The result? Profit margins that kept eroding. The product wasn't universal enough to meet the needs of other users. The "research" had been limited to one user base and the manufacturer suffered the consequences. A redesign reduced the lure locks, inline filters and injection ports. The product was

STEP-BY-STEP WITH CROSS-CULTURE DESIGN RESEARCH

Step 1 (1-2 weeks)
Program launch - Any previous research to-date is reviewed. Research design strategies are developed. Goals are outlined.

Step 2 (4-12 weeks)
Design and ergonomics - Finalization of research methods and instruments such as questionnaires. Consumer research including one-on-one interviews, in-office/in-situ discussions. Ergonomic specifications are determined based on cognitive, emotion and perception studies.

Step 3 (3-6 weeks)
Ergonomic concept and design specifications - The research matrix is used to evaluate all subsequent design development. As the culmination of all research, design concepts may be presented on CD-ROM, multimedia presentation or written format. Ergonomic concept modeling presents different manifestations of the research data representing the best blend of needs for consumer, manufacturing and brand leveraging. Two or three concepts are selected for picture perfect renditions.

Step 4 (3-4 weeks)
Customer validation testing techniques - Using simulation, user groups, point-of-purchase testing, and in-office/in-use testing, cross-cultural researchers look for any deficiencies and opportunities to enhance the final product.

Step 5 (4-5 weeks)
Design development and documentation - Designs are finalized in functional prototypes and detailed CAD documentation are completed and then frozen. No more changes are made after this point. The design is simply implemented. This critical step is the strategic difference in getting products to market faster. Too many companies drag out the concept and design phases in the belief that they can create something even better. In reality the indecisiveness and fear of commitment means lost business opportunities. While they chase a utopian ideal other companies beat them into the marketplace. The business motto to implement is "Be best, then be first."

Step 6 (3-4 weeks)
Testing and evaluation - This sign-off phase is the last sanity check to make sure everything is working according to plan before product tooling and vendor commitments. Only minor refinements occur during this step.

Step 7 (1-2 weeks)
Design finalization - CAD documents are updated with any revisions from testing and evaluation. Production begins.
Total time: 3-6 months

SECRETS TO SUCCESSFUL CROSS-CULTURAL RESEARCH

1. Define systematic procedures for designing the study, gathering the data, and analyzing the findings. Address the concerns unique to each country to minimize impact on results.

2. Incorporate high levels of systematic control into your user or consumer study. When designing your study, push the level of control to your limit.

3. Do not overlook similarities across cultures; and do not assume there will be overwhelming differences.

4. When differences are found, be sure to decipher the extraneous variables or at a minimum, consider them during interpretation. Get beyond the surface when analyzing and interpreting cross-cultural results. Anticipate the differences and probe the reasons behind them.

Attending to these points from the initial planning stage through the final interpretation of results can provide you with measurable cross-cultural data that provides a firm foundation for universal product design and global marketing decisions. Product acceptance and marketing success ultimately depends on understanding the social factors and cultural variances of today's global economy.

instantly more intuitive and profits margins grew healthy again.

In recent research for an in-office medical equipment manufacturer many similarities were revealed among respondents in all five countries studied. The most appealing product was consistent across countries and many product features had the same appeal or lack of appeal across countries. The findings met the research objectives of the client and solidified the direction for future product development.

The study also revealed major differences between national attitudes. Findings from the U.S. overwhelmingly showed a concern that the device is CLIA-waived and that the doctor's office or laboratory would be reimbursed for the costs of each test performed with the device. In France, Germany, and the U.K., quality control and accessory prices drove concerns. The differences stemmed from the managed care in the U.S. versus socialized medicine in France, Germany and the U.K. Although different cultures preferred the same product, the research indicates the product needs be marketed differently depending on the medical system of the country.

Often, as in this case, the main objective for the medical device or equipment manufacturer is to come to a global decision on a new product design. Countries are sampled for cultural variances with the purpose of achieving a sample broad enough to generalize the manufacturer's particular global market. This type of research is not intended to develop country-specific products.

What do the differences mean?

If the objective of the preceding in-office equipment study had been to understand specific national markets, the broad research parameters would have made a perfect setting for the frequent mistakes made by global marketing decision-makers. When the objective is country-specific, the national differences need to be investigated for a deeper understanding of cultural and national influences by including data on cultural effects, socioeconomic conditions and distribution channels. These studies must also address the similarities in findings across cultures and consider these in global marketing decisions. Too often, cross-cultural researchers are so intent on finding differences that the many similarities are overlooked. It's a common mistake to overlook the global similarities and focus solely on national differences.

Health care product success is particularly dependent on understanding of protocol, procedural differences, and purchasing habits. For example, imagine the different mindsets at work in socialized medicine, HMOs and PPOs. There can be different perceptions of what is a disposable and capitalized expense. Some countries can capitalize an expensive piece of medical equipment but not afford disposables or vice versa. The solution to the sale lies in the bundling. The disposable product can be bundled with the equipment and made part of the capitalized expense. In another purchasing paradigm the equipment can be "earned" through the purchase of specified quantity of disposable items. In the U.S. and other capitalist countries the competition of the open market elevates the importance of profitability. Conversely, profitability is not an issue for socialist and communist countries.

Find the reason for the differences

When you understand the reasons behind the national differences, you have the information necessary to properly position your product in the market. For example, a study found that users and purchasers in the U.S. were less concerned about the price of a medical device than were respondents in England. Instead of mistakenly generalizing about more frivolous purchasing habits of U.S. consumers, one would have to further investigate the health care and insurance industries in the U.S. and England to understand the financial concerns. The researchers would not only need to understand how the industries vary by country but how purchasing procedures vary by private and public sector.

Cultural rules and social norms must be understood to get an accurate analysis of results. Users and purchasers in Japan may report finding a product more appealing than consumers in Germany, for example. But before jumping to conclusions and rolling out a large marketing campaign in Japan and a small campaign in Germany, further analysis is necessary. An understanding of Japanese culture and the importance of harmony in all social interactions would need to be considered when comparing Japanese responses to those in other cultures where respondents are less inclined to emphasize this same social standard.

Respondents in all countries except the U.S. may consistently respond very negatively to the largest model of a medical instrument. Instead of only looking at such surface findings and jumping to country-specific conclusions such as "U.S. users like large instruments and users in Japan, France, Germany, and England like small instruments," analyze why this country difference exists. Medical offices of Germany, France, Japan and England are smaller on average than typical U.S. offices. Space limitations might be less of a concern in U.S. medical offices; but that does not necessarily mean that U.S. respondents prefer larger instruments. Again, discern the meaning behind the culture variable.

Counting the costs

The cost of cross-cultural research depends on the number of subjects and venues included as well as the degree of complexity and rigor required. The depth and breadth of the ergonomic performance research, competitive analysis and market analysis determines the costs. In assessing the value of cross-cultural research it is important to remember that the earlier research is integrated into the process the more cost-effective it is.

One way to hold down the cost of cross-cultural research is to use your internal resources to the fullest extent. First, assess the resources within your own organization. Do they have the time and capabilities to undertake some or part of the research process? In-house researchers, marketing, engineering and design team members can help to articulate goals and design strategies. Can they develop and implement a comprehensive cross-cultural research program? If you decide you need help, contact professional organizations such as Industrial Designers Society of America (703-759-0100), Design Management Institute (617-338-6380), and Human Factors and Ergonomics Society (310-394-1811). They can direct you to organizations that specialize in cross-cultural research.

The cross-cultural researcher: a new breed

Cross-cultural research is a new breed of research and the cross-cultural researcher is a new hybrid creature that incorporates a variety of education and experience. The cross-cultural researcher has a unique skill set that includes anthropology, psychology, design research, ergonomics and industrial design. Cross-training in several disciplines facilitates smooth passage along the road from research to finished product. The qualified cross-cultural researcher serves as the bridge between the pragmatic and the emotional. While the demand for cross-cultural research continues to grow, the limited availability of qualified researchers means some companies are developing their existing staff by providing the necessary cross-training.

Cross-cultural research takes shape

Simply stated, cross-cultural research identifies the similarities and differences of different cultures. This understanding allows companies to capitalize on commonality and respond to differences appropriately. A well-designed product should answer most consumer needs. However, the needs of different cultures, populations, and countries may not be able to be homogenized into one product. A country-specific variation of a product may be required. The question is: When do you want to find out? Before you're into the design phase or after you have prototypes? Obviously, the earlier the better. The more thoroughly a product is researched in the early stages, the fewer mistakes occur in the more expensive development phase. The user-centric approach of cross-cultural research eliminates ill-fated proposals early in the game. The streamlined development process ensures that better products get to market faster and more economically.

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M - middle-income ($30,000-$60,000)
L - low-income (under $30,000)

Stations - number of interviewing stations

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

NA - information not available

Alabama

Birmingham

Consumer Pulse of Birmingham
Brookwood Village Mall, #612A
Shades Creek Pkwy.
Birmingham, AL 35209
Ph. 205-879-0268 or 800-336-0159
Fax 205-879-1058
E-mail: birmingham@consumerpulse.com
www.consumerpulse.com
Connie Glass, Director
Income: H-30% M-50% L-20%
Stations: 8 C K P O

Graham & Associates, Inc.
Century Plaza
7580 Century Plaza, Ste. 266
Birmingham, AL 35210
Ph. 205-443-5399
Fax 205-443-5389
Becky South, Supervisor
Income: H-20% M-50% L-30%
Stations: 6 C K P O

Gadsden

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Gadsden Mall
1001 Rainbow Dr.
Gadsden, AL 35901
Ph. 205-443-5399
Fax 205-443-5389
Cora Wilson, Supervisor
Income: H-25% M-50% L-25%
Stations: 5 C K

Huntsville

Graham & Associates, Inc.
Madison Square Mall
5901 University Dr., #86
Huntsville, AL 35806
Ph. 205-443-5399
Fax 205-443-5389
Loretta Gunn, Supervisor
Income: H-50% M-30% L-20%
Stations: 5 C K O

Mobile

Graham & Associates, Inc.
3289 Bel Air Mall
Mobile, AL 36606
Ph. 334-471-0059
Fax 334-478-0015
Martha Bowers, Supervisor
Income: H-30% M-35% L-35%
Stations: 6 C K P O

Montgomery

Nolan Research
1016A Eastdale Mall
Montgomery, AL 36117
Ph. 334-284-4164
Fax 334-286-9788
Deidra Nolan, Partner
Income: H-20% M-70% L-10%
Stations: 5 C P

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

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Tempe, AZ 85282
Ph. 480-839-4606
Fax 480-839-4619
www.car-leneresearch.com
Connie Nipp, Manager
Income: H-20% M-50% L-30%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Arrowhead Towne Center
7700 W. Arrowhead Towne Center
Glendale, AZ 85308
Ph. 623-486-1050
Fax 623-486-2425
www.car-leneresearch.com
Connie Nipp, Manager
Income: H-15% M-55% L-30%
Stations: 6 C K P O
(See advertisement on p. 107)

Creative Consumer Research
Factory Stores of America Mall
2050 S. Roslyn
Mesa, AZ 85208
Ph. 480-557-6666
Fax 480-557-6534
E-mail: ccrphnx@aol.com
Income: H-20% M-60% L-20%
Stations: 3 C
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Cunningham Field & Research Service
Metro Center Mall
9617 N. Metro Center Pkwy. W., Ste. 1214
Phoenix, AZ 85051
Ph. 904-677-5644
Fax 904-677-5534
E-mail: phom@cunninghamresearch.com
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Friedman Marketing Services
Consumer Opinion Center
Desert Sky Mall
7611-118 W. Thomas Rd.
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Fax 623-849-8083
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Phoenix, AZ 85032
Ph. 602-494-7813 or 914-698-9591
Fax 602-996-7465
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Karen Tews
Income: H-50% M-25% L-25%
Stations: 10 C K P O
(See advertisement on p. 119)

Friedman Marketing Services
Phoenix Research
Christown Mall
1739 W. Bethany Home Rd.
Phoenix, AZ 85015
Ph. 602-242-4868 or 914-698-9591
Fax 602-242-4910
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Lance Carrington
Income: H-30% M-50% L-20%
Stations: 11 C K P O
(See advertisement on p. 119)

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

Tucson

Car-Lene Research, Inc.
Tucson Mall
4500 N. Oracle
Tucson, AZ 85705
Ph. 520-292-0966
Fax 520-292-0800
www.car-leneresearch.com
Laura Metelovski, Manager
Income: H-24% M-40% L-36%
Stations: 8 C K P O
(See advertisement on p. 107)

Arkansas

Fort Smith

C & C Market Research, Inc.
Central Mall
5111 Roger Ave., #8
Fort Smith, AR 72903
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-30% M-50% L-20%
Stations: 8 C K P O

Little Rock

Friedman Marketing Services
Consumer Opinion Center
The Pines Mall
2901 Pines Mall Dr.
Pine Bluff, AR 71601
Ph. 870-535-1688 or 914-698-9591
Fax 870-535-1754
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Jason Rodgers
Income: H-15% M-50% L-35%
Stations: 13 C K P O
(See advertisement on p. 119)

California

Bakersfield

Reyes Research
East Hills Mall
3000 Mall View Rd., Ste. 1021
Bakersfield, CA 93306
Ph. 661-872-4433
Fax 661-872-6692
E-mail: arvind@reyesresearch.com
www.reyesresearch.com
Michele Reyes
Income: H-30% M-40% L-30%
Stations: 6 C K P O

Fresno

Bartels Research Corp.
145 Shaw Ave., Bldg. C
Clovis, CA 93612
Ph. 559-298-7557
Fax 559-298-5226
E-mail: bartels1@compuserve.com
Patrick Bartels
Income: H-10% M-75% L-15%
Stations: 6 C K P O

Nichols Research, Inc.
Fashion Fair Mall
557 E. Shaw Ave.
Fresno, CA 93710
Ph. 559-226-3100
Fax 559-226-9354
E-mail: fresno@nichols-research.com
www.nichols-research.com
Amy Shields, Manager
Income: H-20% M-70% L-10%
Stations: 6 C K P O

Los Angeles

(See also Orange County)

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

Car-Lene Research, Inc.
Puente Hills Mall
1600 S. Azusa, Unit 386
City of Industry, CA 91748-1619
Ph. 626-964-4589
Fax 626-964-4809
www.car-leneresearch.com
Danella Hawkins, Manager
Income: H-20% M-50% L-30%
Stations: 6 C K P O
(See advertisement on p. 107)

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

Cunningham Field & Research Service
Northridge Fashion Center
9301 Tampa Ave., Ste. 169A
Northridge, CA 91324
Ph. 904-677-5644
Fax 904-677-5534
E-mail: losn@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-30% L-30%
Stations: 5 C K O
(See advertisement on p. 103)

Facts 'n Figures
Valencia Town Center Mall
24201 Valencia Blvd., Ste. 2317
Valencia, CA 91355
Ph. 661-222-2278
Fax 661-222-2287
E-mail: steve_escoe@factsnfiguresinc.com
www.factsnfiguresinc.com
Income: H-40% M-40% L-20%
Stations: 12 C K P O

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Facts 'n Figures
Antelope Valley Mall
1233 W. Ave. P
Palmdale, CA 93551
Ph. 661-272-4888
Fax 661-272-5676
E-mail: steve_escoe@factsnfiguresinc.com
www.factsnfiguresinc.com
Rene Stapleton, Manager
Income: H-20% M-70% L-10%
Stations: 8 C K P O

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

Friedman Marketing Services
Consumer Opinion Center
Stonewood Center Mall
404 Stonewood St.
Downey, CA 90241
Ph. 562-861-9392 or 914-698-9591
Fax 562-861-2592
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Ruth Grigaras
Income: H-40% M-40% L-20%
Stations: 6 C K P O
(See advertisement on p. 119)

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

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

Mid-America Rsch./Facts In Focus
Santa Monica Place
301 Santa Monica Pl.
Santa Monica, CA 90401
Ph. 310-260-3237 or 847-392-0800
Fax 310-260-3241
Vita Barbour, Manager
Income: H-25% M-70% L-5%
Stations: 25 C K P O

Barbara Nolan Market Research
Montclair Plaza
2157 Montclair Plaza Ln.
Montclair, CA 91763
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR170@attglobal.net
Income: H-25% M-50% L-25%
Stations: 8 C K P O

