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Marketing Research Review

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May 2001

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New column on qualitative research debuts

When good research goes bad

2001 Telephone Facilities Directory


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QUIRK'S Marketing Research Review

Volume XV, Number 5 May 2001

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Mom wants to hear from you

A new survey commissioned by Morgan Hill, Calif.-based Cidco, Inc., maker of the Mivo 200 personal e-mail appliance, reveals that today's Mom doesn't necessarily

want jewelry or flowers for Mother's Day. What she wants most is to feel close to her children, and to hear, "I love you."

According to the survey, almost half of moms (48 percent) believe the best gifts they could receive for Mother's Day are to have their adult children keep in touch with them more often during the year, and to hear them say, "I love you." In fact, the vast majority (82 percent) want to hear from their children at least once a week, and for 22 percent, once a week isn't nearly enough — once a day is more like it.

Even among tangible gifts, moms would prefer those that keep the family connected and strengthen family bonds, such as brunch or dinner out (22 percent) or a Mother's Day card (8 percent). Other "luxury" items, such as a spa treatment, flowers, perfume, jewelry, chocolates, and clothes, received comparatively low scores (4 percent, 3 percent, 2 percent, 2 percent, 1 percent, and 1 percent, respectively).

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Macintosh owners most loyal, but Gateway not far behind

Rochester, N.Y.-based Harris Interactive's Consumer TechPoll study shows that Compaq is the overall unit share leader among PC buyers, followed closely by Hewlett-Packard (HP) and Gateway. Together, these three brands accounted for about half of the consumer PCs purchased in the first three-quarters of 2000. Gateway was the number one brand among first-time home PC buyers. Its share among first-time buyers was nearly 50 percent higher than its overall share and significantly higher than its share among repeat buyers. HP also had a higher share among first-timers than repeat buyers did, but its share was more balanced than Gateway's. In contrast, Compaq was stronger among repeat buyers than among first-timers, although its share was also relatively well balanced.

The survey of more than 140,000 Internet users, including more than 6,500 who purchased a home PC in the first three quarters of 2000, examined brand shares among first-time home PC buyers and brand loyalty among repurchasing home PC buyers.

The study found wide disparity in repurchase loyalty among the top PC brands. Apple Macintosh owners were the most loyal — just over half of Mac owners who bought a personal computer in the first three-quarters of 2000 repurchased a Mac. Gateway's customer loyalty was highest among Wintel brands with a 45 percent repurchase rate. IBM had the lowest repurchase loyalty among the top brands, with only 9 percent of IBM PC owners buying another IBM brand PC when they bought a new home PC. (See table.)

Brand	Repurchase Rate*
Apple Macintosh	53%
Gateway	45%
Dell	40%
Hewlett-Packard	33%
Compaq	29%
IBM Brand	9%

*Percent of brand owners that bought the same brand when they purchased a new home PC in the first three quarters of 2000. Source: Harris Interactive Consumer TechPoll.

"As the consumer PC market matures, repurchase loyalty is a key measure for PC brands," says Dave Tremblay, director of technology research for Harris Interactive. "First-time buyers account for only about one-fifth of all consumer PC purchases. While strength in that segment is a bonus, you can't build a business relying on these buyers. The easiest buyers to capture should be a brand's current users. If a company cannot successfully sell to its own customers, it will likely have problems selling to its competitors' customers. IBM is a good example of this. When IBM de-emphasized its traditional retail consumer distribution channels, its customers abandoned the brand; fewer than one in 10 IBM brand PC owners repurchased an IBM brand PC. While strong repurchase loyalty is not enough — witness Apple's high loyalty but declining share — it is a very good place to start." For more information visit www.harrisinteractive.com.

The Arbitron Company, New York, has named **Jennifer Williams** account manager for the firm's advertiser and agency services division.

Scarborough Research, Austin, Texas, has named **Barbara Quisenberry** account director in the print division.

Mark Halton has joined the *Bozell Chicago* ad agency as associate director, strategic planning and research.

Greenwich, Conn.-based *NFO WorldGroup* (formerly NFO Worldwide) has announced top management transitions in both North America and Europe. **Kenneth M. Freeman** has joined the firm as president, NFO North America. Freeman replaces **Joe Migliara**, founding partner of NFO Migliara/Kaplan, who has been NFO North America's president for the past five years. Migliara is leaving the company to pursue entrepreneurial endeavors in the biotech and health care industries, a move he requested. In Europe, **Bruno Hoetzel**, most recently managing director, NFO Financial Services, as well as director of NFO Europe's R&D/new product development, becomes president, NFO Europe.

In addition, NFO WorldGroup has announced that **Steven Ross** has been named vice president and general manager of the company's Cincinnati regional office. **Kevin Orians** has been promoted to vice president of data collection for the firm's North American division. **Dan Boehm** has been promoted to marketing vice president for the company's newly formed Northeast division. At the Cincinnati office, **Nancy Reilly** has been named director of marketing, **Alan B. Dorsch** has been named account executive, and **Brad Marsh** has been promoted to marketing manager. **Rob Martin** has been promoted to account executive in the firm's Toledo marketing group. At the Greenwich, Conn., office **Jason Steeg** has been named research manager and **Jennifer Pembroke** has been promoted to account executive.


Ross


Orians


Boehm


Upson

Denver-based *Looking Glass, Inc.*, marketer of the Cohorts household-based segmentation system, has named **Mark Upson** its new president and chief executive officer.

Horsham, Pa.-based research firm *Taylor Nelson Sofres Intersearch* (TNS Intersearch), has named **Howard Jaffe** and **Art McKee** as vice presidents in the health care sector. In addition, **Lisa Bellisario** has been named vice president, Internet business development, and **Don Woods** has been named vice president, North American transportation and travel sector.

LightspeedResearch.com, Basking Ridge, N.J., has named **Roger Bailey** chief operating officer.

Simmons Market Research Bureau, New York, has promoted **Theresa LaMontagne** to vice president, product development.

Gail Dreger has been named senior brand planning analyst at the Milwaukee office of *Cramer-Krasselt* advertising.

Minneapolis-based *Custom Research Inc.* has named **Michael Brousseau** vice president, online research. **Greg Pomerantz** has been named vice president of the database marketing group. At the firm's San Francisco office, **Patrice Sandoval** has been named research manager.

Edward Keller, president and COO of *Roper Starch Worldwide*, a New York research firm, has been elected to the board of directors of the *Advertising Research Foundation*.

Modalis Research Technologies, San Francisco, has promoted **Nicolle Gottfried** to account executive.


Gottfried


Watkins

Chris Watkins has been promoted to vice president at *Porchey Research*, St. Louis.

New York research firm *Taylor Nelson Sofres* has named **Mike Gorton** worldwide sector head for television audience measurement services. He will also have responsibility for radio research. In addition, **Tony Anderson** has been named e-commerce director.

Carolyn Setlow, group senior vice president of *Roper Starch Worldwide*, a New York research firm, has been honored by the NOW Legal Defense and Education Fund in a ceremony recognizing 25 of the most influential women in American business.

Paris research firm the *Ifop Group* has named **Pierre Dosdat** vice general manager. In addition, **Pascal Avignon** has been promoted to general manager France, and **Anne Monnier** has been

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Product & Service Update

System manages focus group video clips

New York-based FocusVision Worldwide, Inc. has introduced VideoMarker, a live video content management system for qualitative researchers and their clients. The focus facility-based service allows users to mark, sort, edit and distribute media-rich video clips of focus group highlights. The service is now rolling out to over 100 U.S. focus facilities, and soon internationally to focus studios worldwide.

After booking the service through the facility, the user marks highlights during the interviews by pushing a button on a small, hand-held wireless marker. At the end of the day, the user is given a CD-ROM with a digital video recording of all the sessions with every marked highlight available in a separate file.

Both moderators and clients in the backroom of the facility can mark clips during the session. Users at remote locations equipped with VideoMarker can also mark clips. Clips can be reviewed immediately on a standard Windows PC and sorted for relevance. Then significant clips can be sent via e-mail or integrated into multimedia reports and presentations. For more information call John Houlahan at 203-961-1715 ext. 13 or visit www.focusvision.com.

Bernett launches enhanced site

Boston-based Bernett Research has enhanced its www.bernett.com site to include: The Bernett Research Exchange, which provides a password-protected workspace for Bernett and client-company representatives working on a specific project; online monitoring of surveys in the field; online RFPs; an archive of past projects; and Strategic Partner Response, which provides an extranet between survey respondents and the sponsor of the research project. For more information contact Andrew Hayes at 617-746-2705.

Test power of messages using MindREAD

Moskowitz Jacobs Inc. (MJI), a White Plains, N.Y., research firm, is now offering MindREAD, an online technology that investigates consumer attitude groups in a product/service category and determines how compelling the current messages are in terms of motivating consumers to buy. MindREAD recruits consumer panels through the Internet and re-uses panelists in the attitudinal segments for follow-up development work. MindREAD technology is offered through MJI's syndicated service, but exclusive studies are also available. For more information contact Howard Moskowitz at 914-421-7400.

Greenfield offers online focus group rooms

Wilton, Conn., research firm Greenfield Online has packaged its FocusChat software as an application service provider (ASP) and is calling the new product FocusChat ASP. The software makes online focus group "rooms" available to moderators anywhere. A potential user can recruit and administer a group by logging into www.focuschatasp.com and setting up an account. Subscribers can purchase all or part of what they need for the specific research project. Moderators can buy rooms individually or in bulk. Training can be part of the package and technical support is provided. FocusChat ASP is being managed by FieldSource, Greenfield Online's outsourcing division.

Product helps uncover customer service problems

Crestview Hills, Ky.-based Alliance Research, Inc., the attitudinal research division of Catalina Marketing Corporation, is now offering RED Alert, a research product that combines real-time information with the "voice of the customer" to provide feedback for business management and service recovery

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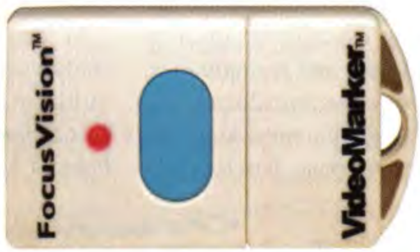
Now, mark and clip your focus group highlights, live.



You're at a focus group and one of those revealing, content-significant moments occurs. The kind that you used to scribble onto a legal pad, or search for the next day on the piles of videotapes or transcripts.

Now you just click.

Introducing VideoMarker from FocusVision. It's new, simple and a productivity breakthrough for researchers.

With the push of a hand-held button, VideoMarker marks your highlights on a CD-ROM. So when the focus group is over you not only have a CD with the complete session but every important moment is saved in a separate file. The highlights are ready to review immediately on your computer and sort for relevance.

All the key comments are right there, so reports get done in a fraction of the time, ready to present or e-mail, complete with video clips. You could even prepare a preliminary report with verbatims and visuals during the plane ride home.

It's fast, easy, inexpensive and requires no special technology for your PC. And it's available today in many research facilities - more tomorrow. Can be used with or without FocusVision VideoConferencing or VideoStreaming services. Call 800. 433.8128 x6 or check www.focusvision.com for participating facilities.

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Research Industry News

News notes

Fairfield, Conn.-based **Survey Sampling, Inc**. announced in April that its surveyspot.com Web research panel has grown to over 250,000 households, representing over 425,000 individuals. The firm plans to increase the panel to 450,000 households by the end of 2001.

Cheskin Research, Redwood Shores, Calif., has shortened its name to Cheskin to reflect the expansion of its consulting practice to include emerging markets and technologies, particularly wireless, broadband, and transmedia brand communication. To that end, the company has recently hired Amy Francetic, former CEO of Zowie Intertainment, as a senior strategy consultant.

On April 2, shares of New York-based **Arbitron Inc.**, began trading on the New York Stock Exchange under the symbol ARB. On March 30, Arbitron became independent of its former parent company, Ceridian Corporation, through a reverse spin-off.

In the annual "Choice in Chains" study commissioned by foodservice publication *Restaurants and Institutions*, consumers ranked Don Pablo's Mexican Kitchen the No. 1 casual dining Mexican restaurant in the U.S. in terms of food quality, menu variety, value, service, atmosphere, cleanliness and convenience. The magazine commissions a national survey of restaurant consumers who rate restaurant brands on seven key attributes. This year, nearly 3,000 consumers participated in the research. The survey was conducted by Greenwich, Conn.-based **NFO Research, Inc**.

The e-survey software division of Ottawa-based **Manta Corporation** has changed its name to **Halogen Software**. In addition, its mantaINSIGHT software has been renamed Halogen eSurveyor.

Research Calendar

Salford Systems will present an introductory decision tree course, "Hands On Data Mining with Decision Trees (CART 4.0)," on May 15-16 in Boston. For more information visit www.salford-systems.com/training.html.

The Mystery Shopping Providers Association (MSPA) will hold its annual conference on May 16-19 at the Bahia Resort Hotel in San Diego. For more information visit www.mysteryshop.org.

The International Quality & Productivity Center (IQPC) will hold a conference titled "Maximizing Online Market Research Strategies" on May 16-17 in Chicago. For more information call 800-882-8684 or visit www.iqpc.com.

Salford Systems will present an introductory course, "Hands On Predictive Modeling with Automated Regression Tools (MARS 2.0)," on May 17 in Boston. For more information visit www.salford-systems.com/training.html.

The Institute for International Research (IIR) will hold a conference titled "Conjoint and Choice Based Modeling Essentials" on May 17-18 at the Crowne Plaza Ravinia in Atlanta. For more info visit www.iir-ny.com or call 888-670-8200.

The American Association for Public Opinion Research (AAPOR) will hold its annual conference on May 17-20 at the Hilton Montreal Bonaventure in Montreal. For more information visit www.aapor.org.

SPSS MR will hold its international conference, SumIT01, on May 20-23 at the Hotel Estoril Sol, Estoril, Portugal. For more information visit www.sumit01.com.

The International Quality & Productivity Center (IQPC) will hold its U.S. Hispanic marketing conference on May 21-23 at the Hyatt Regency in Miami. For more information call 800-882-8684 or visit www.iqpc.com.

The Society of Insurance Research will hold its Spring Workshop Series on May 20-23 at the Embassy Suites Hotel in St. Louis. For more information visit http://sirnet.org or call Stan Hopp at 770-426-9270.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on online media measurements on June 26-28 in Athens, Greece. For more information visit www.esomar.nl.

The Marketing Research Association (MRA) will hold its 43rd annual conference on June 6-8 in New York. For more information visit www.mra-net.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on radio research on June 24-26 in Athens, Greece. For more information visit www.esomar.nl.

The research partnership icon & Landis has reorganized its core operations into two business-directed units. Icon brand navigation US, a subsidiary of the **icon brand navigation group**, will remain headquartered in New York City. The New York business will continue to be managed by Uwe Munzinger, president. **Landis Strategy & Innovation** will retain its global headquarters in Palm Beach Gardens, Fla. The Florida business will continue to be managed by Stephen Landis and Robert Posten, managing principals.

Mill Valley, Calif., research firm **MarketTools, Inc**., has closed a $20 million round of strategic financing. The new capital will fuel the firm's plans for global expansion of its Internet infrastructure and software platform. Strategic investors include advertising and marketing services firm the WPP Group; packaged goods firms General Mills and Procter & Gamble; and Marketing 1to1 Ventures, LLP, a venture capital fund. MarketTools' previous investors also contributed to the round. This is MarketTools' third round of funding in as many years, with a cumulative $50 million raised.

Acquisitions

Nuremberg, Germany-based **GfK Group** has acquired a 51 percent stake in Wiesbaden, Germany, radio research firm **Enigma**.

Port Washington, N.Y., research firm **The NPD Group, Inc.** has completed the sale of its custom marketing research division to French research provider **Ipsos**. The sale facilitates a shift in NPD's business strategy that will allow it to focus on the transformation of its syndicated tracking businesses to Web-based marketing information portals, known as the NPD "Worlds," in selected vertical markets.

With the sale, Ipsos has acquired the HTI Consumer Panel and other NPD consumer panels used for mail and telephone research, branded ad hoc research products, proprietary marketing models, several tracking services known as the Behavioral Tracking businesses, and a 25 percent interest in a management company of the NPD Online Panel. The businesses will be operated as an independent company within the Ipsos international network and will be known as Ipsos-NPD.

Joining Ipsos are approximately 500 employees located in Pt. Washington and Uniondale (N.Y.), Greensboro (N.C.), Cincinnati, Chicago, Houston, and Toronto. The new company will be headed by Rupert Walters, NPD's former chief operating officer.

NPD syndicated tracking businesses will not be affected by the sale. The firm will continue to offer its consumer and retailer point-of-sale (POS) tracking services, and accounts will be serviced by the same NPD staff as prior to the sale. NPD will also continue to operate the NPD Online Panel, while maintaining a 75 percent share in the management company of that asset.

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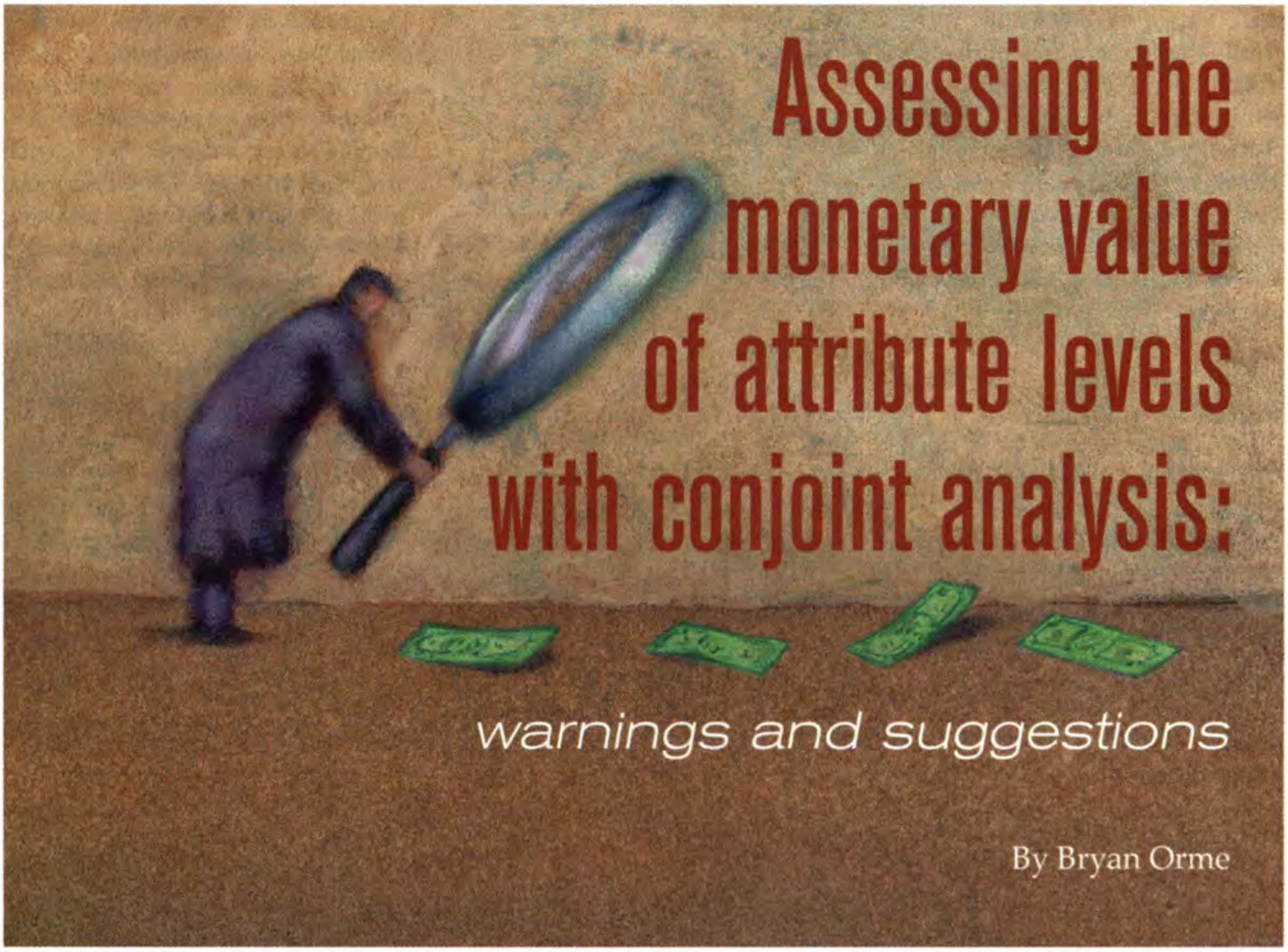

Assessing the monetary value of attribute levels with conjoint analysis:

warnings and suggestions

By Bryan Orme

Editor's note: Bryan Orme is vice president of Sawtooth Software, Inc., Sequim, Wash. He can be reached at 360-681-2300 or at bryan@sawtoothsoftware.com.

Conjoint analysis is often used to assess how buyers trade off product features with price. Researchers can test the price sensitivity of potential product configurations using simulation models based on conjoint results. Most often a simulation is done within a specific context of competitors. But when a product is truly new to the market and has no direct competitors, price sensitivity for that new product can be estimated compared to other options such as buying nothing.

The common forms of conjoint analysis measure contrasts between levels within attributes. The worths of levels are estimated on an arbitrary interval scale, so the absolute magnitudes of utilities have no meaning. Also, each attribute's utilities are determined only to within an arbitrary additive constant, so a utility level from one attribute cannot be directly compared to another from a different attribute. To a trained conjoint analyst, an array of utilities conveys clear meaning. But that meaning is often difficult for others to grasp. It is not surprising, then, that researchers look for ways to make conjoint utilities easier to interpret.

The monetary scaling trap

One common attempt to make conjoint utilities more understandable is to convert them to monetary or "dollar equivalents." This is a way of removing the arbitrariness in their scaling. To do this, price must be included as an attribute in the conjoint design. Note again that we cannot attach a monetary value to a single level (such as the color green), but must express the value in terms of differences between two colors: "green is worth $5 more than yellow." But, if the attribute is a binary (present/absent) attribute such as "has sunroof" versus "doesn't have sunroof," the expressed difference is indeed the value of having the feature versus not.

The idea of converting utilities to dollar values can be very appealing to managers. But in our experience what begins with much promise usually turns out to be a poor use of conjoint data. Some approaches to converting utilities to dollar equivalents are flawed. But even if computed reasonably, the results often seem to defy commonly held

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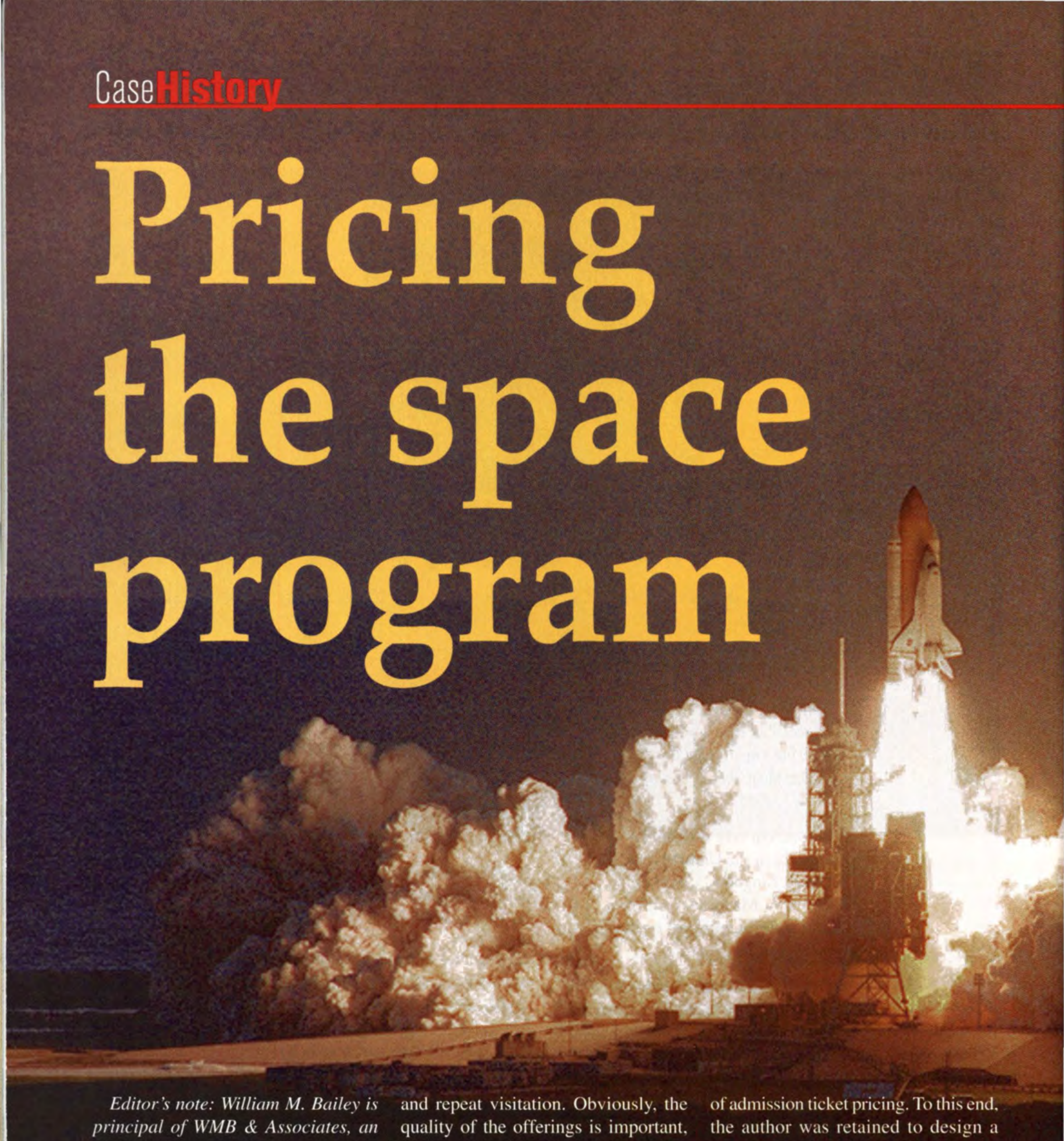
Pricing the space program



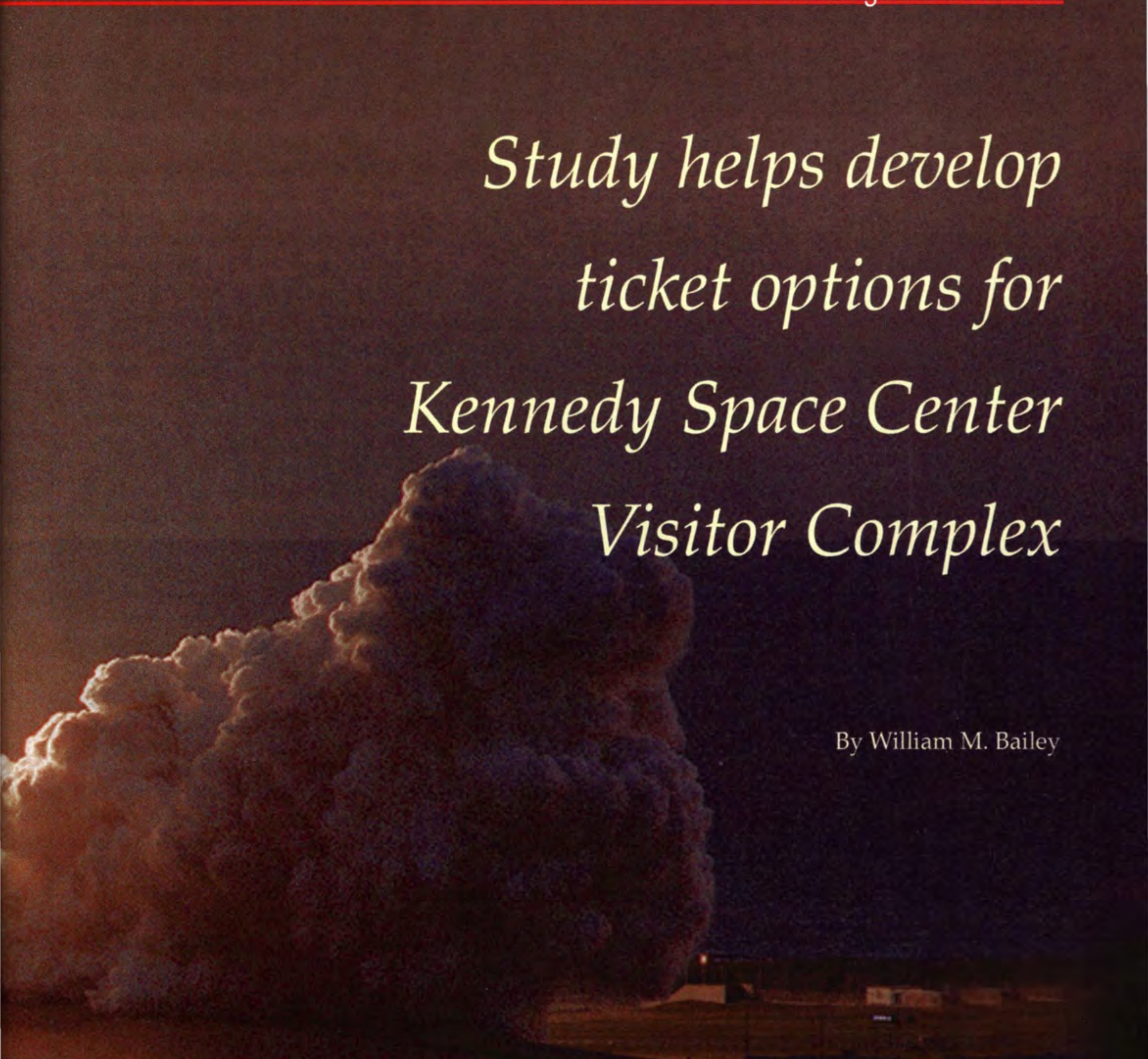
Editor's note: William M. Bailey is principal of WMB & Associates, an Orlando, Fla., statistical services firm. He can be reached at 407-889-5632 or at WBailey@worldramp.net.

The attraction and tourist entertainment market in central Florida is competitively intense. Attractions and/or exhibits that are not located in the central corridor south of Orlando must go to extraordinary efforts to entice new and repeat visitation. Obviously, the quality of the offerings is important, but the admissions structure must also be economically viable and competitive.

One such attraction, the Kennedy Space Center Visitor Complex, under the management of Delaware North Parks Services, is expanding in an effort to add enjoyment to the current NASA experience and also to capture more of the tourist market. A critical step in this process is an examination of admission ticket pricing. To this end, the author was retained to design a plan that would help determine an appropriate pricing strategy. This article presents the results of 506 one-on-one interviews among visitors to the Complex during the latter part of August 1999.

Tell the NASA story

The Kennedy Space Center Visitor Complex, in cooperation with NASA, has the mission to "tell the NASA story



Study helps develop ticket options for Kennedy Space Center Visitor Complex

By William M. Bailey

and inspire all people to support the exploration of space." The Complex includes a wealth of attractions such as:

• An "Astronaut Encounter," in which guests have the opportunity to come face-to-face with a real astronaut. This program consists of question-and-answer sessions, mission briefings, video footage, space artifacts and personal stories of space travel as told by those who have lived it. Various astronauts from throughout space history are scheduled to appear, including astronauts from the Mercury, Gemini, Apollo and Space Shuttle missions.

• "Early Space Exploration," an exhibit that gives visitors a comprehensive history of key missions that served as the foundation for the current space program.

• "Exploration in the New Millennium," visitors to which are taken on a journey from the Vikings' discoveries of Greenland and Iceland to the flight of the Mars Viking Lander, the first U.S. probe to land on another planet. Visitors can see and actually touch a piece of Mars which fell to the Earth as a meteorite. Guests may also submit their names to fly in space on a future mission!

• The "Apollo/Saturn V Center," which brings to life the U.S. space program's missions to the moon. It features an actual 363-foot, 6.2 million-pound Saturn V moon rocket, with a

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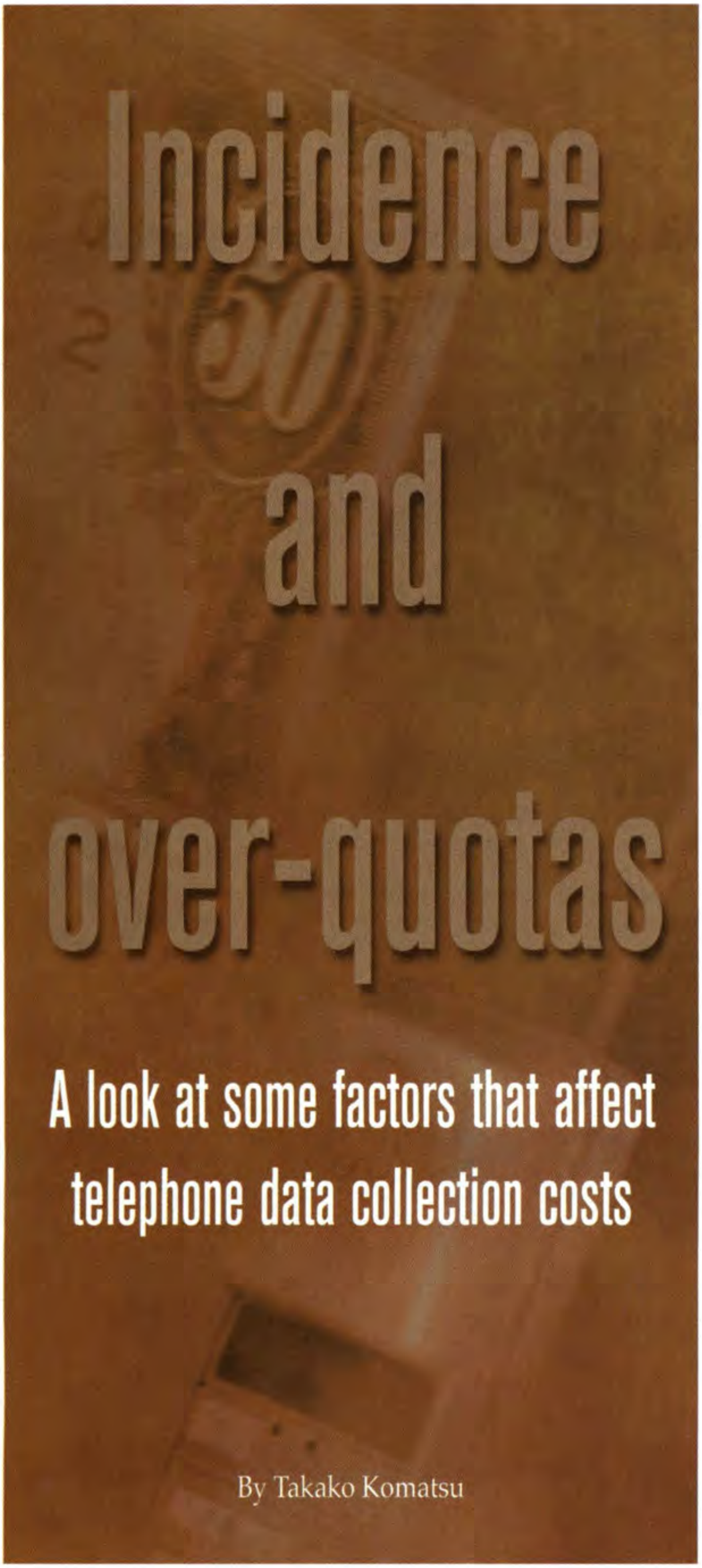


Incidence and over-quotas

A look at some factors that affect telephone data collection costs

By Takako Komatsu

Editor's note: Takako Komatsu is operations analyst with Communications Center, Inc., a Washington, D.C., data collection firm. She can be reached at takakok@cciclientservices.com.

In addition to choosing the right research methodology, today's market researcher also must make sure that a project meets their budgetary goals. The fielding of a study with a telephone data collection firm may be one of the costliest portions of such a project. However, it is often very difficult for the phone center to provide an accurate estimate of the expenditures and resources necessary for the project before it starts. Some examples of factors that can affect data collection costs: the incidence of qualified respondents may be different than expected; the sample may not be as productive as expected; the study may require a certain number of data or points from a low-incidence respondent type.

In this article, we will quantify some common issues encountered by telephone data collection firms in estimating the resources necessary to complete a project. The concept of incidence and population will be redefined in the context of telephone data collection. This discussion will be extended to demonstrate how it can be used to estimate the impact of closing quotas.

Qualification

One of the most crucial pieces of information in estimating costs for a project in telephone data collection is the incidence of qualification. In general research, "population" refers to the group of people in the universe to which the researcher wants to generalize the conclusions of the study. At our firm we have found that in predicting interviewer hours, it is more practical and beneficial to think of population in terms of the universe of phone numbers (sample). By redefining what we think of as the population to fit in to the context of telephone data collection, we can arrive at a more accurate estimate of incidence which is crucial in predicting the resources necessary to complete a project.

For example, in a consumer satisfaction

study about a product, we may know that 20 percent of households in the U.S. use this particular product. This may or may not be relevant in predicting resources needed to collect sufficient data. When estimating incidence of qualification we must always take into account the type of sample that will be used along with the qualifying characteristics of the respondent. This incidence of 20 percent, based on the product usage in the general population, is accurate only if we are calling from a untargeted, computer-generated list of phone numbers. If a list of names and phone numbers of registered customers is going to be provided for this study we need to use the percentage of working numbers that lead to an actual customer within the given phone number list (sample) as incidence. In this case, non-qualified respondents occur only when the sample leads to a household where the target respondent cannot be reached (e.g., they have moved away), or if the respondent claims that he or she is not a customer.

