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November 2001

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Q&A on research in Denmark, Germany, and the Netherlands

New feature: Software Review

International research issue

2001 Mall Research Facilities Directory

QUIRK'S Marketing Research Review

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C O N T E N T S

F E A T U R E S

Case History

Techniques

Publisher
Tom Quirk

Associate Publisher
Evan Tweed

Editor
Joseph Rydholm

Production Manager
James Quirk

Directory Manager
Steve Quirk

Marketing Manager
Dan Quirk

Advertising Sales
Evan Tweed 952-854-5101
Lane E. Weiss 415-461-1404

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Stiff upper lip, clean underarms

Only a quarter of British claim to "have a problem with underarm odor," according to a survey published by Taylor Nelson Sofres' European Toiletries and Cosmetics Database (ETCD). This compares to well over half of people in France (57 percent) and Spain (54 percent) who admitted to having a problem with underarm odor.

The findings also reveal that more British use deodorants than their European counterparts. Almost nine out of 10 (87 percent) British use some form of deodorant, compared with only eight out of 10 (80 percent) Germans and around three quarters of people in France, Italy, and Spain.

In terms of format, sprays are still the favored deodorant product delivery type across all countries surveyed, except in Spain, where contact format (roll-ons, sticks and creams) have traditionally been more popular.

In the U.K., more than nine out of 10 (95 percent) women use deodorant, compared to just eight out of 10 men. Across all countries surveyed, more than half (51 percent) of the female population use a roll-on/stick/cream deodorant, compared to just a third (33 percent) of men.

"Higher deodorant usage in Britain can, in part, be explained by a greater concern about underarm body odor and perspiration than in other European countries," says Alex Seron, account manager, TNS Consumer Usage Panels division. "Certainly, the media images of a sweat-drenched Tony Blair in a blue shirt at last year's Labour Party Conference helped to reinforce this concern. On the other hand, perspiration may be considered more 'natural' and, therefore, more acceptable, in countries such as Italy and France, where it is often more closely associated with traditional images of masculinity.

"At the same time, while sprays are still the favored deodorant type in most countries surveyed, it appears that contact deodorants — such as roll-ons and sticks — are increasing their market share, especially with the launch of new brands in this market sector. The trend is predominantly driven by women, who are increasingly looking for new and more effective ways of controlling perspiration, particularly in the workplace."

The findings are based on Taylor Nelson Sofres' European Toiletries and Cosmetics Database (ETCD). Research has been undertaken since January 1995 amongst a representative sample each year of 14,000 people (aged 11-74 years old). The five countries covered by this survey are Great

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How do you spend your free time?

According to The Harris Poll, reading (28 percent), TV watching (20 percent), spending time with family and kids (12 percent), fishing (12 percent), and gardening (10 percent) are the nation's favorite ways of using their leisure time, all relatively unchanged from the results over the last few years.

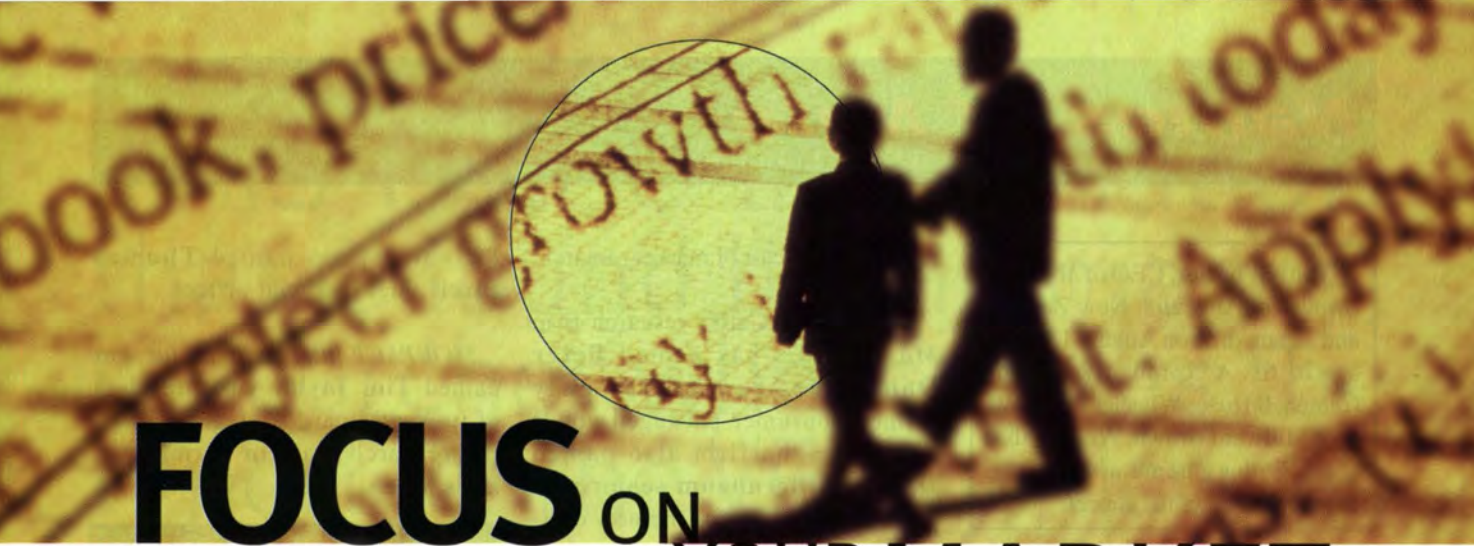
The time that people claim to spend on their work, including paid work, keeping house and school, remains unchanged at 50 hours per week. This has not changed significantly since 1989. In 1987 people reported working only 47 hours a week. In the early 1970s, people reported working only 41 hours a week.