PKM Marketing Research Services
1514 Plaza Dr.
West Covina, CA 91793
Ph. 626-856-3883
Fax 626-856-3886
E-mail: pkmcov@aol.com
Gina Driggers, Manager
Income: H-20% M-45% L-35%
Stations: 6 C P O

Quick Test/Heakin
Lakewood Center Mall
Space 25
Lakewood, CA 90712
Ph. 562-633-7344
Fax 562-633-3791
E-mail: info@quicktest.com
www.quicktest.com
Lisa Fleming, Manager
Income: H-32% M-36% L-32%
Stations: 7 C K

Suburban Associates
Media City Center Mall
201 E. Magnolia, Store 263
Burbank, CA 91501
Ph. 818-563-5360
Fax 818-563-4850
E-mail: lamall@subassoc.com
www.subassoc.com
Susan Wisniewski, Manager
Income: H-20% M-60% L-20%
Stations: 10 C P

Orange County

(See also Los Angeles)

Car-Lene Research, Inc.
The Promenade Mall
40820 Winchester Rd., Ste. 2292
Temecula, CA 92591
Ph. 909-296-0606
Fax 909-296-0605
www.car-leneresearch.com
Kelly Cummings, Manager
Income: H-35% M-45% L-20%
Stations: 5 C K P O
(See advertisement on p. 107)

Quick Test/Heakin
Santa Ana/Mainplace
1800 N. Main St., Ste. 2088
Santa Ana, CA 92705
Ph. 714-547-8300
Fax 714-547-8998
E-mail: info@quicktest.com
www.quicktest.com
Robin Koerner, Manager
Income: H-33% M-34% L-33%
Stations: 10 C K P O

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

Sacramento

Quick Test/Heakin
Arden Fair Mall
1689 Arden Way, #1281
Sacramento, CA 95815
Ph. 916-920-1361
Fax 916-920-1371
E-mail: info@quicktest.com
www.quicktest.com
Roger Millard, Manager
Income: H-23% M-56% L-21%
Stations: 13 C K P O

San Bernardino/ Riverside

Car-Lene Research, Inc.
Ontario Mills Mall
1 Mills Cir., #508
Ontario, CA 91764
Ph. 909-481-7666
Fax 909-481-7706
www.car-leneresearch.com
Tracy Nuno, Manager
Income: H-35% M-45% L-20%
Stations: NA C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Inland Center Mall
500 Inland Center Rd., Ste. 446
San Bernardino, CA 92408
Ph. 904-677-5644
Fax 904-677-5534
E-mail: LOSA@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-70% L-10%
Stations: 5 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Galleria at Tyler, Ste. 1042
Riverside, CA 92503
Ph. 909-637-1100
Fax 909-637-1191
E-mail: info@quicktest.com
www.quicktest.com
Joanna Walb, Manager
Income: H-25% M-55% L-20%
Stations: 12 C K P O

Quick Test/Heakin
Moreno Valley Mall
22500 Towne Circle, #1105
Moreno Valley, CA 92553
Ph. 909-653-3200
Fax 909-653-3255
E-mail: info@quicktest.com
www.quicktest.com
Jim Scott, Manager
Income: H-24% M-46% L-30%
Stations: 10 C K P O

San Diego

Friedman Marketing Services
Consumer Opinion Center
Plaza Camino-Real
2525 El Camino Real, Ste. 102
Carlsbad, CA 92008
Ph. 760-730-4577 or 914-698-9591
Fax 760-730-4576
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Betty Brown
Income: H-60% M-30% L-10%
Stations: 6 C K P O
(See advertisement on p. 119)

Jagorda Interviewing Services
Plaza Bonita Mall
3030 Plaza Bonita Rd., #2001
National City, CA 91950
Ph. 619-479-2760
Fax 619-479-2526
E-mail: alert@jagorda.com
www.jagorda.com
Sharyl Noreme, Office Manager
Income: H-23% M-33% L-44%
Stations: 8 C K P

Luth Research
Mission Valley Center Mall
1640 Camino Del Rio N., Ste. 328
San Diego, CA 92108
Ph. 619-299-7487
Fax 619-299-0513
E-mail: info@luthresearch.com
www.luthresearch.com
Jan Borkum
Income: H-30% M-50% L-20%
Stations: 9 C K P O
(See advertisement on p. 11)

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

Quick Test/Heakin
Parkway Plaza
415 Parkway Plaza, Ste. 304
San Diego, CA 92020
Ph. 619-444-7700
Fax 619-444-4157
E-mail: info@quicktest.com
www.quicktest.com
Mitzie Stewart, Manager
Income: NA
Stations: 6 C K P O

San Diego Surveys, Inc.
The Opinion Center
Chula Vista Center
555 Broadway, Ste. 2014
Chula Vista, CA 91910
Ph. 619-265-2361 or 800-895-1225
Fax 619-582-1562
E-mail: SDSURVEYS@aol.com
Jean Van Arsdale
Income: H-25% M-65% L-10%
Stations: 6 C K P O

San Francisco/San Jose

Car-Lene Research, Inc.
County East Mall
2550 Somersville Rd.
Antioch, CA 94509
Ph. 925-706-9103
Fax 925-706-0437
www.car-leneresearch.com
Michelle Turner, Manager
Income: H-38% M-36% L-26%
Stations: NA C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Stonestown Galleria
3251 20th Ave.
San Francisco, CA 94132
Ph. 415-566-9925
Fax 415-566-9929
www.car-leneresearch.com
Lita Columbres, Manager
Income: H-44% M-36% L-20%
Stations: 6 C K P O
(See advertisement on p. 107)

Consumer Opinion Services, Inc.
Great Mall of the Bay Area
500 Great Mall Dr.
Milpitas, CA 95035
Ph. 408-934-9036 or 206-241-6050 for bids
Fax 408-934-9038
E-mail: info@cosvc.com
www.cosvc.com
Jim Apple, Manager
Income: H-30% M-60% L-10%
Stations: 7 C K P O
(See advertisement on p.129)

Cunningham Field & Research Service
New Park Mall
1129 New Park Mall
Newark, CA 95460
Ph. 904-677-5644
Fax 904-677-5534
E-mail: SANN@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-20%
Stations: 5 C K P O
(See advertisement on p. 103)

Cunningham Field & Research Service
Santa Rosa Plaza
2047A Santa Rosa Plaza
Santa Rosa, CA 95401
Ph. 904-677-5644
Fax 904-677-5534
E-mail: sanf@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 5 C K P O
(See advertisement on p. 103)

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

Friedman Marketing Services
Consumer Opinion Center
5820 Northgate Mall
San Rafael, CA 94903
Ph. 415-472-5394 or 914-698-9591
Fax 415-472-5477
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Kathe Holt
Income: H-50% M-40% L-10%
Stations: 13 C K P O
(See advertisement on p. 119)

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Friedman Marketing Services
Consumer Opinion Center
Capitola Mall
1855 41st Ave., Space C1
Capitola, CA 95010
Ph. 831-465-1592 or 914-698-9591
Fax 831-465-1597
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Ruth Lopez
Income: H-50% M-25% L-25%
Stations: 6 C K P O
(See advertisement on p. 119)

Quick Test/Heakin
262 Bay Fair Mall
San Leandro, CA 94578
Ph. 510-278-2200
Fax 510-278-6738
E-mail: info@quicktest.com
www.quicktest.com
Qian Li, Manager
Income: H-20% M-50% L-30%
Stations: 25 C K P O

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

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

Margaret Yarbrough & Associates
South Shore Center
415 South Shore Center
Alameda, CA 94501
Ph. 510-522-8600 or 510-521-6900
Fax 510-522-6749
Diane Kientz, Vice President
Income: H-30% M-50% L-20%
Stations: 7 C K P

Ventura/Santa Barbara

Reyes Research
1013 Colina Vista
Ventura, CA 93701
Ph. 805-278-1444
Fax 805-278-1447
E-mail: arvind@reyesresearch.com
www.reyesresearch.com
Michele Reyes, Owner
Income: H-25% M-40% L-35%
Stations: 10 C K P O

Colorado

Boulder

Car-Lene Research, Inc.
Crossroads Mall
1700 28th St.
Boulder, CO 80301
Ph. 303-444-1500
Fax 303-444-9897
www.car-leneresearch.com
Dannette Blake, Manager
Income: H-30% M-50% L-20%
Stations: 5 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Twin Peaks Mall
1250 S. Hover Rd., Ste. 45
Longmont, CO 80501
Ph. 303-682-0131
Fax 303-682-0118
www.car-leneresearch.com
Sandra Burgos, Manager
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 107)

Colorado Springs

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

Barbara Nolan Market Research
Chapel Hill Mall
1710 Briargate Blvd., Ste. 315
Colorado Springs, CO 80920
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR162@attglobal.net
Income: H-25% M-50% L-25%
Stations: 6 C K P O

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

Denver

Car-Lene Research, Inc.
Thornton Town Center
10001 Grant St.
Thorton, CO 80229
Ph. 303-452-2696
Fax 303-452-2630
www.car-leneresearch.com
Cindy Rodriguez, Manager
Income: H-25% M-60% L-15%
Stations: NA C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Aurora Mall
14200 E. Alameda, Ste. 1041
Aurora, CO 80012
Ph. 904-677-5644
Fax 904-677-5534
E-mail: DENV@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-25% M-60% L-15%
Stations: 4 C K P O
(See advertisement on p. 103)

Friedman Marketing Services
Consumer Opinion Center
Southwest Plaza Mall
8501 W. Bowles Ave.
Littleton, CO 80123
Ph. 303-972-8734 or 914-698-9591
Fax 303-933-0476
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Ed Mitchell
Income: H-40% M-40% L-20%
Stations: 10 C K P O
(See advertisement on p. 119)

Friedman Marketing Services
Consumer Opinion Center
Westminster Mall, Space 65A
5513 W. 88th Ave.
Westminster, CO 80030
Ph. 303-428-6117 or 914-698-9591
Fax 303-428-6513
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Patti Murray
Income: H-20% M-60% L-20%
Stations: 6 C K P O
(See advertisement on p. 119)

Quick Test/Heakin
Villa Italia Mall, Ste. 200
7200 W. Alameda
Lakewood, CO 80226
Ph. 303-937-0144
Fax 303-937-0502
E-mail: info@quicktest.com
www.quicktest.com
Jackie Stepanich, Manager
Income: H-2% M-80% L-18%
Stations: 4 C K P O

Connecticut

Danbury

Barbara Nolan Market Research
Danbury Fair Mall
7 Backus Ave., Space A-209
Danbury, CT 06810
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR154@attglobal.net
Income: H-60% M-30% L-10%
Stations: 5 C K P O

Hartford

Friedman Marketing Services
Consumer Opinion Center
The Pavillions at Buckland Hills
194 Buckland Hills Dr.
Manchester, CT 06040
Ph. 860-644-9679 or 914-698-9591
Fax 860-644-9698
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Sandy Messaro
Income: H-25% M-50% L-25%
Stations: 5 C K P O
(See advertisement on p. 119)

Performance Plus
Enfield Square
90 Elm St.
Enfield, CT 06082
Ph. 508-872-1287
Fax 508-879-7108
www.performanceplusboston.com
Shirley Shames, President
Income: H-40% M-40% L-20%
Stations: 8 C K P O

New Haven

Firm Facts Interviewing
Chapel Square Mall
New Haven, CT 06510
Ph. 203-375-4666
Fax 203-375-6034
Harriet Quint, Co-Owner
Income: H-25% M-55% L-20%
Stations: 4 C K P

Quick Test/Heakin
Westfield Shopping Town
470 Lewis Ave., Ste. 4039
Meriden, CT 06451
Ph. 203-639-8100
Fax 203-639-4775
E-mail: info@quicktest.com
www.quicktest.com
Adrienne Davis, Manager
Income: H-20% M-60% L-20%
Stations: 4 C K P O

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

Waterbury

Cunningham Field & Research Service
Brass Mill Center
495 Union St., Ste. 1102
Waterbury, CT 06705
Ph. 904-677-5644
Fax 904-677-5534
E-mail: WATE@cunninghamresearch.com
www.cunninghamresearch.com
Income: NA
Stations: 5 C K P O
(See advertisement on p. 103)

District of Columbia

Car-Lene Research, Inc.
Potomac Mills Mall
2700 Potomac Mills Cir.
Woodbridge, VA 22192
Ph. 703-497-4444
Fax 703-497-0999
www.car-leneresearch.com
Yvonne Fayson, Manager
Income: H-25% M-45% L-35%
Stations: NA C K P O
(See advertisement on p. 107)

Consumer Pulse of Washington
The Mall at Manassas
8300 Sudley Rd.
Manassas, VA 22110
Ph. 703-442-0960 or 800-336-0159
Fax 703-442-0967
E-mail: washington@consumerpulse.com
www.consumerpulse.com
Jeff Davis, Director
Income: H-25% M-55% L-20%
Stations: 8 C K P

Cunningham Field & Research Service
Springfield Mall
6691B Springfield Mall
Springfield, VA 22150
Ph. 904-677-5644
Fax 904-677-5534
E-mail: WASH@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-70% L-10%
Stations: 3 C K P O
(See advertisement on p. 103)

Mid-America Rsch./Facts In Focus
St. Charles Towne Center
5000 Rte. 301, Ste. 2006
Waldorf, MD 20603
Ph. 301-870-7799 or 847-392-0800
Fax 301-705-8348
Ann O'Connor
Income: H-15% M-65% L-20%
Stations: 12 C K P O

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

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Daytona Beach

Cunningham Field & Research Service
Volusia Mall
1700 International Speedway Blvd., Ste. 386
Daytona Beach, FL 32114
Ph. 904-677-5644
Fax 904-677-5534
E-mail: DAYT@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-10% M-70% L-20%
Stations: 6 C K P O
(See advertisement on p. 103)

Fort Lauderdale

Car-Lene Research, Inc.
Broward Mall
8000 Broward Mall, Ste. 124
Plantation, FL 33388
Ph. 954-476-6840
Fax 954-476-6839
www.car-leneresearch.com
Sandy Lorello, Manager
Income: H-25% M-35% L-40%
Stations: 6 C K P O
(See advertisement on p. 107)

Carolana Research
Oakbrook Mall
7207 W. Oakland Park Blvd.
Fort Lauderdale, FL 33313
Ph. 954-741-2234
Fax 954-742-3733
Carol Nadell, President
Income: H-25% M-50% L-25%
Stations: NA C K P

Mars Surveys
Fashion Mall at Plantation
321 N. University Dr., Ste. P-3
Fort Lauderdale, FL 33324
Ph. 954-755-2805 or 877-755-2805
Fax 954-755-3061
E-mail: info@marsresearch.com
www.marsresearch.com
Lois Stermer, Vice President
Income: H-60% M-30% L-10%
Stations: 4 C

Quick Test/Heakin
Coral Square Mall
9569 W. Atlantic Blvd.
Coral Springs, FL 33071
Ph. 954-753-4466
Fax 954-753-4981
E-mail: info@quicktest.com
www.quicktest.com
Linda Boneville
Income: H-34% M-56% L-10%
Stations: 14 C K P O

South Florida Market Research
The Festival Mall
2900 W. Sample Rd.
Fort Lauderdale, FL 33060
Ph. 954-975-5982
Fax 954-984-8963
E-mail: SFMRS@bellsouth.net
www.sfmrs.com
Beatrice or Lester Alenik
Income: H-30% M-60% L-10%
Stations: 5 C P

Fort Myers

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

Jacksonville

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

Cunningham Field & Research Service
Orange Park Mall
1910 Wells Rd., Ste. 1002
Orange Park, FL 32073
Ph. 904-677-5644
Fax 904-677-5534
E-mail: JACK@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-70% L-10%
Stations: 6 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
The Avenues Mall
10300 Southside Blvd., Ste. 168
Jacksonville, FL 32256
Ph. 904-363-1480
Fax 904-363-2281
E-mail: info@quicktest.com
www.quicktest.com
Kathy Paddock, Manager
Income: H-20% M-43% L-37%
Stations: 12 C K P

Melbourne

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

Miami

Consumer Reaction Research
Focus World International, Inc.
Miller Square Mall
13790 S.W. 58 St.
Miami, FL 33175
Ph. 732-946-0100
Fax 732-946-0107
E-mail: focusworld@att.net
www.focusworldint.com
Gary Eichenholtz, CEO/CFO
Income: H-10% M-60% L-30%
Stations: 6