Moreover, using a phone number list as our population base is especially crucial when we use outside sources such as census data to estimate incidence. For example, the population ratio of Hispanics is 11.66 percent of the total population. This incidence may not be an accurate representation for telephone data collection because the total percentage of Hispanic households within all households in the U.S. is 8.40 percent (percentages based on census data 1998). When we are calling to reach Hispanic respondents, "household" units become a closer representation of the population of phone numbers with which we should base our estimations. Hence the Hispanic household ratio of 8.40 percent will probably be a closer estimate of the actual incidence observed in the study.

Significant impact

Quota requirements also have a significant impact on the amount of resources necessary to complete data collection. By quotas we mean the target number of completed surveys based on respondents' characteristics (e.g., gender, age, or degree of product usage). Target counts, or quotas, are set before the start of the project to ensure that data is collected according to needs of the researcher. A study may require data to be collected in higher proportions of one group because the other groups are needed only as a baseline, hence requiring less data from the latter group. Or a researcher may need more data from a low-incidence group to increase the power of statistical analysis. Hence target quota counts may or may not reflect the actual incidence of that type of respondent in the population. Any researcher involved in the actual field operation of telephone data collection is aware that closing quotas can have a large impact on the cost of a project. When the discrepancy between quota ratios and population ratios is large enough, estimating the necessary interviewing hours for a project can become extremely difficult and unpredictable.

To demonstrate the impact of quota requirements on total interviewing hours, consider the following hypothetical projects. Study 1 requires a total of 200 surveys, 100 males and 100 females, each divided for three ethnic backgrounds (60 Caucasian, 30 African-American, 10 Hispanic). Study 2 requires a total of 200 surveys, 100 males and 100 females. But they must also have at least 33 respondents in each of the three ethnic backgrounds. We can easily see that in this example Study 2 will be considerably more difficult to complete compared to Study 1. Because the occurrence of Hispanic respondents is considerably lower than either Caucasians or African-Americans, it is most likely that we will inadvertently start an interview with them only to terminate them in order to meet quota requirements for Hispanics. The Caucasian or African-American respondents we call after we have already collected enough data from those categories are terminated as "over-quota terminates."

If we have to terminate a large number of respondents due to over-quotas, it will have a significant impact on the resources necessary to complete data collection on a project. This impact needs to be quantified before the project starts fielding. These terminates are not due to non-qualification or from a lack of cooperation from the respondent. They are fundamentally different from screener terminates and cannot be categorized as unqualified respondents. We need a way to take this factor into account independently of the overall incidence of the project.

At Communications Center we are using a factor called "Over Quota Ratio" to accurately estimate the impact of closing quotas and over-quota terminates on the resources necessary to complete a project. The Over Quota Ratio refers to the average number of over-quota terminates that will be incurred per completed interview by the end of the project within a given incidence and quota requirement. This ratio is then used to adjust the interviewing hours necessary to complete the project under the quota requirements.

$$\text{OQ\%} = \frac{\text{Over Quota Terminates}}{\text{Completed Interviews}} \times 100\ (\%)$$

To do this at the time of project setup, we need to know two things:

1) The incidence of the all quota criteria occurring within the population (sample).

2) The exact quota counts or quota ratios that the client would like represented in the final data set.

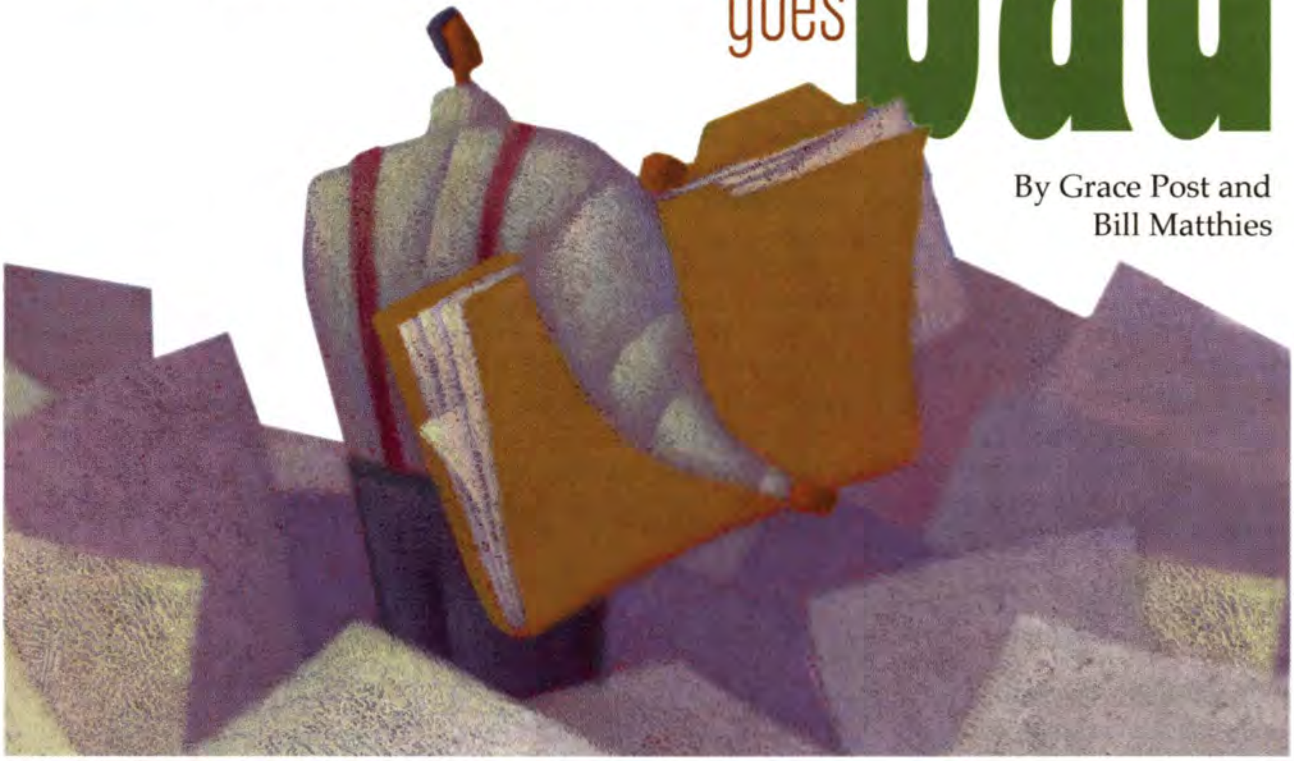
Take for example a project that has gender quotas of 50 males, 50 females. We would expect some female OQ because of the disproportionate number of females who answer the phone. We have found that in telephone interviewing the population answering the phone is roughly 40 percent males, 60 percent females. After 100 completed contacts, there would be 40 males and 60 females, already yielding 10 over-quota females. In order to complete the project there will be an additional 15 over-quota females. At the end of the project we will have incurred 25 over-quotas and an OQ Ratio of 25 percent. From this we know that this project will need 25 percent more resources (interviewing hours) to complete compared to a project with no quotas or with quota requirements that more closely reflect the population incidence.

Accounting for over-quota terminates is particularly important because of the changing dynamics of telephone data collection. It gets more difficult to reach a live person every year. Anytime a qualified respondent is terminated due to closing quotas, the hours necessary to complete the project increase exponentially. Usually these quota questions are placed at the beginning of the survey along with the screener questions to minimize the time an interviewer spends talking. However, we have found that minutes saved from terminating over-quota respondents are insignificant compared to the amount of resources necessary to reach the next prospective respondent. Except in cases of very long surveys, the time incurred in over-quota terminates is approximately the same as that incurred in completing an entire survey.

Obvious merits

In the context of telephone interviewing, our firm has found that there are obvious merits in making assumptions about the population based on the phone number list used for the project. It guides us in how to use census data and other sources to determine incidence and to predict project hours. It also helps us understand and estimate the impact of quota requirements on the resources necessary for a project. In so doing, it enables us to provide more accurate cost estimates and advise our clients on how the project can be optimized for their data collection needs and budget. Further, we can provide options on how cost may reduced by adjusting quota requirements, changing screener questions, purchasing targeted sample or employing other methods.

When good market research goes bad



By Grace Post and Bill Matthies

Editor's note: Grace Post and Bill Matthies are principals of Coyote Insight, a Fullerton, Calif., market research vendor and client consultancy. They can be reached at 714-680-0680. This is the first in a series of four articles addressing the roles of vendors and clients in the creation of actionable market research.

The market research vendor/client landscape is littered with dashed hopes and expectations resulting from market research projects that have gone awry. For the client, a byproduct of this is unanswered questions that stay that way. For the vendor, it's a lack of repeat business. Why and how this happens is everyone's concern and in this and three future articles we will address not only the problem but also the steps both groups can take to improve the situation.

To begin with, let's oversimplify the market research process into four segments including project definition, project execution, project analysis and project results dissemination. All are critical to the success of any market research study, whether quantitative and qualitative, and each will be addressed separately in the course of these four articles.

Garbage in, garbage out

Does the following conversation sound familiar?

Client: *"Hi John, it's Chris. Listen, product development just called and said they want to do focus groups on a new prototype they're working on. Can you guys do two in each of three cities, probably L.A., Chicago, and New York, the week of May 6?"*

Vendor: *"The sixth huh? Let me check. Sure, no problem. What's the objective?"*

Client: *"I don't know a lot, they didn't have time to talk. He just said they want to know what people want in a next generation [INSERT PRODUCT] and specifically how they feel about the cosmetics of the current product. You've seen it haven't you?"*

Vendor: *"Sure, my partner did the groups on that a year or so ago. Anything else?"*

Client: *"Nothing other than time and budget, but what else is new? We*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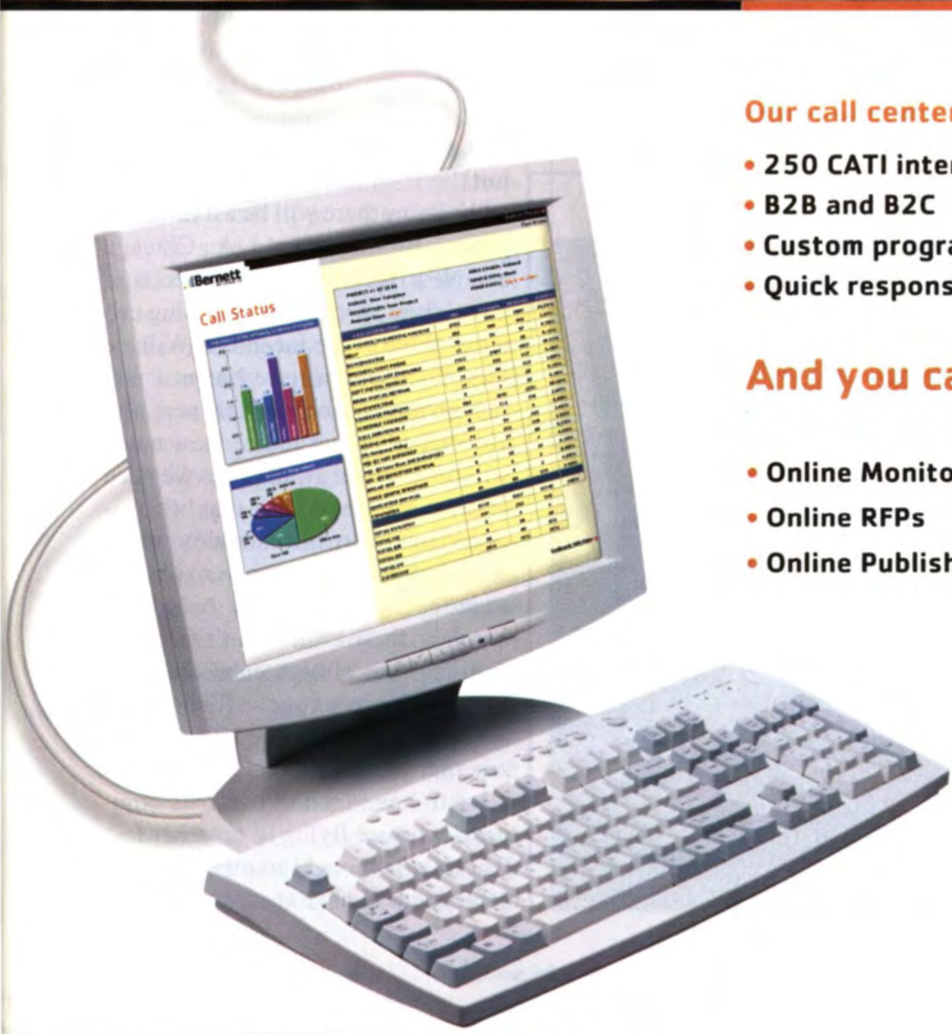
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have to have it done that week and we can't spend more than $4K a group. Will that work for you? If it does I'll try to send you a list of issues for the guide. I'd like it to come from product development but they're traveling so I'll work up a list based on the issues from a similar project."

Vendor: *"Well $4K is a little low but for you, we'll do it. I'll start working on the guide tonight and will incorporate whatever you send me later. That is...if that's what you want. We have this great product called Qualitative Supreme One that our in-house Ph.D. has just developed. It's really powerful...you must have heard about it. Everybody is using it. You really should consider it."*

There are at least four problems with this process, any one of which could result in a failed project. Can you see what they are?

Issues first, methodology second

The MR director asked for focus groups because his internal client asked for focus groups. But what if focus groups are not the appropriate methodology in this case? Moreover, before there is any hint of the issues to be addressed, not only are focus groups chosen as a methodology but the number of groups to be done in specific cities has also been decided — with no mention of who will be in the groups. Certainly there are cases where experienced internal heads of marketing research are able to speak in shorthand with favored vendors but it is dangerous to make that common practice.

Instead, each situation that may require market research should be addressed individually beginning with a clear and concise listing of the issues to be addressed. With this done the client, acting on advice from their vendor, can select the best methodology possible.

In addition, the vendor replied by suggesting their new in-house methodology, without really knowing enough about the specifics of the project to make such a recommendation. Vendors should bring new technology to the attention of their clients but only when they are sure there is a fit. Technology and/or methodology is a means to an end and not the reason for conducting market research.

Market research, not magic

We can assume that groups may be appropriate for the objective of determining how people react to the cosmetics of the current product because at some point there will be a need for qualitative input (although until more is known about the specific issues to be addressed, even that much is not certain). But it is highly doubtful that groups or any other traditional market research methodology will meet the need of finding out what "people want in a next generation product." Consumers don't invent product, they simply react to suggestions of what they might like. It is important that both the client and vendor have realistic expectations of what market research can and cannot do.

General questions result in general answers

The original request for market research came from product development through the research director to the vendor, all in phone calls with no written issue specifications. So what does the vendor put into the moderator's guide? Obviously there will be time for more input but to be certain, the vendor, the MR director and the internal client should all meet face-to-face to discuss what, specifically, is of interest in the cosmetics of the product. Anything less will result in "What do you think?" questions followed by "It's fine" answers. Hardly the type of input upon which one would make changes to a product.

You pay for what you get (or maybe not)

We know there will be a total of six groups, two in each of L.A., Chicago and New York, but where in each of those cities, with what screening criteria? What is the incentive. Will we serve food and/or refreshments? Are the groups to be audiotaped and videotaped or just audio? How many will observe the groups? Do we need to demonstrate product that has special connection issues and/or space or operation issues such as excessive sound?

Again, these issues aren't anything that can't be straightened out later but at whose expense? The only added cost might be the 10 extra pizzas that product development will want to have for the overseas engineers who are flying in (another fact that no one thought to mention), but someone will have to pay.

This conversation appears to have locked in the groups at $4K each so if there is additional expense there will be an awkward moment (at the very least) followed by one party being less than happy with the financial aspects of the project.

The example is fictitious but some or all of this is a daily occurrence for many market research vendors and their clients. The result is dissatisfaction with the process and, in some cases, stillborn project results due to basic methodology flaws. Much if not all of it can be avoided if both parties religiously follow a basic set of rules.

The Market Research Project Manager's Five Commandments

1. Ask the questions first.

The core questions and issues to be addressed must be identified, ideally by the party requesting the data, prior to any discussion of methodology. If we don't know what questions we want to ask we cannot decide how best to get the answers. Also, be vigilant concerning what is appropriate and what is overkill in methodology.

2. Use market research only when it can be effective.

Qualitative and quantitative methodologies can include questions on any topic but not all answers will be the same in terms of their reliability or in terms of providing data that can be acted upon. Done correctly, market research is a powerful tool but it is not a panacea for everything. In some cases the best advice that a market research vendor can give their client is that they should not do market research.

3. Write it down.

Talking about what needs to be done is fine but when everyone thinks the specifics of the project have been identified, write them down and make sure once again that everyone agrees and understands all of the details.

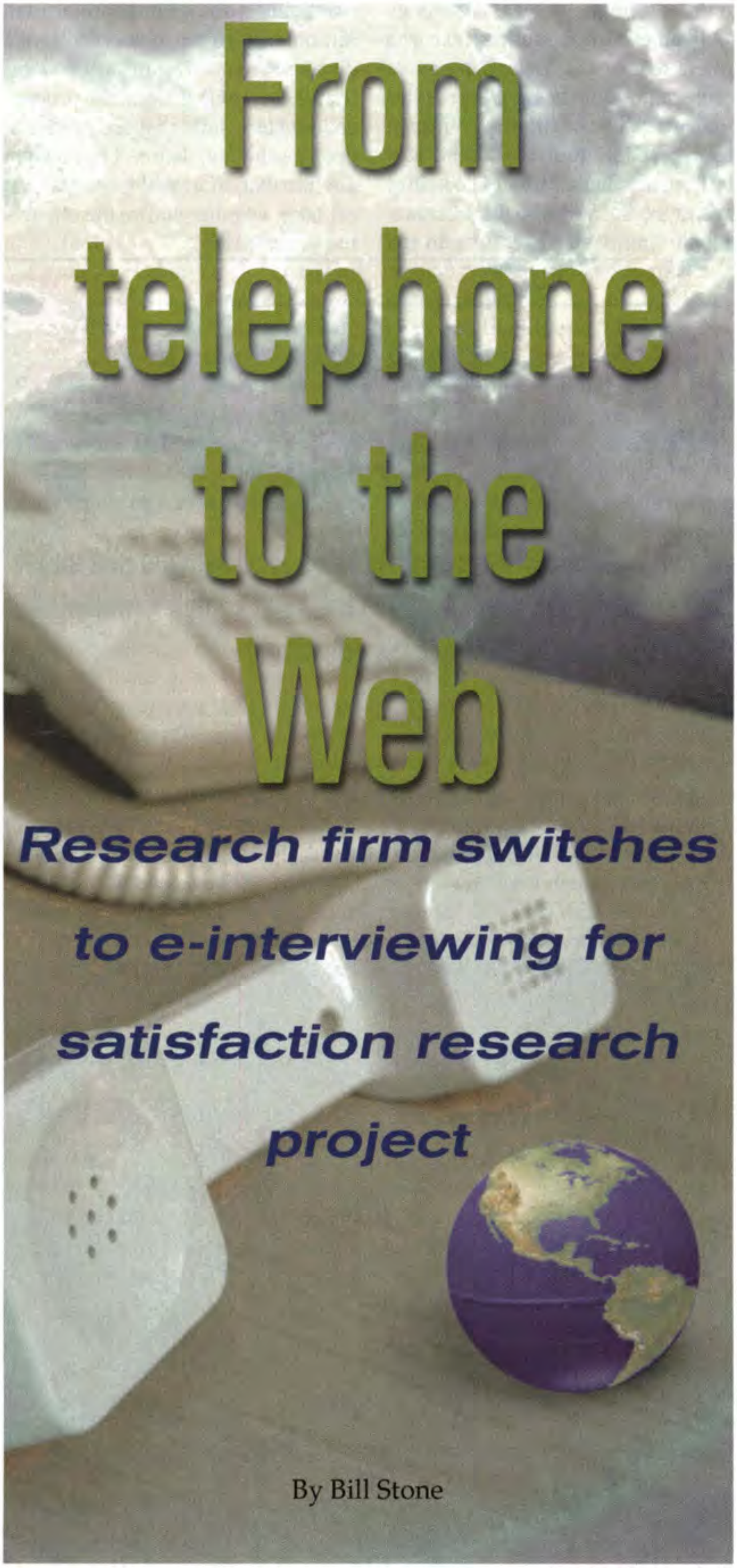
4. Involve everyone who needs to be involved.

Few successful market research projects are the sole effort of one or two individuals. The more complex the project or the more at stake, the more people should be involved in the beginning to insure that all of the issues and specifics that will be important in the project's next phase (execution) have been covered.

5. Double check steps 1 though 4.

All phases of a market research project require the highest degree of accuracy possible but nowhere is this more true than in the beginning. If the project definition is not done correctly then what can be expected of execution, analysis and the presentation of findings? Take time in the beginning to insure that all that can be done has been done to begin the right market research.

Not all market research projects that begin with accurate project definition will go on to succeed (we'll discuss why in future articles) but few if any will ultimately produce actionable results that are not based upon a solid foundation. The time you put into that effort will more than pay off later, whether you're the client or the vendor.



From telephone to the Web

Research firm switches to e-interviewing for satisfaction research project

By Bill Stone

Editor's note: Bill Stone is president of Phoenix, Ariz.-based WKS:CSM Consulting, Inc. He can be reached at 602-494-0231 or at wksconsulting@msn.com.

The Internet is not a research utopia and its limitations should not be overlooked when seeking to convert from more traditional forms of research. However, there are often cases where it is a methodologically better mode than the telephone.

Our firm has been providing customer satisfaction measurement and problem resolution services to a large international industrial manufacturing and service corporation. For the past five years, we have conducted quarterly telephone surveys using CATI software. This medium is usually effective in collecting survey data. However, we found that methodological shortcomings failed to bring our client maximum value from this study. The shortcomings are due primarily to the requirements of the respondent group and the study's fielding requirements.

Respondent group requirements

The respondents in this particular sample travel frequently and are usually away from their office location and their work telephone number. Because of the constant travel, evening/weekend interviewing is not possible with this audience. The field service must place an average of 16 calls before actually reaching each of these respondents. Not only do these additional attempts significantly add to the field time and cost of the study, they also detract from the overall response rate. When the respondents are at last contacted during the work day, gaining participation is extremely challenging due to their hectic and busy schedules. This negatively impacts data quality.

Because of their mobility, this respondent group relies heavily on e-mail and Web-based information. They are extremely comfortable using the Internet and prefer e-mail over the tele-

phone as a primary method of communication. Consequently, interviewers encounter even more resistance when attempting a telephone survey.

Fielding requirements

In this study, it was clear that a 24/7 interviewing schedule would provide more accurate data and better customer service. However, due to cost and time restrictions, telephone data collection can only be done on a periodic basis. Additionally, because the data collected via telephone interviewing takes time to process, the client is hampered in its efforts to provide its goal of a 24-hour turnaround of information for the problem resolution process. Problem resolution is one of the primary reasons for making the calls to begin with.

Because the client has an international presence, properly representative sampling requires quotas which demand a large number of interviewers fluent in an array of languages. This is a staffing challenge for even the most adept telephone center. In addition, interviewer dialect differences and accents can lead to a respondent misunderstanding the questionnaire, resulting in inaccurate data.

Transition to the Web

In an effort to remedy these methodological shortcomings and provide maximum value to our client, we began to investigate other modes of market research. Since the respondent base is extremely Web-savvy, an online survey seemed the most feasible solution. However, in making this transition we were forced to address concerns such as sample control, data validity, and detailed probing. These factors are policed in a telephone survey environment, but cannot be controlled in a typical Web environment.

The article "E-interviewers add human touch to Web-based research" in the July/August 2000 issue of *Quirk's* (accessible via the online Article Archive at www.quirks.com) seemed to indicate that interviewer-assisted, Web-administered research would answer our methodological concerns while allowing us the advantages of Web-based research. SurveyGuardian, a service of humanvoice, a Provo, Utah, data collection company, does exactly this, combining live interviewers with online surveys. Intensive testing of this service led to our decision to shift the majority of the research to these online programs. Since the transition during the third quarter of 2000, we have been able to produce superior data with a higher response rate and a faster turnaround time, while cutting our field costs by up to 20 percent.

Data quality

Respondent accountability and data accuracy are assured through active monitoring of each survey by e-interviewers. Using the interactive chat feature within SurveyGuardian, interviewers check the respondents' answers for accuracy and probe open-ends for more clarity as the survey is completed. Since the software allows one person to monitor multiple surveys at once, we have been able to increase our quotas and service more customers, while keeping the same interviewing staff. Direct comparisons of data previously collected via CATI with the new Web data allow us to control for mode affects.

Non-response bias and sample databases are controlled through use of mixed mode contacts. Both e-interviewer and CATI follow-ups are used for non-responders. This multiple media approach can be efficiently handled by the same e-interviewing staff, thus maintaining interviewer familiarity and avoiding added training and staffing costs or methodological differences induced by different interviewers.

The Web-based approach has also allowed for delivery in multiple languages across vast time differences. The multi-language process has been simplified and the text-only interaction between the interviewer and the respondent eliminates any differences in dialect.

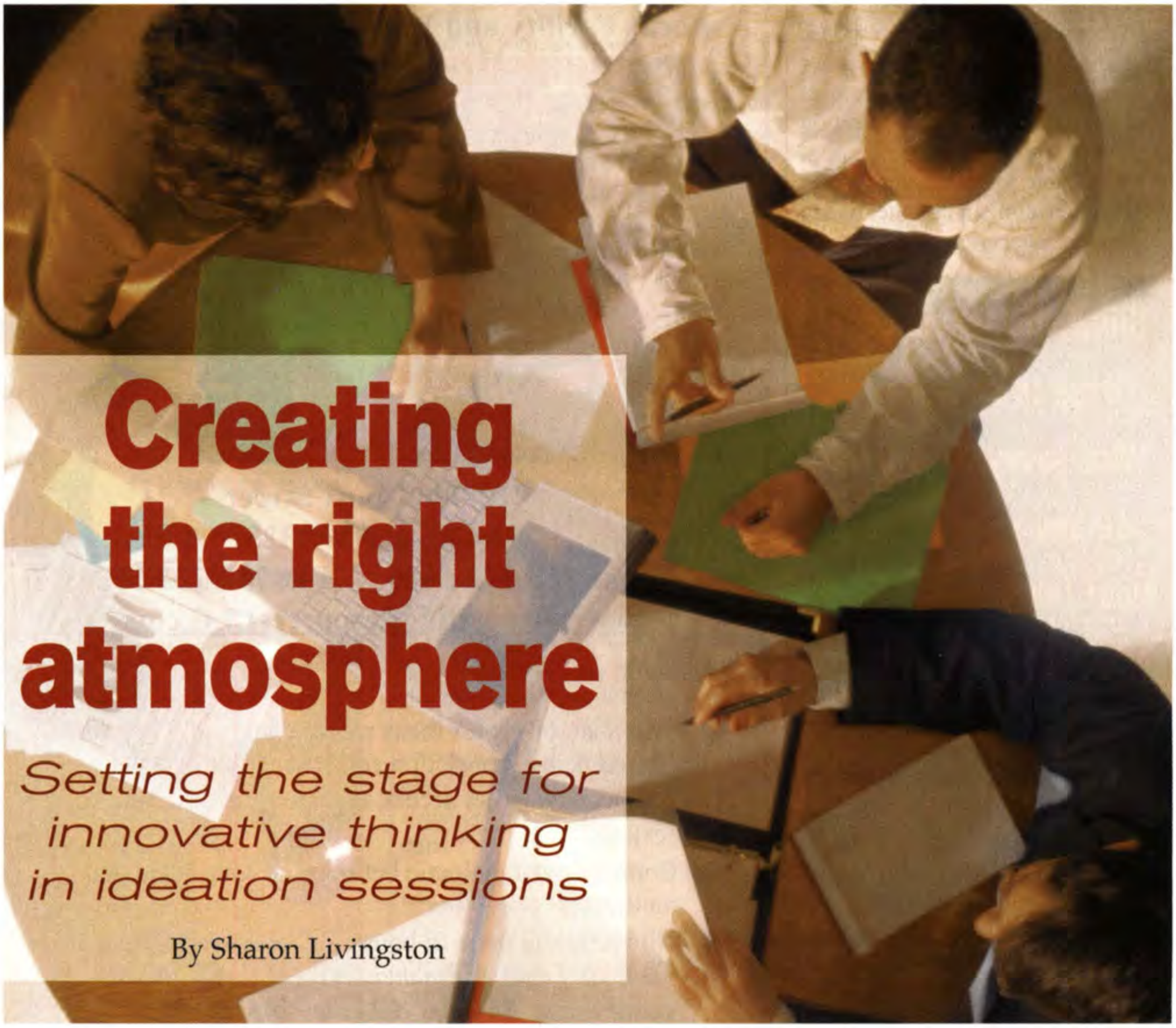
Easier to reach

Study invitations are issued via an e-mail message containing a direct link to the survey. Since the respondent base has access to e-mail in any location, it is easier to reach the predefined target audience. Respondents are able to complete the survey at their convenience. Consequently, we have seen a dramatic rise in response rates. Since the cost savings allow for year-round interviewing, we project even better respondent cooperation rates in the future.

We are able to access our data in real-time resulting in fast attention to respondent concerns. The software also allows us to track respondent rating histories to determine if previously reported problems have been resolved. This allows our client to deliver superior customer service.

Since the respondent base is extremely Web-savvy, an online survey seemed the most feasible solution. However, in making this transition we were forced to address concerns such as sample control, data validity, and detailed probing.

Web-based research alone cannot overcome the shortcomings commonly encountered with self-administered questionnaires. However, in this study we found that, when combined with emerging technologies like e-interviewing, the Internet can be a viable tool for meeting a wide variety of market research needs.



Creating the right atmosphere

Setting the stage for innovative thinking in ideation sessions

By Sharon Livingston

Editor's note: Sharon Livingston is with The Looking Glass, a Syosset, N.Y., focus group facility. She can be reached at 516-992-5666.

Suppose instead of viewing creativity as an accident, we looked at it as a process. What if we viewed creative insight and invention as the products of a series of smaller and less spectacular combinations and reintegrations of concepts or perceptual patterns? And instead of thinking of ingenious ideas as magically formed, what if we viewed them as a result of a concrete process? Remember, magic is only technology before its time!

While perhaps less romantic, the benefit of such reductionism is that we can then study the various elements of the creative process and manipulate them to increase innovation and inventive thinking.

There is vast literature on the facilitation of creative problem-solving. What most all experiments have in common is an emphasis on the optimal structuring of the environment. These surroundings, which will be outlined shortly, induce the most effective, most productive emotional states for creative thinking. When combined with carefully chosen, evocative stimulus input, these conditions make novel insights inevitable.

Relaxed setting

A creative environment most importantly should be structured as a kind of a holding tank — a relaxed setting which fosters a sense of security and acceptance of all emotions and ideas. This safe climate encourages participants to explore the undercurrent recesses and grottos of their minds and to take the risks of meshing unusual connections.

Ideally, the creative session is conducted off campus, away from the interruptions of everyday business life

like phone calls and meetings. Participants are encouraged to dress casually. Off-campus meetings have the additional benefit of novel stimulation, which leads to novel associations, the building blocks of creative production. While hotels often offer rooms and suites for these purposes, facilities known as conference centers tend to be more knowledgeable about the wants and needs of creative teams

and therefore better equipped to provide the proper supports.

The walls in the creative environment should welcome the posting of large sheets of easel paper to be tacked up with pushpins or masking tape. This lets people know that many suggestions will be expected, welcomed, and proudly displayed around the room. There should be several flip charts, equipped with markers in a number of colors to highlight unique points as well as different parts of the process. An abundance of colorful paper should be distributed around the table with a variety of writing implements in hues of the rainbow to accelerate unusual connections, even in the actual inscription of ideas.

Plenty of satisfying but light food should be available, particularly warm liquids. Generating ideas requires much more energy than most people think. It's not unusual for team members to leave a day of sparking ideas feeling happy and exhausted. Individuals have more energy to work with their minds when their stomachs are well-nourished. Along the same lines, lavatories should be close by. While it's important to schedule a number of stretch breaks throughout the day, it's also a good idea to be close to the washrooms so a participant can duck out and return quickly. Lastly, people should be asked periodically throughout the session about the comfort level of the room temperature. If the temperature is not optimal, it should err on the side of being a little bit cool to keep people awake (remember, the goal is relaxed wakefulness).

Foster ingenuity

Besides structuring the environment properly, there are several attitudes which must be modeled by the leaders in order to foster ingenuity. Before discussing these, let's briefly talk a little more about a few of the ways we might define creativity.

As you already know, we see it as a process:

First, we have to confront the conflict of wanting to hold onto, but needing to let go of, the ideas that have already been considered.

Second, it's a systematic creation of confusion and encouraging of oxymorons and other ideas which at first are apparently unrelated.

And finally it's the reintegration and restructuring of thoughts and feelings into original invention.

To accomplish this during the working program there are several postures that must be adopted by the leaders and emulated by team members. In order to bolster the generation of great ideas, research shows agreement by experts in the field on several dimensions.

The team should:

• defer judgment and accept all ideas until the assigned period of evaluation;

• go for quantity;

• invite wild and crazy reveries;

• build on and modify each other's ideas; and

• enlist unconscious processes.

The most important and most empirically validated of these attitudes is that of deferred judgment. This is because (and many may disagree) there is actually no such thing as a bad idea. There are only imperfect ideas. Every idea is the seed for a geometric progression of associations, any one of which may hold the key to the solution sought after. Negative connotations can be reversed by associating antonyms, or finding a synonym which filters out the problem connotation. Additionally, prematurely judging an idea not only deprives one of the idea's progeny, but of the rest of the group's associations to that idea.

In addition to good leadership, a structured environment, and proper attitude, there are a multitude of exercises designed to facilitate what is referred to in psychoanalysis as a combination of both primary and secondary process. In our firm's creative problem-solving approach, these range from forced associations, metaphorical interpretations, and improvisational techniques borrowed from the theater and behavioral sciences, to synethesia — the forced representation of a stimulus presented in one medium, such as visual, in another, such as olfactory. For example: What does a sunset smell like? How about when you see it descending over the Grand Canyon? What if you were sitting on a deck overlooking Long Island Sound? Or standing a top of snowy Mount Everest?

The next time you look at an abstract painting, listen to how it sounds. Get a sense of how the artist felt when planning the composition. Was he tired, joyful, annoyed, bored, making a joke? What facets of the shape, line hues and tones told you that?

Divergent thinking

Another concept central to creativity is that of divergent thinking. Divergent thinking involves the suspension of logical analysis for a period of time in order to get a view of all the possibilities. It is simple to describe, yet hard to accomplish. We are all accustomed to organizing our thoughts into neat little units. Even as you consider what is being said here, you are organizing the sentences into larger arguments, relating those arguments to what was said before, and trying to anticipate where the line of reasoning is going. This is adaptive; the world would be a frightening place if we were unable to anticipate at all.

The need for anticipation and order in the world must be suspended for a while in order to engage in divergent thinking. This is why the environment and attitudes described above are so important, as are leaders who are comfortable with the confusion and anxiety generated during the divergent thinking stage of the session. It is always helpful to remember the ancient Chinese adage, "Out of chaos comes opportunity."

Better ideas

There is one more important element — expectations. Over and over again, people told to expect they will be exceptionally creative turn out to produce more and better ideas than those who are not given this mindset. In the creative session, this is accomplished primarily by an extremely confident, experienced leader who encourages an atmosphere in which there is little room for modesty. As Muhammad Ali once said: "I am the greatest! I said that even before I knew I was!"

Reaching IT professionals: online vs. telephone interviewing

By Brian Van Houten

Editor's note: Brian Van Houten is director, client services, at Answers Research, Solana Beach, Calif. He can be reached at 858-792-4660 or at bvanhouten@answersresearch.com.

In the effort to keep a finger on the pulse of an evolving technology marketplace, manufacturers and providers of advanced technology products and services conduct thousands of surveys annually with the same target in mind: IT professionals. These individuals comprise a critical research target, with purchasing authority and servicing responsibility for computer hardware and software, servers, wireless communications, handhelds, and other technologies utilized in businesses of all sizes. Because the surveys they are asked to complete gather data that heavily influences next-generation designs for the technologies under their jurisdiction, IT professionals have a vested interest in participating. However, because they are a relatively small and oft-contacted group, it is important for marketers to consider factors that will encourage survey participation when designing a research program.

Reaching IT professionals

Important considerations to ensure respondent participation include a clearly written and presented survey, a short interview, completion flexibility, and a generous incentive. Offering an online surveying methodology to this group can help provide these critical elements. The method allows the respondent to read and digest all questions quickly, and perhaps most importantly, gives this important respondent set the flexibility to complete the survey according to their own schedule, not the interviewer's. Use of this method will in turn offer the project sponsor a decrease in research cost and timing, and an increase in survey response rates.

Getting a representative sample

There is no question that telephone interviewing is beneficial when it is critical to ensure a representative sample among a general consumer or business group. When surveying a highly "plugged-in" group of advanced technology decision-makers, however, these restrictions are virtually eliminated. With over 192 million Internet users in the U.S. and Canada, 87 million in Europe and 68

million in Asia, true market representation may be expanding beyond random-digit dialing and in-person methodologies to include their more efficient online counterpart. Moreover, because it is location-neutral, an online methodology eliminates the geographical biases inherent in telephone and in-person interviewing.

Online method offers flexibility

A study recently conducted by my firm uncovered that more than 98 percent of IT managers have been asked to participate in a market research survey in the past 12 months. Additionally, the majority of respondents were asked to participate on more than five occasions. On average, respondents were invited to participate in surveys eight times in the past year. With stats like these, it's clear that if researchers wish to gain participation from this heavily surveyed group, offering increased flexibility is key. Using an online method, IT respondents can complete a survey as their busy schedules permit. Frequent monitoring of our survey completion logbooks shows that respondents completing online surveys work on the survey at all hours of the day and night.