The amount of time available to people to relax, watch TV, take part in sports or hobbies, go swimming, go to the movies, theatre, concerts or other forms of entertainment, or to get together with friends, also remains unchanged at 20 hours per week. This has not changed substantially since the early and mid-1970s, when people reported having 26 hours (in 1973) and 24 hours (in 1975) available for leisure-time activities.

After the most popular leisure-time activities mentioned above, other relatively popular pastimes are swimming (8 percent), computer activities (7 percent), going to the movies (7 percent), walking (6 percent), golf (6 percent), exercise and playing team sports (each at 5 percent).

Compared to a few years ago, the biggest increase is in the popularity of computer activities (presumably in many cases the Internet), up from 2 percent in 1995, and 3 percent in 1997 and 1998, to 7 percent now.

Other activities mentioned by 1 percent include motorcycling, theater, tennis, horseback riding, dancing, skiing, writing, driving, racing cars. These results are from The Harris Poll, a nationwide survey of 1,011 adults surveyed by telephone between June 13-18.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Names of Note

Tony Wheeler, CEO of *Millward Brown* for Australia, New Zealand and Japan, died on August 13 at the age of 62. A co-founder of Yann Campbell Hoare Wheeler (YCHW), now Millward Brown, Wheeler died at his Sydney home after a four-month battle against cancer.

Global Market Insite, Seattle, has named **Pat Molloy** chief technology officer. The firm has also named **Tariq Mirza** vice president, sales and marketing, GMI Europe, and **Andrew Jeavons** vice president, GMI USA.

Scott Sweeney has been named vice president at *Shop'n Chek*, an Atlanta mystery shopping firm.

Northwood, Ohio research firm *NFO WorldGroup* has named **Michele M. Johnson** marketing vice president for NFO North America. NFO WorldGroup has also named **Robyn Atchison** marketing manager for NFO North America's Atlanta office.


Johnson

E-Poll, Encino, Calif., has named **Amber Marks** research director/client services and promoted **Susan Hwang** to marketing director.

Galloway Research, San Antonio, Texas, has promoted **Monica Pang** to project supervisor in the firm's telephone department.

Boston ad agency *Hill, Holliday* has named **Bruce Godfrey** senior vice president, director of market research.

Mill Valley, Calif., research firm *MarketTools* has named **Peter Daboll** president of its newly formed consumer packaged goods division. The firm also named **David S. Biernbaum** senior vice president of sales for the new division.

New York research firm *Taylor Nelson Sofres* has named **Tacis Gavoyannis** worldwide head of its telecoms sector. The firm has also appointed **Arno Hummerston** worldwide head of its interactive solutions division.

Neil Schwartz has joined *TNS Intersearch* and *Market Development* as vice president, business development. He will be based in the Torrance, Calif., office.

Cincinnati qualitative research firm *Understanding UnLtd.* has added **Noelle VonderBrink** and **Elizabeth Jarosz** to its research team. **Beth Hoff** has joined the firm as accountant/bookkeeper.