Cunningham Field & Research Service
Pembroke Lakes Mall
11401 Pines Blvd., Ste. 702
Pembroke Pines, FL 33026
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MIAM@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-20%
Stations: 6 C K P O
(See advertisement on p. 103)

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

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

Rife Market Research, Inc.
Flamingo Pines Plaza
154 S. Flamingo Rd.
Pembroke Pines, FL 33027
Ph. 305-620-4244
Fax 305-621-3533
E-mail: RIFE A@aol.com
www.rifemarketresearch.com
Sandy Palmer, Vice President
Income: H-35% M-50% L-15%
Stations: 10 C P

Orlando

Car-Lene Research, Inc.
West Oaks Mall
9401 W. Colonial Dr., Space 401
Ocoee, FL 34761
Ph. 407-298-6668
Fax 407-298-6877
www.car-leneresearch.com
Linda Powers, Manager
Income: H-36% M-25% L-39%
Stations: 6 C K P O
(See advertisement on p. 107)

Barbara Nolan Market Research
Altamonte Mall
451 E. Altamonte Dr., Space 521
Altamonte Springs, FL 32701
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR173@attglobal.net
Income: H-60% M-30% L-10%
Stations: 10 C K P O

Barbara Nolan Market Research
Florida Mall
8001 S. Orange Blossom Trail, #824
Orlando, FL 32809
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR174@attglobal.net
Income: H-60% M-30% L-10%
Stations: 8 C K P O

Barbara Nolan Market Research
Oviedo Marketplace
1005 Oviedo Marketplace Blvd., Space 1515
Oviedo, FL 32765
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR177@attglobal.net
Income: H-50% M-40% L-10%
Stations: 8 C K P O

Barbara Nolan Market Research
Seminole Town Center
275 Town Center Circle, Space L-9
Sanford, FL 32771
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR180@attglobal.net
Income: H-50% M-40% L-10%
Stations: 8 C K P O

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Quick Test/Heakin
Lake Square Mall
10401-082 Highway 441
Leesburg, FL 34788
Ph. 352-365-0505
Fax 352-365-2005
E-mail: info@quicktest.com
www.quicktest.com
Koko Gough, Manager
Income: H-9% M-28% L-63%
Stations: 6 C K O

Sarasota/Bradenton

Mid-America Rsch./Facts In Focus
De Soto Square
303 U.S. 301 Blvd. W., Ste. 811
Bradenton, FL 34205
Ph. 941-746-1849 or 847-392-0800
Fax 941-746-6157
Margaret Wilde, Manager
Income: H-12% M-78% L-10%
Stations: 12 C K P O

Starr Research
Sarasota Square Mall
8201 S. Tamiami Trail, #54
Sarasota, FL 34238
Ph. 941-925-7827
Fax 941-922-3289
E-mail: starrresearch@netscape.net
Jim Pobicki, Vice President
Income: H-30% M-60% L-10%
Stations: 6 C K P O

Tallahassee

Friedman Marketing Services
Consumer Opinion Center
Tallahassee Mall
2415 N. Monroe St.
Tallahassee, FL 32303
Ph. 850-385-4399 or 914-698-9591
Fax 850-385-3481
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Liz Cox
Income: H-25% M-50% L-25%
Stations: 7 C K P O
(See advertisement on p. 119)

Tampa/St. Petersburg

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

C & C Market Research, Inc.
Lakeshore Mall
901 U.S. Hwy. 27 N. #41
Sebring, FL 33870
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Income: H-35% M-55% L-10%
Stations: 8 C K P O

Car-Lene Research, Inc.
Tyrone Square Mall
2449 Tyrone Way, #698
St. Petersburg, FL 33710
Ph. 727-344-6886
Fax 727-344-6596
www.car-leneresearch.com
Sharon Brandy, Manager
Income: H-27% M-32% L-41%
Stations: 4 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
West Shore Plaza
350 West Shore Plaza
Tampa, FL 33609
Ph. 813-289-8202
Fax 813-289-8302
www.car-leneresearch.com
Income: H-44% M-33% L-23%
Stations: NA K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Brandon Towne Center
334 Brandon Towne Center
Brandon, FL 33511
Ph. 904-677-5644
Fax 904-677-5534
E-mail: TAMB@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-10% M-80% L-10%
Stations: 5 C K P O
(See advertisement on p. 103)

Cunningham Field & Research Service
Countryside Mall
27001 US Hwy. 19 N.
Clearwater, FL 33761
Ph. 904-677-5644
Fax 904-677-5534
E-mail: TAMC@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-20%
Stations: 6 C K P O
(See advertisement on p. 103)

Gulf State Research Center
Eagle Ridge Mall
433 Eagle Ridge Dr., Ste. 211
Lake Wales, FL 33853
Ph. 800-357-8842 or 863-676-3676
Fax 863-676-0471
E-mail: Lvillar@gte.net
Tim Villar, Vice President
Income: H-34% M-49% L-17%
Stations: 6 C K P O

Quick Test/Heakin
Citrus Park Town Center Mall
7852 Citrus Park Town Center Mall
Tampa, FL 33625
Ph. 813-926-3222
Fax 813-926-4091
E-mail: info@quicktest.com
www.quicktest.com
Lori Hulett-Knapp, Manager
Income: H-30% M-60% L-10%
Stations: 7 C K P O

Quick Test/Heakin
Gulf View Square Mall, Ste. 299
9409 U.S. Hwy. 19 N.
Port Richey, FL 34668
Ph. 727-847-2222
Fax 727-842-8541
E-mail: info@quicktest.com
www.quicktest.com
Randy Carson, Manager
Income: H-10% M-30% L-60%
Stations: 6 P

Suburban Associates
Lakeland Square Mall
3800 U.S. Hwy. 98 N.
Lakeland, FL 33809
Ph. 863-858-9639
Fax 863-858-8639
E-mail: lakeland@subassoc.com
www.subassoc.com
Income: H-10% M-70% L-20%
Stations: 10 C K P

Suburban Associates
Tampa Bay Center Mall
4302 W. M.L.K. Hwy., #1037A
Tampa, FL 33607
Ph. 813-871-2516
Fax 813-874-0792
E-mail: tampamall@subassoc.com
www.subassoc.com
Income: H-10% M-50% L-40%
Stations: 8 C K P O

West Palm Beach/Boca Raton

Quick Test/Heakin
Boynton Beach Mall
801 N. Congress Ave., Ste. 283
Boynton Beach, FL 33426
Ph. 561-733-8998
Fax 561-733-9918
E-mail: info@quicktest.com
www.quicktest.com
Suzann Davis, Manager
Income: H-34% M-56% L-10%
Stations: 10 C K P O

Georgia

Athens

Car-Lene Research, Inc.
Georgia Square Mall
3700 Atlanta Hwy., Ste. 109
Athens, GA 30606
Ph. 706-316-0095
Fax 706-316-0096
www.car-leneresearch.com
Keith Schick, Manager
Income: H-30% M-48% L-22%
Stations: 6 C K P O
(See advertisement on p. 107)

Atlanta

Car-Lene Research, Inc.
Arbor Place Mall
2431 Arbor Place Mall
Douglasville, GA 30135
Ph. 770-577-5414
Fax 770-577-8585
www.car-leneresearch.com
Eileen Chestang, Manager
Income: H-43% M-32% L-25%
Stations: 4 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
North Dekalb Mall
2050 Lawrenceville Hwy., Ste. 2005
Decatur, GA 30033
Ph. 404-728-8810
Fax 404-633-9841
www.car-leneresearch.com
Casandra McClain, Office Manager
Income: H-27% M-40% L-33%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Perimeter Mall
4400 Ashford Dunwoody Rd., #2760
Atlanta, GA 30346
Ph. 770-730-0622
Fax 770-730-9968
www.car-leneresearch.com
Christy Haney, Manager
Income: H-75% M-20% L-5%
Stations: 6 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
North Point Mall
1002 N. Point Cir.
Alpharetta, GA 30022
Ph. 904-677-5644
Fax 904-677-5534
E-mail: ATLA@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-35% M-55% L-10%
Stations: 7 C K P O
(See advertisement on p. 103)

MacConnell Research Services, Inc.
Cumberland Mall
1000 Cumberland Mall
Atlanta, GA 30339
Ph. 770-451-6236
Fax 770-451-6184
Terri Clark, President
Income: H-30% M-50% L-20%
Stations: 8 C K P O

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

Mid-America Rsch./Facts In Focus
Lenox Square Mall
3393 Peachtree Rd. N.E.
Atlanta, GA 30326
Ph. 404-261-8011 or 847-392-0800
Fax 404-261-5576
E-mail: marrandhurst@att.net.com
Jeanette Crouse, Manager
Income: H-26% M-60% L-14%
Stations: 24 C K P O

Mid-America Rsch./Facts In Focus
Northlake Mall
4800 Briarcliff Rd.
Atlanta, GA 30345
Ph. 770-493-1403 or 847-392-0800
Fax 770-493-9050
Melody Thomas, Manager
Income: H-19% M-76% L-5%
Stations: 12 C K P O

Quick Test/Heakin
Gwinnett Place Mall
2100 Pleasant Hill Rd.
Duluth, GA 30096
Ph. 770-476-0714
Fax 770-476-3194
E-mail: info@quicktest.com
www.quicktest.com
Gayle Haggett, Manager
Income: H-34% M-37% L-29%
Stations: 10 C K P O

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

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

Gainesville

Cunningham Field & Research Service
Lakeshore Mall
150 Pearl Nix Pkwy., Ste. C6
Gainesville, GA 30501
Ph. 904-677-5644
Fax 904-677-5534
E-mail: ATLG@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Mall of Georgia
333 Buford Dr.
Buford, GA 30519
Ph. 770-831-5099
Fax 770-831-5012
E-mail: info@quicktest.com
www.quicktest.com
Valorie Owens, Manager
Income: H-25% M-46% L-29%
Stations: 10 C K P O

Idaho

Boise

Consumer Opinion Services, Inc.
Boise Towne Square
350 N. Milwaukee St.
Boise, ID 83788
Ph. 208-323-8584 or 206-241-6050 for bids
Fax 208-323-8593
E-mail: info@cosvc.com
www.cosvc.com
Robert Corbin, Manager
Income: H-15% M-60% L-25%
Stations: 9 C K P
(See advertisement on p. 129)

Illinois

Chicago

Bryles Research, Inc.
Brementown Mall
6847 W. 159th St.
Tinley Park, IL 60477
Ph. 708-532-6800
Fax 708-532-1880
E-mail: nancy@brylesresearch.com
www.brylesresearch.com
Robert Bryles, President
Income: H-30% M-60% L-10%
Stations: 12 C K P O

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Bryles Research, Inc.
Northfield Square Mall
1600 N. State Rte. 50
Bourbonnais, IL 60914
Ph. 815-937-8822
Fax 815-937-8885
E-mail: nancy@brylesresearch.com
www.brylesresearch.com
Laura Paulson, Supervisor
Income: H-10% M-70% L-20%
Stations: 10 C K P O

Car-Lene Research, Inc.
Northbrook Court
1108 Northbrook Court
Northbrook, IL 60062
Ph. 847-498-1305
Fax 847-498-1491
www.car-leneresearch.com
Robin Rome, Manager
Income: H-60% M-30% L-10%
Stations:6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Lincolnwood Town Center
3333 W. Touhy Ave.
Lincolnwood, IL 60712
Ph. 847-679-4470
Fax 847-679-4472
www.car-leneresearch.com
Nadya Hasselquist, Manager
Income: H-37% M-17% L-46%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
River Oaks Mall
8 River Oaks Center
Calumet City, IL 60409
Ph. 708-862-6666
Fax 708-862-0660
www.car-leneresearch.com
Barbara Rutledge, Manager
Income: H-14% M-47% L-39%
Stations: 4 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Yorktown Center
266 D Yorktown Center
Lombard, IL 60148
Ph. 630-705-1303
Fax 630-705-1304
www.car-leneresearch.com
Marlene Szafranski, Manager
Income: H-45% M-45% L-10%
Stations: NA C K PO
(See advertisement on p. 107)

Consumer Opinion Services, Inc.
Spring Hill Mall
1140 Spring Hill Mall
West Dundee, IL 60118
Ph. 847-551-1638 or 206-241-6050 for bids
Fax 847-551-1763
E-mail: info@cosvc.com
www.cosvc.com
Susan Piacenza
Income: H-23% M-50% L-27%
Stations: 6 C K P O
(See advertisement on p. 129)

Consumer Pulse of Chicago
Stratford Square Mall #D24
424 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
Steve Lehman, Director
Income: H-30% M-50% L-20%
Stations: 8 C K P O

Consumer Surveys Co.
Northpoint Shopping Center
304 E. Rand Rd.
Arlington Heights, IL 60004
Ph. 847-394-9411
Fax 847-394-0001
E-mail: consumersurveys1@aol.com
Deanna Kohn, Nat'l. Field Director
Income: H-44% M-38% L-18%
Stations: 16 C K P O
(See advertisement on p. 109)

Consumer Surveys Co.
730 Chicago Ridge Mall
Chicago Ridge, IL 60415
Ph. 708-499-6000
Fax 708-499-4621
E-mail: consumersurveys1@aol.com
Deanna Kohn, Nat'l. Field Director
Income: H-32% M-48% L-32%
Stations: 5 C K P O
(See advertisement on p. 109)

Cunningham Field & Research Service
Gurnee Mills Mall
6170 W. Grand Ave., Ste. 588
Gurnee, IL 60031-4548
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CHIG@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 103)

Cunningham Field & Research Service
Lincoln Mall
146B Lincoln Mall
Matteson, IL 60443
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CHIL@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-80% L-0%
Stations: 6 C K P O
(See advertisement on p. 103)

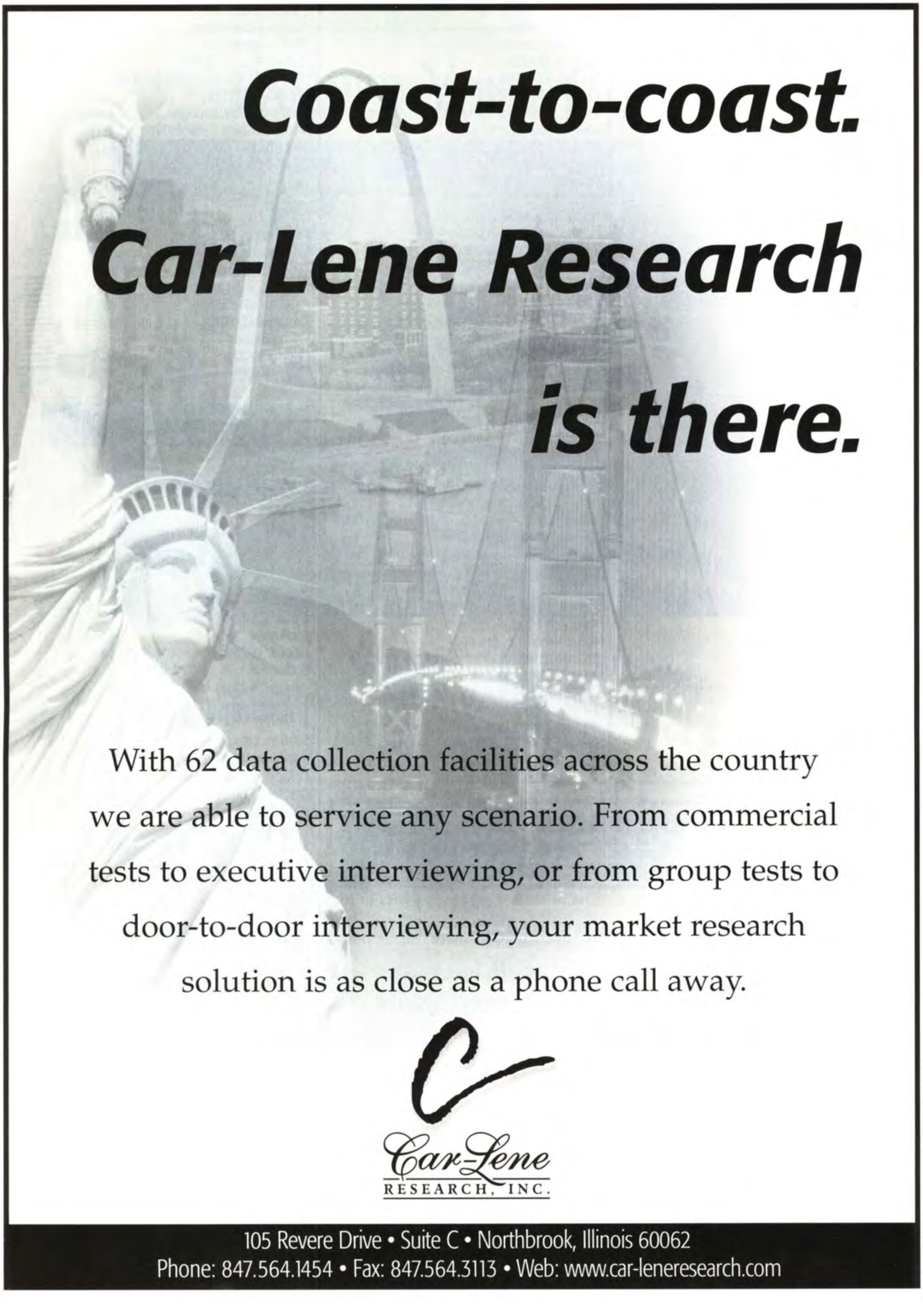
Friedman Marketing Services
Consumer Opinion Center
Harlem-Irving Plaza
4192 Harlem Ave.
Norridge, IL 60634
Ph. 708-452-7660 or 914-698-9591
Fax 708-452-9865
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Emily Kerr
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 119)