Creating an online panel

One of the most efficient methods of garnering ongoing survey participation from the IT professional is through online panel creation. A panel offers benefits to the researcher and panel member, since it offers survey control and consistency for both groups. Panel membership offers the participant the opportunity to contribute to a set number of studies per set time frame, usually a year. Respondents have the convenience of completing studies on their own time and typically receive an incentive upon joining the panel and again for each completed survey. The main benefit of a panel to researchers is that a large group of respondents matching your IT manager criteria is both in one current database and generally available when you have important and timely data to gather.

Incentives

As marketers and research professionals, we must be aware of the ongoing requests to participate in studies among the IT manager sample set. To show appreciation for participation in market research surveys, and to ensure a willingness to participate in future studies, it is imperative that an incentive be delivered immediately following survey completion. The good news is that an incentive for participation must match the inconvenience placed on respondents to complete a survey. In cases where a respondent must travel to a central recruit facility or set aside a block of time for a scheduled or impromptu telephone interview, a larger incentive is usually paid. A clearly-presented online survey that can be completed at the respondent's leisure requires a lower incentive.

Adding a qualitative element

With the online medium, respondents often provide more qualitative detail than they would with alternative research methods, perhaps because they feel a sense of anonymity along with a greater sense of control of their time. Gathering this qualitative input increases the value of a quantitative survey and allows the respondent to deliver a complete and uninhibited opinion about the concept in question. Additionally, as a counterpart to a live telephone interviewer probing for response clarification, online surveys may include a direct link to interviewers ready to clarify any open-ended questions.

Designing complex studies

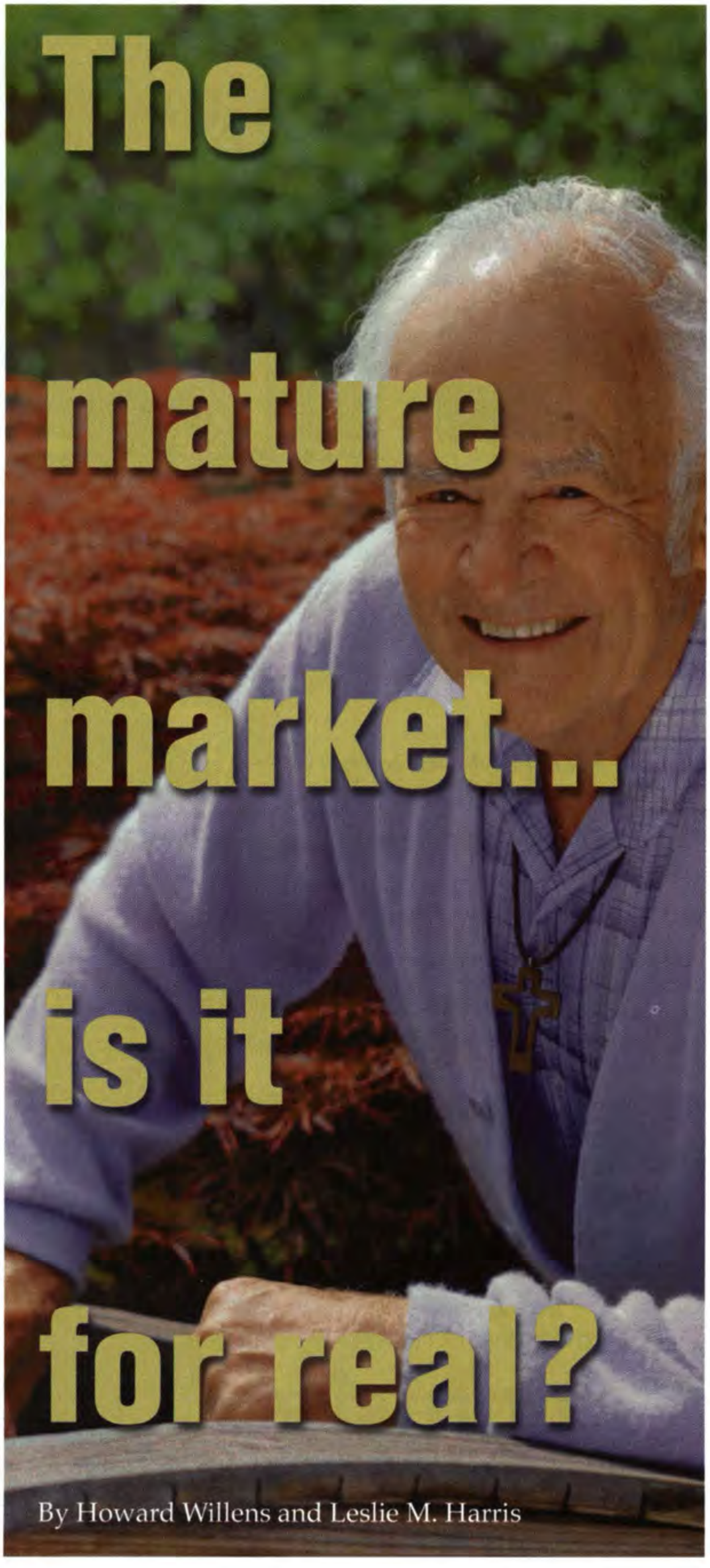
Before online surveying became a viable methodology, central recruit research using computer-assisted or pen-and-paper data capture was the predominant completion method for choice-modeling studies. Using telephone or mail studies is rare with this methodology, as multiple steps are required by the researcher to ensure survey completion. If a telephone methodology is used, respondents are usually mailed or faxed any product descriptions or complex survey portions prior to the phone interview. Conversely, an online methodology can accommodate complex choice-modeling designs with up to 15 attributes each having nine levels. Dynamic online surveys may also include photographs of a product and video demonstrations, eliminating the need to centrally recruit participants to view the product concept.

Future outlook: overcoming geographic challenges

Despite the many advantages of using an online approach, geographic usage limitations do exist. Currently, online interviewing offers an excellent approach to reaching IT decision-makers in North America, Europe and several regions in Asia. But in cases where infrastructure does not yet support full online deployment, mixed methodologies that include the Internet, telephone and in-person interviewing may be more effective. However, these limitations will decrease proportionally to an increase in global Internet penetration.

Make it convenient

As manufacturers and marketers strive to design products that match client needs, input from today's advanced technology decision-makers is critical. To reach this heavily surveyed population, researchers must make the interviewing process convenient for the IT professional participant. By using Internet surveys among this group, marketers serve both the respondent and the research sponsor. Beyond increasing critical response rates, an online approach delivers much more for the researcher: timely data collection, lower overall project cost, and increased data viability. With this kind of win-win scenario, marketers are wise to take advantage of an online approach.



The mature market... is it for real?

By Howard Willens and Leslie M. Harris

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One of the hot topics in marketing in 1990s was the senior market. Speaker after speaker, book after book, and article after article talked about the growing importance of this economically powerful segment of the U.S. economy. This, they told us, was the segment to watch, the segment to attract and sell to. They also told us that manufacturers and retailers needed to concentrate their efforts on this segment if they were to prosper and grow in the '90s and on into the new century.

Well, a funny thing happened on the way to the new century! For the most part, marketers and advertisers today seem to be ignoring the mature market in favor of a youth orientation.

Let's look at the numbers that led the pundits to urge marketers to target mature consumers.

The first and most obvious indication of the potential inherent in the mature market was the projected population trend.

• By 2000, projections showed 70 million consumers age 50+; 20 million Boomers (born 1946-1955).

• By 2005, 115 million consumers would be age 50+, making 40 percent of adult population.

In short, the numbers told us that the population of Americans 50+ was growing...and fast!

Second, research at that time showed that the mature market had a lot of money available for spending, as well as a willingness to spend it.

Third, the mature market is not one-dimensional. Rather it is a diverse group comprised of five different and distinct age segments. Each group has its own distinctly different attitudes, behavior

patterns and propensity to spend. And, the attitudes and behavior of each group are determined by the era in which its members were born.

Specifically, the five groups that make up the mature market are:

• Baby Boomers: This generation was born between 1946 and 1955 and came of age between 1964 and 1973. They are now slightly more than one-quarter of the total U.S. population (267.6 million) and 37 percent of the adult (over 20) population. By 2006 they are expected to be 42 percent of all adults. Their spending power is overwhelming, but a high proportion of their available funds will likely be set aside for their retirement.

• Those moving into the 60-to-64 age group by 2006 are the Wartime Children. They were born between 1941 and 1945 — and began their adult lives during JFK's Camelot of the early 1960s. This group is economically blessed, so the short-term outlook for early retirement remains bright.

• Depression Babies — born between 1931 and 1940. These people became adults between 1949 and 1958, meaning their careers began during a rapid economic expansion. For that reason, they have lots to spend — and indications are they are not afraid to spend it.

• The G.I. Generation — those who were adults during World War II — and parents of the Baby Boomers. They are now in the 75-to-84-age range, and today's increasingly longer lifespan suggests moderate growth in this age group. Further, coverage by Social Security, Medicare, and pensions will ensure their security and good health. Their spending will likely be limited to necessities, as travel and excessive self-indulgence become increasingly more difficult. However, they will spend on their grandchildren.

• The fifth generation — those aged 85 and older — are survivors of the Great Depression of the 1930s. These people find it difficult to forget the hardships of their formative years. Thus they are essentially security- and savings-minded. Rather than spending, they will be preparing legacies for their great-grandchildren.

Interestingly, due to likely gender-related differences in outlook, the five groups listed above might easily be broken into 10.

Based on our analysis, those desiring to sell their products and services to the mature market should focus their efforts on the first three segments. These are the groups who, by their stage in life and available funds, are the most likely targets for the broadest range of consumer products and services.

Two studies we recently conducted provide some indication of the needs, motivations, and buying behavior of the three target groups.

The first of these two studies covered Baby Boomers and those in the 60-69 age category; the second study covered Boomers only. Areas covered included behavior and attitudes with regard to new technologies, automobiles, restaurants, banking/finance, vacations, retirement, and television habits. The second study also included attitudes towards marketers and advertisers — with specific focus on how well they satisfy the needs and motivations of the key Boomer segment.

We learned that for the most part, consumers in the mature market keep up with the times, are quite definite about their wants and needs — and have a series of unique behavior patterns.

To summarize:

• They take frequent vacations.

• They eat out quite often — in both high-end and fast-food restaurants.

• They have specific needs with regard to banking and investment services, with definite differences between Boomers and the older segments.

• They own computers, and they utilize them for a broad range of purposes.

• They are heavily into the Internet, including online shopping.

• They are somewhat light viewers of television (watching the major networks for news and entertainment, cable for education).

These studies also provide some insight into their attitudes towards marketers and advertisers — which in turn strongly suggest what happened to those predictions about the importance of the mature market.

We learned that Baby Boomers are

not happy with the way they are treated by marketers and advertisers. For the most part, they believe marketers and advertisers do not have their interests or needs in mind when developing products, designing packaging — and preparing advertising.

- More than half feel marketers do only a fair to poor job in considering their needs when they develop new products.
- Two out of five say marketers do only a fair to poor job in considering their needs when they develop packaging (as opposed to the 4 percent who feel they do an excellent job).
- And, most damaging to advertisers: almost half the respondents in the Boomer segment feel advertisers and their agencies ignore them in preparing their campaigns (4 percent are satisfied).

This latter finding is consistent with a study conducted by Georgia State University which showed that the vast majority of senior consumers are unhappy with the marketing approaches used on them. (Anyone who monitors television advertising — and sees gray hair only in commercials for products like Depends, Efferdent and retirement communities — would agree.)

The conclusion we draw from our findings — as well as the findings from other research — is that the current focus on youth by marketers and advertisers overlooks the growth and affluence of the mature market.

To paraphrase bank robber Willie Sutton, it's time for marketers to "go where the money is." Baby Boomers are a market waiting for companies with the foresight to develop appropriate products and packaging — and for their advertising agencies to develop mature market-specific campaigns. Those companies will benefit from the loyalty of this segment.

Marketers with an interest in attracting the numbers and economic strength of the mature market to their products/services should concentrate their marketing and advertising efforts on three of the mature market cohorts:

- Boomers — to begin building their loyalty for the long haul. They are in a good financial position now and they expect to be so later as well. Many are planning early retirement to indulge themselves in the "good life."
- Depression Babies and War Babies — they are active, healthy older people who travel, eat out, seek entertainment, take care of themselves, buy new cars, and spoil their grandchildren! They have money to spend and are ready to spend it.

Now is the time for marketers to start lining these people up for recreation, travel, financial services, second/retirement homes, etc. And, most important, marketers should not forget these are large and affluent markets for everyday and high-end products as well!

Data Use

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beliefs about prices and have limited strategic value for decision-making.

We'll review a common technique for converting conjoint utilities to a monetary scale, and then we'll suggest what we believe is a better approach.

Computing dollar equivalents from utilities

Imagine the following utilities for a single respondent for two attributes:

Feature X	2.0
Feature Y	1.0
$10	3.0
$15	1.0

For this respondent, a $5 change in price (from $15 to $10) reflects a utility difference of 2.0 (3.0 - 1.0). Therefore, every one utile change is equal to $2.50 in value ($5/2.0 utiles). It then follows that Feature X, being worth one utile more than Feature Y, is also worth $2.50 more for this respondent.

We hesitate to illustrate this type of analysis for fear of proliferating its use, because it is a potentially misleading use of conjoint data. Moreover, there is one practical problem that must be overcome if there are more than two price levels. Unless the utility is linearly related to price, referencing different price points results in different measures of utiles per dollar. A common solution is to analyze the utility of price using a single coefficient. As long as the price relationship is approximately linear, this seems to remedy this immediate problem.

Another problem arises if price coefficients are positive for some respondents, rather than negative (as expected), due to random noise in the data and some cases of relative price insensitivity. Such reversals would suggest willingness to pay more for less desirable features. One work-around is to compute dollar values of levels using average (across respondents) utilities, which rarely display reversals. Another approach to the problem is to ignore it, assuming that the reversals are just due to random noise. A more useful way to avoid reversals is with an estimation method that enforces utility constraints. Many commercially-available software routines can constrain utilities so that lower prices always have higher utilities.

More complication arises if the price coefficient for a respondent is extremely small in absolute value, approaching zero. In that case, the dollar equivalents for incremental features become very large, approaching infinity. A typical way to handle this is to characterize the centers of the distributions using medians rather than means.

Finally, this type of analysis assumes that the conjoint method has accurately captured respondents' price sensitivity. We have long stressed that adaptive conjoint analysis (ACA) alone often will understate people's price sensitivity. Traditional full-profile and choice-based conjoint (CBC) usually do a better job of reflecting accurate price sensitivity.

However, even after taking the appropriate steps to compute reasonable dollar equivalents, the results are potentially misleading. Even when accurate price sensitivity has been estimated for each individual, an examination of average values will often suggest that respondents are willing to pay much more for one feature over another than is suggested by market prices. This often causes managers to disbelieve the results. However, we'll demonstrate later that such outcomes are to be expected when the monetary value of levels is computed in this way.

There are a number of fundamental problems with analysis based on average dollar values. First, it attempts to ascertain an average willingness to pay for the market as a whole. Firms usually offer products that appeal to specific targeted segments of the market. The firm is most interested in the willingness to pay among its current customers, or among buyers likely to switch to its products, rather than in an overall market average.

Second, this approach does not reference any specific product, but instead considers an average product. We should expect that a respondent's willingness to pay for an additional feature

depends upon what specific product is being enhanced (e.g., a discount or a premium offering).

Third, and most fundamental, this approach assumes no competition. Because product purchase usually constitutes a choice among specific alternatives, the competitive context is a critical part of the purchase situation. To illustrate the fallacy of interpreting average dollar values, without respect to competitive offerings, consider the following illustration.

Economics on *Gilligan's Island*

Though perhaps loath to admit it, many have watched the popular 1960s TV program *Gilligan's Island*. The program revolved around an unlikely cast of characters who became marooned on an uncharted desert island. Each episode saw the promise of rescue. And when it seemed that the cast was finally going to make it off the island, the bumbling Gilligan always figured out some way to ruin the day.

One colorful pair of characters were the ultra-rich Mr. Howell and his wife. Now, imagine that one day a seaworthy boat with capacity for two passengers pulls into the lagoon and offers passage back to civilization for a price to be negotiated. What is the dollar-value of rescue versus remaining on the island for Mr. and Mrs. Howell? Mr. Howell might pull out his checkbook and offer the crew millions of dollars. Under the assumption of no competition, the dollar equivalent utility of rescue is astronomically high. However, it might be much lower for other islanders of more limited means, and the average dollar value for all of them would have little relevance to the captain of the boat in negotiating a price. What would matter is the dollar value of the potential customers, and no one else.

Now, assume that just as Mr. Howell and the first crew are preparing to shake on the deal, a second, equally seaworthy ship pulls into the lagoon and offers its services for a fixed $5,000. Ever the businessman, Mr. Howell will choose the $5,000 passage to freedom.

What has happened here? Is the utility of getting off the island for Mr. Howell suddenly different? Has his price sensitivity changed? No! The amount Mr. Howell would be projected to pay under the assumption of no competition is indeed very different from the amount he will pay given the appearance of another boat.

Had the crew of the first boat administered a conjoint interview to Mr. Howell and computed his willingness to pay under the first method reviewed in this article, they would have concluded that he was willing to pay very much more than $5,000. But, how meaningful is that information in light of the realities of competition? The realistic problem for the boat captain is to figure out what price the market will bear, given the existence of competitive offerings.

We can illustrate this point using another example. What is your willingness to pay for a color monitor for your laptop computer versus a monochrome screen? Assume we conducted a conjoint analysis including monochrome versus color monitors. If we computed your willingness to pay for color over monochrome, we would likely find that the incremental value of color over monochrome is worth a thousand dollars or more. But, how meaningful is this information to a laptop manufacturer given the fact that laptops with color monitors are readily available on the market at quite inexpensive prices?

Price sensitivity simulations in competitive context

For most marketing problems involving competition, the best strategic information results from carefully defined market simulations. If a firm wants to assess the incremental demand resulting from offering specific features for its product, or improving its degree of performance, it should be estimated within a realistic competitive context. It should also be based on specific objectives. For example, the objective may be to determine how much more may be charged for a product or service by offering a new feature without any net loss in market acceptance.

This approach involves simulating a realistic competitive scenario with a conjoint market simulator. Assume four products (A through D) representing the current relevant products in the marketplace. Further assume that the firm is interested in offering an additional feature for Product A and wants to estimate what new price can be charged while maintaining the same share of preference. We first simulate a base case with Products A through D placed in competition with one another, where A does not include the new feature. We record its share of preference (say, 15 percent). We then conduct another simulation in which we improve A by offering a new feature (and hold the competition B through D constant). The share of preference for A should increase (say, to 20 percent). We then perform additional simulations (again holding competition constant) raising the price of the new Product A until its share of preference again drops to the original 15 percent. The difference in price between the more expensive improved Product A that captures 15 percent and the old Product A that captured 15 percent reflects the incremental monetary value that the market will bear for the new feature, given the competitive context and the objective of maintaining share constant.

Market simulations conducted using individual-level utilities are best for this analysis. Individuals have different preferences, and the company producing Product A is most concerned with retaining current Product A customers and attracting new buyers among those most likely to switch. The company does not care so much about individuals who are extremely unlikely to buy its offerings. Market simulations based on individual utilities support such complex market behavior, focusing the "willingness to pay" analysis on a relevant reference product and critical individuals rather than the market whole. Such market simulations can also reveal complex competitive relationships between products, such as degree of substitution (cross-effects) and differences in each product's price sensitivity.

Potentially misleading

The common practice of converting differences between attribute levels to a monetary scale is potentially misleading. The value of product enhancements can better be assessed through competitive market simulations. If the market simulations are conducted using individual utilities, such simulations focus the price/benefit analysis on the customers that are most likely to purchase the firm's product(s) rather than on an overall market average. They provide strategic information based on a meaningful context that enables better decisions, while avoiding pitfalls of other ways of summarizing data. Of course, the success of the simulation approach hinges on a number of assumptions, including:

a) the conjoint method produces accurate measures of price sensitivity;

b) the relevant attributes have been included in the simulation model;

c) the relevant competitive offerings are reflected in the simulation model.

Survey Monitor

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Sadly, Mom's adult children are largely unaware of her preferences. In fact, 38 percent of adults are planning to give Mom flowers for Mother's Day, 13 percent will shower her in jewelry, and 16 percent are going to give her clothes. Less than two in 10 will promise to keep in touch with her more often all year long.

According to the survey, e-mail is indeed gaining in popularity, especially among moms in the West, who are more likely to communicate via the service than moms in other regions (50 percent in the West versus 35 percent in the Northeast, 36 percent in the North Central states, and 40 percent in the South).

Additional findings from the survey shed some light on what keeps kids from checking in with their moms more often during the year. More than one-third (34 percent) say they are just too busy, 21 percent say that long-distance telephone charges are too expensive, and 15 percent admit to procrastinating or being "too tired/lazy" to make the effort. A surprising 38 percent can't provide any answer for not keeping in touch with Mom as often as they should.

The survey also revealed some differences between adult sons and daughters regarding their communication habits with Mom. Fifteen percent of daughters keep in touch with their mothers several times a day either by phone, in-person visits, e-mail, or letters, while only 5 percent of sons do. In addition, 28 percent of daughters contact their mothers once a day, while a mere 15 percent of sons do. Sons are also more likely to be honest and 'fess up to procrastinating or being too tired/lazy when it comes to not keeping in touch with Mom (19 percent of sons versus 10 percent of daughters).

The Cidco survey was conducted January 18-22, 2001 among a nationally representative sample of 2,000 adults 18 years of age and older. A total of 447 interviews were completed with women who have adult children 18 years of age and older who live outside their household. In addition, a total of 448 telephone interviews were conducted during the same period among a nationally representative sample of adults 18 years of age and older who have a mother who lives outside their household. The interviews were conducted in Caravan, a national telephone omnibus survey. This survey was developed for Cidco, Inc. by Leflein Associates, Inc., Fort Lee, N.J., and fielded by Opinion Research Corporation, Princeton, N.J. The margin of error is ±4.5 percentage points.

Americans into not-so-fast food

Fast-food customers are most satisfied with the more specialized regional chains, especially those in the emerging "quick-casual" segment, according to findings from the quarterly syndicated Quick-Track research program conducted by Sandelman & Associates among 68,600 fast-food users across 62 U.S. markets during 2000.

"Over the past year, we have seen increases in the availability and popularity of chains in the so-called quick-casual segment," says Bob Sandelman, president of the Villa Park, Calif., market research firm. Quick-casual restaurants usually provide limited service like typical fast-food restaurants, but the quality of the food and the prices are more similar to full-service, sit-down restaurants. "These chains are raising the bar for the fast-food industry," Sandelman says, "and seem to appeal to somewhat older consumers who grew up on fast-food fare but are now ready for a better product and are willing to pay a bit more for it."

Based on ratings provided by the study's respondents on fast-food chains they visited in the past three months, Sandelman & Associates announced the second annual Quick-

Track Awards of Excellence for the top-rated chains. For the second consecutive year, the highest-rated chain overall was In-N-Out Burger, a California-based, family-owned chain with only about 160 units in California, Nevada, and Arizona. Since 1948, this relatively small chain has been serving a limited menu of burgers, fries, and shakes that are made-to-order. Fully 59 percent of In-N-Out's past-three-month patrons rated their last occasion as "excellent," the top-box rating on a 5-point scale, beating out 75 other chains for the top honor. In-N-Out's overall rating was even three percentage points higher than last year. In-N-Out also scored higher than all other chains on several key attributes, including taste of the food, quality of ingredients, temperature of the food, friendliness/courtesy of employees, order accuracy, and cleanliness of the restaurant.

The remaining chains in the top 10, ranked by overall rating of the last occasion, include two chicken chains, five pizza chains, a quick-casual sandwich chain, and a quick-casual Mexican chain. Each of these chains were rated "excellent" by at least 44 percent of their recent users.

Chick-fil-A, a chicken chain with fairly broad distribution, was the second highest ranked chain overall, up from its third place finish last year. The other chicken chain in the top 10 was Florida-based Pollo Tropical, which ranked No. 10 overall. Davanni's was the highest-rated pizza chain, ranking No. 3 overall. This popular chain has just 17 locations in the Minneapolis-St. Paul area and offers hot hoagies in addition to pizza. Other pizza players in the top 10 are all regional players — Me 'n Ed's, La Rosa's, Papa Murphy's, and Jet's. Schlotzsky's, a growing quick-casual sandwich chain with locations in 38 states that also serves pizza, salads, and soups, was the sixth-ranked chain overall this year and the top sandwich chain. The Mexican segment was headed by Baja Fresh, another regional quick-casual chain with a fresh-food focus, which was ranked ninth overall.

Although no major national chains made the top 10 again this year, some were rated highly on an overall basis as well as on specific attributes. Boston Market was the highest-rated major national chain, with 40 percent of its users rating their last occasion as "excellent," ranking No. 13 among all chains. Subway was the highest-ranking national sandwich chain at No. 15, while Papa John's Pizza headed the pizza category, ranking 23rd overall. Sonic was the highest-ranking major burger chain at the No. 26 spot. Not surprisingly, McDonald's outscored all other chains on convenience of locations and was the second-highest rated chain on overall appeal to kids.

The three most important factors to fast-food users in their selection of a quick-service chain to patronize are the cleanliness of the restaurant (82 percent rated this "extremely important"), taste or flavor of the food (78 percent), and order accuracy (73 percent). The highest-rated chains for cleanliness were In-N-Out, Papa Murphy's, and Baja Fresh. Taste/flavor of food was rated best at In-N-Out, Pollo Tropical, and Schlotzsky's. For order accuracy, the top three chains were In-N-Out, Papa Murphy's, and Rubio's. Quality of ingredients is also highly important (63 percent) and was rated best at In-N-Out, Baja Fresh, and Schlotzsky's.

Given that food taste and quality are so important to fast-food users, it is not surprising that several quick-casual chains are rated highly overall. Seven chains in the top 25 overall can be characterized as quick-casual — Schlotzsky's (No. 6), Baja Fresh (No. 9), Rubio's (No. 11), Boston Market (No. 13), Biscuitville (No. 14), Koo Koo Roo (No. 17), and Quizno's (No. 22). All of these chains either improved their ranking from last year or showed up on the ratings list for the first time this year. And these quick-casual customers are willing to spend more when visiting these chains. In a national Quick-Track study conducted in the fourth quarter of 2000, respondents said they spent an average of $7.02 per person when visiting quick-casual restaurants, compared to $4.42 when visiting fast-food restaurants in general. For more information visit www.sandelman.com.

Shoddy service may drive shoppers from stores forever

More than 20 percent of customers walk out without making a purchase and an equal number stop shopping at a store altogether where they experience bad customer service, according to a national telephone survey of more than 1,000 consumers, sponsored by MOHR Learning, the retail training unit of Boston-based Provant, Inc. Moreover, 26 percent tell their friends about the experience and urge them not to shop at the store.

"While the most common response to poor service is to complain to a store manager," says MOHR Learning CEO Michael Patrick, "many people seem to protest with their pocketbook instead. Retailers need to recognize the less visible impact of bad service — the quiet erosion of their customer base."

"Some retailers assume customers don't care about service and that it's something they can take for granted," says Patrick. "But our research suggests people really get upset — even if they're reluctant to say anything. In fact, some customers who would never complain to a store manager will do so to their friends. And word-of-mouth can be as powerful in retailing as it is in the motion picture business."

Retailers have to assume that every customer who complains represents two others who experienced the same frustration, but didn't voice it, Patrick says. "It's not enough for store managers simply to address individual customer complaints. The better solution is to provide training and supervision to employees so that such incidents are not repeated."

Among the survey's other findings:

• The more affluent a customer, the more likely he/she is to walk out without making a purchase (26 percent of those making $50,000+ vs. 16 percent of those making $15,000-$24,999).

• Men are more likely than women (26 percent vs. 19 percent) to walk out without making a purchase, while women (44 percent vs. 34 percent) are more likely to complain to a manager.

• Customers aged 45-54 are least likely to ignore bad customer service, while those over 55 are most likely (9 percent vs. 18 percent).

• Customers in the Northeast (34 percent) are more likely than those in any other region to walk out without making a purchase, while those in the South (16 percent) are least likely.

• The less-educated a customer, the more likely the person is to ignore poor service and to continue shopping at the store.

• Customers in non-metropolitan areas were more likely than their urban counterparts (21 percent vs. 14 percent) to ignore poor service.

The EXCEL Omnibus Survey of 1,024 consumers was conducted by Media, Pa.-based International Communications Research. For further information please visit www.mohrlearning.com.

"When you experience bad customer service when shopping, which of the following describes your typical reaction?" (respondents could choose all that apply)

Complain to a store manager	39.3%
Tell friends about your experience and urge them not to shop there	25.7%
Stop shopping at that store	22.2%
Walk out without making a purchase	22.0%
Just ignore it	15.3%
Get upset, but continue to shop at the store anyway	12.7%

Study examines Web habits of packaged goods consumers

Chicago research firm Information Resources Inc. has released the results of its study "CPG Online: What's Not Clicking for Manufacturers, Retailers, and Consumers." The research shows discrepancies between shoppers' true use of the Web for consumer packaged goods (CPG) and manufacturers' and retailers' perceptions. The study, which was conducted by IRI's e.Ventures group, focused on the effectiveness of three primary Internet activities of the CPG industry: brand Web sites; advertising, promotions, and e-mail communications; and e-retailing.

The survey found that basic Web sites satisfy the majority of consumer needs, which include company contact and product information.

Consumers are also interested in online coupons and offers for free samples, but among the 75 percent of manufacturers with brand Web sites, only 20 percent provide coupons and 22 percent provide free samples.

Consumers expressed low interest in elaborate Web site content such as lifestyle editorial, games and online chat. "Consumers go online with an agenda — to contact the brand or to get product information," says Brian Murphy, IRI e.Ventures partner. "The rule should be to build basic Web sites, and only invest more when brand-specific research indicates that an exception applies."

Manufacturers are underutilizing online promotions and e-mail marketing. The study found that while consumers are receptive to online coupons, sweepstakes and free samples, one-third or fewer of manufacturers surveyed used these promotions. Similarly, two-thirds of consumers are interested in receiving e-mail communications from manufacturers, but only one-third of manufacturers participate in e-mail marketing.

Banner ads also play an important role in online CPG marketing, as they drive high awareness among consumers, even if click-through rates are low.

Despite recent failures among CPG e-retailers, consumers are optimistic about the Internet's potential as a viable sales channel:

• Trial is relatively high: 23 percent of primary shoppers who are online have purchased a CPG product online more than once in a three-month period.

• Shoppers plan to increase spending: Currently 10 percent of online CPG consumers purchase 25 percent or more of their CPG products online. Next year, the number of online CPG consumers exceeding the 25 percent mark is expected to triple.

• Online CPG shoppers are satisfied: Half of online CPG shoppers are very satisfied with the current state of CPG e-retailing, and more than 75 percent have encouraged their friends to shop online.

The study revealed several factors that will limit the growth of e-retail if not addressed, however. For instance, e-retailers do not have a clear picture of the primary reasons that consumers do and do not shop online: The leading reason consumers shop online is that they value the ability to shop any time of day, but only half of e-retailers surveyed placed this among the top three drivers. On the flipside, e-retailers underestimate the impact of delivery charges and the desire to review products in person as deterrents.

IRI's e.Ventures group surveyed about 8,000 online consumers with Harris Interactive of Rochester, N.Y., and interviewed 75 retailers and manufacturers with PERT Survey Research of Bloomfield, Conn. McCusker & Associates of Suffield, Conn., participated in study design and analysis.

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solutions. RED Alert joins several of Alliance Research's proprietary techniques into a custom-designed alert, feedback, and reporting platform. Client-specific studies on customer satisfaction can use the RED Alert capability to digitally record customer explanations of a problem or reasons for dissatisfaction and provide that information in real time so that immediate action can be taken.

The voice of the customer is recorded using Alliance Research's VOCALS technology to allow clients to hear, learn from, and act to recover a potentially lost customer. RED Alert operates by sending information through e-mail or fax, with alerts summarized on an Alliance Research-hosted reporting Web site to the appropriate client contacts when a negative or problem answer is recorded. The e-mail and faxes provide detail about the response, with a toll-free number to hear the customer's comments. The reporting Web site, which provides access only for those authorized to use the site, also provides summaries of the total number of interviews, as well as additional detail about customer ratings of a client product or service. For more information contact Clint Brown at 859-344-0077.

Data Entry 3.0 from SPSS

SPSS has released SPSS Data Entry 3.0, the latest version of its survey design and data collection software. SPSS Data Entry 3.0 features a new architecture which is designed to deliver faster processing times, better Web performance, increased security and multi-platform availability.

Respondents do not need to download a Java applet before filling out either a simple survey or one with sophisticated validation and "skip and fill" rules. Additionally, SPSS Data Entry can now share the workload of large surveys across multiple servers, speeding up processing time and making more efficient use of IT resources. Additional new features of SPSS Data Entry 3.0 include: Improved HTML export capabilities; SSL security for online surveys; and prevention of online ballot stuffing. For more information visit www.spss.com/dataentry.

CRI expands Criterion CyberScreen services

Minneapolis-based Custom Research Inc.(CRI) has introduced two analytical tools to expand its Criterion CyberScreen online concept testing services: CyberScreen with Category Norms, and Criterion CyberCast. Criterion CyberScreen combines online interviewing with concept testing to offer a tool that screens many new product ideas in a monadic test design. Companies can reduce their product development time by testing concepts earlier in development, and only proceeding with the best ideas. CyberScreen is conducted through CRI and Digital Marketing Services via Opinion Place.

Two new services are offered through CRI's analytical partner, FYI Worldwide LLC, a forecasting, modeling, and analytical services firm. Criterion CyberScreen with Category Norms provides quintile comparisons of research measures across many categories — for example, consumer package goods, financial, and electronic durables — allowing clients to evaluate their concepts relative to others. CRI's second product offering, Criterion CyberCast, provides first-year forecast volume for online concept testing data. For more information contact Beth Ann Rogers at 763-542-0843 or barogers@customresearch.com.

New IVR software from TeleSage

TeleSage, Inc., Seattle, has introduced its new SmartQuest interactive voice response software which is designed to help companies automate market research functions. The software provides and captures spoken or numeric information, using a company's computer and telephone lines. The software can run up to 99 surveys simultaneously, in any language, and the system can branch to different questions, surveys or telephone numbers based on callers' responses. It automatically scores surveys as they are completed and stores all results in Microsoft Access or other standard databases, offering real-time results. For more information visit www.telesage.com.

Package simplifies data collection

Data Entry Systems, Inc., a Huntsville, Ala., data collection firm, has released a product and service package designed to help simplify market research data collection. The firm's Scriptwriter device allows users to fill out their field survey forms as they normally do. While the form is being filled out, Scriptwriter converts written characters and other data to electronic format. This data can then be uploaded to a host system and software packages such as SPSS or any statistics or analysis software (including a spreadsheet) immediately. Scriptwriter gives researchers access to their data and reduces errors from re-keying. For more information call 256-430-3023 or visit www.dataentrysystems.com.

Online tech omnibus from DRI

Digital Research, Inc., Kennebunk, Maine, has launched Intertrak, a monthly online omnibus conducted among 2,500 of the firm's Consumer Technology Panel. The samples are representative of the Internet population and are weighted for region, age and gender. Demographics are also tracked each month, including geographic region, household make-up, income, education, employment status, and ethnicity. Clients provide their proprietary questions and receive responses in less than two weeks. For more information call Jane Mount at 207-985-7660 or visit www.digitalresearch.com.

Technique puts cameras in respondents' hands

Chicago-based consulting firm World-Link Group is now offering Photo-Ethnography, a qualitative research technique in which respondents use a 35mm camera over a three-week period to document and observe their lives. The approach asks respondents to address a question such as "How does your pet affect your life?" The question is directly related to a client's strategic/marketing issue and is phrased in easy-to-understand consumer terms. Respondents spend several weeks exploring the question and taking photos that express their behavior, attitudes, and emotions. Photo-Ethnography is used with adults, teens, and pre-teens. Customized methodologies have been developed for the latter two audiences. For more information call Bob Wilkus at 312-494-9740 or visit www.photo-ethnography.com.

Youth trend-tracker enhances site

San Diego-based Lreport.com, a youth trend tracking Web site, has enhanced its site, adding Hotlists, which provide a quick take on new things trendsetters are doing, buying or coveting; more visuals; and an advanced query function, which allows users to input a word, brand, trend, etc., into a search that is linked to every part of the site, including the National Data, L7, National Trends, and Editorial Gallery sections. The data features interviews with 1,800 young adults aged 14-30 and monthly updates based on feedback from the firm's Urban Pioneer network of trendsetters, and quantitative research.

Pre-test promotional concepts online

Ryan Research & Marketing Insights, Westport, Conn., has launched ConsumerPOV, a new proprietary research tool, in conjunction with PDI (Promotion Decisions Inc.) and Knowledge Networks. ConsumerPOV is an online approach that identifies the diagnostics of a promotional concept before it goes to market. Its measures include: consumer interest in overall concept; interest in participating and/or redeeming; uniqueness; comprehension; fit with brand or category; reasons for likes/dislikes; and category and/or brand usage. For more information contact Paula Friedman at 203-222-6336 or pfriedman@ryanpartnership.com.

Briefly...

Las Vegas research firm the MRC Group is now offering **hand-held computers for on-site data collection projects** such as customer satisfaction ratings, customer profiles, and gathering competitive information. For more information call Jim Medick at 702-360-7700.

Adapt Inc., a Minnetonka, Minn., data processing firm, has purchased a Bantec S-150 scanner, **doubling its scanning capacity** and giving the firm the capability to scan over 15,000 documents per hour. For more information contact Dave Koch at 888-52ADAPT.

ESRI, Redlands, Calif., is offering ArcView Business Analyst 1.1a, its **desktop GIS solution** for business that combines the functionality of ESRI's ArcView GIS with data analysis tools and a catalog of year-2000 business, demographic, and household data for the U.S. For more information visit www.esri.com.