Mid-America Rsch./Facts In Focus
Fox Valley Mall
2260 Fox Valley Center
Aurora, IL 60504
Ph. 630-898-2166 or 847-392-0800
Fax 630-898-2172
Walt Nakapsuka, Manager
Income: H-20% M-60% L-20%
Stations: 16 C K P O

Mid-America Rsch./Facts In Focus
Orland Square Mall
280 Orland Sq.
Orland Park, IL 60462
Ph. 708-349-0888 or 847-392-0800
Fax 708-349-9407
Joan Rogers, Manager
Income: H-24% M-63% L-14%
Stations: 12 C K P O

Mid-America Rsch./Facts In Focus
Randhurst Center
999 N. Elmhurst Rd., Ste. 17
Mt. Prospect, IL 60056
Ph. 847-392-9770 or 847-392-0800
Fax 847-259-7259
E-mail: marrandhurst@att.net.com
Lori Tomeleoni
Income: H-33% M-52% L-15%
Stations: 20 C K P O

Barbara Nolan Market Research
Charlestowne Mall, Space C-221
St. Charles, IL 60174
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR186@attglobal.net
Income: H-25% M-60% L-15%
Stations: 6 C K P O


Coast-to-coast.
Car-Lene Research
is there.
With 62 data collection facilities across the country we are able to service any scenario. From commercial tests to executive interviewing, or from group tests to door-to-door interviewing, your market research solution is as close as a phone call away.
Car-Lene
RESEARCH, INC.
105 Revere Drive • Suite C • Northbrook, Illinois 60062
Phone: 847.564.1454 • Fax: 847.564.3113 • Web: www.car-leneresearch.com

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Quick Test/Heakin
Golf Mill Center
373 Golf Mill Center
Niles, IL 60714
Ph. 847-824-6550
Fax 847-824-6552
E-mail: info@quicktest.com
www.quicktest.com
Susan Habel, Manager
Income: H-22% M-65% L-13%
Stations: 10 C K P O

Quick Test/Heakin
Hawthorn Center
429 Hawthorn Center
Vernon Hills, IL 60061
Ph. 847-367-0036
Fax 847-367-4863
E-mail: info@quicktest.com
www.quicktest.com
Harriet Roth, Manager
Income: H-60% M-30% L-10%
Stations: 11 C K O

Quick Test/Heakin
Louis Joliet Mall
1166 Mall Loop Dr.
Joliet, IL 60435
Ph. 815-439-2053
Fax 815-439-2162
E-mail: info@quicktest.com
www.quicktest.com
Molly Vaught, Manager
Income: H-34% M-39% L-27%
Stations: 8 C K P O

Quick Test/Heakin
North Riverside Mall
7501 W. Cermak Rd.
North Riverside, IL 60546
Ph. 708-447-9208
Fax 708-447-9268
E-mail: info@quicktest.com
www.quicktest.com
Kelly Pausuns, Manager
Income: H-18% M-50% L-32%
Stations: 8 C K P O

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

Survey Center, LLC
River East Plaza
455 E. Illinois St., Ste. 660
Chicago, IL 60611
Ph. 312-321-8100
Fax 312-321-8110
E-mail: carolt@ljs.com
Matthew Smith, President
Income: H-40% M-50% L-10%
Stations: 5 C K P O

Survey Center, LLC
Hickory Palos Square
9638 S. Roberts Rd.
Hickory Hills, IL 60457
Ph. 312-321-8100 or 708-430-6400
Fax 312-321-8110
Matthew Smith, President
Income: H-20% M-50% L-30%
Stations: 15 C

Peoria

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

Indiana

Evansville

Gore/Knauff Research & Associates
Eastland Mall
Evansville, IN 47715
Ph. 812-485-2160
Fax 812-485-2164
E-mail: jknauff@evansville.com
Jim Knauff, Owner
Income: H-25% M-50% L-25%
Stations: 8 C K P O

Indianapolis

Friedman Marketing Services
Consumer Opinion Center
Castleton Square Mall
6020 E. 82nd St., Ste. 904B
Indianapolis, IN 46250
Ph. 317-585-2716 or 914-698-9591
Fax 317-585-3577
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Income: H-25% M-60% L-15%
Stations: 8 C K P
(See advertisement on p. 119)

Gore/Knauff Research & Associates
College Mall
2894 E. 3rd St., Ste. B03
Bloomington, IN 47407
Ph. 812-485-2160
Fax 812-485-2164
E-mail: jknauff@evansville.com
Jim Knauff, Owner
Income: H-25% M-60% L-15%
Stations: NA C

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Herron Associates, Inc.
Greenwood Park, #C-26
1251 U.S. 31 N.
Greenwood, IN 46142
Ph. 317-882-3800
Fax 317-882-4716
E-mail: herron@iquest.net
www.herron-research.com
Paul Jorgensen
Income: H-35% M-48% L-17%
Stations: 10 C K P O
(See advertisement on p. 108)

Herron Associates, Inc.
Washington Square
10202 E. Washington St.
Indianapolis, IN 46229
Ph. 317-882-3800
Fax 317-882-4716
E-mail: herron@iquest.net
www.herron-research.com
Paul Jorgensen
Income: H-30% M-44% L-26%
Stations: 8 C K P O
(See advertisement on p. 108)

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

Terre Haute

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

Iowa

Cedar Rapids

PMR-Personal Marketing Research, Inc.
Westdale Mall
2600 Edgewood Rd. S.W., Ste. G66
Cedar Rapids, IA 52404
Ph. 319-390-6338
Fax 319-390-6340
E-mail: info@e-pmr.com
www.e-pmr.com
Bonnie Howard, Supervisor
Income: H-9% M-72% L-19%
Stations: 6 C K P O

Davenport

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

Des Moines

Car-Lene Research, Inc.
Merle Hay Mall
3800 Merle Hay Rd., Ste. 200
Des Moines, IA 50310
Ph. 515-270-6555
Fax 515-270-6488
www.car-leneresearch.com
Todd Winchester, Manager
Income: H-30% M-45% L-25%
Stations: 3 C K P O
(See advertisement on p. 107)

T.L. Grantham & Associates, Inc.
Park Fair Mall
100 E. Euclid Ave., Ste. 167
Des Moines, IA 50313
Ph. 515-288-7156
Fax 515-698-5573
E-mail: tgrantham@tlgrantham.com
www.tlgrantham.com
Teresa Grantham, President
Income: H-15% M-65% L-20%
Stations: 2 C K P O

Mid-Iowa Interviewing, Inc.
Valley West Mall
1551 Valley W. Dr., Ste. 157A
West Des Moines, IA 50266
Ph. 515-225-6232
Fax 515-225-1184
E-mail: MID225@aol.com
Debbie Gudehus, Manager
Income: H-30% M-40% L-30%
Stations: 6 C K P O

Mid-Iowa Interviewing, Inc.
Southridge Mall
1111 E. Army Post Rd., Ste. 152
Des Moines, IA 50315
Ph. 515-225-6232
Fax 515-225-1184
E-mail: MII152@aol.com
Debbie Gudehus, Manager
Income: H-35% M-45% L-20%
Stations: 12 C K P O

Kansas

Kansas City

(See Kansas City, MO)

Wichita

Barbara Nolan Market Research
Towne West Square, Space 804
Wichita, KS 67209
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR158@attglobal.net
Income: H-25% M-50% L-25%
Stations: 6 C K P O

Kentucky

Louisville

Car-Lene Research, Inc.
Green Tree Mall
Hwy. 131, Unit 224
Clarksville, IN 47129
Ph. 812-284-1770
Fax 812-284-1655
www.car-leneresearch.com
Doris West, Manager
Income: H-31% M-34% L-35%
Stations: 5 C K P O
(See advertisement on p. 107)

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

Personal Opinion, Inc.
Bashford Manor Mall
3600 Bardstown Rd.
Louisville, KY 40218
Ph. 502-899-2400
Fax 502-899-2404
E-mail: poi@alltel.net
www.iglou.com/personal-opinion
Income: H-20% M-60% L-20%
Stations: 6 C K P

Personal Opinion, Inc.
River Falls Mall
951 E. Hwy. 131
Clarksville, IN 47129
Ph. 502-899-2400
Fax 502-899-2404
E-mail: poi@alltel.net
www.iglou.com/personal-opinion
Income: H-20% M-55% L-25%
Stations: 9 C K P O

Paducah

(See Cape Girardeau, MO)

Louisiana

New Orleans

Car-Lene Research, Inc.
North Shore Square Mall
5038 North Shore Blvd., Ste. 5038
Slidell, LA 70460
Ph. 504-847-0405
Fax 504-847-0042
www.car-leneresearch.com
Joshua Barger, Manager
Income: H-40% M-45% L-15%
Stations: 6 C K P O
(See advertisement on p. 107)

Friedman Marketing Services
Consumer Opinion Center
Oakwood Shopping Center
197 Westbank Expwy., Ste. 7
Gretna, LA 70056
Ph. 504-367-5808 or 914-698-9591
Fax 504-367-5852
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Connie Baldassaro
Income: H-25% M-50% L-25%
Stations: 5 C K P O
(See advertisement on p. 119)

Gulf State Research Center
Clearview Mall
4426 Veterans Blvd.
New Orleans, LA 70006
Ph. 800-357-8842 or 504-454-1737
Fax 504—454-2461
E-mail: Lvillar@gte.net
Tim Villar, Vice President
Income: H-38% M-48% L-14%
Stations: 6 C K P

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

Quick Test/Heakin
Esplanade Mall
1401 W. Esplanade, Ste. 118
Kenner, LA 70065
Ph. 504-464-9188
Fax 504-464-9936
E-mail: info@quicktest.com
www.quicktest.com
Roderick McCoy, Manager
Income: H-21% M-45% L-34%
Stations: 12 C K P O

Maryland

Baltimore

Assistance in Marketing/Baltimore
Golden Ring Mall
6400 Rossville Blvd.
Baltimore, MD 21237
Ph. 410-391-7750
Fax 410-391-7850
E-mail: carliseman@aim-cincinnati.com
www.aimresearchnetwork.com
Lisa Blankenship, Facility Manager
Income: H-40% M-40% L-20%
Stations: 7 C K P O

Car-Lene Research, Inc.
Towson Town Center
825 Dulaney Valley Rd., #105
Towson, MD 21204
Ph. 410-823-7900
Fax 410-823-7868
www.car-leneresearch.com
Sylvia Sandler, Manager
Income: H-45% M-35% L-20%
Stations: 4 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
(Opening Fall 2000)
Arundel Mills
7000 Arundel Mills Blvd., #324
Hanover, MD 21076
Ph. 847-564-1454
www.car-leneresearch.com
Income: NA
Stations: NA C K P O
(See advertisement on p. 107)

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

Friedman Marketing Services
Consumer Opinion Center
Eastpoint Mall
7846 Eastpoint Mall
Baltimore, MD 21224
Ph. 410-284-7900 or 914-698-9591
Fax 410-284-9378
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Income: H-30% M-50% L-20%
Stations: 18 C K P O
(See advertisement on p. 119)

Quick Test/Heakin
Owings Mills Town Center
10300 Mill Run Circle, Ste. 1155
Owings Mills, MD 21117
Ph. 410-998-3939
Fax 410-998-3555
E-mail: info@quicktest.com
www.quicktest.com
Randi Stone, Manager
Income: H-46% M-41% L-13%
Stations: 10 C K P O

Quick Test/Heakin
White Marsh Mall
8200 Perry Hall Blvd., #1160
Baltimore, MD 21236
Ph. 410-933-9400
Fax 410-933-9440
E-mail: info@quicktest.com
www.quicktest.com
Joanne Rogers, Manager
Income: H-37% M-45% L-18%
Stations: 10 C K P O

Massachusetts

Boston

Car-Lene Research, Inc.
Silver City Galleria
2 Galleria Mall Dr.
Taunton, MA 02780
Ph. 508-880-0087
Fax 508-880-8715
www.car-leneresearch.com
Steve Martin, Manager
Income: H-34% M-24% L-42%
Stations: 5 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Natick Mall
1245 Worchester St., Ste. 1004
Natick, MA 01760-1553
Ph. 904-677-5644
Fax 904-677-5534
E-mail: BOST@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 5 C K P O
(See advertisement on p. 103)

CODES

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

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

NA - information not available

Barbara Nolan Market Research
Independence Mall Way, Space A-123
Kingston, MA 02364
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR152@attglobal.net
Income: H-25% M-50% L-25%
Stations: 5 C K P O

Performance Plus
2 Faneuil Hall Marketplace, 4th fl.
Boston, MA 02109
Ph. 508-872-1287
Fax 508-879-7108
www.performanceplusboston.com
Shirley Shames, President
Income: H-60% M-30% L-10%
Stations: 10 C K P

Performance Plus
Meadow Glen Mall
3850 Mystic Valley Pkwy., Rte. 16
Medford, MA 02155
Ph. 508-872-1287
Fax 508-879-7108
www.performanceplusboston.com
Shirley Shames, President
Income: H-30% M-60% L-10%
Stations: 10 C K P

Performance Plus
Westgate Mall
200 Westgate Dr., Ste. 23
Brockton, MA 02301
Ph. 508-872-1287
Fax 508-879-7108
www.performanceplusboston.com
Shirley Shames, President
Income: H-10% M-70% L-20%
Stations: 10 C K P

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

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

Springfield

Friedman Marketing Services
Consumer Opinion Center
Eastfield Mall
1655 Boston Rd.
Springfield, MA 01129
Ph. 413-543-8515 or 914-698-9591
Fax 413-543-8430
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Joan Gevry
Income: H-30% M-50% L-20%
Stations: 6 C K P O
(See advertisement on p. 119)

Quick Test/Heakin
Holyoke Mall at Ingleside
50 Holyoke Rd.
Holyoke, MA 01040
Ph. 413-533-6180
Fax 413-532-6855
E-mail: info@quicktest.com
www.quicktest.com
Debbie Mullaly, Manager
Income: H-15% M-55% L-30%
Stations: 8 C K

Michigan

Detroit

Car-Lene Research, Inc.
Frenchtown Square Mall
2121 N. Monroe, Unit 620
Monroe, MI 48162
Ph. 734-241-0489
Fax 734-241-3268
www.car-leneresearch.com
Joy Sanredli, Manager
Income: H-34% M-55% L-11%
Stations: 6 C K P O
(See advertisement on p. 107)

Crimmins & Forman Market Research
Consumer Research Center
Westland Mall
35000 W. Warren Rd.
Westland, MI 48185
Ph. 734-513-5040
Fax 734-513-8966
Lois Forman, Partner
Income: H-25% M-45% L-30%
Stations: 12 C K P O

Crimmins & Forman Market Research
Detroit Marketing
Wonderland Mall
29755 Plymouth Rd.
Livonia, MI 48150
Ph. 734-427-5360
Fax 734-427-5250
Paula Crimmins, Partner
Income: H-25% M-45% L-30%
Stations: 7 C K P

Cunningham Field & Research Service
Great Lakes Crossing
4144 Baldwin Rd., Ste. 419
Auburn Hills, MI 48326
Ph. 904-677-5644
Fax 904-677-5534
E-mail: detr@cunninghamresearch.com
www.cunninghamresearch.com
Income: NA
Stations: NA C K P O
(See advertisement on p. 103)