MarketResearch.com has entered into agreements with **25 additional business intelligence publishers** to expand the number of research reports available at www.marketresearch.com., including publishers such as: Asian Information Resources Ltd., Babcox Research, Buzzback.com, The Consumer Electronics Association (EBrain), Espicom Business Intelligence, Forrester Research Inc., Rich's Business Directories Inc., Standard & Poor's DRI, Supermarket Strategic Alert, Zona Research.

EyeTracking.com, the Web site testing division of EyeTracking, Inc. (ETI), has developed ETI WebCheck, a **new Web site evaluation service**. The service provides objective data and allows clients to test and assess new and old homepage designs. Services include research design, binocular eyetracking, live Web streaming of eyetracking sessions, questionnaire design, facility rental. For more information visit www.eyetracking.com.

Research Industry News

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London-based **WPP Group plc** has acquired Nuremberg-based **icon brand navigation group AG**, a brand consulting and market research firm.

NPD INTELECT Market Tracking, a joint venture of the **NPD Group** and **GfK AG**, has acquired the point-of-sale tracking division of **PC Data**, the Reston, Va.-based provider of market research for the computer hardware and software industries.

Alliances/strategic partnerships

Bcom3 Group, Inc., a global marketing communication holding company, has announced its intent to form a strategic alliance, linking the media and research capabilities of several of its operating units with the information technology capabilities of **Knowledge Networks**.

Rochester, N.Y., research firm **Harris Interactive** has entered into an agreement with **drkoop.com**, an Internet health and wellness network, to recruit members to participate in Harris Interactive research for the health care industry. Under the agreement, Harris Interactive will compensate drkoop.com for each of its two million registered members who elect to join and participate in the Harris Interactive chronic illness panel. Panel members will be able to voluntarily provide information about their concerns, behaviors and attitudes toward their or a family member's medical condition(s) and treatment. This knowledge can then be used by the health care industry to improve policy, products and services.

Separately, Harris Interactive and Saskatoon, Saskatchewan-based **Itracks**, an Internet-based data collection provider, have signed a three-year online market research agreement. Under this agreement, Itracks will provide online focus groups, bulletin board focus groups, online one-on-one interviews, and custom survey programming for Harris Interactive during each year of the agreement.

And Harris Interactive has signed an agreement with the MMI Group, based in Oslo, Norway and Stockholm, Sweden, to make it a Harris Interactive Global Network member company. **MMI Group** will represent Harris Interactive in Denmark, Finland, Norway, and Sweden.

New York marketing firm **DoubleClick Inc**. and **comScore Networks**, a Reston, Va., provider of data-based Internet infrastructure services, have entered into a partnership to create a suite of online audience measurement products. The first of these products is a tool called netScore, a comScore product, which DoubleClick will exclusively sell to its client base of advertisers, ad agencies and Web publishers. NetScore is based on comScore's database of over 1.5 million opt-in people, which, with consumer permission, captures Web traffic and purchase transaction information.

Onetone Research, Milan, Italy, and Paris-based Internet information firm **NetValue** have formed a strategic alliance to deliver Internet audience and behavior information in Italy. Under the agreement, Onetone becomes the exclusive partner for NetValue in Italy. Onetone operates a representative panel of approximately 2,500 households connected to the Internet, which will be converted to NetValue's metering and analysis technology. Onetone Research will also act as the exclusive vendor of NetValue products and services in the Italian market, including both standard and custom panels. NetValue will install its technology on Onetone Research's panel in exchange for a licensing fee and a revenue share.

Walker Information, an Indianapolis research firm, has added two new members to its Global Network, Paris-based **CSA-TMO**, and Milan-based **Eurisko**.

Wilton, Conn., research firm **Greenfield Online, Inc.**, has formed a partnership with **Directions for Decisions Marketing & Research** under which Greenfield Online's FieldSource division will handle online surveys and focus groups for the Jersey City, N.J., firm.

New York-based health care research firm **WebSurveyResearch** and **NFO Migliara/Kaplan**, an Owings Mills, Md., health care marketing research firm, will work together to deliver online surveys to assess marketing research information from physicians and other health care professionals. Under the terms of the letter of intent, NFO Migliara/Kaplan will have immediate access to WebSurveyResearch's physician panel for performing marketing research. NFO Migliara/Kaplan will perform the questionnaire design and analysis of data.

Association/organization news

The Council of American Survey Research Organizations (CASRO), Port Jefferson, N.Y., has announced the adoption of standards for Internet Research. Adoption means that all of the 186 CASRO member organizations are committed to observe the standards in connection with research projects that they perform. CASRO members are responsible for almost 90 percent of survey research revenues in the U.S.

Because of its extremely low cost of entry and thus high potential for abuse, the Internet medium raised unique concerns regarding the use of e-mail as a means of recruiting research respondents. CASRO members united to confront these concerns for respondent harassment via unsolicited e-mail recruiting (spamming) by adapting their Code of Standards to specifically address the characteristics of Internet research.

The standards were adopted by a vote of the full CASRO membership after more than a year and a half of study and deliberation by a committee chaired by Kevin Mabley, vice president, operations, Cyber Dialogue. "Internet research is different from other data collection methodologies and requires standards appropriate for that environment," Mabley says. "The new standards give market research companies a proactive stance with the ISPs to enforce a high standard of privacy protection on the Internet."

Awards

The 2001 ARF David Ogilvy Research Awards were handed out at the **Advertising Research Foundation** conference in New York in April. Each year, the ARF honors research that has made an important contribution to creating, identifying and improving advertising. Awards are presented based on case history submissions of research initiatives that were instrumental in steering winning advertising campaigns. The top award, the ARF Ogilvy Grand Winner award, was presented for the research that drove the Census 2000 campaign.

Grand Winner and winner in the services category: the Census 2000 campaign

Accepting the award: Darlene Billia, senior partner, managing director brand planning, Young & Rubicam

Advertiser: The Bureau of The Census

Agencies: Young & Rubicam New York, The Bravo Group, Kang & Lee, G&G Advertising, The Chisholm-Mingo Group

Research: The Maya Group, The K-Group, Michael Jones, Market Development, Asia Link, Data & Management Counsel, Edna Sanabria, Penn Schoen & Berland Associates

Winner in the packaged goods category: the Aleve "Dramatic Difference" campaign

Accepting the award: Leslie Perrell, manager, marketing research, Bayer Consumer Care

Advertiser: Bayer Consumer Care

Agency: BBDO Chicago

Research: IRI, Monroe Mendelsohn Research, CLT Research Ascts., Moskowitz Jacobs, Inc.; rsc - the quality measurement company, Viewpoints Consulting, Carol Bernstein Ascts., Ipsos-ASI, Media Marketing Assessment, Mediscope, ACNielsen, Simmons Market Research Bureau

Winner in the durables category: the OnStar "Batman" campaign

Accepting the award: David Lockwood, senior vice president, director of account planning, Campbell-Ewald.

Advertiser: OnStar

Agency: Campbell-Ewald

Research: J.D. Power, MRI, Diagnostic Research International, Millward Brown International

Distinguished finalist in the services category: the AT&T Broadband "Boundless" campaign

Accepting the award: Sara Lipson, vice president, brand asset management, AT&T; Randall L. Zeese, division manager - brand asset management, AT&T

Advertiser: AT&T

Agencies: Young & Rubicam, FCB Worldwide

Research: NPD, Lieberman Research, SE Surveys, MS&P

Distinguished finalist in the packaged goods category: the Easy Mac "Siblings" campaign

Accepting the award: Lori Bollom, market research manager, Kraft Foods

Advertiser: Kraft Foods

Agency: FCB Worldwide

Research: ACNielsen, Millward Brown International, Insights in Marketing, Media Marketing Assessment

Distinguished finalist in the durables category: the KitchenAid "Ingredients" campaign

Accepting the award: Gretchen Jezerc; director of brand marketing for KitchenAid, Whirlpool Corporation

Advertiser: KitchenAid

Agency: Ayer

Research: Doblin Group, NFO, Sheskin Research, Gallup & Robinson, Millward Brown International

New accounts/projects

Westport, Conn.-based **IMS Health** has expanded its business relationship with the U.S. Food and Drug Administration (FDA). Under a new five-year contract, the FDA will use IMS Health market research services to improve its knowledge of drug use and the impact of pharmaceutical products on patient outcomes.

ACNielsen U.S., Schaumburg, Ill., has announced an information agreement with Grand Rapids, Mich.-based retailer **Meijer** in which ACNielsen will become Meijer's preferred provider of syndicated product sales information and analysis. The agreement also enables consumer packaged goods manufacturers that do business with the retailer to obtain sales information organized by Meijer-defined trading areas.

Chicago research firm **Market Facts** has selected **SPSS MR's** Verbastat software for coding its studies, purchasing 30 licenses of the software.

Torrance, Calif.-based **Eye Dynamics**, maker of SafetyScope, a product for worker impairment testing, has retained **Gene Taylor & Associates**, an Irvine, Calif., research firm, for a special marketing research project. Taylor has added interactive elements to Eye Dynamics' Web site that allow capture of information related to level of interest in the SafetyScope by potential users. Product information and a questionnaire will be disseminated electronically with results of the survey to be used for strategic market planning and brand positioning of SafetyScope.

Austin, Texas-based **Tonic Software Inc.**, a provider of Web applications management (WAM) software, has licensed Spanish online market researcher **Sigma Dos interactiva** (SDi) to use Tonic as an online research tool. SDi is implementing an adaptation of Tonic's original WAM software, formulated for online market research as the Automated Mystery Shopper (AMS). AMS simulates the mystery shopping techniques used by banks, retailers and other distribution chains.

Kmart Corporation has selected Kansas City-based **Service Management Group** (SMG) to develop a comprehensive customer satisfaction program for over 2,000 Kmart stores nationwide. Kmart's new Super Service Index is a measurement program developed by SMG to monitor satisfaction at the store level using surveys of over 250,000 Kmart customers each month.

The Disney Kids Network and **C&R Research**, Chicago, have announced a working partnership to help Disney maintain an active dialogue with its core audiences using C&R's online research panel KidzEyes.com.

Monster.com, an online recruiting company, has subscribed to the **Nielsen//NetRatings** service in multiple countries in Europe and Asia Pacific.

New companies/new locations

New York-based digital marketing firm **DoubleClick Inc.** has announced a new division, Diameter, an online research business that will offer a suite of research tools in addition to media intelligence, audience measurement and advertising effectiveness products.

Interviewing Service of America, Van Nuys, Calif., has opened a new telephone research center in Lancaster, Calif.

Service Management Group has moved to new offices at 210 West 19th Terrace, Suite 200, Kansas City, Mo., 64108.

CENSYDIAM, an Antwerp, Belgium, research firm, has opened a new office in Brazil. It will be headed by Regina Borowski.

Robert Hale has founded **Robert Hale & Associates**, a marketing strategy firm, at 1927 Chicago, Suite A, San Diego, Calif., 92110. Phone 800-506-8726. Fax 619-276-4955.

Carlos Santiago and Isabel Valdes have joined forces to form **Santiago & Valdes Solutions**, a Newport Beach, Calif., multicultural marketing, research, and consulting firm.

Fairfield, Conn.-based research firm **Millward Brown** and one of its divisions, Millward Brown IntelliQuest, have opened an office on New York's Madison Avenue.

RDD Inc., a Portland, Ore., telephone research firm, has moved to 5510 S.W. Macadam Ave., Suite 500, in the John's Landing area of the city. The firm has also unveiled a new logo and tagline.

Boston-based research and consulting firm the **Yankee Group** has launched its new Australasian Market Strategies research and consulting practice. The offices for The Yankee Group Australia & New Zealand Pty. Ltd. are located at Level 14, 309 Kent St., Sydney NSW, Australia. Phone +61-2-9279-0990. Fax +61-2–9279-0995.

Cincinnati-based **MarketVision/Gateway Research, Inc.** and **Universal Studios** Hollywood have opened a new consumer interviewing center and office at Universal Studios Hollywood in Los Angeles. The interviewing facility is located in the lower level of the studio backlot. Consumer surveys will be conducted with selected domestic and international visitors to the park.

Company earnings reports

SPSS Inc., Chicago, announced results for the fourth quarter and fiscal year ended Dec. 31, 2000. On a pro forma basis consistent with previous reporting and revenue recognition practices, net revenues in the quarter were $43.2 million and diluted earnings per share (EPS) were $0.60, which compare to 1999 pro forma figures (which also exclude acquisition charges) of $40.7 million and $0.63 respectively. For the fiscal year, pro forma net revenues were $157.8 million and diluted EPS were $1.79, which compare to 1999 pro forma figures of $141.9 million and $1.66 respectively.

Nuremberg, Germany-based **GfK** has reported the best-ever results in company history in fiscal 2000, with total revenue increasing 24.3 percent to Euro 483 million.

Space Center

continued from p. 19

dramatic recreation of the first manned Apollo launch, and hands-on exhibits.

Methodology

This study was conducted among Kennedy Space Center visitors between 9:00 a.m. and 4:30 p.m. during the period of August 16 through September 3, 1999. Each respondent was randomly selected based on a systematic sampling plan, with some direction for quota distribution needs, before entering the ticket booth area. After agreeing to participate, the respondent was taken to a designated location for the one-on-one, computer-assisted interview. All effort was made to prevent the person from seeing the current ticket options displayed on the ticket booths.

Respondent's Primary Residency

Residency	Base N	Base %
United States, Non-Florida	310	61%
Florida Resident	74	15%
International [English speaking]	122	24%
Base	506	100%

Each interview averaged 10 minutes and involved 40 questions ranging from basic demographic classification questions and prior visitation to a set of 18 price sensitivity questions. The pricing questions, by ticket option, were rotated for each interview.

The response base by residency is shown in the chart above.

The Van Westendorp Price Sensitivity Model, developed in the 1970s by the Dutch economist Peter Van Westendorp, was the basis for the study. The objective of the model is to ascertain the range of acceptable prices, as well as optimum and indifference price points, for a product or service. The range will run from the price at which the preponderance of respondents start to doubt the quality of the product to the point at which the preponderance of respondents consider the product or service too expensive.

In this model, price sensitivity relates not to absolute price, but rather to perceived value of the product and service. Consumer price expectations and tolerances are measured by asking a set of price perception questions. These questions are the key to the model and seek to ascertain the price at which the product or service is:

- so cheap that product quality is questionable (Too Inexpensive);
- a bargain (Inexpensive);
- beginning to seem too expensive (Expensive);
- too expensive to consider (Too Expensive).

Once graphed, the point at which the Inexpensive and Expensive responses intersect is considered the Indifference Price Point (IDP); the point at which the Too Inexpensive and Too Expensive responses intersect is considered the Optimal Price Point (OPP).

IDP is where "cheap" and "expensive" curves cross. At this point, as many people consider the product or service cheap as consider it expensive. This represents the "normal" price in the market. At this point, we have maximized the percentage of respondents whose "normal" range we are in.

OPP is where "too cheap" and "too expensive" cross. At this point, the number of respondents finding the price acceptable is maximized and the resistance (in the form of unacceptability) to price changes is minimal.

Respondents are also asked for each of the two ticket options the price they would expect to pay, priced and unpriced purchase intentions, and perceived value.

Findings

Ticket Option A

Ticket Option A, which later became the Maximum Access badge, provides full access to the Kennedy Space Center Visitor Complex and was described as follows:

"With Ticket Option A, you will have unlimited access to the Kennedy Space Center Tour, IMAX Movies, Robot Scouts, Universe Theater, Early Space Exploration, New Millennium, and all other Visitor Complex attractions."

(The Kennedy Space Center Tour takes guests in air-conditioned "open view" buses to exhibits located several miles from the Visitor Complex. These are near the shuttle launch area and include the Apollo/Saturn V Center, the LC 39 Observation Gantry, and the International Space Station Center.)

After the description was read to them, the respondent was asked several unpriced general intent-to-purchase questions. Ninety-four percent indicated that they definitely or probably would buy this ticket option based solely on its description. (Two ticket options were presented and rotated in their presentation. To avoid a potential name association bias, the tickets were labeled and read as Ticket Option A and Ticket Option B.)

Then visitors are asked the series of price sensitivity questions based on the Van Westendorp configuration regarding their pricing perceptions for this (still unpriced) ticket option. The mean (averages) responses to the five key points of the pricing model are shown in Table 1.

Highlights include:

• Overall, the expected ticket price is $34.71.

• Florida residents are a bit more restrictive, with an expected price of just over $31; non-Florida residents expected a price of $34.21.

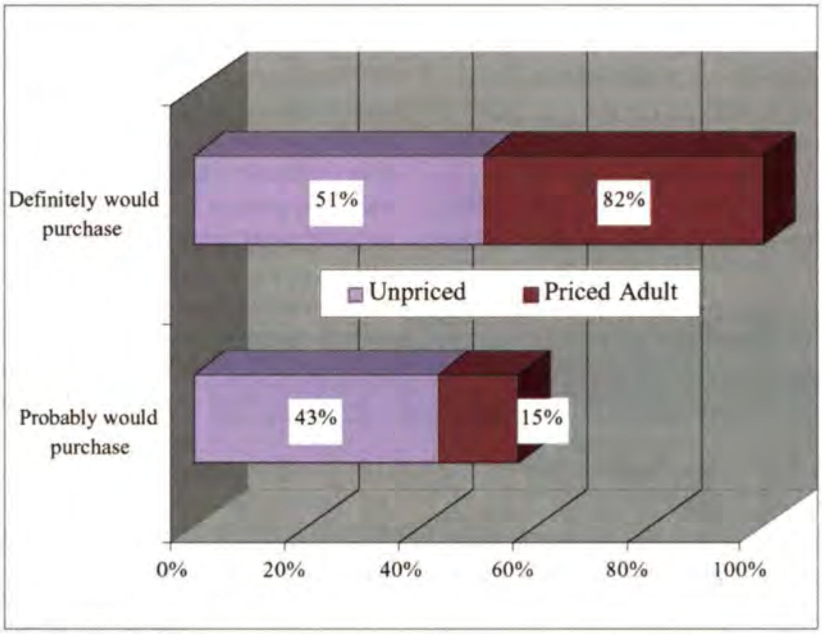
• International visitors expected to pay an average of $38.48 for the Maximum Access ticket.

• The plotting of the Optimal Price Point and the Indifference Price Point indicated a range from $31 to $40. (See "Ticket Option A – Pricing Strategy" graphic.)

• After being told that the actual price of the ticket as described was $24, the definite likelihood of purchase increased from the unpriced response of 51 percent to the priced response of 82 percent. (See "Purchase Intent" graphic.)

• For the child's ticket price of $15, the definite likelihood of purchase increased from 51 percent to 60 percent. (No specific question for an unpriced child's ticket was asked. The purchase decision was made solely on the $15 price presentation. Thus, the

Purchase Intent



Perception of Value

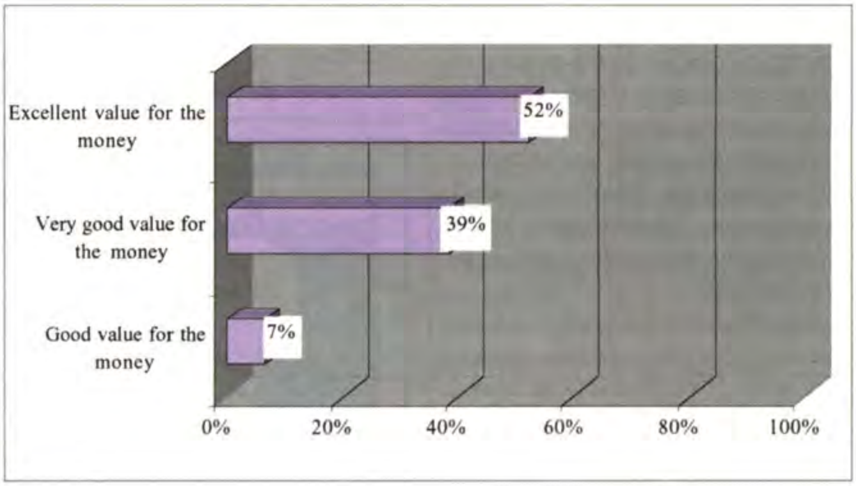
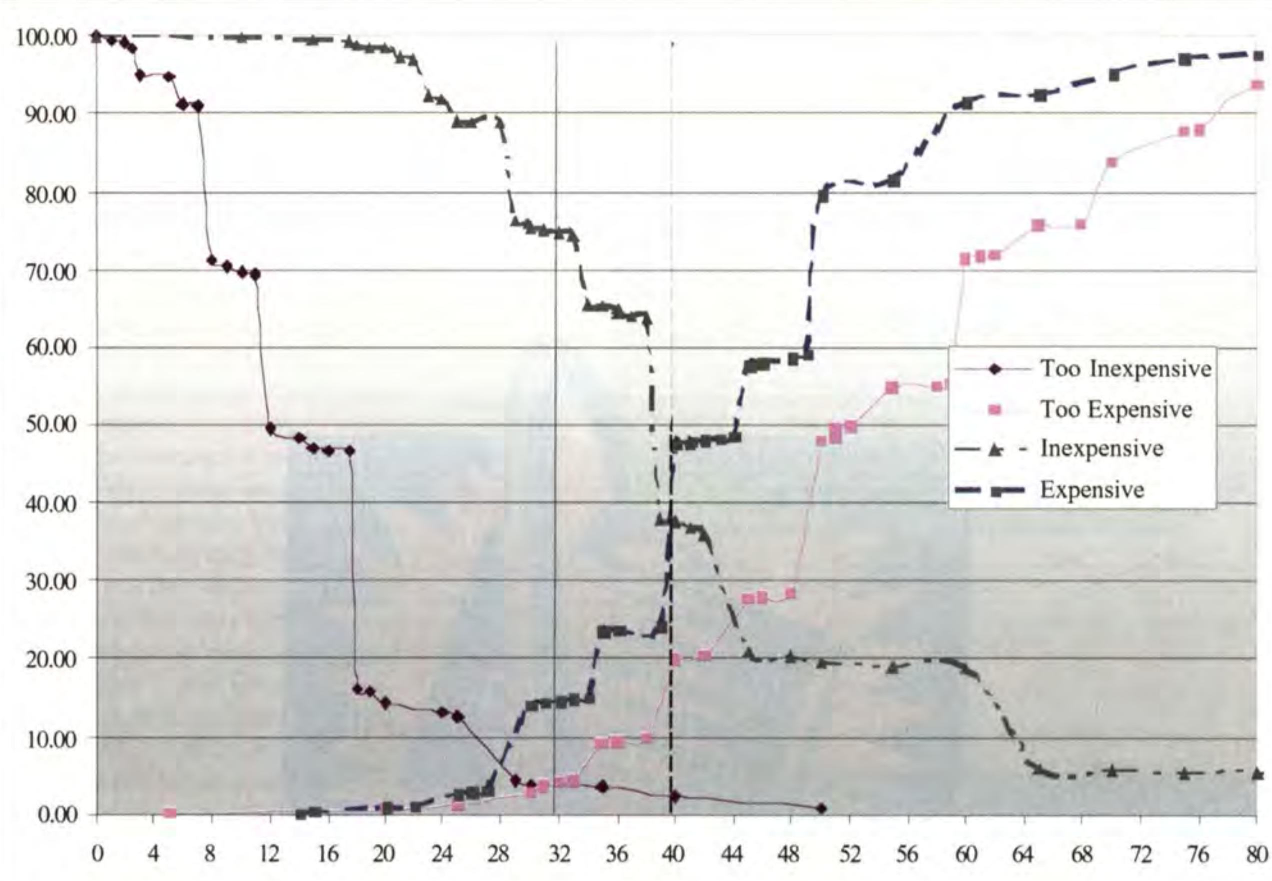


Table 1: Pricing Perceptions - "Ticket Option A"

Question	Average Price Points: Overall	Non-Florida, U.S. Residents	Florida Residents	International
Would be so cheap that you would question its quality	$13.68	$13.38	$11.09	$16.46
Would consider it a bargain	$30.64	$30.10	$27.34	$34.05
Would begin to seem expensive	$44.95	$44.13	$39.93	$50.10
Would be too expensive to consider	$55.91	$54.30	$50.96	$63.00
Would expect to pay	$34.71	$34.21	$31.00	$38.48

*Mean response, 5 percent trim to reduce the effect of extreme outliers.

Ticket Option A – Pricing Strategy



same unpriced response.)

When told of the proposed price for Ticket Option A, few (under 5 percent) expressed resistance to the entrance price of $24. This reaction indicated that this price point had strong market acceptance. Further, when asked to express their opinions on the value of Ticket Option A for its $24 price, 91 percent considered it an excellent/very good value for the money.

This study estimates a "definitive balk rate" to be under 2 percent, with another 2-3 percent being indecisive as to their intentions at this price point.

Purchase likelihood is high for Ticket Option A, as seen in the "Purchase Intent" and "Perception of Value" graphics. The bars display the purchase patterns between the unaided initial action question based solely on the ticket option's description compared to the actual price disclosure.

The percentage saying they "definitely would purchase" increased from 51 percent to fully 82 percent saying that they would purchase the adult ticket at the proposed $24 fee.

Value for Ticket Option A is high, with 91 percent saying it is an excellent/very good value for the price.

In the "Ticket Option A — Pricing Strategy" graphic, the point at which the Too Inexpensive and Too Expensive responses intersect is considered the Optimal Price Point (solid vertical line), in this case just under $32. The point at which the Inexpensive and Expensive responses intersect is considered the Indifference Price Point (dashed vertical line), in this case it is approximately $39.75. Thus the proposed $24 entrance fee was an appropriate pricing strategy. (The vertical axis is cumulative percentage points and the horizontal is in dollars.)

Ticket Option B

As with Ticket Option A, respondents were first read an unpriced description of a limited access ticket to the Space Center Complex, called Ticket Option B. This ticket design, which became the Limited Access ticket, was described as follows:

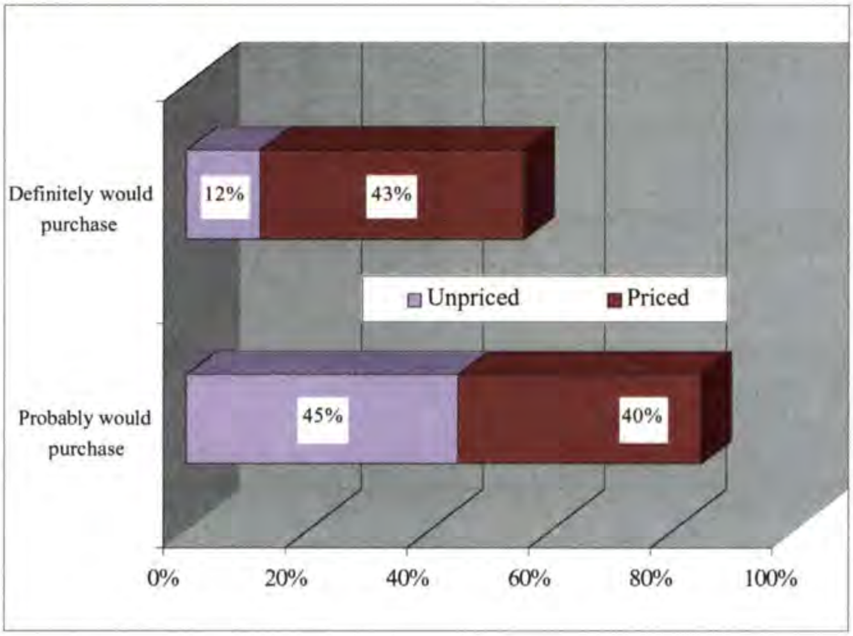
"With Ticket Option B, you have

Table 2: Pricing Perceptions – Ticket Option B

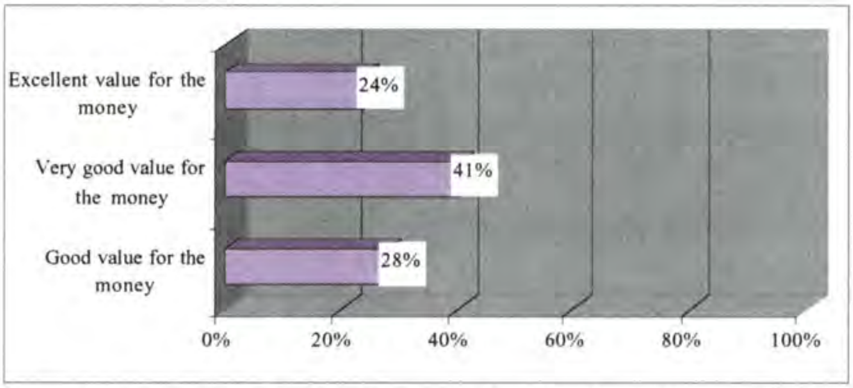
	Average Price Points			
Question	Overall	Non-Florida, US Residents	Florida Residents	International
Would be so cheap that you would question its quality	$6.81	$6.49	$5.84	$8.35
Would consider it a bargain	$17.05	$16.54	$14.64	$19.78
Would begin to seem expensive	$27.65	$26.83	$24.74	$32.02
Would be too expensive to consider	$35.52	$33.98	$32.69	$41.86
Would expect to pay	$19.44	$19.02	$17.67	$21.72

*Mean response, 5 percent trim to reduce the effect of extreme outliers.

Purchase Intent



Perception of Value



access to Early Space Exploration, New Millennium, and Visitor Complex attractions only."

After reading the description, the respondent continued the interview in the same sequence as with Ticket Option A. Fifty-seven percent indicated that they definitely or probably would buy this (unpriced) option. The mean (averages) responses to the five key points of the pricing model are shown in Table 2.

About 6 percent expressed a definite resistance to the proposed entrance price of $10. This relatively small negative reaction indicated that the planned fee for the Limited Access ticket had very good market acceptance. Ten percent said that they "might or might not" purchase. Key points include:

• On average, the expected entrance fee for the Limited Access ticket was $19.44.

• Non-Florida residents expected to pay an amount just slightly higher than Florida residents: $19.02 versus $17.67, respectively.

• International visitors expected to pay an average of $21.72.

• The plotting of the Optimal Price Point (OPP) and the Indifference Price Point (IDP) indicated a narrow band range from $19.50 to $21.

• After respondents were told the actual $10 price, the "definite likelihood" of purchase increased nearly four-fold from the unpriced response of 12 percent to the priced response of 43 percent.

The Limited Access ticket's perceived value for its $10 price also was high: 65 percent considered it an excellent/very good value for the money.

Purchase likelihood was high for Ticket Option B as seen in the graphics above. The bars display the purchase patterns between the unaided initial action question based solely on the ticket option's description compared to the actual price disclosure. The percentage saying they "definitely would purchase" the ticket at the proposed $10 fee increased from 12 percent to 43 percent. Twenty-four percent said that the $10 entrance fee was an excellent value for the money and another 41 percent rated the value as very good.

In the "Ticket Option B — Pricing Strategy" graphic, the Optimal Price Point (solid vertical line) is around $19.50; the Indifference Price Point (dashed vertical line) is just about $21.00. This showed that the proposed $10 entrance fee was an appropriate pricing strategy. (The vertical axis is cumulative percentage points, whereas the horizontal is in dollars.)

Secondary set of questions

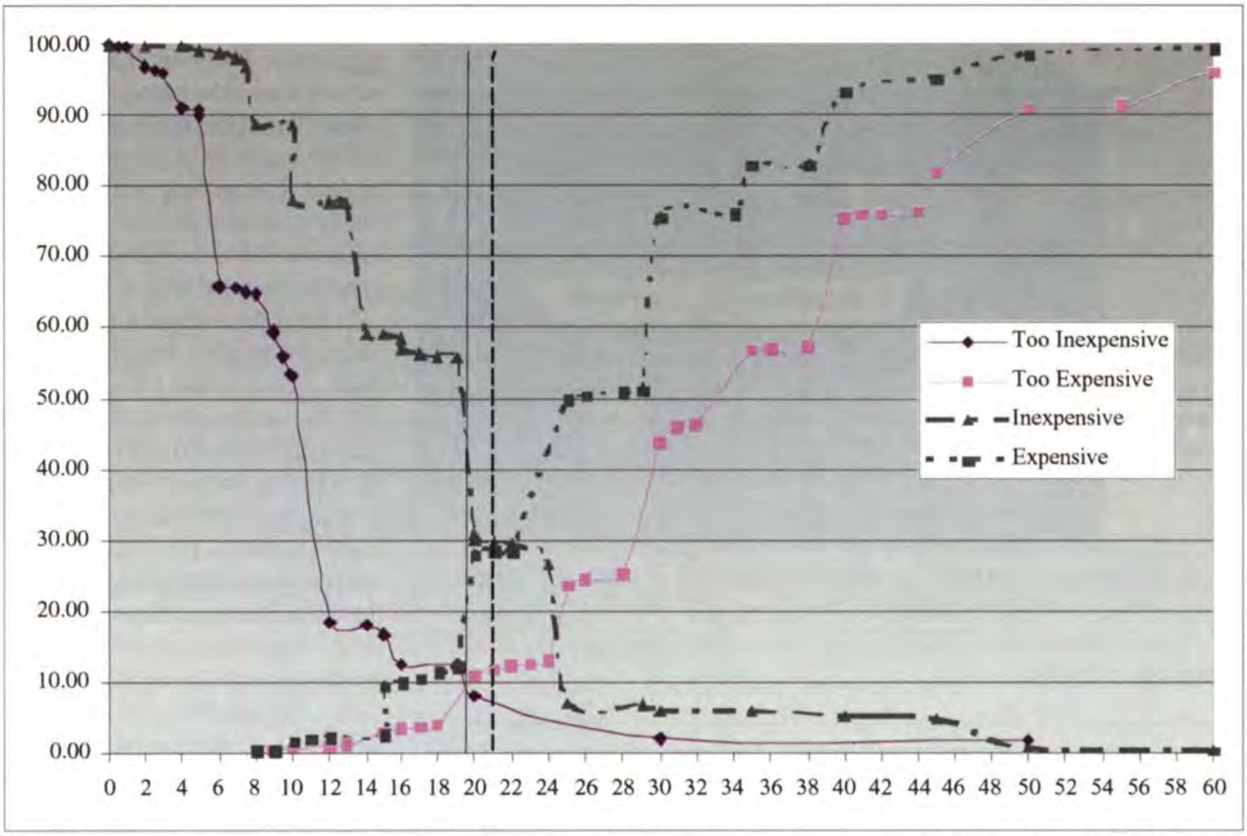
Ticket Option A was clearly preferred, with over 90 percent of respondents selecting this entrance option. (Responding to the question "Given these two admission options to the Kennedy Space Center, which one would you most likely purchase?", 93 percent chose Option A and 7 percent chose Option B.

Of the 7 percent of respondents who favored Ticket Option B, most were concerned about not having enough time available to take advantage of all the facilities/attractions involved with Ticket Option A. When these respondents were asked "If Ticket Option B was not available, what would you do?", 57 percent said they would purchase Ticket Option A; about one-third (31 percent) of this sub-group said they would leave. (This departing group translates into approximately 2 percent of the visitors [31 percent of 7 percent].) The 11 percent who chose "other" generally expressed an interest in a family ticket option or in just walking around.

Respondent demographics

While no specific quotas were planned, a good distribution of visitors was monitored (both at the residency and age group levels) and the principal decision maker was interviewed among those in the travel party. (The author's experience in the area's attraction mar-

Ticket Option B – Pricing Strategy



ket has found that the decision is typically a family affair.)

Almost half of visitors interviewed were between 25 and 44 years old. (Age 18-24: 21 percent; age 25-34: 23 percent; age 35-44: 24 percent; age 45-54: 23 percent; 55-64: 8 percent; 65 and over: 2 percent.)

	Number	Percent
Family	246	49%
Non-Family	260	51%
Base	506	100%

The gender breakdown was 55 percent male and 45 percent female.

The composition of the visitor travel party was evenly split between family and non-family composition, with an average of 3.3 members per party.

	Number	Percent
Northeast	70	14%
Midwest	77	15%
South	196	39%
West	41	8%
International	122	24%
Total	506	100%

As might be expected, the majority of visitors were from the southern U.S., with 15 percent overall from Florida and the majority being full-time residents.

Conclusions

Based on the research, the following conclusions were drawn:

Maximum Access badge

• There was strong market acceptance for the proposed Maximum Access ticket option: 82 percent said that they would "definitely" purchase this option as described at the $24 price.

• The estimated "balk rate" was under 2 percent; an additional 2 to 3 percent were "indecisive."

• The acceptable price range was from $30 to $40.

• Just over half (52 percent) rated the Maximum Access ticket option as an excellent value for the money; 39 percent said its value was "very good."

Limited Access ticket

• Just under half (43 percent) would "definitely" buy the Limited Access ticket option, as priced and described; 40 percent would "probably" make the purchase.

• There was an approximate 6 percent "balk rate;" 10 percent were indecisive.

• The Limited Access ticket had an acceptable price range of $19.50 to $21.

Positive review

The study received very positive review from both Delaware North management and NASA. The results of their actions took effect in March 2000:

• The pricing study also found a market segment that comes to the Visitor Complex with the sole purpose of purchasing merchandise and/or souvenirs. As a result, a "shopper pass" was introduced into the admissions structure during the last quarter of 2000.

• As of January 2001, the Limited Access ticket option was sold only to visitors who arrived after the last Kennedy Space Center Tour bus departed. Thus, late-arriving visitors are still able to see the many exhibits in and around the actual Visitor Complex.

• Management began an ongoing tracking program to monitor visitor activity, opinions toward the Complex and associated exhibits, and entrance fee structure.

• The study has also generated several adjunct studies for Complex partners such as concessions and food services.

Names of Note

continued from p. 10

promoted to general manager group.

Laura Miller has been named research analyst at *Ulrich Research*, Orange Park, Fla. In addition, **Jim Flagg** has become the firm's co-owner and vice president.

Polaris Marketing Research, Inc., Atlanta, has promoted **R. Casey Goodman** to senior project manager.

Goodman

Stucki

Robert Stucki has been promoted to operations director at *Western Wats B2B*, a Provo, Utah, research firm.

Gil Hoffman, chief information officer of *Maritz Inc.*, St. Louis, has been named a "Premier 100 IT Leader for 2001" by *Computerworld* magazine.

Research Data Design, Portland, Ore., has named **Laura Duran** site manager of the firm's new call center in Las Cruces, N.M.

Jeffrey Bliss has been named vice president of *Saul Cohen & Associates*, Ltd., a Stamford, Conn., research firm.

Janet Streicher has joined *Knowledge Networks*, a Menlo Park, Calif., marketing information firm, as a vice president and managing director of the technology practice. In addition, the firm named **Charles Pearson** vice president and managing director for the Western region.

MarketTools, Inc., a Mill Valley research firm, has added three members to its board of directors: **Gayle Fuguitt** of General Mills; **Michael Mills** of Ticonderoga Capital; and **Richard Beanland** of WPP's information and consulting division, The Kantar Group.

Focus Pointe Manhattan (formerly The New York Conference Center) has named **Janis Wagman** facility manager.

Cheskin, a Redwood Shores, Calif., research firm, has named **Amy Francetic** senior strategy consultant in wireless.

Raul J. Lopez has joined Access Worldwide's *Cultural Access Group* as general manager, based in Miami. He will split his time between the company's office in Los Angeles and the new Miami location.

New York-based *Jupiter Media Metrix* has announced a new executive management structure to support its evolution into an integrated measurement and analyst research organization. In addition, the company has initiated an external search for a new chief executive officer. Until the search is completed, **Tod Johnson** will remain in his current position as chairman and chief executive officer. The company's two group presidents, **Kurt Abrahamson** and **Mary Ann Packo**, will divide responsibilities along functional lines, with Abrahamson assuming responsibility for the U.S. business and worldwide sales and Packo assuming responsibility for the international business and worldwide strategic marketing. **Jean Robinson**, Jupiter Media Metrix's chief financial officer, will take on additional responsibilities as the company's chief administrative officer.

Mary Jo Emery has joined Chicago-based *SPSS MR* as a senior sales executive.

Eduventures.com, a Boston market research firm, has added **Jim McVety** to its research team and named **Chris Curran** director of client services.

New York accessories maker *Coach* has named **Kate Buggeln** senior vice president, strategic planning and new business development.

Irving, Texas, research and CRM firm *Aegis Communications Group, Inc.* has named **Stanton D. Anderson**, a partner with the law firm of McDermott, Will, & Emery, to its board of directors, replacing **Robert Denious**, who has resigned from the board.

Christina Labertow has joined *Eagle Research-Denver* as a supervisor in the qualitative research department. **Steve Riegel** has been named director of operations in the Denver office. At *Eagle Research-Atlanta*, **Robin Protheroe** has been named qualitative director.

Consumer Pulse, Inc. (CPI), Birmingham, Mich., has appointed **Patrick J. Parrott** chief operating officer.

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Qual. & Quant. Rsch. Focus Groups In Many Categories.

View Finders Market Research
11 Sandra Lane
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Ph. 914-735-7022
Fax 914-735-7256
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Primary Insights, Inc.
Strategic Focus, Inc.

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MarketBetter, Inc.
Smithmark Corporation

Iowa
Essman/Research

Maryland
Low + Associates, Inc.

Massachusetts
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Hispanic Research Inc.
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James Spanier Research
Thorne Creative Research
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I+G Medical Research International

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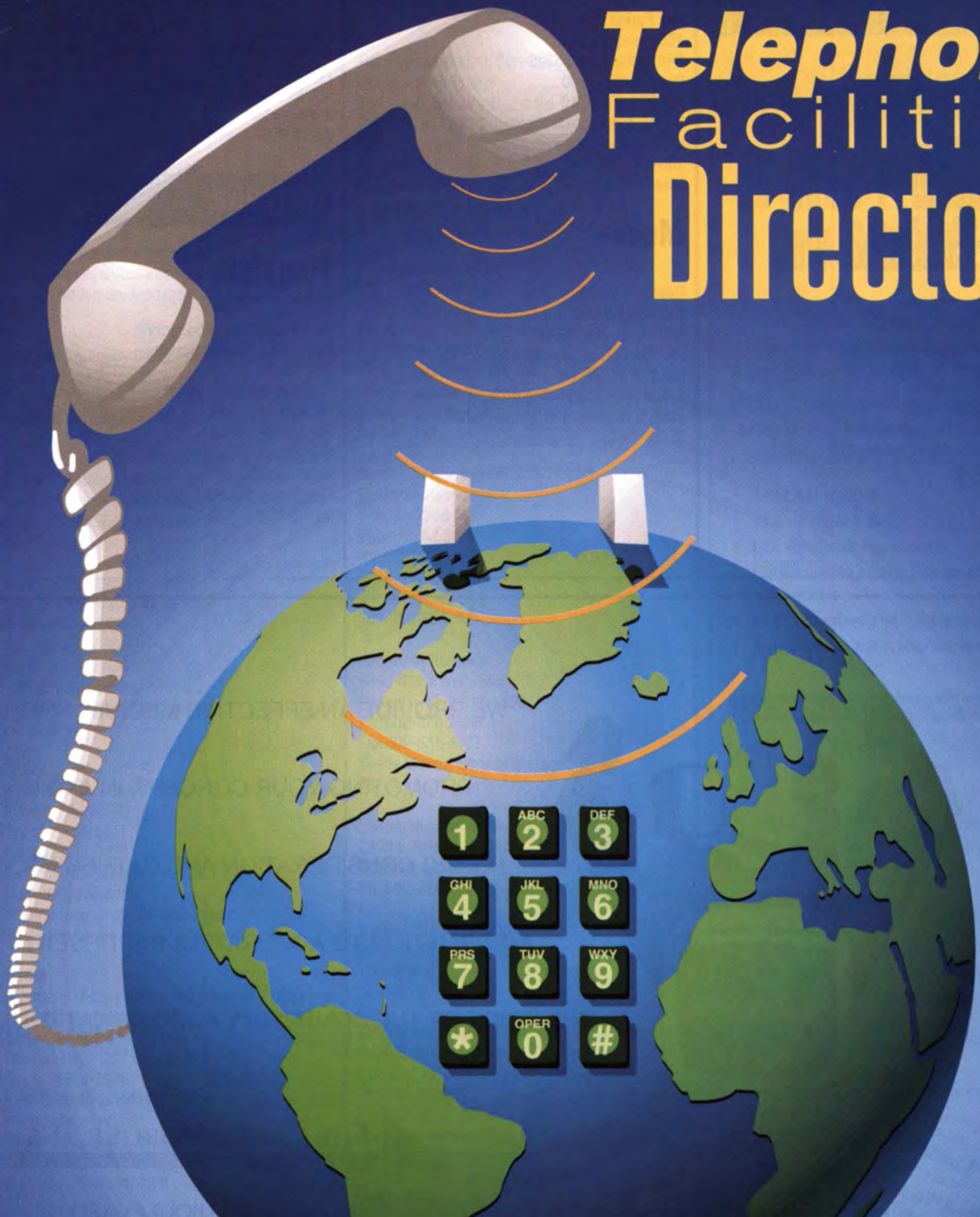

This directory was developed by mailing forms to firms we identified as having telephone interviewing facilities. In addition to each company's vital information, we've included a line of codes showing the number of interviewing stations, the number of stations that use computer-aided interviewing (CATI), and the number of stations that can be monitored on-site and off-site.

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

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

Alabama

Birmingham

Connections, Inc.
3928 Montclair Rd., Ste. 230
Birmingham, AL 35213
Ph. 205-879-1255
Fax 205-868-4173
E-mail: bvwconnect@mindspring.com
Rebecca V. Watson, President
32-14-32-0

Graham & Associates, Inc.
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Birmingham, AL 35244
Ph. 205-443-5399
Fax 205-443-5389
E-mail: grahampga@aol.com
Cindy Eanes, Vice President
30-15-30-30

New South Research
3000 Riverchase, Ste. 405
Birmingham, AL 35244
Ph. 205-443-5350 or 800-289-7335
Fax 205-443-5340
E-mail: jjager@newsouthresearch.com
Jim Jager, President
40-15-40-40

The Parker Group, Inc.
468 Palisades Blvd.
Birmingham, AL 35209
Ph. 205-868-1700
Fax 205-868-1710
E-mail: tpggroup@aol.com
www.the-parker-group.com
160-160-160-160
(See advertisement on p. 72)

Mobile

Research Strategies, Inc.
P.O. Box 190666
Mobile, AL 36619-0666
Ph. 334-660-2910 or 504-522-2115
Fax 334-660-2918
E-mail: rsincorp@bellsouth.net
Patricia Rhinehart, Vice President
25-25-25-0

Alaska

Anchorage

Craciun Research Group
630 W. 4th Ave.
Anchorage, AK 99501
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Fax 907-279-0321
E-mail: craciun@craciun.com
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40-15-40-0

Arizona

Flagstaff

Social Research Laboratory
Northern Arizona University
Box 15301
Flagstaff, AZ 86011-5301
Ph. 520-523-1515
Fax 520-523-6654
E-mail: Fred.Solop@nau.edu
www.nau.edu/~srl
Fred Solop, Associate Director
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Phoenix

The Analytical Group, Inc.
8687 E. Via de Ventura
Scottsdale, AZ 85258
Ph. 480-483-2700
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Lucy Haydu
60-60-60-60
(See advertisement on p. 23)

Arizona Market Research Services
Div. of Ruth Nelson Research
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Fax 602-944-0130
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www.ruthnelsonresearchsvcs.com
Lincoln Anderson, Manager
20-0-20-1

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Fax 602-252-2729
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Earl de Berge, Research Director
50-50-50-50

Creative Consumer Research
500 W. Broadway, #102
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Norma Gomez, Branch Manager
30-15-30-15

Datacall, Inc.
8055 N. 24th Ave., #111
Phoenix, AZ 85021
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Fax 602-864-0029
E-mail: shelley@data-call.com
www.data-call.com
Shelley Thompson, Sr. Vice President
40-40-40-40

Delve
(Formerly Quality Controlled Services - QCS)
1225 W. Washington, Ste. 113
Tempe, AZ 85281
Ph. 800-647-4217 or 602-914-1950
Fax 602-914-1909
E-mail: postmaster@delve.com
www.delve.com
Robert Dobbs, Branch Manager
14-0-0-0
(See advertisement on p. 103)

Focus Market Research, Inc.
Camelback Executive Park
6991 E. Camelback Rd., Ste. A-110
Phoenix, AZ 85251
Ph. 480-874-2714
Fax 480-874-1714
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www.focusmarketresearch.com
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Friedman Marketing Services
Phoenix Field/Phone
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Phoenix, AZ 85015
Ph. 602-242-6617 or 914-698-9591
Fax 602-242-6534
E-mail: gvigeant@roper.com
www.friedmanmktg.com
10-0-10-0

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Tempe, AZ 85282
Ph. 888-967-4441 or 480-967-4441
Fax 480-967-6171
E-mail: surveys@oneilresearch.com
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14-14-14-0

Research International USA/Phoenix
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Fax 602-735-3270
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Phoenix, AZ 85013-1150
Ph. 602-277-2526
Fax 602-631-4477
Shelly Munoz, General Manager
75-25-75-25

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

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

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

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

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

Tucson

C P I
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Tucson, AZ 85710-3942
Ph. 520-751-0900 or 800-313-8720
Fax 520-751-0918
E-mail: jpetrillo@cpisurveys.com
Jim Petrillo, President
70-70-70-70

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

Parker Consulting, LCC
4500 E. Speedway Blvd., Ste. 16
Tucson, AZ 85712
Ph. 888-530-9908
Fax 888-423-1614
Tony Parker, Owner
72-72-72-72
(See advertisement on p. 72)

PhoneSolutions, L.L.C.
1101 N. Wilmot Rd., Ste. 253
Tucson, AZ 85712
Ph. 520-296-1015
Fax 520-296-3393
E-mail: michael@phonesolutions.com
www.phonesolutions.com
Mike Schlegel, President
75-75-75-75
(See advertisement on p. 73)

Arkansas

Fort Smith

C & C Market Research, Inc.
3730 Rogers Ave.
Fort Smith, AR 72903
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
19-8-19-19

Little Rock

Flake-Wilkerson Market Insights, LLC
333 Executive Ct., Ste. 100
Little Rock, AR 72205
Ph. 501-221-3303 or 800-327-8831
Fax 501-221-2554
E-mail: research@mktinsights.com
www.mktinsights.com
Sandy Houser, Dir. Interviewing Operations
50-50-50-50

ICT Research Services/VFIS
1535 N. Business, 9-B
Morrilton, AK 72110-1539
Ph. 877-360-3419
E-mail: asuperfine@ictgroup.com
Alan Superfine, Vice President
80-80-80-80

California

Bakersfield

Marketing Works
425 18th St.
Bakersfield, CA 93301
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E-mail: marketworks@aol.com
Dee Simpson, Owner
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Fresno

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

Bartels Research Corp.
145 Shaw Ave., Bldg. C
Clovis, CA 93612
Ph. 559-298-7557
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Patrick Bartels, Vice President
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Nichols Research, Inc.
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Ph. 559-226-3100
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www.nichols-research.com
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15-8-10-0

Los Angeles

(See also Orange County)

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Fax 562-493-6535
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www.appliedmktresearch.com
Dr. Anita Kantak, Principal
17-17-17-17

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20-0-20-0

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Long Beach, CA 90806
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Fax 562-981-2705
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www.aimresearchnetwork.com
Peter Carmichael, Manager
14-0-0-0

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Fax 818-780-0329
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44-44-44-44

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250-250-250-250

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Angie Abell, Director
20-12-20-20

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Denver, CO 80014
Ph. 303-751-0190
Fax 303-751-8075
E-mail: irires@aol.com
Norm Petitt, President
15-0-15-15

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240 St. Paul St., Ste. 100
Denver, CO 80206
Ph. 303-388-0873
Fax 303-388-3822
E-mail: kweiss@marketperceptions.com
www.marketperceptions.com
Erika Queen, Research Facilities Mgr.
20-20-20-20

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Denver, CO 80226
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Fax 303-922-1589
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www.paragon-research.com
Dave Xaviers, Nat'l. Field Director
40-25-40-40

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Fax 303-922-9181
Ruby Standage, President
50-0-50-35

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1150 Delaware St.
Denver, CO 80204
Ph. 303-623-3600
Fax 303-825-8131
Harvey H. Sundel, President
30-0-30-30

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

1. STATIONS - No. of interviewing stations at this location
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Aurora, CO 80011
Ph. 720-859-8700
Fax 720-859-8770
E-mail: mdf@tmrinfo.com
www.tmrinfo.com
Michael Felderman, V.P./G.M.
50-50-50-50

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3950 JFK Pkwy., Bldg. 10
Fort Collins, CO 80525
Ph. 970-226-4333
Fax 970-226-4770
E-mail: gretchen@pbr-net.com
www.pbr-net.com
Gretchen Schlager, Dir. of Client Services
200-200-200-200

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Grand Junction, CO 81501
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Fax 801-434-7304
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www.pgmincorporated.com
Robert E. Higginson, V.P./Client Relations
24-24-24-24

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Focus Facility Hartford
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Farmington, CT 06032
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Fax 860-677-4967
E-mail: B1Research@aol.com
Paul Keene, Telephone Ctr. Director
20-0-10-0

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Fax 203-777-1807
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www.crpp.com
Jerry C. Lindsley, President
25-25-25-25

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Fax 203-483-0408
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Robert Lester, President
100-100-100-100

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E-mail: srstrumbull@aol.com
Sandy Shapiro, President
8-0-8-0

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Lorraine Kweskin, V.P. Client Services
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Ann Stabile, Vice President
35-6-35-35

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www.aspensys.com/services/services.html
Richard Rosenthal
16-16-16-0

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15200 Shady Grove Rd., Ste. 350
Rockville, MD 20850
Ph. 301-840-3850
Fax 301-840-3859
E-mail: DC@centracUSA.com
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Jeffrey Adler, President
100-75-100-100

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Fax 703-442-0967
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www.consumerpulse.com
Jeff Davis, Director
15-8-15-15

Decision Data Collection
1489 Chain Bridge Rd., #100
McLean, VA 22101
Ph. 703-556-7748
Fax 703-356-1680
Gary Brown, Exec. Vice President
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Fairfax, VA 22030
Ph. 703-385-1108
Fax 703-385-8620
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www.metroresearchservices.com
Angela Lorinchak, President
16-0-16-0

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Washington, DC 20008
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Fax 202-686-7163
E-mail: nr@dgsys.com
Rebecca Craig, President
50-37-37-37

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HTI Custom Research
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Hyattsville, MD 20782
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45-45-45-45

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7253-C Hanover Pkwy.
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Fax 301-474-4307
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www.OMRdc.com
Jill L. Siegel, President
35-0-35-35

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Bethesda, MD 20814
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Rick Seale, V.P. Field Operations
20-0-20-20

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Steve Markenson, President
40-40-40-40

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Ph. 301-251-1500
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Fax 954-344-7687
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Lois Stermer, Vice President
48-48-48-20

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Fort Lauderdale, FL 33068
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Paula Smith, President
15-0-15-0

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Patrick Altiere, Sr. Project Director
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Gainesville

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Fax 352-371-0087
E-mail: aparrish@irwinservices.com
www.irwinservices.com
Angela Parrish, Director, Telephone Operations
94-94-94-94
(See advertisement on p. 85)

Perceptive Market Research, Inc.
2306 S.W. 13th St., Ste. 807
Gainesville, FL 32608
Ph. 800-749-6760 or 352-336-6760
Fax 352-336-6763
E-mail: surveys@pmrresearch.com
www.pmrresearch.com
Dr. Elaine M. Lyons-Lepke, President
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Jacksonville

Consumer Pulse of Jacksonville
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Jacksonville, FL 32225
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Fax 904-723-0048
E-mail: jacksonville@consumerpulse.com
www.consumerpulse.com
Leisa Dorough, Manager
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E-mail: kirkresh@bellsouth.net
Rebecca Kirk, Vice President
15-0-15-0

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E-mail: mail@markethorizons.com
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Charles A. McMillin, Principal/CEO
50-45-45-45

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Jim Flagg, Vice President
20-0-20-0

Melbourne

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Melbourne, FL 32905
Ph. 352-722-9600
Fax 352-722-9017
E-mail: dhenry@irwinservices.com
www.irwinservices.com
Denise Henry, President
74-74-74-74
(See advertisement on p. 85)

Miami

Ask Miami Market Research
2121 Ponce De Leon Blvd., Ste. 1250
Miami, FL 33134
Ph. 800-282-2771 or 305-443-2000
Fax 305-448-6825
E-mail: AskMiami@aol.com
www.askmiami.com
Juliette Aldana-Chiles, Dir. of Field Services
30-12-30-30

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Findings International Corp.
9100 Coral Way, Ste. 6
Miami, FL 33165
Ph. 305-225-6517
Fax 305-225-6522
E-mail: findings@interfindings.com
Orlando Esquivel, President
20-0-20-0

The Market Segment Group
201 Alhambra Circle, Ste. 804
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E-mail: gberman@marketsegment.com
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National Opinion Research Services
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Daniel Clapp, President
100-100-100-100
(See advertisement on p. 84)

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Ph. 305-620-4244
Fax 305-621-3533
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Sandy Palmer, Vice President
28-0-28-28

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Fax 352-369-5335
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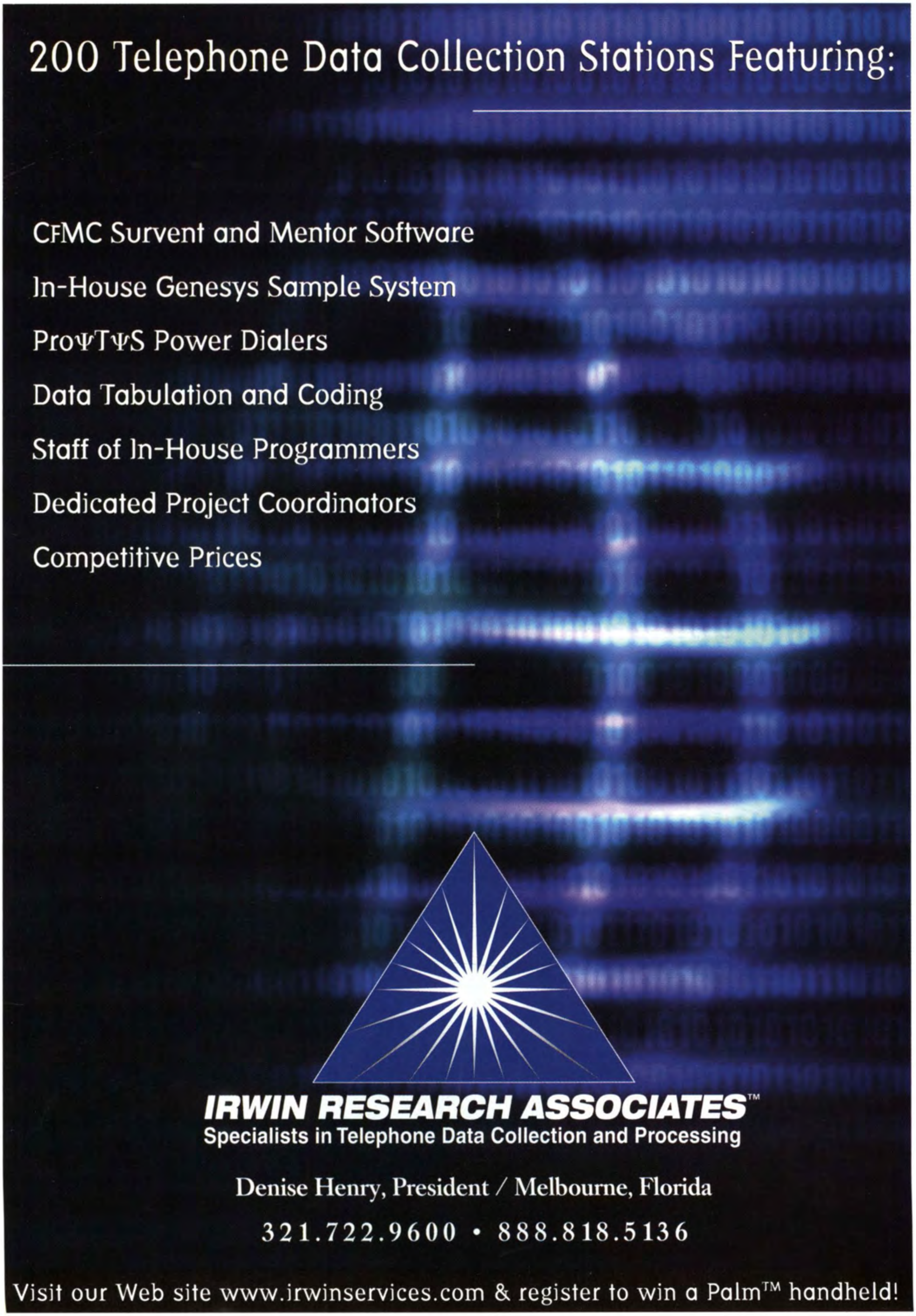
Angela Parrish, Director, Telephone Operations
32-32-32-32
(See advertisement on p. 85)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Orlando

AccuData Market Research, Inc.
520 N. Semoran Blvd., Ste. 100
Orlando, FL 32807
Ph. 800-731-3527 or 407-282-3770
Fax 407-282—3771
E-mail: orlando@accudata.net
www.accudata.net
12-0-12-0

Hancock Information Group, Inc.
2180 W. State Rd. 434, Ste. 3170
Longwood, FL 32779
Ph. 800-595-0101 or 407-682-1556
Fax 407-682-0025
E-mail: amy.williams@hancockinfo.com
www.hancockinfo.com
100-100-100-100

Insight Orlando, Inc.
5828 S. Semoran Blvd.
Orlando, FL 32822
Ph. 407-384-8883
Fax 407-384-9048
E-mail: insighto@magicnet.net
Stockton Reeves, President
20-0-20-20

Barbara Nolan Market Research
218 Jackson St.
Maitland, FL 32751
Ph. 407-629-8800 or 800-240-6119
Fax 407-629-7633
E-mail: BNMR172@attglobal.net
50-16-50-50

Schlesinger Associates South, Inc.
Maitland Green II
2290 Lucien Way, Ste. 180
Maitland, FL 32751
Ph. 407-660-1808
Fax 407-660-0225
E-mail: orlando@schlesingerassociates.com
www.schlesingerassociates.com
Deborah Leaper, Facility Director
14-14-14-0
(See advertisement on p. 9)

Pensacola

The Listener Group
1163 Gulf Breeze Pkwy.
Gulf Breeze, FL 32561
Ph. 877-616-8363
Fax 850-934-7454
E-mail: info@listenergroup.com
www.listenergroup.com
Robert W. Smith, CEO
100-100-100-100
(See advertisement on p. 86)

Tallahassee

MGT of America, Inc.
2123 Centre Point Blvd.
Tallahassee, FL 32308
Ph. 850-386-3191
Fax 850-385-4501
E-mail: nstepina@mgtamer.com
www.mgtamer.com
Nancy Stepina, Director of Marketing
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Maria Callanan, Manager
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600 N. Westshore Blvd., Ste. 702
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Fax 813-282-3553
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www.herrongroup.com
Elaine Herron-Cravens, President
24-4-24-0

RSVP/Research Services
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E-mail: mindy@rsvpresearch.com
www.rsvpresearch.com
60-60-60-60
(See advertisement on p. 127)

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Conference Center
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Fax 813-875-6789
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24-0-24-0

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Arnold Sheer
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www.field-n-focus.com
Shirley Stanko, Telephone Supervisor
35-35-35-35

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Peter McGuinness, President
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Fax 561-965-6925
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Judy A. Hoffman, President
40-40-40-35

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Georgia

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Fax 706-548-6094
www.cmrcompass.com
52-52-52-52

Atlanta

Booth Research Services, Inc.
1120 Hope Rd., Ste., 200
Atlanta, GA 30350
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Fax 770-642-4535
E-mail: dottie@boothresearch.com
www.boothresearch.com
Dottie Nix, V.P. Account Services
75-75-75-75

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

Compass Marketing Research
3725 DaVinci Ct., Ste. 100
Norcross, GA 30092
Ph. 770-448-0754
Fax 770-416-7586
E-mail: CMRCOMPASS@aol.com
www.cmrcompass.com
Scott Taylor, President
120-110-110-110
(See advertisement on p. 89)

Data Research Services
3323 Chamblee - Dunwoody Rd.
Atlanta, GA 30341
Ph. 770-455-0114
Fax 770-458-8926
E-mail: jon@dataservice.com
www.dataservice.com
Jon A. Mitchell, Exec. Vice President
32-32-32-32

Delve
(Formerly Quality Controlled Services - QCS)
2635 Century Pkwy., Ste. 100
Atlanta, GA 30345
Ph. 800-227-2974 or 404-321-0468
Fax 404-636-3276
E-mail: postmaster@delve.com
www.delve.com
Susan Lipsitz, Branch Manager
14-0-14-0
(See advertisement on p. 103)

Eagle Research - Atlanta
One Dunwoody Park, Ste. 128
Atlanta, GA 30338
Ph. 770-395-6090 or 770-350-7704
Fax 770-671-9708
E-mail: joel.reish@eagleresearch.com
www.eagleresearch.com
Joel Reish, Vice President
96-96-96-96
(See advertisement on p. 88)

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

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290 Fourteenth St.
Atlanta, GA 30318
Ph. 404-892-2931
Fax 404-892-8651
E-mail: research@imagesusa.net
Deborah White, Director of Field Services
20-20-20-20
(See advertisement on p. 87)

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

1. STATIONS - No. of interviewing stations at this location
2. CATI - No. of stations using computer-aided interviewing
3. ON-SITE - No. of stations which can be monitored on-site
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Margaret Hicks, President
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Fax 404-634-8131
Glenda McMahon, Study Director
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Fax 770-451-6184
Terri Clark
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Mid-America Rsch./Facts In Focus
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Fax 404-261-5576
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Debra Wilson
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Ph. 404-848-8188 or 800-956-9818
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Robert Van Dam, President
14-14-14-14

Schlesinger Associates Atlanta, Inc.
The Palisades Building, Ste. 950
5909 Peachtree Dunwoody
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www.schlesingerassociates.com
Stephenie King, Facility Director
20-0-20-20
(See advertisement on p. 9)

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Carol Sanchez
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Dydra H. Virgil, Principal
20-12-12-12

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Atlanta Marketing Research Center
5600 Roswell Rd., Ste. 300 North
Atlanta, GA 30342
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Fax 404-237-1235
E-mail: john@pwarner.com
www.pwarner.com
20-0-20-0

Whaley Research & Associates, Inc.
102 N. 85 Pkwy.
Fayetteville, GA 30214
Ph. 800-576-3041 or 770-461-9350
Fax 770-719-5407
E-mail: wra@bellsouth.net
Marilynn Whaley, CEO
40-40-35-35

Gainesville

DRS Dawsonville Field Office
86 Hwy. 53 W., Ste. 210
Dawsonville, GA 30534
Ph. 706-265-9052
Fax 706-265-9054
E-mail: ggriffin@dawsonvillefieldoffice.com
www.dawsonvillefieldoffice.com
Gary Griffin, Sales Director
32-32-32-32

Hawaii

Honolulu

Market Trends Pacific, Inc.
1001 Bishop St., Ste. 505
Honolulu, HI 96813
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Fax 808-532-0744
E-mail: info@markettrendspacific.com
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Pacific Tower, 19th fl.
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Ph. 808-524-5194
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Barbara Ankersmit, President
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1042 Fort St. Mall, Ste. 200
Honolulu, HI 96813
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Fax 808-537-2686
Jim Dannemiller, President
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E-mail: wrstaff@wardresearch.com
Rebecca S. Ward, President
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Idaho

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Boise, ID 83704
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Fax 208-376-2008
E-mail: info@clearwater-research.com
www.clearwater-research.com
Janice L. Rush, Admin. Director Research
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Northwest Research Group, Inc.
225 N. 9th St., Ste. 200
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Rebecca Elmore-Yalch
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Pocatello

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Pocatello Phone Room
1800 Garrett Way
Pocatello, ID 83201
Ph. 800-276-5594
Fax 617-746-2709
E-mail: info@bernett.com
www.bernett.com
Andrew Hayes, Brother & Partner
220-220-220-220
(See advertisement on p. 25)

David's Phone Center
640 Pershing Dr.
Pocatello, ID 83201
Ph. 208-232-1818
Fax 208-232-1466
David McKamey, President
118-118-118-118

Western Wats B2C
8 South 1st East
Rexburg, ID 83440
Ph. 801-375-0636
Fax 801-375-0672
E-mail: dottesen@westernwats.com
Dave Ottesen
92-92-92-92
(See advertisement on p. 133)

Western Wats CfMC - CATI Center
250 S. Woodruff
Idaho Falls, ID 83401
Ph. 801-375-0636
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Dave Ottesen
45-45-45-45
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Moscow Phone Room
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East Side Marketplace
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www.bernett.com
Andrew Hayes, Brother & Partner
220-220-220-220
(See advertisement on p. 25)

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Moscow, ID 83843
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Jeff Welch
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1620 W. Main
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24-16-24-24

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Andrea Weiner, Project Director
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Tony Pacenti
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(See advertisement on p. 23)

Assistance In Marketing/Chicago
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Cherlyn Robinson, Project Coordinator
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Terry Cotter, President
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Kathy Beimfohr
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Data Research, Inc.
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Richard Day, President
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www.delve.com
Candice Wysock, Branch Manager
10-0-10-0
(See advertisement on p. 103)

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

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

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Ava Powell, General Manager
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Kevin Heakin, Vice President
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Elizabeth Ganze, Dir. Of Data Collection
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Diana Manos, Field Work Manager
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(See advertisement on back cover)

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Kevin Rooney, Vice President
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Galli Research Services
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Maureen Clancy, President
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Precision Research, Inc.
O'Hare Corporate Towers
10600 W. Higgins Rd., Ste. 100
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Fax 847-390-8885
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Scott Adleman, President
30-6-30-30
(See advertisement on pp. 44, 55)

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Darlene Piell, Partner
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Thomas Paul
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Kevin Smith, President
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Larry Kaplan, CEO
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Van Pitts, Manager Phone Services
6-0-6-0
(See advertisement on p. 81)

U.S. Research Co.
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2. CATI - No. of stations using computer-aided interviewing
3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES- No. of stations which can be monitored off-premises

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Chris Cage, President
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Gary

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Fax 219-464-7011
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www.kldresearch.com
Kathleen L. DeWitt, President
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Indianapolis

Circle City Research Corp.
7150 E. Washington St., Ste. FC028
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Kathy DeMunbrun, President
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710 Executive Park Dr.
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www.herron-research.com
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Janet Jackson, President
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Indianapolis, IN 46241
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Fax 317-227-3001
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Toby Stone, President
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Cynthia Haugen, Marketing Manager
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Mason City

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Tom Thul, Partner
30-25-25-25

Shenandoah

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Kansas

Kansas City

(See Kansas City, MO)

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Kentucky

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Louisiana

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321 St. Charles Ave.
New Orleans, LA 70001
Ph. 504-522-2115
E-mail: rsincorp@bellsouth.net
Patricia Rhinehart, Vice President
8-8-8-0

Southern Spectrum Research, Inc.
1600 Canal St., Ste. 400
New Orleans, LA 70112
Ph. 504-539-9222
Fax 504-539-9228
E-mail: lindecuir@aol.com
www.southernspectrum.com
Linda DeCuir, Research Coordinator
30-0-30-0

Maine

Portland

Market Decisions, LLC
85 E St.
South Portland, ME 04106
Ph. 207-767-6440
Fax 207-767-8158
E-mail: cmildner@marketdecisions.com
www.marketdecisions.com
Curtis Mildner, President
15-15-15-15

Seaport Surveys, Maine
44 Oak St.
Portland, ME 04101
Ph. 207-756-7770 or 800-756-7710
Fax 207-756-7777
E-mail: jkumnick@seaportsurveys.com
www.seaportsurveys.com
John Kumnick, President
15-0-15-15

Strategic Marketing Services
A Div. of Pan Atlantic Consultants, Inc.
5 Milk St.
Portland, ME 04101
Ph. 207-774-6738 or 207-871-8622
Fax 207-772-4842
E-mail: pmurphy@maine.rr.com
www.panatlantic.net
Patrick O. Murphy, President
20-10-20-0

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

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

Maryland

Baltimore

Assistance in Marketing/Baltimore
101 E. Chesapeake Ave., Ste. 102
Towson, MD 21286
Ph. 410-337-5000
Fax 410-337-0672
E-mail: kskopins@aimbalt.com
www.aimresearchnetwork.com
Carl Iseman or Kathy Skopinski
20-0-20-0

Bay Area Research
9936 Liberty Rd.
Randallstown, MD 21133
Ph. 410-922-6600
Fax 410-922-6675
E-mail: baya@erols.com
www.bayareamarketingresearch.com
Tamara Zwingelberg, President
35-30-30-30

Chesapeake Surveys
4 Park Center Ct., Ste. 100
Owings Mills, MD 21117
Ph. 410-356-3566
Fax 410-581-6700
E-mail: chessurv@migkap.com
Debbie Caplan
20-0-20-20
(See advertisement on p. 97)

Consumer Pulse of Baltimore
1232 Race Rd.
Baltimore, MD 21237
Ph. 410-687-3400 or 800-336-0159
Fax 410-687-7015
E-mail: baltimore@consumerpulse.com
www.consumerpulse.com
Kim Colwell, Director
20-12-20-20

Hollander Cohen & McBride
22 West Rd., Ste. 301
Towson, MD 21204
Ph. 410-337-2121
Fax 410-337-2129
E-mail: smcbride@hcmresearch.com
www.hcmresearch.com
Scott McBride, President
35-15-35-35

Innovative Medical Research, Inc.
11350 McCormick Rd.
Executive Plaza II, Ste. 1000
Hunt Valley, MD 21031
Ph. 410-785-2100
Fax 410-785-2140
E-mail: shocker@imrinc.com
www.imrinc.com
60-60-60-0

Maryland Marketing Source, Inc.
817 Maiden Choice Ln.
Baltimore, MD 21228
Ph. 410-247-3276
Fax 410-536-1858
E-mail: bbridge@mdmarketingsource.com
www.mdmarketingsource.com
Barbara Bridge, President
33-25-25-25

Hagerstown/Frederick

Marketing & Research Resources, Inc.
1303-A East Patrick St.
Frederick, MD 21701
Ph. 301-694-2800
Fax 301-694-5171
www.m-rr.com
David Vershel, President
64-64-64-64

Marketing & Research Resources, Inc.
79 E. Main St., Ste. 302
Westminster, MD 21157
Ph. 410-751-5300
Fax 410-751-5303
www.m-rr.com
David Vershel, President
24-24-24-24

Massachusetts

Boston

Atlantic Marketing Research Co., Inc.
109 State St.
Boston, MA 02109
Ph. 617-720-0174
Fax 617-589-3731
E-mail: phooper@atlantic-research.net
www.atlantic-research.net
Peter Hooper, President
36-36-36-36

Bernett Research Services, Inc.
1505 Commonwealth Ave.
Boston, MA 02134
Ph. 617-746-2600
Fax 617-746-2709
E-mail: andrew@Bernett.com
www.bernett.com
Andrew Hayes, Brother & Partner
220-220-220-220
(See advertisement on p. 25)

Dorr & Sheff, Inc.
2000 Commonwealth Ave.
Boston, MA 02135
Ph. 508-650-1292
Fax 508-650-4722
Garry Sheff, President
24-0-24-24