Friedman Marketing Services
Consumer Opinion Center
Oakland Mall
350-B. W. 14 Mile Rd.
Troy, MI 48083
Ph. 248-589-0950 or 914-698-9591
Fax 248-589-0271
E-mail: gvigeant@roper.com
www.friedmanmktg.com
La'Von Tarleton
Income: H-30% M-50% L-20%
Stations: 15 C K P O
(See advertisement on p. 119)

Quick Test/Heakin
Eastland Mall
18000 Bernier Rd., Ste. 731
Harper Woods, MI 48225
Ph. 313-521-8811
Fax 313-521-9152
E-mail: info@quicktest.com
www.quicktest.com
Sue McCallum, Manager
Income: H-30% M-35% L-35%
Stations: 9 C K P O

Quick Test/Heakin
Macomb Mall
32441 Gratiot, Ste. 440
Roseville, MI 48066
Ph. 810-294-3232
Fax 810-294-3759
E-mail: info@quicktest.com
www.quicktest.com
Diana Chalou, Manager
Income: H-31% M-41% L-28%
Stations: 8 C K P O

Quick Test/Heakin
Southland Center Mall
23000 Eureka Rd.
Taylor, MI 48180
Ph. 734-287-3600
Fax 734-287-3840
E-mail: info@quicktest.com
www.quicktest.com
Jill Linares, Manager
Income: H-25% M-50% L-25%
Stations: 11 C K P O

Grand Rapids

Barnes Research, Inc.
Rogers Plaza
1051 28th St. S.W.
Wyoming, MI 49509
Ph. 616-363-7643
Fax 616-363-8227
E-mail: barnesresr@aol.com
Della Welch, Production Director
Income: H-25% M-50% L-25%
Stations: 10 C K P

Minnesota

Duluth

Bryles Research, Inc.
Miller Hill Mall
1600 Miller Trunk Hwy.
Duluth, MN 55811
Ph. 218-722-9274
Fax 218-722-9327
E-mail: nancy@brylesresearch.com
www.brylesresearch.com
Income: H-10% M-70% L-20%
Stations: 12 C K P O

Minneapolis/St. Paul

Car-Lene Research, Inc.
Brookdale Center
1269 Brookdale
Brooklyn Center, MN 55430
Ph. 763-585-1858
Fax 763-585-1859
www.car-leneresearch.com
Jaime Rodriguez, Manager
Income: H-35% M-30% L-35%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Southdale Mall
0306 Southdale Mall
Edina, MN 55435
Ph. 952-922-1444
Fax 952-922-1999
www.car-leneresearch.com
Sandra Gingrich, Manager
Income: H-35% M-25% L-40%
Stations: 6 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Maplewood Mall
3001 White Bear Ave N., Ste. 2013
Maplewood, MN 55109
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MINM@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 7 C K P O
(See advertisement on p. 103)

Cunningham Field & Research Service
Northtown Mall
310 Northtown Dr.
Blaine, MN 55434
Ph. 904-677-5644
Fax 904-677-5534
E-mail: minn@cunninghamresearch.com
www.cunninghamresearch.com
Susan Hoffman, Manager
Income: H-20% M-80% L-0%
Stations: 4 C K P O
(See advertisement on p. 103)

Friedman Marketing Services
Consumer Opinion Center
Burnsville Center Mall
1178 Burnsville Center, Ste. 25
Burnsville, MN 55306
Ph. 612-892-5383 or 914-698-9591
Fax 612-898-2940
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Kris Weiss
Income: H-50% M-40% L-10%
Stations: 8 C K P O
(See advertisement on p. 119)

Quick Test/Heakin
Mall of America
300 E. Broadway
Bloomington, MN 55425
Ph. 612-854-3535
Fax 612-854-4375
E-mail: info@quicktest.com
www.quicktest.com
Elena Johnson, Manager
Income: H-25% M-50% L-25%
Stations: 14 C K P O

Quick Test/Heakin
Ridgedale Mall
12745 Wayzata Blvd.
Minnetonka, MN 55305
Ph. 612-512-3838
Fax 612-512-0011
E-mail: info@quicktest.com
www.quicktest.com
Sherie Behrens-Pfiefer, Manager
Income: H-30% M-40% L-30%
Stations: 10 C K P O

Mississippi

Jackson

Friedman Marketing Services
Jackson Opinion Center
Metrocenter Mall, 1275 Metrocenter
Highway 80 and Robinson Rd.
Jackson, MS 39209
Ph. 601-352-9340 or 914-698-9591
Fax 601-355-3530
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Ruth Davis
Income: H-20% M-60% L-20%
Stations: 13 C K P O
(See advertisement on p. 119)

Missouri

Cape Girardeau

Ask America Inc.®
185 West Park Mall
Cape Girardeau, MO 63701
Ph. 314-692-0226
Fax 573-332-1944
E-mail: ASKAMERICA@aol.com
Income: H-30% M-50% L-20%
Stations: 10 C K P O

Kansas City

C & C Market Research, Inc.
Metro North Mall
400 N.W. Barry Rd., Ste. 143
Kansas City, MO 64155
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-35% M-55% L-10%
Stations: 5 C K P O

Quick Test/Heakin
116 Independence Center
Independence, MO 64057
Ph. 816-795-0706
Fax 816-795-1416
E-mail: info@quicktest.com
www.quicktest.com
Carmun Harshberger, Manager
Income: H-23% M-48% L-29%
Stations: 10 C K P O

Quick Test/Heakin
The Great Mall of the Great Plains
20383 W. 151st St.
Olathe, KS 66061
Ph. 913-782-5110
Fax 913-782-5506
E-mail: info@quicktest.com
www.quicktest.com
Mirna Tapia, Manager
Income: H-30% M-40% L-30%
Stations: 9 C K O

Quick Test/Heakin
Bannister Mall
5600 E. Banister Rd., #102
Kansas City, MO 64137
Ph. 816-767-8300
Fax 816-761-0110
E-mail: info@quicktest.com
www.quicktest.com
Debbie Culver, Manager
Income: H-24% M-55% L-21%
Stations: 10 C K P O

CODES

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

Stations - number of interviewing stations

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

NA - information not available

St. Louis

Car-Lene Research, Inc.
Alton Square Mall
200 Alton Square, #203B
Alton, IL 62002
Ph. 618-462-1173
Fax 618-462-1180
www.car-leneresearch.com
Jason Sprakties, Manager
Income: H-18% M-30% L-52%
Stations: 4 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
South County Mall
Hwy. 55 & Lindbergh Blvd.
St. Louis, MO 63129
Ph. 314-845-2002
Fax 314-845-6254
www.car-leneresearch.com
Marie Sykes, Manager
Income: H-30% M-30% L-40%
Stations: 4 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
St. Clair Square Mall
134 St. Clair Square, #125
Fairview Heights, IL 62208
Ph. 904-677-5644
Fax 904-677-5534
E-mail: STLO@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-40% L-30%
Stations: 5 C K P O
(See advertisement on p. 103)

Friedman Marketing Services
Consumer Opinion Center
Mid River Mall #1720
St. Peters, MO 63376
Ph. 636-278-3821 or 914-698-9591
Fax 636-278-8213
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Linda Greer
Income: H-25% M-50% L-25%
Stations: 10 C K P
(See advertisement on p. 119)

Friedman Marketing Services
Consumer Opinion Center
St. Louis Union Station
1820 Market St.
St. Louis, MO 63103
Ph. 314-241-4559 or 914-698-9591
Fax 314-241-6058
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Kathleen Whirley
Income: H-30% M-50% L-20%
Stations: 10 C K P O
(See advertisement on p. 119)

Barbara Nolan Market Research
338 Jamestown Mall
Florissant, MO 63034
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR164@attglobal.net
Income: H-25% M-50% L-25%
Stations: 10 C K P O

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

Superior Surveys of St. Louis, Inc.
208 Crestwood Plaza
St. Louis, MO 63126
Ph. 314-918-7460
Fax 314-692-2427
E-mail: SURVEYS4U@aol.com
Carol McGill, Manager
Income: H-60% M-30% L-10%
Stations: 10 C K P O
(See advertisement on p. 79)

Springfield

Bryles Research, Inc.
227 Battlefield Mall
Springfield, MO 65804
Ph. 417-887-1035
Fax 417-887-0209
E-mail: nancy@brylesresearch.com
www.brylesresearch.com
Steve Russell, Supervisor
Income: H-10% M-80% L-10%
Stations: 12 C K P O

Nebraska

Omaha

Car-Lene Research, Inc.
Westroads Shopping Mall
10000 California
Omaha, NE 68114
Ph. 402-343-9090
Fax 402-343-9191
www.car-leneresearch.com
Frank Padilla, Manager
Income: H-34% M-34% L-32%
Stations: 6 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Crossroads Mall
7400 Dodge St., Ste. B-2
Omaha, NE 68114
Ph. 904-677-5644
Fax 904-677-5534
E-mail: omah@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-45% L-25%
Stations: 6 C K P O
(See advertisement on p. 103)

Midwest Survey & Research
Mall of the Bluffs
1751 Madison Ave., Ste. 708
Council Bluffs, IA 51503
Ph. 712-323-1438
Fax 712-323-1438
Elaine Bosilevac, Vice President
Income: H-25% M-30% L-45%
Stations: 9 C K P O

Nevada

Las Vegas

Cunningham Field & Research Service
The Galleria at Sunset
1300 W. Sunset Rd., Ste. 1324
Henderson, NV 89014
Ph. 904-677-5644
Fax 904-677-5534
E-mail: LASV@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 6 C K P O
(See advertisement on p. 103)

Las Vegas Surveys, Inc.
The Boulevard Mall
3860 S. Maryland Pkwy., Ste. 201
Las Vegas, NV 89109
Ph. 702-650-5500
Fax 702-650-0729
E-mail: lvsurveys@aol.com
Carlos Kelley, V.P. Research
Income: H-60% M-30% L-10%
Stations: 4 C K P O
(See advertisement on p. 115)

New Hampshire

Concord

Cunningham Field & Research Service
Steeplegate Mall
270 London Rd., Ste. 1164
Concord, NH 03301
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CONC@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-60% L-20%
Stations: 5 C K O
(See advertisement on p. 103)

Nashua

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

New Jersey

Northern New Jersey

Car-Lene Research, Inc.
Bergen Mall
Rte. 4 & Forest Ave.
Paramus, NJ 07652
Ph. 201-845-5600
Fax 201-845-6201
www.car-leneresearch.com
Nina Velella, Manager
Income: H-20% M-45% L-35%
Stations: 5 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Moorestown Mall
Rte. 38 & Lenola
Moorestown, NJ 08057
Ph. 856-231-0600
Fax 856-231-9575
www.car-leneresearch.com
Evan Celwyn, Manager
Income: H-35% M-31% L-34%
Stations: 4 C K P O
(See advertisement on p. 107)

Consumer Pulse of New York
Garden State Rtes. 4 & 17
Paramus, NJ 07652
Ph. 800-336-0159
Fax 248-645-5685
E-mail: newyork@consumerpulse.com
www.consumerpulse.com
Mary K. Taras, Vice President
Income: H-50% M-35% L-15%
Stations: 13 C K P O

Consumer Reaction Research
Focus World International, Inc.
Seaview Square Mall
Rtes. 66 & 35
Ocean, NJ 07712
Ph. 732-946-0100
Fax 732-946-0107
E-mail: focusworld@att.net
www.focusworldint.com
Gary Eichenholtz, CEO/CFO
Income: H-10% M-50% L-40%
Stations: 6 C K

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Cunningham Field & Research Service
Raceway Mall
3710 Rte. 9, Ste. 238A
Freehold, NJ 07728
Ph. 904-677-5644
Fax 904-677-5534
E-mail: FREE@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-50% M-40% L-10%
Stations: 6 C K P O
(See advertisement on p. 103)

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

Consumer Reaction Research
Focus World International, Inc.
Brunswick Square Mall
Rte. 18
East Brunswick, NJ
Ph. 732-946-0100
Fax 732-946-0107
E-mail: focusworld@att.net
www.focusworldint.com
Gary Eichenholtz, CEO/CFO
Income: H-60% M-30% L-10%
Stations: 8 C K P

Mid-America Rsch./Facts In Focus
Livingston Mall
131 Livingston Mall
Livingston, NJ 07039
Ph. 973-740-1566 or 847-392-0800
Fax 973-740-0569
Marc Brandon, Manager
Income: H-15% M-80% L-5%
Stations: 12 C K P O

Northeast Data
High Income Mall Testing & Group Focus Facility
Wayne Towne Center, Rte. 23 S.
Wayne, NJ 07470
Ph. 973-785-4449
Fax 973-785-3679
E-mail: northeastdata@yahoo.com
Paul Schwartz, President
Income: H-70% M-25% L-5%
Stations: 8 C K P O
(See advertisement on p. 117)

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

Quick Test/Heakin
Woodbridge Center
196 Woodbridge Center Dr.
Woodbridge, NJ 07095
Ph. 732-326-9779
Fax 732-326-9646
E-mail: info@quicktest.com
www.quicktest.com
Shannon Brown, Manager
Income: H-45% M-35% L-20%
Stations: 12 C K P O

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

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

Southern New Jersey

(See Philadelphia, PA)

New Mexico

Albuquerque

Car-Lene Research, Inc.
Coronado Center
6600 Menaul Blvd. N.E., Ste. K8
Albuquerque, NM 87110
Ph. 505-889-3070
Fax 505-889-3071
www.car-leneresearch.com
Scott Solis, Manager
Income: H-34% M-36% L-30%
Stations: 6 C K P O
(See advertisement on p. 107)

Barbara Nolan Market Research
Cottonwood Mall
10000 Coors Bypass N.W., Space D201
Albuquerque, NM 87114
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR147@attglobal.net
Income: H-25% M-50% L-25%
Stations: 8 C K P O

Santa Fe

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

New York

Albany

Barbara Nolan Market Research
Rotterdam Square Mall
93 W. Campbell Rd.
Schenectady, NY 12306
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR155@attglobal.net
Income: H-25% M-50% L-25%
Stations: 5 C K P O

Barbara Nolan Market Research
Wilton Mall
3065 Rte. 50
Saratoga Springs, NY 12866
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR157@attglobal.net
Income: H-50% M-40% L-10%
Stations: 6 C K P O

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

J.L. Whalen Markette Research, Inc.
421 Clifton Country Mall
Clifton Park, NY 12065
Ph. 518-383-1661
Fax 518-371-0791
Income: H-60% M-30% L-10%
Stations: 6 C K P O

Buffalo

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

Buffalo Survey & Research, Inc.
Main Place Mall
390 Main St., 1st fl.
Buffalo, NY 14202
Ph. 716-845-6262
Fax 716-834-6499
E-mail: buffalosur@aol.com
Jeanette Levin, President
Income: H-10% M-50% L-40%
Stations: 8 K P

Ruth Diamond Market Research Services
Boulevard Mall
770 Alberta Dr.
Buffalo, NY 14226
Ph. 716-836-1110 or 716-836-1111
Fax 716-836-1114
E-mail: RDMKTRSCH@aol.com
Harvey Podolsky, President
Income: H-22% M-49% L-29%
Stations: 6 C K P O

Marion Simon Research Service, Inc.
C-103 Walden Galleria
Buffalo, NY 14225
Ph. 716-684-8025
Fax 716-684-3009
Sharon Leidy, Mall Manager
Income: H-35% M-35% L-30%
Stations: 3 C K P O

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

New York City

(See also Northern New Jersey)

Answers to Questions, Inc.
South Shore Mall
1701 Sunrise Hwy.
Bay Shore, NY 11706
Ph. 631-666-9705
Fax 631-666-4596
E-mail: ATQ@worldnet.att.net
Mary Garofaldo, Managing Director
Income: H-20% M-60% L-20%
Stations: 7 C K P O

Brianne Associates, Inc.
Hunting Square Mall
4000 Jericho Turnpike
East Northpoint, NY 11731
Ph. 631-462-2052
Fax 631-462-2957
Fern Roseman, Manager
Income: H-25% M-60% L-15%
Stations: NA C P