First Market Research Corp.
656 Beacon St., 6th fl.
Boston, MA 02215
Ph. 800-FIRST-1-1 or 617-236-7080
Fax 617-267-9080
E-mail: mpriddy@firstmarket.com
www.firstmarket.com
Margi Priddy, Project Director
20-20-20-20
(See advertisement on p. 22)

Kadence Business Research
85 Speen St.
Framingham, MA 01701
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Fax 508-620-1223
E-mail: kadenceus@kadence.com
www.kadence.com
Owen Jenkins, CEO
15-0-15-15

Opinion Dynamics Corp.
1030 Massachusetts Ave.
Cambridge, MA 02138-5335
Ph. 617-492-1400
Fax 617-497-7944
E-mail: nlutz@opiniondynamics.com
www.opiniondynamics.com
Henry Kanter, V.P. Operations
34-34-34-34

Performance Plus
111 Speen St., Ste. 105
Framingham, MA 01701
Ph. 508-872-1287
Fax 508-879-7108
www.performanceplusboston.com
Shirley Shames, President
32-6-32-0

Research Data, Inc.
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Framingham, MA 01702
Ph. 508-875-1300
Fax 508-872-2001
E-mail: rtippett@res-data.com
www.res-data.com
Ilene Kenney, Telephone Ops. Dir.
60-30-60-60

Voicentral
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Framingham, MA 01702
Ph. 508-820-1777
Fax 508-872-2001
E-mail: ikenney@res-data.com
www.res-data.com
Ilene Kenney, Telephone Ops. Dir.
60-30-60-60

Michigan

Ann Arbor

(See Detroit)

Battle Creek

WJ Schroer Company
Two W. Michigan Ave.
Battle Creek, MI 49017
Ph. 616-963-4874 or 616-963-4844
Fax 616-963-5930
E-mail: bschroer@prodigy.net
www.socialmarketing.org
Bill Schroer, Principal
6-6-6-0

Detroit

Advantage Research Services, Inc.
33620 Five Mile Rd.
Livonia, MI 48154
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Fax 734-261-8477
E-mail: Advantage3@aol.com
www.advantageresearch.net
David Sokolowski, President
40-20-40-0

AFFINA - The Customer Relationship Co.
800 Kirts Blvd., Ste. 600
Troy, MI 48084
Ph. 248-614-8400
Fax 248-614-5456
E-mail: mail@affina.com
www.affina.com
Amy Hernandez
50-50-50-50

Amrigon
42557 Woodward Ave.
Bloomfield Hills, MI 48304
Ph. 248-332-2300
Fax 248-333-9710
Richard Smith, President
192-192-192-192

Consumer Pulse of Detroit-WATS
725 S. Adams Rd., Ste. 265
Birmingham, MI 48009
Ph. 248-540-5330 or 800-336-0159
Fax 248-645-5685
E-mail: detroitwats@consumerpulse.com
www.consumerpulse.com
Robert Rochte, Director
60-30-60-60

Crimmins & Forman Market Research
29955 Southfield Rd.
Southfield, MI 48076
Ph. 248-569-7095
Fax 248-569-8927
E-mail: pcrimmins@crimminsandforman.com
www.crimminsandforman.com
20-10-20-20

DataStat, Inc.
3975 Research Park Dr.
Ann Arbor, MI 48108
Ph. 734-994-0540
Fax 734-663-9084
E-mail: twilkinson@datastat.com
www.datastat.com
Brent Phillips, Dir. Sales & Mktg.
68-68-68-68

Delve
(Formerly Quality Controlled Services - QCS)
34119 W. Twelve Mile Rd., Ste. 360
Farmington Hills, MI 48331
Ph. 800-224-6322 or 248-553-4714
Fax 248-553-7528
E-mail: postmaster@delve.com
www.delve.com
Dianne Flock, Branch Manager
70-70-70-70
(See advertisement on p. 103)

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

Demand Research, Inc.
2466 E. Stadium Blvd.
Ann Arbor, MI 48104-4813
Ph. 734-973-1050
Fax 734-973-1932
E-mail: demandresearch@wwnet.net
MariAnn Apley, President
14-14-14-14

Foresight Research
100 E. Big Beaver Rd., Ste. 811
Troy, MI 48083
Ph. 248-619-9800
Fax 248-619-9191
E-mail: cas@foresightresearch.com
50-50-50-50

Maritz Marketing Research Inc.
34119 W. Telve Mile Rd., Ste. 360
Farmington Hills, MI 48331
Ph. 800-224-6322
Fax 248-553-4714
E-mail: mmri@maritz.com
www.maritzresearch.com
Dianne Flock, Branch Manager
70-70-70-70
(See advertisement on p. 17)

MORPACE International, Inc.
Field Services
31700 Middlebelt Rd., Ste. 200
Farmington Hills, MI 48334
Ph. 248-737-5300 or 800-878-7223
Fax 248-737-5326
E-mail: information@morpace.com
www.morpace.com
Sue Prieur, Vice President
235-235-235-235
(See advertisement on p. 99)

Nordhaus Research, Inc.
20300 W. 12 Mile Rd.
Southfield, MI 48076
Ph. 248-827-2400 or 800-860-9996
Fax 248-827-1380
E-mail: lynn@nordhaus.com
Robert Van Dam, President
20-20-20-20

Opinion Search
21800 Melrose, Ste. 12
Southfield, MI 48075
Ph. 248-358-9922
Fax 248-358-9914
E-mail: opnsch@usa.net
Joanne Levin, President
16-0-16-16

RDA Group
450 Enterprise Ct.
Bloomfield Hills, MI 48302
Ph. 248-332-5000
Fax 248-332-4168
E-mail: abenson@rdagroup.com
www.rdagroup.com
Ann Benson, Vice President
80-80-80-0

Shifrin-Hayworth
20300 Civic Center Dr., Ste. 207
Southfield, MI 48076
Ph. 248-223-0020
Fax 248-223-0038
E-mail: SHIFHAY@aol.com
www.shifrin-hayworth.com
Arlene Hayworth-Speiser, V.P. Operations
12-12-12-12

Stander Research Associates, Inc.
26701 Harper Ave.
St. Clair Shores, MI 48081
Ph. 810-778-8910
Fax 810-778-2938
E-mail: STANDERCO@aol.com
www.standerresearch.com
David Stander, President
27-10-27-10

Yee/Minard & Associates, Inc.
31700 Middlebelt Rd., Ste. 240
Farmington Hills, MI 48334
Ph. 248-539-5250
Fax 248-539-5252
E-mail: dminard@yeeminard.com
Donald Minard
235-235-235-235

Grand Rapids

Advantage Western Michigan Research, Inc.
6159 28th St. S.E.
Grand Rapids, MI 49546
Ph. 616-949-8724
Fax 616-949-8511
E-mail: advantagegr@aol.com
www.advantageresearch.net
Kim Brandt, Dir. of Research Ops.
40-20-40-0

Barnes Research, Inc.
4920 Plainfield N.E.
Grand Rapids, MI 49525
Ph. 616-363-7643
Fax 616-363-8227
E-mail: barnesresr@aol.com
Sona Barnes, President
55-55-55-55

Datatrack
A Div. of Wirthlin Worldwide
2401 Camelot Ct. S.E.
Grand Rapids, MI 49546
Ph. 616-954-0303
Fax 616-954-0001
E-mail: info@datatracksolutions.com
www.datatracksolutions.com
Kevin Scheppman, Field Director
50-50-50-50

Nordhaus Research, Inc.
3226 28th St. S.E.
Grand Rapids, MI 49512
Ph. 248-827-2400 or 800-860-9996
Fax 248-827-1380
E-mail: lynn@nordhaus.com
Robert Van Dam, President
72-72-72-72

Wirthlin Worldwide
2401 Camelot Ct. S.E.
Grand Rapids, MI 49546
Ph. 616-954-0200 or 800-968-7447
Fax 616-954-0001
E-mail: inquiries@wirthlin.com
www.wirthlin.com
Kevin Scheppman, Director Field Operations
50-50-50-50

Lansing

Capitol Research Services, Inc.
2940 Lake Lansing Rd.
East Lansing, MI 48823
Ph. 517-333-3388
Fax 517-333-4402
E-mail: crs@voyager.net
www.capitolresearchservice.com
Rachelle Neal, President
20-4-20-0

Minnesota

Minneapolis/St. Paul

Anderson, Niebuhr & Associates, Inc.
Northpark Corp. Center
6 Pine Tree Dr., Ste. 200
Arden Hills, MN 55112
Ph. 651-486-8712 or 800-678-5577
Fax 651-486-0536
E-mail: info@ana-inc.com
www.ana-inc.com
Marsha Niebuhr
20-20-20-20

COMPASS International/Power Systems Research
1365 Corporate Center Curve
St. Paul, MN 55121
Ph. 651-905-8400
Fax 651-905-8487
E-mail: mwright@compassresearch.com
www.compassresearch.com
Orlando Mazzolin, V.P. Business Development
30-20-20-20

Comprehensive Research
1740 N. Rice St., lower level
St. Paul, MN 55113
Ph. 651-489-3200
Fax 651-481-0020
E-mail: CRG2900@aol.com
www.crginc.org
Craig Swager, President
15-0-15-0

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Cook Research & Consulting, Inc.
6600 France Ave. S., Ste. 214
Minneapolis, MN 55435
Ph. 952-920-6251
Fax 952-920-1230
E-mail: cookresearch@att.net
Harold W. Cook, President
10-0-10-10

Custom Research Inc.
8401 Golden Valley Rd.
P.O. Box 27900
Minneapolis, MN 55427-0900
Ph. 763-542-0800
Fax 763-542-0864
E-mail: custom@customresearch.com
www.customresearch.com
Beth Rounds, Sr. Vice President
70-70-70-70

Delve
(Formerly Quality Controlled Services - QCS)
2051 Killebrew Dr., Ste. 680
Bloomington, MN 55425
Ph. 800-526-5718 or 952-858-1550
Fax 952-858-1580
E-mail: postmaster@delve.com
www.delve.com
Kathleen Fischbach, Branch Manager
16-0-16-0
(See advertisement on p. 103)

Bette Dickinson Research, Inc.
7468 Mariner Dr. N.
Maple Grove, MN 55311-2611
Ph. 763-420-3235
Fax 763-420-4385
Bette Dickinson, President
25-25-25-25

Jeanne Drew Surveys
5005 1/2 - 34th Ave. S.
Minneapolis, MN 55417
Ph. 612-729-2306
Fax 612-729-7645
Jeanne Drew, President
17-0-17-0

Focus Market Research, Inc.
Two Meridian Crossings, Ste. 160
Minneapolis, MN 55423
Ph. 612-869-8181
Fax 612-869-8109
E-mail: minneapolis@focusmarketresearch.com
www.focusmarketresearch.com
Judy Opstad, President
20-0-20-0

Information Specialists Group, Inc.
9905 Hamilton Rd.
Eden Prairie, MN 55344
Ph. 952-941-1600 or 800-279-5314
Fax 952-942-0747
E-mail: isg@isgmn.com
Bob McGarry, President
25-25-25-25

IPSOS - Reid Corporation
100 S. 5th St., Ste. 2200
Minneapolis, MN 55402
Ph. 612-904-6970
Fax 612-904-6980
www.angusreid.com
380-380-380-380

Market Resource Associates, Inc.
15 S. Fifth St., 8th fl.
Minneapolis, MN 55402
Ph. 612-334-3056 or 800-795-3056
Fax 612-334-3121
E-mail: johnmra@aol.com
www.mraonline.com
John Cashmore, CEO
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The Market Solutions Group, Inc.
3209 W. 76th St., Ste. 301
Edina, MN 55435
Ph. 612-333-5400
Fax 612-344-1408
Darlo Martin, Project Director
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The Market Solutions Group, Inc.
431 S. 7th St., Ste. 2500
Minneapolis, MN 55415
Ph. 612-333-5400
Fax 612-344-1408
Darlo Martin, Project Director
30-30-30-30

MarketResponse International USA, Inc.
6385 Old Shady Oak Rd., Ste. 270
Minneapolis, MN 55344
Ph. 952-943-2230
Fax 952-943-2320
E-mail: decide@marketresponse.com
www.marketresponse.com
Tom Pearson, Managing Director
147-147-147-147

Northstar Interviewing Service, Inc.
4660 W. 77th St., Ste. 140
Edina, MN 55435
Ph. 952-897-3700
Fax 952-897-3878
E-mail: nisiinc@aol.com
Roger L. Mayland, President
30-30-30-30

C.J. Olson Market Research, Inc.
2125 E. Hennepin Ave., Ste. 100
Minneapolis, MN 55413-2720
Ph. 612-378-5040 or 800-788-0085
Fax 612-378-5401
E-mail: admin@cjolson.com
www.cjolson.com
Carolyn J. Olson, President/Owner
14-0-14-0

Orman Guidance Research®, Inc.
715 Southgate Office Plaza
5001 W. 80th St.
Minneapolis, MN 55437-1106
Ph. 800-605-7313 or 952-831-4911
Fax 952-831-4913
E-mail: info@ormanguidance.com
www.ormanguidance.com
Allan D. Orman, Ph.D., President
15-0-15-0

Research Systems, Inc.
149 E. Thompson, Ste. 200
West St. Paul, MN 55118
Ph. 952-544-6334
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E-mail: RESSYSWHIT@aol.com
Bill Whitney, President
24-0-24-0

The TCI Group
3225 Hennepin Ave., S.
Minneapolis, MN 55408
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E-mail: bethfischer@theTCIGroup.com
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Beth Fischer, President
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Mississippi

Gulfport/Biloxi

Research Strategies, Inc.
P.O. Box 6152
Gulfport, MS 39532
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E-mail: rsincorp@bellsouth.net
Patricia Rhinehart, Vice President
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Jackson

Southern Research Group
460 Briarwood Dr., Ste. 300
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E-mail: mayo@southernresearchgroup.com
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Lee Ann Mayo, V.P. Development
48-48-48-48

Missouri

Cape Girardeau

Ask America Inc.℠
185 West Park Mall
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E-mail: ASKAMERICA@aol.com
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Columbia

Horizon Research Services
409 Vandiver Dr., Bldg. 6, Ste. 102
Columbia, MO 65202
Ph. 573-874-1333
Fax 573-874-6904
E-mail: info@horizonresearch.com
www.horizonresearch.com
Kathleen Anger, Ph.D., President
14-9-14-14

Kansas City

Applied Marketing Research, Inc.
10000 W. 75th St., Ste. 231
Shawnee Mission, KS 66204
Ph. 800-381-5599 or 913-982-5599
Fax 913-982-9444
E-mail: dphipps@appliedmktresearch.com
www.appliedmktresearch.com
Donald L. Phipps, Principal
25-25-25-25

Delve
(Formerly Quality Controlled Services - QCS)
9233 Ward Pkwy., Ste. 150
Kansas City, MO 64114
Ph. 800-628-3428 or 816-361-0345
Fax 816-361-3580
E-mail: postmaster@delve.com
www.delve.com
Iva Schlatter, Group Manager
20-0-20-20
(See advertisement on p. 103)

Delve
(Formerly Quality Controlled Services - QCS)
Corporate Woods Office Park
10875 Grandview St., Ste. 2230
Overland Park, KS 66210
Ph. 800-525-1952 or 913-345-2050
Fax 913-345-9450
E-mail: postmaster@delve.com
www.delve.com
Iva Schlatter, Group Manager
9-0-0-0
(See advertisement on p. 103)

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

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

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

Kirksville

Maritz Marketing Research Inc.
Kirksville Survey Center
R.R. #3 Box 111A
Kirksville, MO 63501
Ph. 660-488-5500
Fax 660-488-6400
E-mail: mmri@maritz.com
www.maritzresearch.com
Janet Drummond, Branch Manager
84-84-84-84
(See advertisement on p. 17)

St. Louis

ACG Research Solutions
An IBM Company
Pierre Laclede Center
7701 Forsyth, Ste. 1100
St. Louis, MO 63105
Ph. 314-726-3403
Fax 314-726-2503
E-mail: sjlemon@us.ibm.com
www.ibm.com
Stephen J. Lemon, Director of Operations
40-40-40-40
(See advertisement on p. 101)

Communications For Research, Inc.
P.O. Box BF
61 E. Hwy. 8
Steelville, MO 65565
Ph. 573-775-4550
Fax 573-775-4560
E-mail: cfri@misn.com
www.cfrinc.net
Jim Steber, President
80-80-80-80

Consumer Opinion
10403 Clayton Rd.
St. Louis, MO 63131
Ph. 314-692-2686
Fax 314-692-2427
Kathleen Dunn, Manager
12-4-12-0

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

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

Delve
(Formerly Quality Controlled Services - QCS)
1650 Des Peres Rd., Ste. 110
Des Peres, MO 63131
Ph. 800-992-2139 or 314-966-6595
Fax 314-822-4294
E-mail: postmaster@delve.com
www.delve.com
Deborrah Moore, Group Manager
25-0-25-25
(See advertisement on p. 103)

Delve
(Formerly Quality Controlled Services - QCS)
St. Louis Survey Center
3701 S. Lindbergh, Ste. 201
Sunset Hills, MO 63127
Ph. 636-827-9700
Fax 636-827-9701
E-mail: postmaster@delve.com
www.delve.com
Shirley Plevyak, Branch Manager
70-70-70-70
(See advertisement on p. 103)

Fact Finders, Inc.
1852 Craig Park Ct.
St. Louis, MO 63146
Ph. 314-469-7373
Fax 314-214-4138
E-mail: factfinder@primary.net
www.ffinet.com
Timothy Caplinger, President
40-40-40-40

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St. Louis Survey Center
3701 S. Lindbergh, Ste. 201
Sunset Hills, MO 63127
Ph. 636-827-9700
Fax 636-827-9701
E-mail: mmri@maritz.com
www.maritzresearch.com
Shirley Plevyak, Branch Manager
70-70-70-70
(See advertisement on p. 17)

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

Marketing Horizons, Inc.
1001 Craig Rd., Ste. 100
St. Louis, MO 63146
Ph. 314-432-1957 or 800-669-0839
Fax 314-432-7014
E-mail: lwims@stlnet.com
www.mhorizons.com
Stephanie Feeney, Dir. Field Svcs.
12-3-12-12
(See advertisement on p. 102)

Marketing Horizons, Inc.-South
11166 Tesson Ferry
St. Louis, MO 63123
Ph. 314-432-1957
Fax 314-432-7014
E-mail: lwims@stlnet.com
www.mhorizons.com
Stephanie Feeney, Dir. Field Svcs.
70-70-70-70
(See advertisement on p. 102)

Peters Marketing Research, Inc.
12400 Olive Blvd., Ste. 225
St. Louis, MO 63141-5437
Ph. 314-469-9022
Fax 314-469-7436
E-mail: joyce@petersmktg.com
www.petersmktg.com
18-18-18-18

Pragmatic Research, Inc.
200 S. Hanley, Ste. 420
St. Louis, MO 63105
Ph. 314-863-2800
Fax 314-863-2880
E-mail: ds@pragmatic-research.com
www.pragmatic-research.com
Doug Sinnard, President
24-24-24-24

Superior Surveys of St. Louis, Inc.
10403 Clayton Rd.
St. Louis, MO 63131
Ph. 800-325-4982 or 314-692-2699
Fax 314-692-2427
E-mail: SURVEYS4U@aol.com
Carol McGill, Partner
12-4-12-0

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

Nebraska

Lincoln

The Gallup Organization
North American Operations Center
301 S. 68th St. Pl.
Lincoln, NE 68510
Ph. 402-489-9000
Fax 402-486-6560
www.gallup.com
184-184-184-184

Service Research Corporation
6201 S. 58th, Ste. A
Lincoln, NE 68516
Ph. 402-434-5000
Fax 402-434-5006
E-mail: kkluver@serviceresearch.com
www.serviceresearch.com
Kirk Kluver, Marketing Manager
22-0-22-22

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

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

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

Omaha

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

Wiese Research Associates, Inc.
780 N. 114th St.
Omaha, NE 68154
Ph. 402-391-7734
Fax 402-391-0331
E-mail: mary_arkfeld@wraresearch.com
Tom Wiese, President
30-18-30-30

Wiese Research Associates, Inc.
401 Norfolk Ave.
Norfolk, NE 68701
Ph. 402-644-4444 or 402-391-7734 (Hq.)
Fax 402-644-4455
E-mail: mary_arkfeld@wraresearch.com
Tom Wiese, President
45-40-45-45

Nevada

Las Vegas

I/H/R Research Group
4440 S. Maryland Pkwy., Ste. 203
Las Vegas, NV 89119
Ph. 702-734-0757
Fax 702-734-6319
E-mail: IHRRRA2@aol.com
Lynn Stalone, Partner
150-150-150-150
(See advertisement on p. 104)

Las Vegas Surveys, Inc.
3405 S. Cambridge St.
Las Vegas, NV 89019
Ph. 702-650-5500 or 800-797-9877
Fax 702-650-0729
E-mail: lvsurveys@aol.com
Carlos Kelley, V.P. Research
19-0-19-0

MRCPhone
101 Convention Center Dr., Plaza 125
Las Vegas, NV 89109
Ph. 702-360-7700
Fax 702-360-7798
E-mail: research@mrcgroup.com
www.mrcgroup.com
James T. Medick, Managing Director
200-200-200-200
(See advertisement on p. 105)

Reno

C/J Research, Inc.
Executive Plaza
1005 Terminal Way, Ste. 202
Reno, NV 89502
Ph. 775-337-1000
Fax 775-688-3788
E-mail: info@cjr.com
www.cjr.com
60-60-60-60

MarkeTec, Incorporated
P.O. Box 9058
Reno, NV 89507
Ph. 775-333-1221
Fax 775-333-1224
E-mail: marketecnv@aol.com
Katherine Cole, President
7-0-4-0

New Hampshire

Manchester/Nashua

New England Interviewing, Inc.
337 Amherst St.
Nashua, NH 03063-1723
Ph. 603-889-8222
Fax 603-883-1119
E-mail: newenglandint@cs.com
Joan Greene, President
14-0-14-0

New Jersey

Northeast Shore

Centrac, Inc.
112 Pavilion Professional Center
Brick, NJ 08723-7920
Ph. 973-575-3200
Fax 973-575-0520
E-mail: RLeeds@centracusa.com
www.centrac.com
Ron Leeds, President
100-100-100-100

Schulman, Ronca & Bucuvalas, Inc.
185 Monmouth Pkwy., Ste. F
W. Long Branch, NJ 07764
Ph. 732-728-7100
E-mail: c.turakhia@srbi.com
www.srbi.com
Chintan Turakhia, Sr. Vice President
120-120-120-120

Northern New Jersey

Bruskin Research
100 Metroplex Dr.
Edison, NJ 08817
Ph. 732-572-7300
Fax 732-572-7980
E-mail: ikorman@bruskin.com
Irwin Korman, Exec. Vice President
300-300-300-300

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

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

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

Capricorn Q Research
Q Research Solutions, Inc.
Renaissance Corporate Center
3548 Rte. 9 S., 2nd fl.
Old Bridge, NJ 08857
Ph. 732-952-0000
Fax 732-952-0001
E-mail: maryanak@whoisq.com
www.whoisq.com
Maryana Kaplan, Sr. Dir. Rsch. Svcs.
75-75-75-75
(See advertisement on p. 107)

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

CMR Market Research, Inc.
109 White Oak Lane
Old Bridge, NJ 08857
Ph. 732-607-3700
Fax 732-607-3776
E-mail: CMR Market@aol.com
Joel Brown, Exec. V.P.
20-0-20-0

Consumer Pulse of New York
One Garden State Plaza, #1170
Paramus, NJ 07652
Ph. 201-909-0144
Fax 201-909-9877
E-mail: newyork@consumerpulse.com
www.consumerpulse.com
Liz Ellingsen, Manager
8-4-8-8

Focus World International, Inc.
146 Hwy. 34, Ste. 100
Holmdel, NJ 07733
Ph. 732-946-0100
Fax 732-946-0107
E-mail: focusworld@att.net
www.focusworldint.com
Gary Eichenholtz, CEO/CFO
60-24-60-60

Harte-Hanks Market Research
10 Elizabeth St.
River Edge, NJ 07661-1943
Ph. 201-342-6400
Fax 201-342-1709
E-mail: research@harte-hanks.com
www.harte-hanks.com
40-40-40-40

Marketing Solutions Corporation
2 Ridgedale Ave., Ste. 216
Cedar Knolls, NJ 07927
Ph. 973-540-9133 or 800-326-3565
Fax 973-540-9280
E-mail: MarketingSolutions@ibm.net
www.marketingsolutionscorp.com
Jean Kelly, V.P. Field Director
40-30-40-40

Schlesinger Associates, Inc.
Executive Plaza, Ste. 400
10 Parsonage Rd.
Edison, NJ 08837
Ph. 732-906-1122
Fax 732-906-8792
E-mail: info@schlesingerassociates.com
www.schlesingerassociates.com
Steven Schlesinger, President
65-0-65-65
(See advertisement on p. 9)

Statistical Research, Inc.
111 Prospect St.
Westfield, NJ 07090
Ph. 908-654-4000
Fax 908-654-6498
E-mail: SRI@sriresearch.com
www.sriresearch.com
Gale Metzger, President
45-45-45-45

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

TMR, Inc.
Two Sylvan Way
Parsippany, NJ 07054
Ph. 973-829-1030
Fax 973-829-1031
E-mail: jwj@tmrinfo.com
www.tmrinfo.com
Jamie Jurgaitis, V.P./G.M.
50-50-50-50

The Wats Room, Inc.
18 Railroad Ave.
Rochelle Park, NJ 07662
Ph. 201-845-3100 or 800-724-0222
Fax 201-845-3131
E-mail: louroth@thewatsroom.com
www.thewatsroom.com
Lou Roth, President
180-180-180-180
(See advertisement on p. 106)

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

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

Princeton

The Olson Research Group, Inc.
Princeton Crossroads Corporate Center
300 Phillips Blvd., Ste. 100
Ewing, NJ 08618
Ph. 609-882-9888
Fax 609-882-9826
E-mail: colson@olsonresearchgroup.com
www.olsononlinesystems.com
Chip Olson, Sr. Vice President
25-25-25-25
(See advertisement on p. 109)

Southern New Jersey

(See Philadelphia, PA)

New Mexico

Albuquerque

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

Sandia Marketing Services, Inc.
2201 San Pedro N.E., Bldg. 1, Ste. 230
Albuquerque, NM 87110
Ph. 800-950-4148 or 505-883-5512
Fax 505-883-4776
E-mail: lana@nmia.com
Lana Scutt, President
14-14-14-14

Sante Fe

Southwest Planning & Marketing
903 W. Alameda, #206
Santa Fe, NM 87501
Ph. 505-989-8500 or 800-989-9275
Fax 505-984-1393
E-mail: swpm@prodigy.net
www.swplanning-marketing.com
5-0-5-0

New York

Albany

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

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

PhoneSolutions, L.L.C.
433 State St., Ste. 300
Schenectady, NY 12305
Ph. 518-346-6050
Fax 518-346-9346
E-mail: michael@phonesolutions.com
www.phonesolutions.com
Mike Schlegel, President
75-75-75-75
(See advertisement on p. 73)

Buffalo

Buffalo Survey & Research, Inc.
1249 Eggert Rd.
Buffalo, NY 14226
Ph. 716-833-6639
Fax 716-834-6499
E-mail: buffalosur@aol.com
Jeanette Levin, President
8-0-8-0

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
David Levin, Vice President
4-0-0-0

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

ICT Research Services/VFIS
3370 Walden Ave., Ste. 100
Depew, NY 14043
Ph. 716-651-6004
Fax 716-651-0473
E-mail: jprice@ictgroup.com
Judy Price, Vice President
120-120-120-120

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

Survey Service, Inc.
1911 Sheridan Dr.
Buffalo, NY 14223
Ph. 716-876-6450
Fax 716-876-0430
E-mail: sservice@surveyservice.com
www.surveyservice.com
Susan R. Adelman, President
60-60-60-60
(See advertisement on p. 111)

New York City

(See also Northern New Jersey)

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

Central Marketing, Inc.
30 Irving Place, 7th fl.
New York, NY 10003
Ph. 212-260-0070
Fax 212-979-5647
E-mail: CMcma9@aol.com
Carol McMahon, Partner
90-50-90-90

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

Ebony Marketing Research, Inc.
2100 Bartow Ave., Ste. 243
Bronx, NY 10475
Ph. 718-217-0842 or 718-320-3220
Fax 718-320-3996
E-mail: emr@interport.net
www.ebonymktg.com/
Bruce Kirkland, Vice President
90-0-90-0

Gazelle International, Inc.
114 E. 32nd St., Ste. 708
New York, NY 10016
Ph. 212-686-8808
Fax 212-686-5114
E-mail: info@gazelleintl.com
www.gazelleintl.com
350-350-350-350

Informed Sources, Inc.
291 Wall St.
Kingston, NY 12401
Ph. 800-358-1961
E-mail: bob@informed-sources.com
Bob Kasper, Vice President
40-40-40-40

Innovative Concepts Marketing Research
200 Stonehinge Ln.
Carle Place, NY 11514
Ph. 516-479-2200 or 800-631-0209
Fax 516-479-2215
E-mail: scott@ic-mr.com
www.ic-mr.com
Scott Sycoff, Exec. Vice President
75-75-75-75
(See advertisement on p. 113)

IPC (International Point of Contact)
32 E. 31st St.
New York, NY 10016
Ph. 212-213-3303
Fax 212-213-3554
E-mail: RLBIPC@aol.com
Rhoda Brooks, Partner
40-40-40-40
(See advertisement on p. 110)

Manhattan Phone Center
A Div. Of Friedman Marketing
115 E. 23rd St.
New York, NY 10010
Ph. 212-387-7550
Fax 212-387-8180
E-mail: LSchneider@roper.com
www.friedmanmktg.com
Larry Schneider, Sr. Vice President
250-250-250-250

MKTG, Inc.
200 Carleton Ave.
East Islip, NY 11730
Ph. 631-277-7000
Fax 631-277-7601
E-mail: HowardG3@aol.com
Howard Gershowitz, Exec. Vice President
220-220-220-220

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

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

Opinion Access Corp.
31-00 47th Ave.
Long Island City, NY 11101
Ph. 718-729-2622 or 888-489-DATA
Fax 718-729-2444
E-mail: info@opinionaccess.com
www.opinionaccess.com
Joe Rafael, Chairman
Lance Hoffman, Account Representative
200-200-200-200
(See advertisement on inside front cover)

ORC Macro
aka Macro International Inc.
116 John St., 8th fl.
New York, NY 10038
Ph. 888-MACRO-US or 212-941-5555
Fax 212-941-7031
E-mail: tduffy@macroint.com
www.macroint.com
230-230-230-230

Research Management, Inc.
255 Oser Ave.
Hauppauge, NY 11788
Ph. 631-231-3277
Fax 631-435-3287
E-mail: resmanage1@aol.com
www.resmanage.com
Stewart Goldberg, Managing Director
40-40-40-40

Roper Starch Worldwide Inc.
205 E. 42nd St., 17th fl.
New York, NY 10017
Ph. 212-599-0700
Fax 212-876-7008
E-mail: info@roper.com
www.roper.com
225-100-100-225

Barbara Ruderman
211 W. Chester St.
Long Beach, NY 11561
Ph. 516-889-3559
E-mail: rudyj211@optonline.net
Barbara Ruderman
20-0-20-20

Schulman, Ronca & Bucuvalas, Inc.
145 E. 32nd St., Ste. 500
New York, NY 10016
Ph. 212-779-7700
Fax 212-779-7785
E-mail: m.schulman@srbi.com
www.srbi.com
Chintan Turakhia, Sr. Vice President
70-70-70-70

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
25-0-25-25

The Telephone Centre, Inc.
30-00 47th Ave., 4th fl.
Long Island City, NY 11101
Ph. 718-752-0300
Fax 718-752-1401
E-mail: afleischer@telectr.com
www.telectr.com
Adam Fleischer, Owner
150-150-150-150

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

Universal Survey Center
29 W. 38th St.
New York, NY 10018
Ph. 212-391-5243
Fax 212-391-5428
E-mail: mlefkowitz@universalsurvey.com
www.universalsurvey.com
Mike Lefkowitz, Exec. Vice President
175-175-175-175

Rochester

Harris Interactive
70 Carlson Rd.
Rochester, NY 14610
Ph. 877-919-4765
Fax 716-482-3299
E-mail: info@harrisinteractive.com
www.harrisinteractive.com
350-350-350-350
(See advertisement on p. 115)

The Sutherland Group, Ltd.
1160 Pittsford-Victor Rd.
Pittsford, NY 14534
Ph. 716-586-5757
Fax 716-586-7508
www.suth.com
Dan Reed, Dir., Analytical Services
380-380-380-380

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

Syracuse

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

McCarthy Associates
6075 E. Molloy Rd.
Syracuse, NY 13211
Ph. 315-431-0660
Fax 315-431-0672
E-mail: mccarthyfield@cs.com
John McCarthy, President
10-10-10-10

Zogby International
1750 Genesee St.
Utica, NY 13502
Ph. 315-624-0200
Fax 315-624-0210
E-mail: marketing@zogby.com
www.zogby.com
Donielle Bradley
94-94-94-0

North Carolina

Charlotte

Consumer Pulse of Charlotte
Eastland Mall
5625 Central Ave.
Charlotte, NC 28212
Ph. 704-536-6067 or 800-336-0159
Fax 704-536-2238
E-mail: charlotte@consumerpulse.com
www.consumerpulse.com
Daniel Bashaw, Director
15-8-15-15

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

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

MarketWise, Inc.
831 E. Morehead St., Ste. 150
Charlotte, NC 28202
Ph. 704-332-8433 or 800-849-5924
Fax 704-332-0499
E-mail: nburnap@marketwise-usa.com
www.marketwise-usa.com
Nancy Burnap, Ph.D., Principal
22-20-22-22

Greensboro/ Winston-Salem

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

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

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

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

The Telephone Centre, Inc.
1204 Oakland Ave.
Greensboro, NC 27403
Ph. 336-574-3000
Fax 336-574-3007
E-mail: lwinter@telectr.com
www.telectr.com
Liz Winter, Owner
132-132-132-132

Raleigh/Durham

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

Harker Research
6131 Falls of Neuse Rd., Ste. 112
Raleigh, NC 27609
Ph. 919-954-8300
Fax 919-954-8844
E-mail: harkerresearch@mindspring.com
Richard Harker, President
40-0-40-0

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

Medical Marketing Research, Inc.
P.O. Box 99660
Raleigh, NC 27624-9660
Ph. 919-870-6550 or 800-866-6550
Fax 919-848-2465
E-mail: info@mmrx.com
www.mmrx.com
George Matijow, President
10-10-10-0

Rocky Mount

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

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

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North Dakota

Fargo

Dynamics Marketing, Inc.
805 Sunflower Ave.
Cooperstown, ND 58424
Ph. 800-533-5761
Fax 800-339-1043
E-mail: terik@dynamicsmarketinginc.com
www.dynamicsmarketinginc.com
Teri Knutson, Research Director
85-85-85-85

Heritage Marketing Group, Inc.
2410 8th St.
Moorhead, MN 56560
Ph. 877-582-4636
Fax 218-236-8277
E-mail: klandgaard@hmgroupinc.com
www.heritageteleresearch.com

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

Jamestown

Dynamics Marketing - Jamestown
1805 13th St. N.E.
Jamestown, ND 58401
Ph. 701-251-9120
E-mail: terik@dynamicsmarketinginc.com
www.dynamicsmarketinginc.com
Teri Knutson, Research Director
115-85-115-85

Minot

Dynaband, LLC
P.O. Box 200, Hwy. 5
Belcourt, ND 58316
Ph. 701-477-0262
Fax 701-477-9989
E-mail: terik@dynamicsmarketinginc.com
www.dynamicsmarketinginc.com
Teri Knutson
110-85-110-85

Ohio

Akron

EBSCO TeleServices
4150 Belden Village Ave. N.W.
lower level #9
Canton, OH 44718
Ph. 800-456-5101
www.call-ets.com
Bob Prosise, Vice President

Cincinnati

Alliance Research, Inc.
2845 Chancellor Dr.
Crestview Hills, KY 41017
Ph. 859-344-0077
Fax 859-344-0078
E-mail: info@allianceresearch.com
www.allianceresearch.com
Clint Brown, President
150-150-150-150

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

Assistance in Marketing, Inc.
11890 Montgomery Rd.
Cincinnati, OH 45249
Ph. 513-683-6600 or 888-4AIMFIRE
Fax 513-683-9177
E-mail: Irwin@AIM-Cincinnati.com
www.aimresearchnetwork.com
Irwin Weinberg
20-0-20-20

B & B Research Services, Inc.
8005 Plainfield Rd.
Cincinnati, OH 45236
Ph. 513-793-4223
Fax 513-793-9117
E-mail: bbresearchserv@aol.com
Jim Moler Jr.
20-6-20-20

Burke, Inc.
805 Central Ave.
Cincinnati, OH 45202
Ph. 513-576-5700
Fax 513-684-7500
E-mail: info@burke.com
www.burke.com
200-200-200-200

Calo Research Services, Inc.
10250 Alliance Rd.
Cincinnati, OH 45242
Ph. 513-984-9708
Fax 513-792-7404
E-mail: ncalo@caloresearch.com
www.caloresearch.com
Patricia A. Calo, Vice President
14-0-14-0

Convergys Marketing Research Services
201 E. Fourth St.
Cincinnati, OH 45202
Ph. 800-344-3000
Fax 513-458-1315
E-mail: marketing@convergys.com
www.convergys.com
Kathy Renaker, Account Executive
85-85-85-85

Disher Strategic Research, LLC
873 Fenchurch Ct.
Cincinnati, OH 45230
Ph. 513-232-1603 or 888-9-DISHER
Fax 513-232-8187
E-mail: dave@disher.com
www.disher.com
40-40-40-40