Car-Lene Research, Inc.
Galleria at Crystal Run
1 Galleria Dr.
Middletown, NY 10941
Ph. 845-692-2226
Fax 845-692-2207
www.car-leneresearch.com
Tabatha Lanos, Manager
Income: H-25% M-40% L-35%
Stations: 4 C K P O
(See advertisement on p. 107)

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

Ebony Marketing Research, Inc.
2100 Bartow Ave., Ste. 243
Bronx, NY 10475
Ph. 718-217-0842 or 718-320-3220
Fax 718-320-3996
E-mail: emr@interport.net
www.ebonymktg.com/
Esther Remusat, Mall Manager
Income: H-5% M-95% L-0%
Stations: 8 C K P O

CODES

Income
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L - low-income (under $30,000)

Stations - number of interviewing stations

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

NA - information not available

Friedman Marketing Services
Consumer Opinion Center
Smith Haven Mall
313 Smith Haven Mall, Sears Wing, Space E-11C
Lake Grove, NY 11755
Ph. 631-366-6325 or 914-698-9591
Fax 631-366-6331
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Joe Brundin
Income: H-40% M-40% L-20%
Stations: 6 C K O
(See advertisement on p. 119)

Friedman Marketing Services
Consumer Opinion Center
The Galleria at White Plains
100 Main St., Fashion Level 1, Ste. 301
White Plains, NY 10601
Ph. 914-328-2447 or 914-698-9591
Fax 914-328-2977
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Jon Erickson
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 119)

J & R Field Services, Inc.
Attais Mart
5750 Sunrise Hwy.
Sayville, NY 11782
Ph. 631-244-0475
Fax 631-244-0839
E-mail: jrfield@aol.com
Patricia Bryant
Income: H-15% M-65% L-20%
Stations: 4 C P

J & R Field Services, Inc.
East Meadow Mall
1917 Front St.
East Meadow, NY 11554
Ph. 516-542-0081
Fax 516-542-6314
E-mail: jrfield@aol.com
Robin Vega
Income: H-10% M-55% L-35%
Stations: 6 C P

Primary Data Collection Services
1063 Green Acres Mall
Valley Stream, NY 11581
Ph. 516-561-1723
Fax 516-561-2523
E-mail: primarydta1@aol.com
Tom Champion, President
Income: H-20% M-65% L-15%
Stations: 8 C P O

Quick Test/Heakin
Kings Plaza Mall
5422 Kings Plaza
Brooklyn, NY 11234
Ph. 718-338-3388
Fax 718-692-4365
E-mail: info@quicktest.com
www.quicktest.com
Kelly Devlin, Manager
Income: H-20% M-45% L-35%
Stations: 15 C K P

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

Audrey Schiller Market Research
Nassau Mall, lower level
3601 Hempstead Tpke.
Levittown, NY 11756
Ph. 516-731-1500
Fax 516-731-4235
E-mail: aschiller1@aol.com
Audrey Schiller, President
Income: H-35% M-50% L-15%
Stations: 8 C K P O

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

Poughkeepsie

Barbara Nolan Market Research
Poughkeepsie Galleria
790 South Road, Space 282
Poughkeepsie, NY 12601
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR176@attglobal.net
Income: H-50% M-30% L-20%
Stations: 6 C K P O

Rochester

Car-Lene Research, Inc.
Greece Ridge Center Mall
150 Greece Ridge Center Dr.
Rochester, NY 14626
Ph. 716-225-3100
Fax 716-225-2834
www.car-leneresearch.com
Helen Elliott, Manager
Income: H-19% M-39% L-42%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Irondequoit Mall
54 Irondequoit Dr.
Rochester, NY 14622
Ph. 716-342-7630
Fax 716-342-9047
www.car-leneresearch.com
Barry Rudner, Manger
Income: H-33% M-39% L-28%
Stations: 3 C P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Market Place Mall
301- Miracle Mile Dr.
Rochester, NY 14623
Ph. 716-424-3203
Fax 716-292-0523
www.car-leneresearch.com
Barbi White, Manager
Income: H-32% M-67% L-31%
Stations: 6 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Eastview Mall
602 Eastview Mall
Victor, NY 14564
Ph. 904-677-5644
Fax 904-677-5534
E-mail: ROCH@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-35% M-45% L-20%
Stations: 5 C K P O
(See advertisement on p. 103)

Syracuse

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

McCarthy Associates
Carousel Mall
9763 Carousel Center Dr.
Syracuse, NY 13290
Ph. 315-431-0660
Fax 315-431-0672
E-mail: mccarthyfield@cs.com
John McCarthy, President
Income: H-33% M-34% L-33%
Stations: 7 C K P O

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

Marion Simon Research Service, Inc.
Great Northern Mall
4081 Rte. 31
Syracuse, NY 13041
Ph. 315-652-1812
Fax 315-652-1814
E-mail: Msrdc@aol.com
Phillip Roundy, Manager
Income: H-35% M-35% L-30%
Stations: 4 C K P O

Marion Simon Research Service, Inc.
Northern Lights Mall
Syracuse, NY 13212
Ph. 315-455-5952
Fax 315-455-1826
E-mail: Msrdc@aol.com
Diana Casey, Mall Manager
Income: H-35% M-35% L-30%
Stations: NA C K P O

North Carolina

Ashville

Cunningham Field & Research Service
Ashville Mall
3 S. Tunnel Rd., Ste. L-34
Ashville, NC 28805
Ph. 904-677-5644
Fax 904-677-5534
E-mail: ASHE@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-50% L-30%
Stations: 6 C K P
(See advertisement on p. 103)

Mellon Market Research
Biltmore Square
800 Brevard Rd., 516
Asheville, NC 28806
Ph. 877-9MELLON or 826-667-0704
Vicki Phillips, Director
Income: H-35% M-45% L-25%
Stations: 4 C K P O

Charlotte

A O C Marketing Research
10100 Park Cedar Dr., Ste. 100
Charlotte, NC 28210
Ph. 704-341-0232
Fax 704-341-0234
E-mail: aocinc@bellsouth.net
www.aocresearch.com
Income: H-25% M-45% L-20%
Stations: 10 C K P O

Car-Lene Research, Inc.
Concord Mills Mall
8111-677 Concord Mills Blvd.
Concord, NC 28027
Ph. 704-979-1660
Fax 704-979-1663
www.car-leneresearch.com
Tori Dryburgh, Manager
Income: H-38% M-48% L-14%
Stations: 6 C K P O
(See advertisement on p. 107)

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
Daniel Bashaw, Manager
Income: H-20% M-60% L-20%
Stations: 7 C K P O

Cunningham Field & Research Service
Carolina Place
11025 Carolina Place Pkwy.
Pneville, NC 28134
Ph. 904-677-5644
Fax 904-677-5534
E-mail: chap@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-45% M-35% L-20%
Stations: 5 C K P O
(See advertisement on p. 103)

Cunningham Field & Research Service
Eastridge Mall
246 N. New Hope Rd., Ste. E-120
Gastonia, NC 28054
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CHAR@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-10%
Stations: 6 C K P O
(See advertisement on p. 103)

Greensboro/ Winston-Salem

Car-Lene Research, Inc.
Oak Hollow Mall
921 E. Chester Dr., Hwy. 68, #1130
High Point, NC 27262
Ph. 336-882-0992
Fax 336-882-0999
www.car-leneresearch.com
Lee Pietryk, Manager
Income: H-25% M-50% L-25%
Stations: 4 C K P O
(See advertisement on p. 107)

Homer Market Research Associates, Inc.
333 Four Seasons Town Centre
Greensboro, NC 27407
Ph. 336-294-9415
Fax 336-294-6116
E-mail: homermktresearch@msn.com
www.homer-research.com
Jan Homer, Exec. Vice President
Income: H-25% M-45% L-30%
Stations: 10 C K P O

W.H. Long Marketing, Inc.
Golden Gate Shopping Center
2240 Golden Gate Dr.
Greensboro, NC 27408
Ph. 336-292-4146
Fax 336-299-6165
John Voss, Vice President
Income: H-33% M-34% L-33%
Stations: 8 C K P O

Raleigh/Durham

Car-Lene Research, Inc.
Crabtree Valley Mall
4325 Glenwood Ave., Ste. 2072
Raleigh, NC 27612
Ph. 919-786-1535
Fax 919-786-0742
www.car-leneresearch.com
Brian King, Manager
Income: H-52% M-30% L-18%
Stations: 6 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Cary Towne Center
1105 Walnut St., Ste. E103A
Cary, NC 27511
Ph. 904-677-5644
Fax 904-677-5534
E-mail: RALE@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 6 C K P O
(See advertisement on p. 103)

Ohio

Akron

Cunningham Field & Research Service
Chapel Hill Mall
2000 Brittain Rd., Ste. 465
Akron, OH 44310
Ph. 904-677-5644
Fax 904-677-5534
E-mail: AKRO@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-70% L-10%
Stations: 6 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Rolling Acres Mall
2400 Romig Rd.
Akron, OH 44320
Ph. 330-745-8883
Fax 330-745-7881
E-mail: info@quicktest.com
www.quicktest.com
Debbie Moore, Manager
Income: H-10% M-70% L-20%
Stations: 6 C K

Cincinnati

B & B Research Services, Inc.
Eastgate Mall
4601 Eastgate Ave.
Cincinnati, OH 45245
Ph. 513-793-4223
Fax 513-793-9117
E-mail: BBRSCH@aol.com
Jim Moler, Project Director
Income: H-20% M-60% L-20%
Stations: 8 C K P O

Consumer Pulse of Cincinnati
Northgate Mall
9663A Colerain Ave.
Cincinnati, OH 45251
Ph. 513-385-8228 or 800-336-0159
Fax 513-385-2140
E-mail: cincinnati@consumerpulse.com
www.consumerpulse.com
Virginia Williams, Manager
Income: H-30% M-50% L-20%
Stations: 10 C K P

Cunningham Field & Research Service
Tri County Mall
11700 Princeton Rd., Ste. E-207
Cincinnati, OH 45246
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CINC@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 5 C K P
(See advertisement on p. 103)

Quick Test/Heakin
Florence Mall
1150 Florence Mall
Florence, KY 41042
Ph. 606-282-1333
Fax 606-282-6333
E-mail: info@quicktest.com
www.quicktest.com
Mary Ann Habel, Manager
Income: H-30% M-40% L-30%
Stations: NA K P O

Cleveland

Car-Lene Research, Inc.
Great Northern Mall
924 Great Northern Mall
North Olmsted, OH 44070
Ph. 440-979-0200
Fax 440-979-1163
www.car-leneresearch.com
Christine Readence, Manager
Income: H-32% M-31% L-37%
Stations: 5 C K P O
(See advertisement on p. 107)

OPINIONation
4301 Ridge Rd.
Cleveland, OH 44144
Ph. 216-351-4644
Fax 216-351-7876
E-mail: OPINION@ix.netcom.com
www.opinionation.com
Bryan Boehlefeld, Operations Manager
Income: H-20% M-70% L-10%
Stations: 8 C K P

Opinions, Ltd.
Sandusky Mall
4314 Milan Rd., #340
Sandusky, OH 44870
Ph. 419-626-8944
Fax 419-626-4798
E-mail: info@whereopinionscount.com
http:/www.whereopinionscount.com
Mark Kikel, Owner
Income: H-17% M-62% L-21%
Stations: 7 C

Pat Henry Market Research, Inc.
Tower City Center
230 Huron Rd. N.W., Ste. 100.43
Cleveland, OH 44113
Ph. 800-229-5260 or 216-621-3831
Fax 216-621-8455
E-mail: research@pathenry.com
www.thepathenrygroup.com
Susan Stone
Income: H-30% M-60% L-10%
Stations: 11 C K P O

Questions, Inc.
Great Lakes Mall
7850 Mentor Rd.
Mentor, OH 44060
Ph. 440-255-9940
Fax 440-974-0001
E-mail: wiscoron@aol.com
Ron Weingarten, President
Income: H-20% M-60% L-20%
Stations: 7 C K

Quick Test/Heakin
Richmond Town Square
Richmond Heights, OH 44143
Ph. 440-473-1000
Fax 440-473-1000
E-mail: info@quicktest.com
www.quicktest.com
Eric Silver, Manager
Income: H-28% M-52% L-20%
Stations: 10 C K P O

Columbus

T.I.M.E. Market Research
745 Indian Mound Mall
771 S. 30th St.
Heath, OH 43056
Ph. 740-788-8808
Fax 740-788-8809
E-mail: hellotime75@hotmail.com
Shawn Bishop, Manager
Income: H-10% M-60% L-30%
Stations: 8 C K P O

Toledo

Barbara Nolan Market Research
Franklin Park Mall
5001 Monroe St., Ste. 2005
Toledo, OH 43623
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR167@attglobal.net
Income: H-25% M-50% L-25%
Stations: 6 C K P O

Youngstown

McCarthy Associates
Eastwood Mall
Unit #911
Niles, OH 44446
Ph. 315-431-0660
Fax 315-431-0672
E-mail: mccarthyfield@cs.com
Income: H-3% M-50% L-20%
Stations: 6 C K P

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Opinions, Ltd.
Southern Park Mall
7401 Market St., #869
Boardman, OH 44512
Ph. 330-965-1190
Fax 330-965-1192
E-mail: info@whereopinionscount.com
www.whereopinionscount.com
Mark Kikel, Owner
Income: H-24% M-57% L-19%
Stations: 10 C K P

Oklahoma

Oklahoma City

C & C Market Research, Inc.
Central Mall
200 "C" Ave., #109
Lawton, OK 73501
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-25% M-55% L-20%
Stations: 8 C K P O

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

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

Tulsa

C & C Market Research, Inc.
Arrowhead Mall
501 N. Main St., Ste. 75
Muskogee, OK 74401
Ph. 501-785-5637
Fax 501-785-5648
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-30% M-55% L-15%
Stations: 9 C K P O

Cunningham Field & Research Service
Promenade Mall
4107 S. Yale, Ste. LA 107
Tulsa, OK 74135
Ph. 904-677-5644
Fax 904-677-5534
E-mail: TULP@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 6 C K P O
(See advertisement on p. 103)

Cunningham Field & Research Service
Woodland Hills Mall
7021 S. Memorial, Ste. 204A
Tulsa, OK 74133
Ph. 904-677-5644
Fax 904-677-5534
E-mail: TULW@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-60% L-0%
Stations: 7 C K P O
(See advertisement on p. 103)

Oregon

Eugene

Quick Test/Heakin
Gateway Mall
3000 Gateway St., #502
Springfield, OR 97477
Ph. 541-747-1333
Fax 541-747-1334
E-mail: info@quicktest.com
www.quicktest.com
Lori Kempten, Manager
Income: NA
Stations: NA

Portland

Consumer Opinion Services, Inc.
1206 Jantzen Beach Center
Portland, OR 97217
Ph. 503-240-8159 or 206-241-6050 for bids
Fax 503-240-8161
E-mail: info@cosvc.com
www.cosvc.com
Anita Rubadue, Manager
Income: H-5% M-50% L-45%
Stations: 8 C K P
(See advertisement on p. 129)

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: info@cosvc.com
www.cosvc.com
Cheri Jones, Manager
Income: H-15% M-55% L-30%
Stations: 9 C K P O
(See advertisement on p. 129)

Consumer Pulse of Portland
Clackamas Town Center
12000 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, Manager
Income: H-25% M-55% L-20%
Stations: 8 C K P

Pennsylvania

Erie

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

Philadelphia

Car-Lene Research, Inc.
Echelon Mall
2070 Echelon Mall, Ste. 245
Voorhees, NJ 08043-1903
Ph. 856-772-2411
Fax 856-772-2421
www.car-leneresearch.com
Evan Celwyn, Manager
Income: H-40% M-50% L-10%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Oxford Valley Mall
2300 E. Lincoln Hwy, #108
Langhorne, PA 19047
Ph. 215-750-7202
Fax 215-750-9622
www.car-leneresearch.com
Mickey Kiely, Manager
Income: H-23% M-65% L-12%
Stations: 7 C K P O
(See advertisement on p. 107)

Consumer Pulse of Philadelphia
One Plymouth Meeting Office Center &
Plymouth Meeting 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
Income: H-20% M-60% L-20%
Stations: 15 C K P O

Cunningham Field & Research Service
Deptford Mall
1750 Deptford Center Rd., #2D-06
Deptford, NJ 08096
Ph. 904-677-5644
Fax 904-677-5534
E-mail: PHIL@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-35% M-40% L-25%
Stations: 6 C K P O
(See advertisement on p. 103)