Fields Marketing Research, Inc.
7979 Reading Rd.
Cincinnati, OH 45237
Ph. 513-821-6266
Fax 513-679-5300
E-mail: ken@fieldsresearch.com
www.fieldsresearch.com
Bernie Kearney, Vice President
25-25-25-25

Friedman-Swift Associates
110 Boggs Ln., Ste. 200
Cincinnati, OH 45246
Ph. 513-772-9200
Fax 513-772-9207
E-mail: info@friedmanswift.com
www.friedmanswift.com
Judy George, Sr. Vice President
36-0-36-0

Market Inquiry LLC
5825 Creek Rd.
Cincinnati, OH 45242
Ph. 513-794-1088
Fax 513-794-1176
E-mail: cathy@marketinquiry.com
www.marketinquiry.com
Cathy Noyes, Owner
24-15-24-24

MarketVision Research®
Corporate Headquarters
MarketVision Building
4500 Cooper Rd.
Cincinnati, OH 45242-5617
Ph. 513-791-3100
Fax 513-794-3500
E-mail: info@marketvisionresearch.com
www.marketvisionresearch.com
Jon Pinnell, President/COO
56-56-56-56
(See advertisement on p . 117)

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MRSI
600 Vine St., #2900
Cincinnati, OH 45202
Ph. 513-579-1555 or 800-729-6774
Fax 513-562-8819
E-mail: info@mrsi.com
www.mrsi.com
M. Randall Thaman, President
92-92-92-80

QFACT Marketing Research, Inc.
9908 Carver Rd.
Cincinnati, OH 45242
Ph. 513-891-2271
Fax 513-791-7356
E-mail: info@qfact.com
www.qfact.com
Mary Swart, V.P. of Research
24-0-24-24

RDI Market Services
9920 Carver Rd.
Cincinnati, OH 45242
Ph. 513-984-5927
Fax 513-984-9735
E-mail: rgarner@rdimarketing.com
Ronald Garner, V.P. Client Svcs.
60-60-60-60

Service Industry Research Systems, Inc. (SIRS)
201 Martha Layne Collins Blvd.
Highland Heights, KY 41076-1750
Ph. 859-781-9700
Fax 859-781-8802
E-mail: knowledge@sirsinc.com
www.sirsinc.com
Bill Welch
50-50-50-50

Cleveland

Business Research Services, Inc.
Tri Pointe Building, Ste. A
23825 Commerce Park
Cleveland, OH 44122-5841
Ph. 216-831-5200 or 888-831-5200
Fax 216-292-3048
E-mail: brsresearch@aol.com
www.marketingresearch.com
Barbara Elioff, Field Service Director
25-25-25-25

Cleveland Field Resources
Subsidiary of National Market Measures, Inc.
25109 Detroit Rd., Ste. 325
Cleveland, OH 44145
Ph. 440-892-8555
Fax 440-892-0002
www.nmminc.com
Daniel McCafferty, General Manager
15-15-15-15

Focus Groups of Cleveland Survey Center
2 Summit Park Dr., Ste. 225
Cleveland, OH 44131
Ph. 216-901-8075 or 800-950-9010
Fax 216-901-8085
E-mail: research@idirectdata.com
www.focusgroupsofcleveland.com
Amy Morris, Executive Director
12-3-10-0
(See advertisement on p. 119)

The Maffett Research Group
25050 Country Club Blvd., Ste. 100
N. Olmsted, OH 44070
Ph. 440-779-1303
Fax 440-779-3040
Shelly Entres, Project Supervisor
21-12-8-0

Marketeam Associates
3645 Warrensville Center Rd., #331
Shaker Heights, OH 44122
Ph. 216-491-9515
Fax 216-491-8552
E-mail: vstakes@doanemr.com
www.mkteam.com
36-0-36-0

National Market Measures, Inc.
25109 Detroit Rd., Ste. 330
Cleveland, OH 44145
Ph. 440-892-8555
Fax 440-892-0002
www.nmminc.com
Luci Dudich, Field Director
15-15-15-15

National Market Measures, Inc.
30405 Solon Rd.
Cleveland, OH 44139
Ph. 440-542-2450
Fax 440-542-2455
E-mail: nmmeast@nmminc.com
www.nmminc.com
Kim White, Focus Group Coord.
10-10-10-10

National Survey Research Center
5350 Transportation Blvd., Ste. 19
Cleveland, OH 44125
Ph. 800-837-7894 or 216-518-2805
Fax 216-518-2903
E-mail: nsrc@nsrc.com
Lauren Wagner, Mgr. Customer Relations
20-20-20-20

Opinion Centers America
Ste. 100, Great Northern Corporate Ctr. III
25050 Country Club Blvd.
North Olmsted, OH 44070
Ph. 800-779-3003 or 440-779-3000
Fax 440-779-3040
E-mail: oca@opinioncenters.com
www.opinioncenters.com
Karen Cunningham, Field Director
20-12-20-20

OPINIONation
4301 Ridge Rd.
Cleveland, OH 44144
Ph. 216-351-4644
Fax 216-351-7876
E-mail: OPINION@ix.netcom.com
www.opinionation.com
Ron Kornokovich, President
35-35-35-35

Pat Henry Market Research, Inc.
P.O. Box 17182
Cleveland, OH 44117
Ph. 800-229-5260 or 216-531-9562
Fax 216-531-9724
E-mail: jhominy@pathenry.com
www.thepathenrygroup.com
Judy Hominy
30-25-25-25

Columbus

B & B Research Services, Inc.
1365 Grandview Ave.
Columbus, OH 43212
Ph. 614-486-6746
Fax 614-486-9958
Judy Frederick, Project Director
8-0-8-0

Delve
(Formerly Quality Controlled Services - QCS)
7634 Crosswoods Dr.
Columbus, OH 43235
Ph. 800-242-4118 or 614-436-2025
Fax 614-436-7040
E-mail: postmaster@delve.com
www.delve.com
Judy Golas, Group Manager
23-0-23-0
(See advertisement on p. 103)

Focus and Phones, Inc.
One Easton Oval, Ste. 100
Columbus, OH 43219
Ph. 614-583-2100
Fax 614-416-2006
E-mail: fandpinc@infinet.com
Lorne Dillabaugh, V.P., Field Operations
20-0-20-0

Saperstein Associates, Inc.
4555 N. High St.
Columbus, OH 43214
Ph. 614-261-0065
Fax 614-261-0076
E-mail: research@sapersteinassociates.com
Martin D. Saperstein, Ph.D., President
20-20-20-20

Dwight Spencer & Associates, Inc.
1290 Grandview Ave.
Columbus, OH 43212
Ph. 614-488-3123
Fax 614-421-1154
Betty Spencer, President
45-20-23-0

Dayton

Center For Business & Economic Research
University of Dayton
300 College Park
Dayton, OH 45469-2110
Ph. 937-229-2453 or 888-483-2237
Fax 937-229-2371
E-mail: weiler@udayton.edu
www.udayton.edu/~cber
Richard Stock, Director
25-15-17-0

Paragon Opinion Research, Inc.
2000 Composite Dr.
Mail Stop W6
Kettering, OH 45420
Ph. 937-294-9004
Fax 937-294-9006
E-mail: susie@glasscity.net
Susan McLaughlin
20-0-20-0

QFACT Marketing Research, Inc.
Normandy Square
381 Miamisburg - Centerville Rd.
Dayton, OH 45459
Ph. 937-435-5067
Fax 937-435-3457
E-mail: libby@cincy.qfact.com
www.qfact.com
Libby Webster, Manager
12-0-12-12

Toledo

A Z G Research
13330 Bishop Rd.
Bowling Green, OH 43402
Ph. 800-837-4300
Fax 419-725-0100
E-mail: sales@azgresearch.com
www.azgresearch.com
Stephanie Schwaegerle
25-25-25-25

Barbour Research, Inc.
5241 Southwyck Blvd., Ste. 201
Toledo, OH 43614
Ph. 419-866-3475
Fax 419-866-3478
E-mail: BARBOUREK@aol.com
Emily Barbour, President
53-53-53-53

Creative Marketing Ent., Inc.
1546 Dartford Rd.
Maumee, OH 43537
Ph. 419-867-4444
Fax 419-867-4470
Joyce Clevenger, Exec. V.P.
55-55-55-55

Great Lakes Marketing Associates
3103 Executive Pkwy.
Toledo, OH 43606
Ph. 419-534-4700
Fax 419-531-8950
E-mail: info@greatlakesmarketing.com
www.greatlakesmarketing.com
Mark Iott, Principal
20-20-20-20

Market Research of Toledo
3103 Executive Pkwy, Ste. 106
Toledo, OH 43606
Ph. 419-534-4705
Fax 419-531-8950
Mark Iott, Principal
20-20-20-20

NFO Research, Inc.
2700 Oregon Rd.
Northwood, OH 43619
Ph. 419-666-8800
Fax 419-661-8595
www.nfor.com
200-200-200-200

Youngstown

McCarthy Associates
Eastwood Mall
Unit #911
Niles, OH 44446
Ph. 315-431-0660
Fax 315-431-0672
E-mail: mccarthyfield@cs.com
John McCarthy, President
6-6-6-6

Oklahoma

Oklahoma City

Johnson Marketing Research, Inc.
2915 Classen Blvd., Ste. 350
Oklahoma City, OK 73106
Ph. 405-528-2700
Fax 405-528-3238
Patty Casteel, President
14-0-14-0

Oklahoma City Research Services
Div. of Ruth Nelson Research
4323 N.W. 63rd St., #235
Oklahoma City, OK 73116-1520
Ph. 405-840-2707
Fax 405-840-2754
E-mail: ocrs@worldnet.att.net
www.ruthnelsonresearchsvcs.com
Bohn Macrory
8-0-8-0

Oklahoma Market Research
Data Net
4900 N. Portland Ave., Ste. 150
Oklahoma City, OK 73112
Ph. 405-525-3412
Fax 405-525-3419
E-mail: dcarter@theshop.net
Deanna Carter, Vice President
40-40-40-40

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

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Tulsa

Consumer Logic, Inc./Tulsa Surveys
4928 S. 79th E. Ave.
Fontana Center
Tulsa, OK 74145
Ph. 918-665-3311 or 800-544-1494
Fax 918-665-3388
www.consumer-logic.com
Dan Jarrett, President
28-28-28-28

On-Line Communications, Inc.
401 S.E. Dewey
Bartlesville, OK 74003
Ph. 800-765-3200 or 918-338-2000
Fax 918-338-0831
E-mail: askus@on-linecom.com
www.on-linecom.com
Peggy O'Connor
180-180-180-180
(See advertisement on p. 120)

Oregon

Portland

Bardsley & Neidhart, Inc.
1220 S.W. Morrison, Ste. 425
Portland, OR 97205
Ph. 503-248-9058
Fax 503-222-3804
E-mail: info@bnresearch.com
www.bnresearch.com
Gary Frazier, Field Director
30-30-30-30

Benner Research Group, Inc.
9115 S.W. Oleson Rd., Ste. 202
Portland, OR 97223
Ph. 800-575-8812 or 503-245-8812
Fax 503-245-8708
E-mail: info@bennerresearch.com
www.bennerresearch.com
Daniela Diaz
25-0-25-25

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
Jim Weaver, Manager
12-0-12-0
(See advertisement on p. 135)

Consumer Pulse of Portland
Clackamas Town Center
12000 S.E. 82nd Ave., #D-2
Portland, OR 97266
Ph. 503-654-1390 or 800-336-0159
Fax 503-654-1436
E-mail: portland@consumerpulse.com
www.consumerpulse.com
Vikki Peterson, Director
6-4-6-6

Gilmore Research Group
729 N.E. Oregon St., Ste. 150
Portland, OR 97232
Ph. 503-236-4551
Fax 503-731-5590
E-mail: dbauman@gilmore-research.com
www.gilmore-research.com
Denise Bauman, Vice President
28-28-28-28

Griggs-Anderson/Gartner Consulting
308 S.W. First Ave.
Portland, OR 97204-3499
Ph. 503-241-8700
Fax 503-241-8716
www.gar.com
Nandita Stixrud, Project Coord. Mgr.
75-75-75-75

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InfoTek Research Group, Inc.
4915 S.W. Griffith Dr., Ste. 200
Beaverton, OR 97005
Ph. 503-644-0644
Fax 503-641-0771
E-mail: Steveb@infotekresearch.com
www.infotekresearch.com
Steve Boespflug, V.P./Principal
62-62-62-62

Market Decisions Corporation
8959 S.W. Barbur Blvd., Ste. 204
Portland, OR 97219
Ph. 503-245-4479
Fax 503-245-9677
E-mail: info@mdcresearch.com
www.mdcresearch.com
Lester Harman, Field Svcs Acct. Exec.
60-60-60-24

Market Trends, Inc.
1201 S.W. 12th, Ste. 310
Portland, OR 97205
Ph. 503-224-4900
Fax 503-224-0633
E-mail: infomanager@markettrends.com
www.markettrends.com
Jim Tizekker, Office Manager
15-15-15-15

Research Data Design, Inc.
5100 S.W. MacAdam, Ste. 500
Portland, OR 97201
Ph. 503-223-7166
Fax 503-223-6760
E-mail: jpalish@researchdatadesign.com
www.researchdatadesign.com
Jeff Palish, Vice President
450-450-450-450
(See advertisement on p. 121)

Sorensen Associates, Inc.
999 N.W. Frontage Rd., Ste. 190
Troutdale, OR 97060
Ph. 800-542-4321
Fax 503-666-5113
E-mail: wjhruby@sorensen-associates.com
www.sorensen-associates.com
Katie Ramseur, Account Executive
25-0-25-0
(See advertisement on p. 41)

Pennsylvania

Allentown/Bethlehem

Integrated Marketing Concepts
3724 Crescent Ct. W.
Whitehall, PA 18052
Ph. 610-437-4000
Fax 610-437-5212
E-mail: info@integratedmc.com
www.integratedmc.com
101-101-101-101

Marketing Solutions Corporation
522 Main St., #16
Bethlehem, PA 18018
Ph. 800-326-3565
Fax 610-861-0184
E-mail: MarketingSolutions@ibm.net
www.marketingsolutionscorp.com
Greg Surovcik, Vice President
10-2-10-10

Erie

Moore Research Services, Inc.
2675 West 12th St.
Erie, PA 16505
Ph. 814-835-4100
Fax 814-835-4110
E-mail: colleen@moore-research.com
www.moore-research.com
Colleen Moore Mezler, President
15-5-3-3

Lancaster

Visions Marketing Services
528 W. Orange St.
Lancaster, PA 17603
Ph. 800-222-1577
Fax 717-295-8020
E-mail: allan@vmsmkt.com
www.vmsmkt.com
Allan Geller, President
35-35-35-35

Philadelphia

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
15-8-15-15

M Davis & Co., Inc.
1520 Locust St., 3rd fl.
Philadelphia, PA 19102-4403
Ph. 215-790-8900
Fax 215-790-8930
E-mail: info@mdavisco.com
www.mdavisco.com
Brian Cirskey
35-35-35-10

Delta Market Research, Inc.
333 N. York Rd.
Hatboro, PA 19040
Ph. 215-674-1180
Fax 215-674-1271
E-mail: DMRSUPPORT@aol.com
Linda Celec, President
32-32-32-32

Delve
(Formerly Quality Controlled Services - QCS)
Two Greenwood Square
3331 Street Rd., Ste. 130
Bensalem, PA 19020
Ph. 800-752-2027 or 215-639-8035
Fax 215-639-8224
E-mail: postmaster@delve.com
www.delve.com
Dorothy McDougall, Branch Manager
14-0-14-0
(See advertisement on p. 103)

Eastern Research Services
1001 Baltimore Pike, Ste. 208
Springfield, PA 19064
Ph. 610-543-0575
Fax 610-543-2577
E-mail: mail@easternresearch.com
Kean Spencer, President
60-60-60-60

ICR/International Communications Research
605 W. State St.
Media, PA 19063
Ph. 610-565-9280
Fax 610-565-2369
E-mail: icr@icrsurvey.com
www.icrsurvey.com
Steve McFadden, President
285-285-285-285
(See advertisement on p. 47)

ICT Research Services/VFIS
584 Middletown Blvd.
Langhorne, PA 19047
Ph. 215-702-9300
Fax 215-702-9366
E-mail: asuperfine@ictgroup.com
Alan Superfine, V.P./G.M.
48-48-48-48

Inter-Tel Associates, Inc.
P.O. Box 206
Chadds Ford, PA 19317
Ph. 610-459-5969
Fax 610-459-7898
E-mail: itaemail@aol.com
Gene S. Rullo, President
40-25-40-40

JRA, J. Reckner Associates, Inc.
587 Bethlehem Pike, Ste. 800
Montgomeryville, PA 18936-9742
Ph. 215-822-6220
Fax 215-822-2238
E-mail: info@reckner.com
www.reckner.com
Gina Cassel, Vice President
75-75-75-75
(See advertisement on p. 122)

JRP Marketing Research Services
100 Granite Dr., Terrace Level
Media, PA 19063
Ph. 610-565-8840
Fax 610-565-8870
E-mail: jrpmark@fast.net
Kathy McCarty
33-15-20-20
(See advertisement on p. 123)

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

MAXimum Research, Inc.
1860 Greentree Rd.
Cherry Hill, NJ 08003
Ph. 856-874-9000 ext 101
Fax 856-874-9002
E-mail: RMalmud@maximumresearch.com
www.maximumresearch.com
Robert A. Malmud
80-80-80-80
(See advertisement on p. 124)

MSI International East, Inc.
860 First Ave., Ste. 860
King of Prussia, PA 19406
Ph. 610-265-2000 or 800-927-0919
Fax 610-265-2213
E-mail: sharon@msimsi.com
www.msiinternational.com
Sharon Santangelo, Field Director
40-40-40-40

PhoneLab Research
100 N. 17th St., 4th fl.
Philadelphia, PA 19103
Ph. 800-220-5089 or 215-561-7400
Fax 215-561-7403
E-mail: psmith@mlr.net
www.phonelabresearch.com
Patricia Smith, Vice President
50-50-50-50
(See advertisement on p. 125)

Research Incorporated
521 Plymouth Rd., Ste. 116-N
Plymouth Meeting, PA 19462
Ph. 610-941-2700 or 800-220-1201
Fax 610-941-2711
E-mail: psantoro@survdata.com
www.survdata.com/research
15-12-15-15

The Response Center
535 Pennsylvania Ave.
Ft. Washington, PA 19034
Ph. 215-793-2496
Fax 215-793-2889
E-mail: admin@response-center.com
200-200-200-200

Ricci Telephone Research, Inc.
2835 West Chester Pike
Broomall, PA 19008
Ph. 610-356-0675
Fax 610-356-7577
E-mail: info@ricciresearch.com
Chris Ricci, President
50-50-50-50

RSVP/Research Services
1916 Welsh Rd.
Philadelphia, PA 19115
Ph. 215-969-8500
Fax 215-969-3717
E-mail: rsvp@rsvpresearch.com
www.rsvpresearch.com
Michael Feldman, Co-CEO
60-60-60-60
(See advertisement on p. 127)

Schlesinger Associates Philadelphia, Inc.
1650 Arch St., 27th fl.
Philadelphia, PA 19103
Ph. 215-564-7300
Fax 215-564-5161
E-mail: pa@schlesingerassociates.com
www.schlesingerassociates.com
Amber Leila Jones, Facility Director
15-0-15-15
(See advertisement on p. 9)

Survey America Research
1350 S. Pennsylvania Ave.
Morrisville, PA 19067
Ph. 215-736-1600
Fax 215-736-5984
E-mail: SurveyAmerica@worldnet.att.net
www.sarc.net
Douglas Elliott, President
35-35-35-35

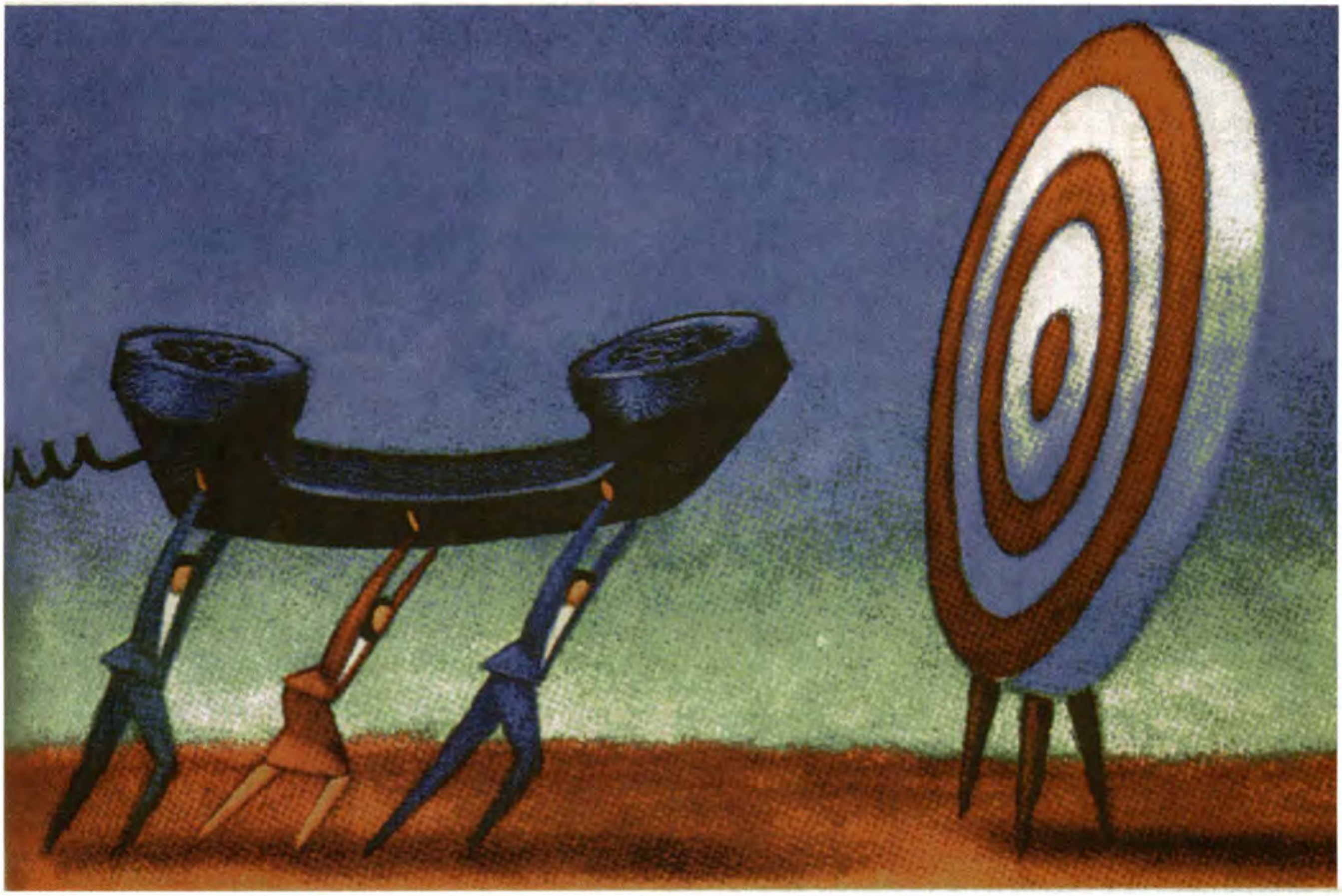
Taylor Nelson Sofres Intersearch
410 Horsham Rd.
Horsham, PA 19044-0189
Ph. 215-442-9000
Fax 215-442-9040
E-mail: bob.michaels@intersearch.tnsofres.com
www.intersearch.tnsofres.com
650-650-650-650

TMR, Inc.
1924 Parker Ave.
Holmes, PA 19043
Ph. 610-586-5051
Fax 610-586-6466
E-mail: yz@tmrinfo.com
www.tmrinfo.com
Youssett Zerkani, V.P./G.M.
50-50-50-50

TMR, Inc.
1974 Sproul Rd.
Broomall, PA 19008
Ph. 610-359-1190
Fax 610-359-1824
E-mail: mla@tmrinfo.com
www.tmrinfo.com
Michelle Adore, V.P./G.M.
50-50-50-50

Pittsburgh

Campos Market Research, Inc.
216 Boulevard of the Allies
Pittsburgh, PA 15222
Ph. 412-471-8484
Fax 412-471-8497
E-mail: campos@campos.com
www.campos.com
R. Yvonne Campos, President
40-20-40-40



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

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

Clark Market Research
5933 Baum Blvd.
Pittsburgh, PA 15206
Ph. 412-361-3200
Fax 412-361-3319
E-mail: jjca5933@aol.com
www.ranlog.com/jjca
John J. Clark, President
40-20-40-40

Customer Contact, Inc. (CCI)
1082 Bower Hill Rd.
Pittsburgh, PA 15243
Ph. 412-279-0909
Fax 412-279-1002
Tim Green, General Manager
38-38-38-38

Direct Feedback, Inc.
Four Station Square, Ste. 545
Pittsburgh, PA 15219
Ph. 412-394-3676 or 800-519-2739
Fax 412-394-3660
E-mail: dfmktrsch@aol.com
www.dfresearch.com
Alan Mavretish, Project Manager
15-15-15-15

Guide Post Research
21 Yost Blvd., Suite 400
Pittsburgh, PA 15221-5283
Ph. 412-823-8444
Fax 412-823-8300
E-mail: GDE PST@aol.com
Jay P. La Mond, President
15-0-15-0

Noble Interviewing Service, Inc.
1610 Potomac Ave.
Pittsburgh, PA 15216
Ph. 412-343-6455
Fax 412-343-3288
Alma Noble, President
20-0-20-0

The Peer Group
224 Fifth Ave., Ste. 216
McKeesport, PA 15132
Ph. 412-675-5100
Fax 412-672-4406
E-mail: anita.younkin@peergroupinc.com
Anita Younkin, Manager
250-125-250-125

PERT Survey Research
2247 Babcock Blvd.
Pittsburgh, PA 15237
Ph. 860-242-2005
Fax 860-242-4857
E-mail: pertsr@aol.com
www.pertsurvey.com
Joyce Bergeron, Field Director
40-35-40-40

TeleData Research
Direct Response Marketing, Inc.
1500 Ardmore Blvd.
Pittsburgh, PA 15221
Ph. 412-242-6200
Fax 412-731-9510
E-mail: drmtdr@usaor.net
www.directresponsemktg.com
70-70-70-70

Scranton/Wilkes-Barre

Centrac, Inc.
145 W. Broad St.
Hazleton, PA 18201
Ph. 973-575-3200
Fax 570-455-7102
E-mail: RLeeds@centracusa.com
www.centrac.com
Ron Leeds, President
40-40-40-40

State College

Diagnostics Plus, Inc.
1333 S. Allen St.
State College, PA 16801
Ph. 814-238-7936
Fax 814-231-7672
E-mail: paulw@diagnosticsplus.com
www.diagnosticsplus.com
Paul Weener, President
23-23-23-23

Market Insight, Inc.
112 W. Foster Ave., Ste. 202-C
State College, PA 16801
Ph. 814-231-2140
Fax 814-234-7215
E-mail: frankf@mkt-insight.com
www.mkt-insight.com
Frank Forney, President
38-38-38-38

Rhode Island

Newport

Advantage Marketing Information, Inc.
7 Main St., Harbor Ste. 3
Wickford, RI 02852
Ph. 401-294-6910
Fax 401-294-6661
E-mail: info@advantagemarketinginfo.com
www.advantagemarketinginfo.com
Rick Nagele, President
15-0-15-0

Providence

Alpha Research Associates, Inc.
395 Smith St.
Providence, RI 02908
Ph. 401-861-3400
Fax 401-861-0062
James P. Gaffney, President
22-0-22-0

Capture, Inc.
1944 Warwick Ave, Ste. 1
Warwick, RI 02889
Ph. 401-732-3269
Fax 401-739-2401
E-mail: resource@captureinc.com
www.captureinc.com
20-20-20-20

Customer Linx
50 Murray St.
Providence, RI 02909
Ph. 401-275-8500
Fax 401-275-8585
E-mail: conrsrch1@aol.com
www.customerlinx.com
Timothy Earnshaw, Director of Research
30-0-30-30

South Carolina

Columbia

Metromark Market Research, Inc.
3030 Devine St.
Columbia, SC 29205
Ph. 803-256-8694
Fax 803-254-3798
E-mail: emsmith@metromark.net
www.metromark.net
Emerson Smith, President
19-0-10-0

Greenville/Spartanburg

ProGen Research, Inc.
2724-A Wade Hampton Blvd.
Greenville, SC 29615
Ph. 864-244-3435
Fax 864-244-8283
Maxie Freeman, Senior Partner
22-7-22-22

Research, Inc.
211 Century Dr., Ste. 102-D
Greenville, SC 29607
Ph. 864-232-2314 or 770-619-9837 (Hq.)
Fax 864-232-1408
E-mail: info@researchincorporated.com
www.researchincorporated.com
18-10-18-18

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

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David Sparks & Associates
107 Clemson St.
Clemson, SC 29631
Ph. 864-654-7571
Fax 864-654-3229
E-mail: dsa@sparksresearch.com
www.sparksresearch.com
48-48-48-10

South Dakota

Sioux Falls

American Public Opinion Survey & Market Research Corp.
1320 S. Minnesota Ave.
Sioux Falls, SD 57105-0625
Ph. 605-338-3918
Fax 605-338-3964
E-mail: ron@mtcnet.net
www.mtcnet.net/~ron
Ron Van Beek, President
27-27-27-27

L & S TeleServices, Inc.
3812 N. Cliff Ave.
Sioux Falls, SD 57104
Ph. 800-894-7832
Fax 605-978-1581
E-mail: teleservices@mostresponsive.com
www.mostresponsive.com
John Sievert
24-24-24-24

RMA, Inc.
Robinson & Muenster Associates, Inc.
1208 Elkhorn St.
Sioux Falls, SD 57104-0218
Ph. 605-332-3386
Fax 605-332-8722
E-mail: terrim@rma-inc.com
www.rma-inc.com
120-120-120-120

Tennessee

Chattanooga

Wilkins Research Services, Inc.
1730 Gunbarrel Rd.
Chattanooga, TN 37421
Ph. 423-894-9478
Fax 423-894-0942
E-mail: opinions@wilkinsresearch.net
www.wilkinsresearch.net
Lisa Wilkins, Executive Director
40-40-40-40

Knoxville

HMR & Associates
2904 A. Tazewell Pike, #A
Knoxville, TN 37918
Ph. 865-281-0038
Fax 865-281-2250
John Myers, Owner
8-0-8-0

Memphis

AccuData Market Research, Inc.
1036 Oakhaven Rd.
Memphis, TN 38119
Ph. 800-625-0405 or 901-763-0405
Fax 901-763-0660
E-mail: memphis@accudata.net
www.accudata.net
Valerie Jolly, Manager
12-0-12-12

Ethridge & Associates, LLC
751 Walnut Knoll Ln
Cordova, TN 38018-6301
Ph. 901-754-9437
Fax 901-755-8075
E-mail: steven@ethridge.com
www.ethridge.com
Steven Ethridge, President
40-40-40-40

NextResearch Marketing Direction
5050 Poplar Ave., Ste. 920
Memphis, TN 38157
Ph. 901-682-1011
Fax 901-684-5352
E-mail: leslie@nextresearch.com
www.nextresearch.com

PWI Research
5100 Poplar Ave., Ste. 3125
Memphis, TN 38137
Ph. 901-682-2444
Fax 901-682-2471
E-mail: pwipat@aol.com
www.pwiresearch.com
Pat LaPointe, President
35-35-35-35

Nashville

Elrick & Lavidge
1850 Business Park Dr., Ste. 122-B
Clarksville, TN 37040
Ph. 931-920-2000
Fax 931-920-2019
E-mail: dct@elavidge.com
www.elrickandlavidge.com
Denise Terkos, Site Director
105-105-105-105

The Nashville Research Group
1161 Murfreesboro Rd., Ste. 150
Nashville, TN 37217
Ph. 615-399-7727
Fax 615-399-9171
E-mail: service@nashvilleresearch.com
www.nashvilleresearch.com
Glyna E. Kilpatrick, Owner/Field Director
9-0-9-9

Perdue Research Group
21 White Bridge Rd., Ste. 200
Nashville, TN 37205
Ph. 615-298-5117
Fax 615-298-5668
E-mail: gfuson@mindspring.com
Greg Fuson, Acct. Mgr./Cnslt.
20-16-0-0

Prince Market Research
2323 Hillsboro Rd., #500
Nashville, TN 37212
Ph. 615-292-4860 or 800-788-7728
Fax 615-292-0262
E-mail: dprince@PMResearch.com
www.pmresearch.com
8-0-8-0

Texas

Austin

First Market Research Corp.
2301 Hancock Dr.
Austin, TX 78756
Ph. 800-FIRST-TX or 512-451-4000
Fax 512-451-5700
E-mail: jheiman@firstmarket.com
www.firstmarket.com
James Heiman, President
20-20-20-20
(See advertisement on p. 22)

The Gallup Organization - Austin
1016 LaPosada, Ste. 290
Austin, TX 78752
Ph. 512-454-5271
Fax 512-453-3307
www.gallup.com
155-155-155-155

NuStats Research & Consulting
3006 Bee Caves Rd., Ste. A300
Austin, TX 78746
Ph. 512-306-9065 or 512-637-6700
Fax 512-306-9077
E-mail: carce@nustats.com
http://nustats.com
Carlos H. Arce, President
75-70-70-70

Tammadge Market Research
210 Barton Springs Rd., Ste. 515
Austin, TX 78704
Ph. 800-879-9198 or 512-474-1005
Fax 512-370-0339
E-mail: melissa@tammadge.com
www.tammadge.com
Melissa Pepper, CSO
30-20-30-30

Dallas/Fort Worth

Decision Analyst, Inc.
604 Avenue H East
Arlington, TX 76011-3100
Ph. 817-640-6166 or 800-ANALYSIS
Fax 817-640-6567
E-mail: jthomas@decisionanalyst.com
www.decisionanalyst.com
Jerry W. Thomas, President/CEO
65-65-65-65
(See advertisement on inside back cover)

Delve
(Formerly Quality Controlled Services - QCS)
2711 LBJ Freeway, Ste. 300
Farmers Branch, TX 75234
Ph. 800-421-2167 or 972-488-9988
Fax 972-488-9997
E-mail: postmaster@delve.com
www.delve.com
Lynn Hibben, Group Manager
12-0-12-12
(See advertisement on p. 103)

Discovery - National Qualitative Network
Dallas Focus
2723 Valley View Ln.
Dallas, TX 75234
Ph. 972-241-6696
Fax 972-241-8513
E-mail: dallas@discovery-nqn.com
www.discovery-nqn.com
25-8-25-25

DSS Research
711 E. Lamar Blvd., Ste. 101
Arlington, TX 76011-3854
Ph. 817-265-2422
Fax 817-261-0707
E-mail: rgates@dssresearch.com
www.dssresearch.com
Dr. Roger Gates, President
75-75-75-75

Fenton Swanger Consumer Research, Inc.
14140 Midway Rd., Ste. 105
Dallas, TX 75244
Ph. 972-934-0707
Fax 972-490-3919
E-mail: focus@fentonswanger.com
www.fentonswanger.com
Ruthye Fowler, Vice President
35-35-35-35

Focus On Dallas, Inc.
Alpha Plaza
4887 Alpha Rd., Ste. 210
Dallas, TX 75244-4632
Ph. 972-960-5850
Fax 972-960-5859
E-mail: bids@focusondallas.com
www.focusondallas.com
Mary Ulrich, President
36-0-36-0

Information Unlimited, Inc.
13747 Montfort, Ste. 218
Dallas, TX 75240
Ph. 972-386-4498
Fax 972-450-8456
Nancy Monnier, Vice President
150-150-150-150

MMR Research
8700 N. Stemmons Fwy., Ste. 190
Dallas, TX 75247-3715
Ph. 800-315-TEXX
Fax 214-630-6769
E-mail: tveliz@aol.com
Tony Veliz, Facility Director
10-0-10-0

Rincon & Associates
6060 N. Central Expwy., Ste. 670
Dallas, TX 75206
Ph. 214-750-0102
Fax 214-750-1015
E-mail: info@rinconassoc.com
www.rinconassoc.com
Edward T. Rincon, Ph.D., President
30-0-30-30

Savitz Field and Focus - Dallas
13747 Montfort Dr., Ste. 112
Dallas, TX 75240
Ph. 972-386-4050
Fax 972-450-2507
E-mail: info@savitzfieldandfocus.com
www.savitzfieldandfocus.com
Harriet E. Silverman, Exec. Vice President
150-150-150-150

El Paso

Aim Research
10456 Brian Mooney
El Paso, TX 79935
Ph. 915-591-4777
Fax 915-595-6305
E-mail: AIMRES@aol.com
www.aimresearch.com
Linda Adams, Owner/Director
30-20-5-0
(See advertisement on p. 129)

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Eastern Research Services
Vista Estrella II
1810 George Diter Blvd., Ste. 106
El Paso, TX 79936
Ph. 915-921-0875
Jack Morales, Director
90-90-90-90

Houston

CQS Research, Inc.
2500 West Loop S., Ste. 300
Houston, TX 77027
Ph. 713-783-9111 or 800-460-9111
Fax 713-789-2020
E-mail: cqs@cqsinc.com
www.cqsinc.com
Noel Roulin, President
50-15-50-50

Creative Consumer Research
3945 Greenbriar
Stafford, TX 77477
Ph. 281-240-9646
Fax 281-240-3497
E-mail: ccrhous@insync.net
Patricia Pratt, Field Director
60-40-60-60