JRA, J. Reckner Associates, Inc.
Philadelphia - Mall
Montgomery Mall, Store 152
North Wales, PA 19454-3909
Ph. 215-362-1060
Fax 215-362-7569
E-mail: akeeley@reckner.com
www.reckner.com
Alice Keeley, Manager
Income: H-48% M-28% L-24%
Stations: 15 C K P O
(See advertisement on p. 123)

JRP Marketing Research Services
279 Granite Run Mall
Media, PA 19063
Ph. 610-565-7821
Fax 610-565-4403
E-mail: jrpmark@fast.net
Kathleen McCarty, V.P. Field Svcs.
Income: H-30% M-40% L-30%
Stations: 10 C K P O
(See advertisement on p. 27)

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

Quick Test/Heakin
Cherry Hill Mall
2000 Rte. 38, Ste. 917
Cherry Hill, NJ 08002
Ph. 609-910-1000
Fax 609-910-1010
E-mail: info@quicktest.com
www.quicktest.com
Tammy Stevens, Manager
Income: H-35% M-39% L-26%
Stations: 10 C K P O

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

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

Pittsburgh

Car-Lene Research, Inc.
Monroeville Mall, Rm. 144
Monroeville, PA 15146
Ph. 412-373-3670
Fax 412-373-5076
www.car-leneresearch.com
Kathleen Hanlin, Manager
Income: H-15% M-45% L-40%
Stations: 7 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
(Opening Fall 2001)
The Mall at Robinson Town Center
300 Park Manor Dr.
Pittsburgh, PA 15205-1046
Ph. 847-564-1454
www.car-leneresearch.com
Income: NA
Stations: NA C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
(Opening Spring 2001)
South Hills Village
301 South Hills Village
Pittsburgh, PA 15241
Ph. 847-564-1454
www.car-leneresearch.com
Income: NA
Stations: NA C K P O
(See advertisement on p. 107)

Data Information, Inc.
Century III Mall
3075 Clairton Blvd., Ste. 934
Pittsburgh, PA 15123
Ph. 412-655-8690
Fax 412-655-8693
E-mail: datainfo@nauticom.net
Diane Palyo-Foster, V.P., Mgr. of Operations
Income: H-40% M-49% L-11%
Stations: 11 C K P O

Noble Interviewing Service, Inc.
North Hills Village Mall
4801 McKnight Rd.
Pittsburgh, PA 15237
Ph. 412-343-6455
Fax 412-343-3288
Income: H-30% M-40% L-30%
Stations: 6 K P O

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Quick Test/Heakin
Ross Park Mall
1000 Ross Park Mall Rd.
Pittsburgh, PA 15237
Ph. 412-369-4545
Fax 412-369-4473
E-mail: info@quicktest.com
www.quicktest.com
Mary Zandier, Manager
Income: H-40% M-48% L-12%
Stations: 13 C K P O

T.I.M.E. Market Research
366 Beaver Valley Mall
Monaca, PA 15061
Ph. 724-728-8463
Fax 724-728-9806
E-mail: time81@prodigy.net
Tammy Bailey, Manager
Income: H-20% M-55% L-25%
Stations: 14 C K P O

Rhode Island

Providence

Performance Plus
Providence Place Mall
80 Providence Place
Providence, RI 02903
Ph. 508-872-1287
Fax 508-879-7108
www.performanceplusboston.com
Shirley Shames, President
Income: H-40% M-40% L-20%
Stations: 8 C K P O

South Carolina

Charleston

Quick Test/Heakin
Northwoods Mall
E1B Northwoods Mall
2150 Northwoods Blvd.
North Charleston, SC 29406
Ph. 843-553-0030
Fax 843-553-0526
E-mail: info@quicktest.com
www.quicktest.com
Judy Hart, Manager
Income: H-5% M-80% L-15%
Stations: 7 C K P O

Greenville/Spartanburg

C & C Market Research, Inc.
205 W. Blackstock Rd., #290
Spartanburg, SC 29301
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-40% M-40% L-20%
Stations: 7 C K P O

Tennessee

Knoxville

Mellon Market Research
3000A N. Mall Rd.
Knoxville, TN 37924
Ph. 877-9MELLON or 423-428-8360
Fax 423-428-6042
Vicki Phillips, Director
Income: NA
Stations: 5 C K P O

Memphis

Friedman Marketing Services
Consumer Opinion Center
4435 Mall of Memphis
Ste. 1, Space P-231
Memphis, TN 38118
Ph. 901-368-5449 or 914-698-9591
Fax 901-368-1390
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Rosemarie O'Sullivam
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 119)

Friedman Marketing Services
Consumer Opinion Center
Raleigh Springs Mall
3423 Raleigh Springs Mall
Memphis, TN 38128
Ph. 901-382-9970 or 914-698-9591
Fax 901-382-9929
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Denise Raupp
Income: H-40% M-40% L-20%
Stations: 10 C K O
(See advertisement on p. 119)

Quick Test/Heakin
6080 Hickory Ridge Mall
Memphis, TN 38115
Ph. 901-360-0400
Fax 901-360-8213
E-mail: info@quicktest.com
www.quicktest.com
Sylvia Sargent, Manager
Income: H-35% M-44% L-21%
Stations: 8 C K P O

Quick Test/Heakin
Wolfchase Galleria
2760 N. Germantown Pkwy., Ste. 102
Memphis, TN 38133
Ph. 901-381-4811
Fax 901-381-4138
E-mail: info@quicktest.com
www.quicktest.com
Katy Hagen, Manager
Income: H-61% M-30% L-9%
Stations: 8 C K P O

Nashville

Car-Lene Research, Inc.
Bellevue Center
7620 Hwy. 70 S., #257a
Nashville, TN 37221
Ph. 615-646-7044
Fax 615-646-7062
www.car-leneresearch.com
Marvin Henderson, Manager
Income: H-47% M-34% L-19%
Stations: 5 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Stones River Mall
1720 Old Fort Parkway
Murfreesboro, TN 37129
Ph. 615-907-0037
Fax 615-907-0039
www.car-leneresearch.com
Tiffany Hays, Manager
Income: H-30% M-45% L-25%
Stations: 5 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Cool Springs Galleria
1800 Galleria Blvd., Ste. 1320
Franklin, TN 37064
Ph. 904-677-5644
Fax 904-677-5534
E-mail: NASH@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-80% L-0%
Stations: 3 C K P O
(See advertisement on p. 103)

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

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

Texas

Austin

Barbara Nolan Market Research
Lakeline Mall
11200 Lakeline Mall Dr., Space J-1
Cedar Park, TX 78613
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR151@attglobal.net
Income: H-25% M-50% L-25%
Stations: 6 C K P O

Quick Test/Heakin
Barton Creek Square
2901 Capital of Texas Hwy., P-9
Austin, TX 78746
Ph. 512-327-8787
Fax 512-327-7460
E-mail: info@quicktest.com
www.quicktest.com
Joseph Owens, Manager
Income: H-20% M-40% L-40%
Stations: 10 C K P O

Corpus Christi

Quick Test/Heakin
Sunrise Mall
5858 S. Padre Island Dr., Ste. 37C
Corpus Christi, TX 78412
Ph. 361-993-6200
Fax 361-991-7380
E-mail: info@quicktest.com
www.quicktest.com
Lorna Turner, Manager
Income: H-20% M-50% L-30%
Stations: 6 C K P O

Dallas/Ft. Worth

C & C Market Research, Inc.
Valley View Mall
13331 Preston Rd., #1073
Dallas, TX 75240
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-40% M-40% L-20%
Stations: 6 C K P O

Car-Lene Research, Inc.
Collin Creek Mall
811 N. Central Expwy., Ste. 2245
Plano, TX 75075
Ph. 972-424-8587
Fax 972-424-7467
www.car-leneresearch.com
Mona Hinton, Manager
Income: H-60% M-30% L-10%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Grapevine Mills Mall
3000 Grapevine Mills Pkwy., Ste. 208
Grapevine, TX 76051
Ph. 972-724-6816
Fax 972-724-6819
www.car-leneresearch.com
Debbie Middleton, Manager
Income: H-53% M-35% L-12%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
North Hills Mall
7624 Grapevine Hwy. N., Ste. 728
North Richland Hills, TX 76180
Ph. 817-595-3737
Fax 817-595-1988
www.car-leneresearch.com
Sharon White, Manager
Income: H-57% M-31% L-12%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Richardson Square Mall
501 S. Plano Rd.
Richardson, TX 75081
Ph. 972-783-1935
Fax 972-680-3652
www.car-leneresearch.com
Gary Ranne, Manager
Income: H-50% M-35% L-15%
Stations: 5 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Six Flags Mall
2911 E. Division, #409A
Arlington, TX 76011
Ph. 817-633-6020
Fax 817-633-4460
www.car-leneresearch.com
Patricia Palmer, Manager
Income: H-25% M-55% L-20%
Stations: 6 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Stonebriar Center
2601 Preston Rd.
Frisco, TX 75034
Ph. 904-677-5644
Fax 904-677-5534
E-mail: DALL@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 6 C K P O
(See advertisement on p. 103)

Friedman Marketing Services
Consumer Opinion Center
Town East Mall
2063 Town East Mall
Mesquite, TX 75150
Ph. 914-698-9591
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Income: H-50% M-30% L-20%
Stations: 7 C K P O
(See advertisement on p. 119)

Quick Test/Heakin
2211 Northeast Mall
1101 Melbourne Rd.
Hurst, TX 76055
Ph. 817-589-0426
Fax 817-589-0547
E-mail: info@quicktest.com
www.quicktest.com
Melodie Henderson, Manager
Income: H-55% M-25% L-20%
Stations: 12 C K P O

Quick Test/Heakin
Golden Triangle Mall
2201 I-35 E. at Loop 288
Denton, TX 76205
Ph. 940-382-5888
Fax 940-566-6671
E-mail: info@quicktest.com
www.quicktest.com
Income: H-0% M-50% L-50%
Stations: 11 K P O

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Quick Test/Heakin
Hulen Mall
4800 S. Hulen, #202
Fort Worth, TX 76132
Ph. 817-263-8890
Fax 817-346-0778
E-mail: info@quicktest.com
www.quicktest.com
Scott Eady, Manager
Income: H-30% M-45% L-25%
Stations: 12 C

Quick Test/Heakin
Irving Mall
3680 Irving Mall
Irving, TX 75062
Ph. 972-594-8573
Fax 972-257-0487
E-mail: info@quicktest.com
www.quicktest.com
Pat Scott, Manager
Income: NA
Stations: NA

Quick Test/Heakin
Vista Ridge Mall
2401 S. Stemmons Fwy., Ste. 1420
Lewisville, TX 75067
Ph. 972-315-3555
Fax 972-315-8926
E-mail: info@quicktest.com
www.quicktest.com
Helen Nicholas, Manager
Income: H-46% M-41% L-13%
Stations: 10 C K P O

Savitz Field and Focus
The Parks at Arlington Mall
3811 S. Cooper, Ste. 2053
Arlington, TX 76015
Ph. 817-467-6437
Fax 817-467-6552
E-mail: information@savitzfieldandfocus.com
www.savitzfieldandfocus.com
Barbara Brodie, Manager
Income: H-35% M-45% L-20%
Stations: 14 C K P O
(See advertisement on p. 63)

Houston

C & C Market Research, Inc.
Central Mall
3100 Hwy. 365, #185
Port Arthur, TX 77642
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: NA
Stations: NA C K P O

Car-Lene Research, Inc.
Katy Mills Mall
5000 Katy Mills Circle, Ste. 667
Katy, TX 77494
Ph. 281-644-6100
Fax 281-644-6104
www.car-leneresearch.com
Cheryl Sempe, Manager
Income: H-49% M-28% L-23%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Northwest Mall
307 Northwest Mall
Houston, TX 77092
Ph. 713-686-5557
Fax 713-686-5584
www.car-leneresearch.com
Cheryl Sempe, Manager
Income: H-35% M-30% L-35%
Stations: 6 C K P O
(See advertisement on p. 107)

Creative Consumer Research
Deerbrook Mall, #1122
20131 Hwy. 59
Humble, TX 77338
Ph. 281-446-9730
Fax 281-446-6649
E-mail: ccrhous@insyn.net
Patricia Pratt, Field Director
Income: H-30% M-39% L-31%
Stations: 10 C K P O
(See advertisement on p. 127)

Creative Consumer Research
First Colony Mall
16535 S.W. Frwy., Ste. 560
Sugarland, TX 77479
Ph. 281-277-7778
Fax 281-277-7779
E-mail: ccrhous@insyn.net
Patricia Pratt, Field Director
Income: H-50% M-38% L-12%
Stations: 8 C K P O
(See advertisement on p. 127)

Creative Consumer Research
Northline Mall
113 Northline Mall
Houston, TX 77022
Ph. 281-240-9646
Fax 281-240-3497
E-mail: ccrhous@insyn.net
Patricia Pratt, Field Director
Income: H-10% M-31% L-59%
Stations: 6 C P
(See advertisement on p. 127)

Cunningham Field & Research Service
The Woodlands Mall
1201 Lake Woodlands Dr., Ste. 1104
The Woodlands, TX 77380
Ph. 904-677-5644
Fax 904-677-5534
E-mail: HOUS@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 4 C K P O
(See advertisement on p. 103)

Gulf State Research Center
San Jacinto Mall
1670 San Jacinto Mall
Houston, TX 77521
Ph. 800-357-8842 or 281-421-7798
Fax 281-421-1976
E-mail: Lvillar@gte.net
Tim Villar, Vice President
Income: H-36% M-47% L-17%
Stations: 6 C K P O

Market Research & Analysis Field Staff, Inc.
The Research Center
5075 Westheimer Rd.
Houston, TX 77056
Ph. 713-271-5624
Fax 713-840-0699
Tiffanie Seymour, Office Manager
Income: H-50% M-30% L-20%
Stations: 5 C K P O

Quick Test/Heakin
247 Greenspoint Shopping Mall
Houston, TX 77060
Ph. 281-872-4164
Fax 281-872-7024
E-mail: info@quicktest.com
www.quicktest.com
Lori Pugh, Manager
Income: H-27% M-50% L-23%
Stations: 12 C K P O

Quick Test/Heakin
Almeda Mall
703 Almeda Mall
Houston, TX 77075
Ph. 713-944-1431
Fax 713-944-3527
E-mail: info@quicktest.com
www.quicktest.com
Lois Vinsun, Manager
Income: H-20% M-40% L-20%
Stations: 5 C K P

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Quick Test/Heakin
Galleria II
5085 Westheimer, Ste. 3897
Houston, TX 77056
Ph. 713-871-8542
Fax 713-871-8549
E-mail: info@quicktest.com
www.quicktest.com
Income: H-37% M-51% L-12%
Stations: 12 C K P O

Quick Test/Heakin
West Oaks Mall, Ste. 547
Houston, TX 77082
Ph. 281-531-5959
Fax 281-531-6233
E-mail: info@quicktest.com
www.quicktest.com
Linda Hunter, Manager
Income: H-40% M-35% L-25%
Stations: 12 C K P O

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

San Antonio

Car-Lene Research, Inc.
North Star Mall
7400 San Pedro, #2060
San Antonio, TX 78216
Ph. 210-340-3595
Fax 210-340-3559
www.car-leneresearch.com
Sandra Yeater, Manager
Income: H-39% M-40% L-19%
Stations: 8 C K P O
(See advertisement on p. 107)

Creative Consumer Research
McCreeless Mall
South Cross & I-37
San Antonio, TX
Ph. 210-531-9345
Fax 210-531-9345
E-mail: ccrsan@aol.com
Amalia Pena, Project Supervisor
Income: H-10% M-65% L-25%
Stations: 7 C P
(See advertisement on p. 127)

Creative Consumer Research
Westlakes Mall
Marbach Rd. at 410
San Antonio, TX 78227
Ph. 210-673-0802
Fax 210-673-0094
E-mail: ccrsan@aol.com
Amalia Pena, Manager
Income: H-10% M-52% L-38%
Stations: 6 C K
(See advertisement on p. 127)

Cunningham Field & Research Service
Rivercenter Mall
849 E. Commerce St., #403
San Antonio, TX 78205
Ph. 904-677-5644
Fax 904-677-5534
E-mail: sant@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-65% L-15%
Stations: 4 C K
(See advertisement on p. 103)