Delve
(Formerly Quality Controlled Services - QCS)
17625 El Camino Real, Ste. 100
Houston, TX 77058
Ph. 800-522-2385 or 281-488-8247
Fax 281-486-3831
E-mail: postmaster@delve.com
www.delve.com
Diana Reid, Branch Manager
14-0-14-14
(See advertisement on p. 103)

The Gallup Organization - Houston
14405 Walters Rd., #200
Houston, TX 77014-1344
Ph. 281-444-0040
Fax 281-444-7658
www.gallup.com
240-240-240-240

M.A.R.S. Research of Texas
3200 Wilcrest, Ste. 100
Houston, TX 77042
Ph. 713-266-6277 or 888-320-6277
Fax 713-266-6276
E-mail: johnniehorn@marstexas.com
www.marsresearch.com
Johnnie Horn, President
35-35-35-35
(See advertisement on p. 130)

Market Research & Analysis Field Staff, Inc.
The Research Center
5075 Westheimer Rd.
Houston, TX 77056
Ph. 713-271-5624
Fax 713-840-0699
E-mail: mrafs@swbell.net
Fay Parker, President
15-6-15-0

Opinions Unlimited, Inc.
Three Riverway, Ste. 250
Houston, TX 77056
Ph. 713-888-0202 or 800-604-4247
Fax 713-960-1160
E-mail: ask@opinionsunlimited.com
www.opinions-unlimited.com
Andrew Martin, Vice President
70-60-70-24
(See advertisement on p. 131)

Quest Research
7026 Old Katy Rd., Ste. 254
Houston, TX 77024
Ph. 713-956-6569
Fax 713-956-2593
E-mail: research@tqba.com
www.tqba.com
Mary Jo Martin, Vice President
50-50-50-50

Voter/Consumer Research
3845 FM 1960 W., Ste. 440
Houston, TX 77068
Ph. 281-893-1010
Fax 281-893-8811
E-mail: vcr@vcrhouston.com
www.vcrhouston.com
Jerry Goins, Vice President
175-175-175-175

Lubbock

C P I
4136 E. 19th St.
Lubbock, TX 79410
Ph. 806-780-8880
Fax 806-780-7676
E-mail: jpetrillo@cpisurveys.com
Doug Chapin, Vice President
60-60-60-60

United Marketing Research
1516 53rd St.
Lubbock, TX 79412
Ph. 806-744-6740
Fax 806-744-0327
E-mail: umr220@door.net
www.umspromo.com
David McDonald, Sales/Marketing Dir.
85-85-80-80

San Antonio

Consumer Research Services
(Formerly VNU Operations Center)
4801 N.W. Loop 410, Ste. 125
San Antonio, TX 78229
Ph. 954-753-6043
www.vnu.com
70-70-70-70

Creative Consumer Research
5300 Wurzbach Rd., Ste. 400
San Antonio, TX 78238
Ph. 210-520-7025
Fax 210-680-9906
E-mail: ccrsan210@aol.com
Richard Weinhold, Vice President
50-15-50-0

Galloway Research Services
4346 N.W. Loop 410
San Antonio, TX 78229-5121
Ph. 210-734-4346
Fax 210-732-4500
E-mail: grs@gallowayresearch.com
www.gallowayresearch.com
Linda K. Brazel, General Manager
75-75-75-75

Utah

St. George

PGM Incorporated
1325 S. 320 E., #4
St. George, UT 84790
Ph. 801-434-9546
Fax 801-434-7304
E-mail: mail@pgmincorporated.com
www.pgmincorporated.com
Robert E. Higginson, V.P./Client Relations
59-59-59-59

Western Wats Interviewing Center
44 North 800 East
St. George, UT 84770
Ph. 801-374-5572
Fax 801-379-4197
E-mail: jwelch@westernwats.com
Jeff Welch
48-48-48-48
(See advertisement on p. 133)

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Salt Lake City

Discovery Research Group of Utah
2089 E. Fort Union Blvd.
Salt Lake City, UT 84121
Ph. 800-678-3748 or 801-944-0326
Fax 801-944-0550
E-mail: slarson@drgutah.com
www.drgutah.com
Steve Larson, Account Executive
350-350-350-350
(See advertisement on p. 132)

PGM Incorporated
581 W. 1600 N.
Orem, UT 84057
Ph. 801-434-9546
Fax 801-434-7304
E-mail: mail@pgmincorporated.com
www.pgmincorporated.com
Robert E. Higginson, V.P./Client Relations
88-88-88-88

PGM Incorporated
776 N. 1200 W.
Orem, UT 84057
Ph. 801-434-9546
Fax 801-434-7304
E-mail: mail@pgmincorporated.com
www.pgmincorporated.com
Robert E. Higginson, V.P./Client Relations
49-49-49-49

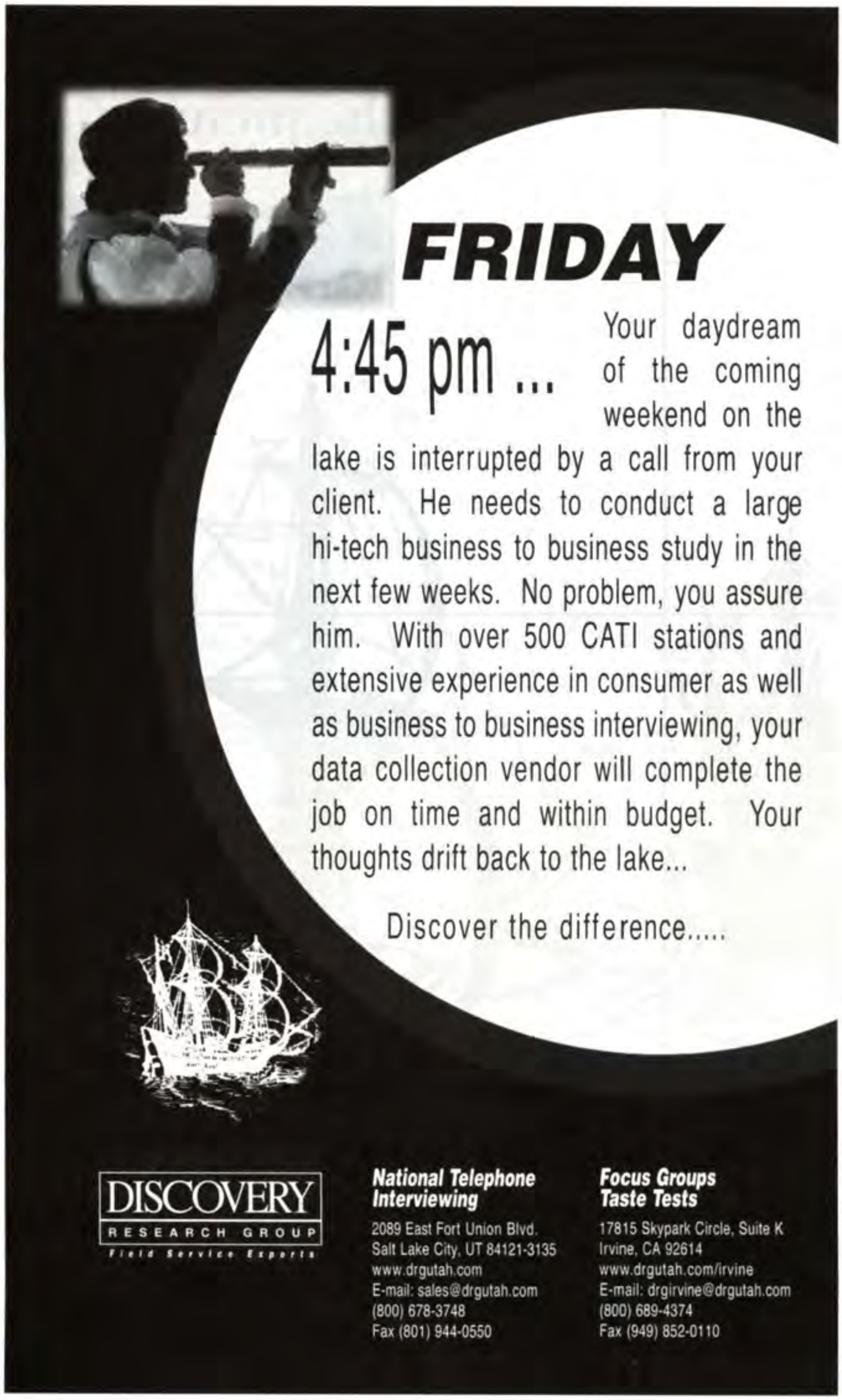
RTNielson Company
8 E. Broadway, Ste. 312
Salt Lake City, UT 84111
Ph. 801-359-1345 or 800-786-9946
Fax 801-355-6335
E-mail: info@rtnielson.com
www.rtnielson.com
Ron Nielson, President
150-150-150-150

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
10-0-10-0

Valley Research, Inc.
350 E. 500 S., Ste. 102
Salt Lake City, UT 84111-3351
Ph. 801-907-2000
Fax 801-907-2001
E-mail: valley@valley-research.com
www.valley-research.com
Sheri Guiver, President
20-20-20-20

Venture Data
3320 S. 300 E.
Salt Lake City, UT 84115
Ph. 800-486-7955
Fax 801-486-4488
E-mail: jeffc@VentureData.com
www.VentureData.com
Jeff Call, General Manager
200-200-200-200
(See advertisement on p. 134)

Western Wats B2B
2155 N. Freedom Blvd.
Provo, UT 84604
Ph. 801-344-5600
Fax 801-344-5700
E-mail: gbishop@westernwats.com
Gordon Bishop
54-54-54-54
(See advertisement on p. 133)



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Western Wats Interviewing Center
208 N. Orem Blvd.
Orem, UT 84057
Ph. 801-374-5572
Fax 801-379-4197
E-mail: jwelch@westernwats.com
Jeff Welch
40-40-40-40
(See advertisement on p. 133)

Western Wats Opinion Research Center
39 E. 380 N.
Ephraim, UT 84627
Ph. 801-374-5572
Fax 801-379-4197
E-mail: jwelch@westernwats.com
Jeff Welch
50-50-50-50
(See advertisement on p. 133)

Western Wats Trax
1070 N. Main St.
Spanish Fork, UT 84660
Ph. 801-374-0795
Fax 801-343-2500
E-mail: ajackson@westernwats.com
Art Jackson
50-50-50-50
(See advertisement on p. 133)

Western Wats Trax
22 E. Center St.
Logan, UT 84321
Ph. 801-374-0795
Fax 801-343-2500
E-mail: ajackson@westernwats.com
Art Jackson
64-64-64-64
(See advertisement on p. 133)

Wirthlin Worldwide
1998 S. Columbia Ln.
Orem, UT 84097-8052
Ph. 801-226-1524 or 800-311-6593
Fax 801-226-3483
E-mail: inquires@wirthlin.com
www.wirthlin.com
Tom Summerhays, Director Field Operations
123-123-123-123

Vermont

Burlington

Action Research
212 Battery St.
Burlington, VT 05401
Ph. 802-862-4370
Fax 802-862-2349
E-mail: info@actionresearch.com
www.actionresearch.com
Richard H. McCoy, President
30-30-30-0

Virginia

Newport News/ Norfolk/Virginia Beach

Continental Research Associates, Inc.
4500 Colley Ave.
Norfolk, VA 23508
Ph. 757-489-4887
Nanci A. Glassman, President
14-7-14-14

Discovery - National Qualitative Network
Norfolk Telephone
825 Greenbrier Circle, Ste. 200
Chesapeake, VA 23320
Ph. 757-523-2505
Fax 757-523-0463
E-mail: norfolk@discovery-nqn.com
www.discovery-nqn.com
Gerri Kennedy, Manager
20-20-20-20

Eastern Research Services
Pembroke Six, Ste. 318
297 Independence Blvd.
Virginia Beach, VA 23462
Ph. 757-519-9145
Fax 757-519-9685
Nanci Hawkins, Manager
60-60-60-60

Issues and Answers Network, Inc.
5151 Bonney Rd.
Virginia Beach, VA 23462
Ph. 757-456-1100 or 800-23-ISSUE
Fax 757-456-0377
E-mail: peterm@issans.com
www.issans.com
Peter McGuinness, President
120-120-120-120

Richmond

Media General Research
333 E. Franklin St.
Richmond, VA 23219
Ph. 804-649-6787
Fax 804-819-1242
E-mail: sshaw@mediageneral.com
Steve Shaw, Director of Research
15-0-15-0

Southeastern Institute of Research (SIR)
2325 W. Broad St.
Richmond, VA 23220
Ph. 800-807-8981
Fax 804-358-9761
E-mail: SIR@SIRresearch.com
www.SIRresearch.com
Lois Abernathy, Dir. Special Projects
104-104-104-104

Roanoke

Issues and Answers Network, Inc.
Buchanan Information Park
Rural Rte. 3, Box 181A
Grundy, VA 24614
Ph. 757-456-1100 or 516-487-8339
Fax 757-456-0377
E-mail: peterm@issans.com
www.issans.com
Peter McGuinness, President
90-90-90-90

Issues and Answers Network, Inc.
Russell County Industrial Park
Rural Rte. 2, Box 480
Lebanon, VA 24266
Ph. 757-456-1100 or 516-487-8339
Fax 757-456-0377
E-mail: peterm@issans.com
www.issans.com
Peter McGuinness, President
120-120-120-120

Washington

Seattle/Tacoma

Consumer Opinion Services, Inc.
12825 First Ave. S.
Seattle, WA 98168
Ph. 206-241-6050
Fax 206-241-5213
E-mail: info@cosvc.com
www.cosvc.com
Jerry Carter, Vice President
17-0-17-0
(See advertisement on p. 135)

Delve
(Formerly Quality Controlled Services - QCS)
14711 NE 29th Place, Ste. 110
Bellevue, WA 98007
Ph. 888-863-9573 or 425-881-7272
Fax 425-881-7121
E-mail: postmaster@delve.com
www.delve.com
Donna Glosser, Branch Manager
12-0-12-0
(See advertisement on p. 103)

First Northwest Group
7907 212th St. S.W., Ste. 200
Edmonds, WA 98026
Ph. 425-775-3500
Fax 425-776-1202
E-mail: karen@firstnwgroup.com
www.firstnwgroup.com
Karen Benedict, General Manager
75-75-75-75

Gilmore Research Group
2324 Eastlake Ave. E., Ste. 300
Seattle, WA 98102-3306
Ph. 206-726-5555
Fax 206-726-5620
E-mail: cnicholl@gilmore-research.com
www.gilmore-research.com
Tim Tracy, Focus Manager
39-39-39-39

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

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3. ON-SITE - No. of stations which can be monitored on-site
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GMA Research Corp.
11808 Northrup Way, Ste. 270
Bellevue, WA 98005
Ph. 425-827-1251
Fax 425-828-6778
E-mail: gma70@aol.com
Richard Secker, Director of Field Service
34-28-24-24

Market Data Research Corp.
308 Tacoma Ave. S.
Tacoma, WA 98402
Ph. 800-488-DATA or 253-383-1100
Fax 253-383-0852
E-mail: scotts@marketdataresearch.com
www.marketdataresearch.com
Scott Schoeggl
22-22-22-22

Market Trends, Inc.
(Corporate Headquarters)
375 Corporate Dr. S., Ste. 100
Seattle, WA 98188
Ph. 206-575-1222
Fax 206-575-8779
E-mail: infomanager@markettrends.com
www.markettrends.com
Jackie Weise, Exec. Vice President
50-50-50-50

MindAbility
215 8th Ave. N.
Seattle, WA 98109
Ph. 800-918-9301 or 206-381-8600
Fax 206-374-2893
E-mail: info@mindability.com
www.crni.com
Evan Reilly, Vice President
120-0-120-120

Northwest Research Group, Inc.
400 108th Ave. N.E., Ste. 200
Bellevue, WA 98004
Ph. 425-635-7481
Fax 425-635-7482
E-mail: ethertn@nwrg.com
www.nwrg.com
Kris Lau
36-36-36-36

Pacific Market Research
15 S. Grady Way, Ste. 620
Renton, WA 98055
Ph. 425-271-2300
Fax 425-271-2400
E-mail: mrosenkranz@pacificmarketresearch.com
Mark Rosenkranz, Managing Director
58-58-58-58

Spokane

Communications Center, Inc.
627 E. Sprague Ave., Ste. A
Spokane, WA 99202
Ph. 509-624-8228
Fax 509-624-8341
E-mail: bids@cciclientservices.com
www.ccicorporate.com
Matt Hewitt
120-120-120-120

Robinson Research, Inc.
524 W. Indiana
Spokane, WA 99205
Ph. 509-325-8080
Fax 509-325-8068
E-mail: robinsonresearch@icehouse.net
www.robinsonresearchinc.com
William D. Robinson, President
30-30-30-30

Strategic Research Associates
426 W. Boone Ave.
Spokane, WA 99201
Ph. 509-324-6960 or 888-554-6960
Fax 509-324-8992
E-mail: stevend@strategicresearch.net
www.strategicresearch.net
Steven Dean, Director
20-10-16-16

West Virginia

Charleston

McMillion Research Service
1012 Kanawha Blvd. E.
Charleston, WV 25301-2809
Ph. 304-343-9650
Fax 304-343-6522
E-mail: jmace@mcmillionresearch.com
www.mcmillionresearch.com
Gary or Sandy McMillion, Owners
125-125-125-125
(See advertisement on p. 137)

Morgantown

Market Facts, Inc.
2567 University Ave., Ste. 2017
Morgantown, WV 26505
Ph. 847-590-7000
Fax 847-590-7167
E-mail: tpayne@marketfacts.com
www.marketfacts.com
Sharon Abrams
110-110-110-110

Wisconsin

Green Bay/Appleton

Delve
(Formerly Quality Controlled Services - QCS)
4330 W. Spencer St.
Appleton, WI 54914
Ph. 800-637-0775 or 920-636-1200
Fax 920-636-1212
E-mail: postmaster@delve.com
www.delve.com
Esther Young, Branch Manager
16-16-16-16
(See advertisement on p. 103)

Leede Research Group, Inc.
1332 S. 26th St.
Manitowoc, WI 54220
Ph. 920-683-5940
Fax 920-683-5950
E-mail: JimD@Leede.com
www.Leede.com
Jim DeZeeuw, Vice President
35-35-35-35

Venture Research Corporation
681 Baeten Rd.
Green Bay, WI 54304
Ph. 920-496-1960
Fax 920-496-1961
E-mail: lsegersin@venturegb.com
Linda Segersin, General Manager
18-18-18-18

Wisconsin Research, Inc.
1270 Main St.
Green Bay, WI 54302
Ph. 920-436-4646
Fax 920-436-4651
Kathy Fisher
20-20-20-0

Madison

Chamberlain Research Consultants, Inc.
710 John Nolen Dr.
Madison, WI 53713
Ph. 608-246-3010
Fax 608-246-3019
E-mail: crc@crcwis.com
www.crcwis.com
Nicole Wyrembeck, Vice President
30-30-30-30

Gene Kroupa & Associates
222 N. Midvale Blvd., Ste. 29
P.O. Box 5258
Madison, WI 53705
Ph. 608-231-2250
Fax 608-231-6952
E-mail: gene@genekroupa.com
www.genekroupa.com
Dr. Gene Kroupa, Research Director
20-20-20-20

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

Milwaukee

Advantage Research, Inc.
W202 N10246 Lannon Rd.
Germantown, WI 53022
Ph. 262-502-7000 or 877-477-7001
Fax 262-502-7010
E-mail: ssegrin@ariadvantage.com
www.ariadvantage.com
Scott Segrin, Vice President
40-40-40-40
(See advertisement on p. 139)

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, Manager
15-8-15-15

The Dieringer Research Group, Inc.
3064 N. 78th St.
Milwaukee, WI 53222
Ph. 414-449-4545 or 800-489-4540
Fax 414-449-4540
E-mail: research@thedrg.com
www.thedrg.com
Delanie Johnson, Dir. Rsch Ops.
60-60-60-60

Lein/Spiegelhoff, Inc.
720 Thomas Ln.
Brookfield, WI 53005
Ph. 262-797-4320
Fax 262-797-4325
E-mail: ls@execpc.com
www.lein-spiegelhoff.com
Charles Spiegelhoff, President
50-40-50-50

Management Decisions, Inc.
6525 W. Bluemound Rd.
Milwaukee, WI 53213-4073
Ph. 414-774-0623
Fax 414-774-0385
E-mail: info@managementdecisionsinc.com
www.managementdecisionsinc.com
Ronald D. Bisbing, President
40-20-40-40

Market Probe, Inc.
2655 N. Mayfair Rd.
Milwaukee, WI 53226-1310
Ph. 414-778-6000
Fax 414-778-3730
E-mail: info@marketprobe.com
www.marketprobe.com
Jason Holmes, Call Center Coordinator
75-75-75-75

Market Probe, Inc.
1760 22nd Ave.
Kenosha, WI 53140
Ph. 262-612-1200
Fax 262-612-1201
www.marketprobe.com
Brenda Dwyer, Manager-CATI
65-65-65-65

Mazur/Zachow, Inc.
1025 S. Moorland Rd., Ste. 300
Brookfield, WI 53005
Ph. 262-938-9244
Fax 262-938-9255
E-mail: mazurzac@aol.com
www.mazurzachow.com
Diane Zachow, Vice President
15-5-10-0

Milwaukee Market Research, Inc.
10101 W. Innovation Dr., Ste. 350
Woodlake Business & Technology Ctr.
Milwaukee, WI 53226
Ph. 414-475-6656
Fax 414-475-0842
E-mail: mmr@execpc.com
Susan Lehmann, President
17-14-14-0

PERT Survey Research
1209 W. Layton Ave.
Milwaukee, WI 54022
Ph. 860-242-2005
Fax 860-242-4857
E-mail: pertsr@aol.com
www.pertsurvey.com
Joyce Bergeron, Field Director
40-35-40-40

Wyoming

Laramie

Western Wats Trax
1604 Grand Ave.
Laramie, WY 82070
Ph. 801-374-0795
Fax 801-343-2500
E-mail: ajackson@westernwats.com
Art Jackson
50-50-50-50
(See advertisement on p. 133)

INTERNATIONAL

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D'Alessio/Harris (Argentina)
25 de Mayo 252 piso 11
1002 Buenos Aires
Argentina
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Fax +54-11-4342-9292
E-mail: info@dalessio.com.ar
www.dalessio.com.ar
Dr. Eduardo Luis D'Alessio, President
7-7-7-0

Gallup Argentina
Av. Cordoba 883 - 12
1054 Buenos Aires
Argentina
Ph. +54-11-4312-7541 or +54-11-4312-7543
E-mail: mcarballo@gallup.com.ar
www.gallup.com.ar
40-40-40-40

IFOP-ASECOM Latin America
Av. Belgrano 1255
(C1093AAA) Buenos Aires
Argentina
Ph. +54-11-4381-1118
Fax +54-11-4381-0234
E-mail: research@asecom.com.ar
www.asecom.com.ar
Jorge Garcia-Gonzalez, President
36-36-36-0

Australia

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1st floor, 202-206 Broadway
Ultimo, NSW 2007
Australia
Ph. +61-2-9211-1050
Fax +61-2-9211-4080
E-mail: brian@amrsydney.com
www.harrisinteractive.com
Brian Fine, Managing Director
100-100-100-0

DBM Consultants Pty Ltd
5-7 Guest Street
Hawthorn, VIC 3122
Australia
Ph. +61-3-9819-1555
Fax +61-3-9819-9333
E-mail: dbm@dbmcons.com.au
www.dbmcons.com.au
50-50-50-50

Right Marketing Australia
Ground floor, Churchill Court
232 Churchill Ave.
Subiaco, WA 6008
Australia
Ph. +61-8-9388-8640
Fax +61-8-9388-8650
E-mail: rma@rightmarketing.com.au
www.rightmarketing.com.au
60-60-60-60

West Coast Field Services
1st Floor, 47 Kishorn Rd.
Applecross, WA 6153
Australia
Ph. +61-8-9316-3366
Fax +61-8-9316-9117
E-mail: answers@marketresearch.com.au
25-0-25-0

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Austria

Integral Markt- und Meinungsforschung
Mohsgasse 2
1030 Vienna
Austria
Ph. +43-1-799-19-94
Fax +43-1-799-19-94-18
E-mail: office@integral.co.at
www.integral.co.at

Barbados

Data Call International
Bridgetown
Barbados
Ph. 888-530-9908
Fax 888-423-1614
Tony Parker, Owner
76-76-76-76
(See advertisement on p. 72)

Belgium

Taylor Nelson SOFRES Dimarso
240 Avenue Rogier
1030 Brussels
Belgium
Ph. +32-2-215-19-30
Fax +32-2-216-13-96
E-mail: info@dimarso.com
Luc Schulpen
160-160-160-0

Brazil

ABACO Marketing Research, Ltd.
Sao Paulo Marketing Center
Rua Minas Gerais, 396
01244-010 Sao Paulo
Brazil
Ph. +55-11-257-0711 or +55-11-257-0030
Fax +55-11-256-3982
E-mail: abaco@abacoresearch.com
www.abacoresearch.com
Alan Grabowsky, President
26-26-6-0

EP-Escritorio de Pesquisa Eugenia Paesani S/C Ltda
Rua Armando Penteado, 245
01242-010 Sao Paulo
Brazil
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Fax +55-11-3823-8601
E-mail: ep@eppesq.com.br
Eugenia Paesani, President
24-24-24-24

Goldfarb Consultants Brasil
Rua Bandeira Paulista, 600-cj82
04532-001 Sao Paulo
Brazil
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Fax +55-11-3849-3401
E-mail: d.myhrer@goldfarbconsultants.com
www.goldfarbconsultants.com
David Myhrer
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Sao Paulo Focus
The Focus Network
Rua Bandeira Panlista, 600 14th floor
04532-001 Sao Paulo
Brazil
Ph. +55-11-3841-9010
E-mail: saopaulofocus@thefocusnetwork.com
www.thefocusnetwork.com
Andren Sichero
20-12-20-0

Canada

Alberta

Calgary

Call-Us Info, Inc.
1414 8th St. S.W., #530
Calgary, AB T2S 1Y2
Canada
Ph. 888-244-4114
Fax 403-244-0442
E-mail: cruben@call-us-info.com
www.call-us-info.com
Connie Ruben, President
65-65-65-65
(See advertisement on p. 140)

Insight Research & Consulting Corp.
604 1st St. S.W., Ste. 400
Calgary, AB T2P 1M7
Canada
Ph. 403-265-8700 or 888-265-8700
Fax 403-265-8701
E-mail: tremblay@ircc.com
www.ircc.com
10-10-10-0

Top Hat Focus Surveys Ltd.
3015 12th St. N.E., #140
Calgary, AB T2E 7J2
Canada
Ph. 403-299-0750 or 877-255-7022
Fax 403-299-0762
E-mail: tophat@ab.imag.net
25-25-25-25

Edmonton

Advanis Field Research (AFR)
10123 99 Street, Ste. 1600
Edmonton, AB T5J 3H1
Canada
Ph. 780-944-9212
Fax 780-426-7622
E-mail: info@advanisfield.ca
www.advanisfield.ca
120-120-120-120

British Columbia

Vancouver

CGT Research International
1100 - 675 W. Hastings St.
Vancouver, BC V6B 1N2
Canada
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Fax 604-681-0427
E-mail: adipaula@cgtnet.com
www.cgtnet.com
Adam Di Paula
52-52-52-52

L.M.L. Market Research Services, Ltd.
7035B 120th St.
Scottsdale Mall
Delta, BC V4E 2A9
Canada
Ph. 604-507-7474
Fax 604-507-7676
16-16-16-16

Market Facts of Canada - Vancouver
Royal City Center
610 - 6th st., Ste. 235
New Westminster, BC V3L 3C2
Canada
Ph. 604-517-0070
Fax 604-517-0079
E-mail: tpayne@marketfacts.com
www.marketfacts.com
Else Lewer, Manager
20-20-20-20

McIntyre & Mustel Research Ltd.
1505 W. 2nd Ave., Ste. 402
Vancouver, BC V6H 3Y4
Canada
Ph. 604-733-4213
Fax 604-733-5221
30-30-30-30

Nova Quality Research, Ltd.
2nd fl. - 1622 W. 7th Ave.
Vancouver, BC V6J 1S5
Canada
Ph. 604-734-2330
Fax 604-734-4725
E-mail: nqr@telus.net
www.novaquality.com
Valerie Jenkinson, President
12-12-12-12

Sowden Research, Inc.
952 A Brunette Ave.
Coquiltam, BC V3K 1C9
Canada
Ph. 604-606-3130
Fax 604-525-0024
E-mail: sowden@ican.net
50-20-50-20

Manitoba

Winnipeg

Dimark Research Inc.
665 Stafford St.
Winnipeg, MB R3M 2X7
Canada
Ph. 204-987-1960
Fax 204-987-1928
E-mail: fabio@dimark.ca
Fabio Espsito, President
48-48-48-48

PRA, Inc.
Prairie Research Associates
530-363 Broadway
Winnipeg, MB R3C 3N9
Canada
Ph. 204-987-2030
Fax 204-989-2454
E-mail: admin@pra.ca
www.pra.ca
Greg Mason, Ph.D., Managing Director
40-40-40-40

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Nova Scotia

Halifax

Corporate Research Associates, Inc.
2695 Dutch Village Rd., Ste. 700
Halifax, NS B3L 4V2
Canada
Ph. 902-421-1336
Fax 902-453-0344
E-mail: dmills@cra.ca
www.cra.ca
David Chan, Dir. Market Research

KLJ Field Services Inc.
P.O. Box 668
94 Wentworth Road
Windsor, NS B0N 2T0
Canada
Ph. 888-4KLJ-NOW
Fax 866-686-0KLJ
E-mail: sblack@kljsolutions.com
www.kljsolutions.com/field
Stacey Black
48-48-48-48
(See advertisement on p. 141)

RDI Fieldworks, Inc.
1310 Hollis St., Ste. 160
Halifax, NS B3J 3P3
Canada
Ph. 902-492-8989
Fax 902-490-1665
E-mail: ddudka@rdihq.ns.ca
www.rdi-group.com
David Dudka
107-59-107-0

Ontario

Ottawa

Ekos Research Associates, Inc.
99 Metcalfe St., Ste. 1100
Ottawa, ON K1P 6L7
Canada
Ph. 613-235-7215
Fax 613-235-8498
E-mail: pobox@ekos.com
www.ekos.com
75-75-75-75

Opinion Search, Inc.
1800 - 160 Elgin St.
Ottawa, ON K2P 2C4
Canada
Ph. 800-363-4229
Fax 613-230-3793
E-mail: info@opinionsearch.com
www.opinionsearch.com
Janette Niwa, V.P., Client Services
125-125-125-125
(See advertisement on p. 5)

PricewaterhouseCoopers, LLP
99 Bank St., Ste. 800
Ottawa, ON K1P 1E4
Canada
Ph. 613-237-3702
Fax 613-237-3963
E-mail: douglas.meredith@ca.pwcglobal.com
www.pwcglobal.com
65-65-65-65

Toronto

Acrobat Results Marketing, Inc.
70 Park Lawn Rd.
Toronto, ON M8Y 3H8
Canada
Ph. 416-503-4343
Fax 416-503-8707
E-mail: info@acrobat-results.com
www.acrobat-results.com
Roland Klassen, President
160-160-160-160

BBM Bureau of Measurement
1500 Don Mills Rd., Ste. 300
Toronto, ON M3B 3L7
Canada
Ph. 416-445-9800
Fax 416-445-8644
www.bbm.ca
200-200-200-200

Burwell Hay
211 Laird Dr., Ste. 201
Toronto, ON M4G 3W8
Canada
Ph. 416-422-2200
Fax 416-422-5600
E-mail: info@burwellhay.com
www.burwellhay.com
40-40-40-40

Canadian Viewpoint, Inc.
Hillcrest Mall
9350 Yonge St., Ste. 206
Richmond Hills, ON L4C 5G2
Canada
Ph. 905-770-1770 or 888-770-1770
Fax 905-770-1692
E-mail: cdnview@interlog.com
www.canview.com
Alan Boucquey, V.P. Operations
50-25-50-25

ComQuest Research, Inc.
A subsidiary of BBM Bureau of Management
1500 Don Mills Rd., Ste. 305
Toronto, ON M3B 3L7
Canada
Ph. 416-445-8881
Fax 416-445-8406
E-mail: dpeirce@comquest.ca
www.comquest.ca
Diane Peirce
240-240-240-240

Consumer Contact
1220 Sheppard Ave. E., #100
Toronto, ON M2K 2S5
Canada
Ph. 800-461-3924
Fax 416-493-0176
E-mail: info@consumercontact.com
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David Black, Exec. Vice President
300-300-300-300

Consumer Vision
1255 Bay St., Ste. 300
Toronto, ON M5R 2A9
Canada
Ph. 416-967-1596
Fax 416-967-0915
E-mail: phyllis.friedman@consumervision.on.ca
www.consumervision.on.ca
Phyllis Friedman, General Manager
40-0-40-0

Forum Canada Research, Inc.
180 Bloor St. W., Ste. 1401
Toronto, ON M5S 2V6
Canada
Ph. 416-960-9600 ext. 9603
Fax 416-960-9602
E-mail: lbozinoff@forumresearch.com
www.forumresearch.com
Lorne Bozinoff, President
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Qualitatively Speaking

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Should focus groups be banned from the marketing tool kit? Or, at the very least, should we professionals create a law that prohibits even fielding a focus group that asks questions for which techniques such as one-on-one interviews, observational research, or quantitative testing are better suited?

Venerable companies like Procter & Gamble and most qualitative researchers themselves advise marketers and advertising agency people to be circumspect about what they observe in focus groups. Never, never should focus groups be used as a basis for decision-making. Although the duly advised nod their agreement, they soon forget or ignore the admonitions. Before the last respondent leaves the focus group room, off go the observers into generalization-land.

Focus groups are often cited as excellent means of accessing deep consumer motivations and understanding brand imagery. But is a 90-minute group composed of people who have never met, answering questions that force them to rationalize reactions that are normally automatic, the best way to get at these subjects? I don't think so. Marketing researchers use other qualitative methods that are superior for unveiling consumer attitudes and beliefs: in-depth one-on-one interviews, sometimes with life history discussions and projective devices such as photographs and collages; dyads and triads that avoid the group dynamics in sessions of eight-plus individuals; and in-home and in-store observation, among others. These techniques overcome one of the major flaws of traditional focus groups: consumers are asked direct questions about life events, product usage or creative concepts, and their answers are taken at face value.

A better way to learn about consumers' product needs and attitudes is to first understand their lives. Once the texture of consumers' lives is revealed — their roles and responsibilities, their trials and their triumphs — an examination of where the product category and brand fit in can begin. This protocol is best undertaken by using some of the alternate research techniques I just mentioned. Although these methods are no more statistically projectable than focus groups, they produce richer and more bona fide attitudes and sentiments.

I am not suggesting that focus groups be totally abolished. Instead, I propose that their use be more restricted. Field a focus group to hear consumer language, generate hypotheses for future research or screen particularly expressive respondents for later in-depth interviews and observational research. Let's stop using focus groups as a quick, cheap way to gain consumer knowledge. Because when we do so, we endanger the future of our brands. If we discipline ourselves in this manner, we will improve the quality of qualitative research.

References

1 "Advertising" column by Vanessa O'Connell, *Wall Street Journal*, November 27, 2000, p. B21.

2 *Truth, Lies & Advertising*, by Jon Steel (John Wiley & Sons, 1998), pp. 79, 202-205.

Qualitatively Speaking

This month we introduce Qualitatively Speaking, a regular column in which a revolving cast of authors will offer their thoughts on various aspects of the multifaceted world of qualitative research — in 1,000 words or less! Submissions are welcome. Send your ideas or manuscripts to joe@quirks.com.

The end of focus groups

By Robert Morais

Editor's note: Robert Morais is chief strategic officer at Carrafiello Diehl & Associates, an Irvington, N.Y., advertising firm. He can be reached at 914-674-3968 or at rmorais@carrafiellodiehl.com.

A couple of marketing anthropologists from a company called Cultural Dynamics sell their services on the basis that focus groups have little to do with actual behavior and beliefs. As they put it, "Why did it never occur to an anthropological fieldworker to sit his or her respondents around a table in the middle of their village, feed them a sandwich and a soda, then ask them to describe their lives, rituals, social hierarchy and sense of kinship?" The reason: respondents cannot and should not be expected to accurately characterize their lives in such a situation, nor should their on-the-spot reactions to advertising or new product ideas be viewed as a reflection of their actual beliefs. Respondents live their lives subjectively; anthropologists, after observing respondents, explain their lives objectively.

According to a *Wall Street Journal* article[1], over 100,000 focus groups were fielded in 1999. Still, marketing and advertising professionals have mixed feelings about their value. On one hand, focus groups are seen as a fast, inexpensive way to hear consumer language, watch consumers react to advertising, and see how they respond to new product ideas, among many other possible uses. On the other hand, executives admit that they often succumb to the temptation to let one or two focus groups select a "winning" creative idea or predict the sales potential of a new product. Executives also worry about the artificial setting of focus group rooms, the perils of "professional" respondents, and the dominance of a session by a few highly vocal participants. Jon Steel, author of *Truth, Lies & Advertising*, expresses the industry's ambivalence about focus groups in two separate sections of his book. At one point he says, "I believe that the thoughts and behavior of a human focus group respondent are as representative of the broader population as the thoughts and behavior of a chimpanzee in San Francisco Zoo are of chimps in the East African forests. Which is to say, not very representative at all." Later, he argues that only focus groups are suitable for gaining consumer responses to advertising concepts and contends that interaction among focus group respondents often brings insights that other research cannot[2].

I have personally witnessed hundreds of focus groups. On occasion, I have moderated them. I worry that, despite the advantages of focus groups, the instant judgments, non-projectable conclusions, and the demise of groundbreaking creative ideas are so counterproductive that the liabilities of this methodology often outweigh the benefits. After due consideration I find myself wondering,

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