Friedman Marketing Services
Consumer Opinion Center
Rolling Oaks Mall
6909 Loop 1604 E., Ste. 1112
San Antonio, TX 78247
Ph. 210-651-6971 or 914-698-9591
Fax 210-651-5777
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Yvonne Brockman
Income: H-25% M-50% L-25%
Stations: 7 C K
(See advertisement on p. 119)

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

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

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

Utah

Salt Lake City

Consumer Opinion Services, Inc.
1120 Newgate Mall
Ogden, UT 84405
Ph. 801-778-0380 or 206-241-6050 for bids
Fax 801-778-0383
E-mail: info@cosvc.com
www.cosvc.com
Willard Hill, Manager
Income: H-10% M-65% L-25%
Stations: 9 C K P
(See advertisement on p. 129)

Cunningham Field & Research Service
South Towne Center
10450 S. State St., Ste. 1331
Sandy, UT 84070
Ph. 904-677-5644
Fax 904-677-5534
E-mail: SALT@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-10% M-80% L-10%
Stations: 4 C K P O
(See advertisement on p. 103)

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: umrs@worldnet.att.net
www.ruthnelsonresearchsvcs.com
Berdene Atkin, Manager
Income: H-40% M-40% L-20%
Stations: 3 C P

Washington

Everett

Consumer Opinion Services, Inc.
Everett Mall
1402 S.E. Everett Mall Way
Everett, WA 98208
Ph. 425-347-2424 or 206-241-6050 for bids
Fax 425-290-8433
E-mail: info@cosvc.com
www.cosvc.com
Maureen Barbee, Manager
Income: H-10% M-65% L-25%
Stations: 10 C K P
(See advertisement on p. 129)

Kelso

Consumer Opinion Services, Inc.
Three Rivers Mall
351 Three Rivers Dr.
Kelso, WA 98626
Ph. 360-425-8815 or 206-241-6050 for bids
Fax 360-425-3143
E-mail: info@cosvc.com
www.cosvc.com
Yvone Pecha, Manager
Income: H-10% M-60% L-30%
Stations: 12 C K P O
(See advertisement on p. 129)

Seattle/Tacoma

Car-Lene Research, Inc.
Alderwood Mall
3000 184th St. S.W., #861
Lynnwood, WA 98037
Ph. 425-744-8047
Fax 425-744-7809
www.car-leneresearch.com
Jean LeBlanc, Manager
Income: H-44% M-27% L-29%
Stations: 6 C K P O
(See advertisement on p. 107)

Consumer Opinion Services, Inc.
Lakewood Mall
10509 Gravelly Lake Dr. S.W.
Tacoma, WA 98499
Ph. 253-588-0276 or 206-241-6050 for bids
Fax 253-588-1029
E-mail: info@cosvc.com
www.cosvc.com
Judy Riha, Manager
Income: H-10% M-50% L-40%
Stations: 9 C K P
(See advertisement on p. 129)

Cunningham Field & Research Service
Super Mall of the Great N.W.
1101 Super Mall Way., Ste. 1239
Auburn, WA 98001
Ph. 904-677-5644
Fax 904-677-5534
E-mail: SEAT@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-0% M-80% L-20%
Stations: 5 C K P O
(See advertisement on p. 103)

Friedman Marketing Services
Consumer Opinion Center
South Hill Mall
3500 Meridian South
Puyallup, WA 98373
Ph. 253-840-0112 or 914-698-9591
Fax 253-840-0131
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Ted Hubbard
Income: H-30% M-50% L-20%
Stations: 6 C K P O
(See advertisement on p. 119)

Barbara Nolan Market Research
555 Northgate Mall, Ste. 220
Seattle, WA 98125
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR160@attglobal.net
Income: H-25% M-50% L-25%
Stations: 6 C K P O

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

Spokane

Consumer Opinion Services, Inc.
Northtown Mall
4750 N. Division St., Ste. E-219
Spokane, WA 99207
Ph. 509-487-6173 or 206-241-6050 for bids
Fax 509-487-7205
E-mail: info@cosvc.com
www.cosvc.com
Linda Levely, Manager
Income: H-9% M-61% L-30%
Stations: 8 C K P O
(See advertisement on p. 129)

CODES

Income
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M - middle-income ($30,000-$60,000)
L - low-income (under $30,000)

Stations - number of interviewing stations

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

NA - information not available

Cunningham Field & Research Service
Spokane Valley Mall
14700 E. Indiana, #1188
Spokane, WA 99216
Ph. 904-677-5644
Fax 904-677-5534
E-mail: spok@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-50% L-30%
Stations: 6 C K O
(See advertisement on p. 103)

Vancouver

Consumer Opinion Services, Inc.
Vancouver Mall
8700 N.E. Vancouver Mall Dr.
Vancouver, WA 98662
Ph. 360-254-5650 or 206-241-6050 for bids
Fax 360-254-6588
E-mail: info@cosvc.com
www.cosvc.com
Alice Hilby, Manager
Income: H-15% M-45% L-40%
Stations: 7 C K P
(See advertisement on p. 129)

West Virginia

Charleston

McMillion Research Service
Charleston Town Center Mall
Unit 3007
Charleston, WV 25389
Ph. 304-343-1578
Fax 304-343-1570
E-mail: ctc@mcmillionresearch.com
www.mcmillionresearch.com
Barbara Kiddy, Manager
Income: H-40% M-50% L-10%
Stations: 7 C K P O
(See advertisement on p. 131)

Huntington

McMillion Research Service
Huntington Mall, Unit 290
Rte. 60 at I-64
Barboursville, WV 25501
Ph. 304-733-1643
Fax 304-733-0472
E-mail: mcmillhtm@aol.com
www.mcmillionresearch.com
Mary Burton, Manager
Income: H-33% M-48% L-19%
Stations: 7 C K P O
(See advertisement on p. 131)

Wheeling

T.I.M.E. Market Research
280 Ohio Valley Mall
St. Clairsville, OH 43950
Ph. 740-695-6288
Fax 740-695-5163
E-mail: timothyaspenwall@home.com
Tim Aspenwall, Manager
Income: H-10% M-75% L-15%
Stations: 12 C K P O

Wisconsin

Eau Claire

Friedman Marketing Services
Consumer Opinion Center
Oakwood Mall
4800 Golf Rd., Ste. 604
Eau Claire, WI 54701
Ph. 715-836-6580 or 914-698-9591
Fax 715-836-6584
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Julie Ogdon
Income: H-25% M-55% L-20%
Stations: 8 C K P O
(See advertisement on p. 119)

Green Bay/Appleton

Friedman Marketing Services
Consumer Opinion Center
Fox River Mall
4301 W. Wisconsin
Appleton, WI 54915
Ph. 920-730-2240 or 914-698-9591
Fax 920-730-2247
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Dawn Marhefke
Income: H-30% M-55% L-15%
Stations: 11 C K P O
(See advertisement on p. 119)

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

Milwaukee

Car-Lene Research, Inc.
Northridge Mall
7700 W. Brown Deer Rd.
Milwaukee, WI 53223
Ph. 414-357-6611
Fax 414-357-7757
www.car-leneresearch.com
Christine Malone, Manager
Income: H-31% M-31% L-38%
Stations: 4 C K P O
(See advertisement on p. 107)

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
Kelly McGrath, Director
Income: H-25% M-55% L-20%
Stations: 8 C K P O

Quick Test/Heakin
Southridge Mall
5300 S. 76 St., Ste. 1325
Greendale, WI 53129
Ph. 414-421-2865
Fax 414-421-2990
E-mail: info@quicktest.com
www.quicktest.com
Linda Kelly, Manager
Income: H-20% M-60% L-20%
Stations: 9 C K O

100-Station CATI Phone Center

CFMC Survent And Mentor Software

Web Ready

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Customer, Employee Satisfaction & Awareness Surveys

Jury Selection / Mock Trials

PRO-T-S Proactive Automated Dialing System

Two Focus-Study Suites

Business And Executive Interviews

Mall Facilities In Charleston And Huntington, West Virginia

McMillion Research

AMERICA'S RESEARCH EXPERTS

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Gary & Sandy McMillion
Co-Presidents

McMillion Research
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1012 Kanawha Boulevard East / Charleston, West Virginia 25301
(304) 343-9650 / (304) 343-6522 Fax / **(800) 969-9235**
E-mail: jmace@mcmillionresearch.com
Website: www.mcmillionresearch.com

CODES

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

Stations - number of interviewing stations

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

NA - information not available

CANADA

British Columbia

Vancouver

Research House, Inc.
Metrotown Centre
468 - 4800 Kingsway
Burnaby, BC V5H 4J2
Canada
Ph. 604-433-2640
Fax 604-266-1640
E-mail: vanc@research-house.ca
www.research-house.ca
Tammy Braun, Project Director
Income: H-35% M-50% L-15%
Stations: 5 C K P O
(See advertisement on p. 133)

Research House, Inc.
Willowbrook Shopping Centre
19705 Fraser Hwy., Unit 117
Langley, BC V3A 7E9
Canada
Ph. 604-433-2640
Fax 604-433-1640
E-mail: vanc@research-house.ca
www.research-house.ca
Tammy Braun, Project Director
Income: H-25% M-55% L-20%
Stations: 6 C K P
(See advertisement on p. 133)

Ontario

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. Operations
Income: H-25% M-50% L-25%
Stations: 4 C K P O

Canadian Viewpoint, Inc.
Centerpoint Mall
6464 Yonge St., Ste. N5
Toronto, ON M2M 3X4
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. Operations
Income: H-30% M-60% L-10%
Stations: 3 C K P O

Canadian Viewpoint, Inc.
Eastgate Mall
75 Centennial Pkwy. N.
Hamilton, ON L85 2P2
Canada
Ph. 905-770-1770
Fax 905-770-1692
www.canview.com
Alan Boucquey, V.P. Operations
Income: H-20% M-70% L-10%
Stations: 4 C P O

Canadian Viewpoint, Inc.
Meadowvale Town Center
6677 Battleford Rd.
Mississauga, ON L5N 3R8
Canada
Ph. 905-770-1770
Fax 905-770-1692
www.canview.com
Alan Boucquey, V.P. Operations
Income: H-20% M-70% L-10%
Stations: 4 C K P O

Canadian Viewpoint, Inc.
Oakville Place Mall
Oakville, ON L6H 3H6
Canada
Ph. 905-339-1441
Fax 905-339-1820
www.canview.com
Alan Boucquey, V.P. Operations
Income: NA
Stations: 4 C K P O

Car-Lene Research, Inc.
(Opening Fall 2000)
Vaughan Mills
Toronto, ON
Canada
Ph. 847-564-1454
www.car-leneresearch.com
Income: NA
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Classified Ads

Names of Note

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ment consulting team.

Jack Weber has joined *Evaluative Criteria*, a Stamford, Conn., research firm, as a senior vice president.

Alisa Joseph has been named vice president, advertiser services, at the Los Angeles office of *The Arbitron Company*.

Steve Seraita has been promoted to executive vice president, director of sales, at New York-based *Scarborough Research*.

Burke Marketing Research, Cincinnati, has promoted **Bart Gamble** to vice president, BMR client services.

Fort Washington, Pa.-based *TVG, Inc.*, has promoted **Gail Keppler** to managing director, TVG business units, which include marketing research and consulting, and education and communications.

Randall Sword has joined *Applied Marketing Science*, Waltham, Mass., as a principal.

Jeff Berg has been promoted to vice president, OPG/North America at *Modalis Research Technologies*, San Francisco. In addition, **Terra Schehr** has been named research director.

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Psychographics

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variety of other research efforts pertaining to product development, marketing, and advertising. Each class of attributes is addressed separately below, starting from a person's core (personality) and working outward.

1) Personality - Most psychologists agree that personality has a high degree of "heritiability" (i.e., it is passed along from generation to generation) and is at least partially innate. Most psychologists also agree that a person's personality can be shaped to some degree by early life experiences. While there is long-standing controversy over the degree to which nature vs. nurture contributes to one's personality, there is general agreement that personality is fairly fixed before a person's early teens. Recently, there has been some consensus on the underlying factors of personality (Digman, 1990; McCrae, 1992). Called the 5PF personality factors (or the Big Five), they include: extro-/introversion, openness to new experiences, conscientiousness, narcissism, and agreeableness. Older personality schemes (e.g., Myers-Briggs, 16PF, etc.) are still employed but with less regularity. The Big Five have been, more or less, accepted by the academic community. Personality can only be reliably measured by validated psychological batteries that tend to be fairly long.

2) Values - According to Milton Rokeach, the father of values, a value is "an enduring belief that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence." Values are formed very early in life and do not generally change in the course of one's lifetime. Values are such concepts as freedom, happiness, and obedience. They are generally based in and influenced by one's culture, religion, and moral foundation. Methodologically, it is recommended that they should only be measured in an "ipsative" or ranking fashion, since they have a high degree of social desirability and can only be measured in a relative sense. Values have also been derived through second-order factor analyses of attitudes. Values may manifest themselves across a wide band of behaviors but are not effective in predicting specific behavior.

3) Core attitudes - Core attitudes tend to be those that guide one's life. These are also sometimes called zero-order attitudes. Attitudes such as a belief in democracy or monogamy are examples of zero-order attitudes. Attitudes can be influenced by heritiability, but are generally formed by life experiences and behaviors. Core attitudes are usually shaped early on in life and are difficult to change. Attitudes are typically measured with a Likert-summated rating scale or on occasion with a Guttman or Thurstone approach. All scales constructed must be validated and proved reliable through pre-testing before use.

4) Attitudes - This level refers to attitudes which are specific to a certain object. This is typically where needs-based segmentation takes place. This level tends to be more malleable than core attitudes. For example, my attitude towards four-wheel drive systems will not be as deeply held as my opinions about equal rights. For that reason, these "lighter" attitudes are easier to influence through communication. In many cases, these attitudes may not even exist at all. For example, most Toyota Corolla owners probably do not have an opinion about locking differential systems. In these cases attitudes can be significantly influenced by communication.

A special class of attitudes called behavioral intentions are used to predict future behavior. Measurement efforts should specify the target, the action, the context, and the timing of the behavior (Fishbein and Azjen, 1980). For example, in predicting consumers' likelihood to purchase a vehicle, my questionnaire item might read: "I plan on purchasing a new LS400 in the next six months from a Lexus dealer." The target is the new LS400, the action is purchasing it, the context is a Lexus dealer and the timing is the next six months. Behavioral intentions are the best choice for predicting specific future behavior.

5) Behaviors - The only overt manifestations that are commonly measured, behaviors are usually the outcome of the attitudes, values, and personality of a person. Behaviors may be product choices, lifestyle activities, product usage, or any other overt and measurable behavior. This is typically the level where lifestyle segmentation takes place. However, you can reasonably assume that attitudes, values, and personality usually drive a person's lifestyle. What is known as lifestyle segmentation uses behavior to infer (predict) other associated behaviors (e.g., product preferences). This approach has met with mixed success, depending on the application. Behaviors can be used as a source of segmentation or to profile segmentation based on covert levels (attitudes). Obviously, they have the highest validity of prediction (they are reporting behaviors!). The same can not be said for the lifestyle application of this level (behaviors to predict other behaviors). Behaviors are also the most malleable class of attributes.

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Untangling psychographics and lifestyle

A psychologist's view of consumers

By Dave Fish

Editor's note: Dave Fish is strategic research manager with Toyota Motor Sales, U.S.A. Inc., Torrance, Calif. He can be reached at David_Fish@toyota.com.

The terms "psychographics" and "lifestyle segmentation" have permeated the marketing literature and practice over the last several years. The intent of this short review is to clarify what is meant by these ill-defined and imprecise terms. The following provides a brief overview of how consumer psychologists view the components that drive human behavior.

There are roughly five intrapersonal classes of attributes, each of which varies in terms of malleability, generalizability, and predictive behavioral power. Malleability refers to the ease with which each structure is changed by outside forces (i.e., communication). Generalizability refers to the degree with which a given class of attributes will be manifested in the form of commonalties across a range of behaviors. Predictive power refers to how accurate a prediction can be made from the given class of attributes. Towards the center of the different classes are those that are most resistant to change, can be generalized across a wide range of behavior, and are the least predictive of specific behavior. Moving outward results in structures that are less resistant to change by outside forces, are less generalizability to a wide class of behaviors, but offer greater predictive validity.

Only one of the five layers is observable (behavior). Any one of these levels (or a combination of several) can be used as a basis for segmentation. These levels are also used in a

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