Previously based in France and the U.K., **Amaury de Conde**, managing director of *TNS Worldwide*, has relocated to Taylor Nelson Sofres' Horsham, Pa., office.

Eagle Research has promoted **DeLynn Newberg** to director of qualitative research at the firm's Denver office. In addition, **Rachel Webster** has been named manager of qualitative research at the Denver office. At the firm's Atlanta office, **Eleanor Poore** has been named qualitative director.

Deerfield Beach, Fla.-based *Symmetrical Holdings, Inc.*, parent company of Simmons Market Research Bureau and Symmetrical Resources, has named **Thomas Birch** chief financial officer.

MORPACE international, Inc. has named **Tim Taylor** vice president of its Yee/Minard strategic marketing research team in Farmington Hills, Mich.



Taylor **Stuart**

Polaris Marketing Research, Atlanta, has promoted **Vicki Stuart** to senior data specialist.

Research firm *Guideline Chicago, Inc.*, has named **Michelle Schimpff** associate project director and promoted **Beth Wilson** to senior vice president.

Warren Schultz has been named national manager, network radio, advertiser/agency services, at *Arbitron Inc.*, New York.

New York-based *Visualizer Multimedia Research* has named **Jim Fleckenstein** as its managing director.

Chicago-based *SPSS Inc.* has named **Louis Davidson** vice president and international controller and **Terrence Schohn** vice president of corporate administration.

Andrew L. McClain has been named group director of client services, and **Robert B. Fox** associate director, client services, at *Genactis, Inc.*, a Fort Washington, Pa., research firm.

Microtab debuts XP 2002

Atlanta-based research software firm Microtab Inc., has introduced Microtab XP 2002, its latest Windows-based software release. The Standard and Professional Editions allow unlimited questionnaire length and unlimited tables on as many as 10 million surveys. The Professional Edition also includes sample balancing, statistical testing and data manipulation features. Both Windows Editions come with 24/7 free support from Microtab, which also provides online searchable help and documentation. For more information visit www.microtab.com or call Larry Hills at 770-552-7856.

QualTalk.com now offers partner program

Nashville-based QualTalk.com, a provider of qualitative market research software, has introduced a new partner-based marketing plan for the latest version of its software. The QualPartner program will give market research firms the software enabling them to use the Internet to conduct qualitative research. Firms will set up shop online for a start-up fee and then pay for services on a per-usage basis. The program includes free training, tech support, and software updates at no additional cost. For more information visit www.qualtalk.com.

Census tools from MarketResearch.com

MarketResearch.com has released Census Looks, a new series of Census 2000 database tools. Census Looks are available in Excel spreadsheet format and offer complete historical data from the 2000, 1990, and 1980 censuses, providing detailed figures on the metropolitan statistical area (MSA), county, and state levels. The product series will be expanded to include more detailed demographic reports as more complete 2000 Census numbers are released. Census Looks reports contain demographic indices measuring the similarity and dissimilarity of individual geographic areas to the state and national averages. This tool allows the user not only access to the raw data, but also to put this information into context. A sample from a Census Looks report is available at www.MarketResearch.com.

Study examines Japanese dining habits

The NPD Group, Inc., a Port Washington, N.Y., research firm, and Japan-based research firm Util, Inc., have conducted The Japanese Dining Habits Benchmarking Study, to examine consumer attitudes and behaviors regarding dining out, take-out foods, and in-home dining. The database was created from the responses of 3,000 people in the metropolitan Tokyo and Osaka areas. Seventy-seven major restaurant chains (including supermarkets, department stores, take-out shops, etc.) are profiled and compared. In addition, restaurant type segments are compared by consumer awareness, usage and intent-to-visit for all demographic segments. For more information contact Util, Inc. at 81-3-5408-3850 or at food@util.co.jp or visit www.npd.com.

Research project management product upgraded

Seattle-based Global Market Insite (GMI) has launched Net-MR 2.0, a new version of its end-to-end, Web-based platform for market research management. Built on the same technology used in Net-MR 1.5, Net-MR 2.0 adds new modules which allow for mixed-mode data collection, and further streamlining of market research processes via project and client management tools. Net-MR 2.0 allows for panel management, project management, data collection, data processing, data analysis and reporting, as well as the management of multi-lingual panel and client portals. All licensees of Net-MR 1.5 will be able to upgrade to Net-MR 2.0 with no additional cost. For more information visit www.gmi-mr.com.

A look at the future of wholesale distribution

The sixth edition of the National Association of Wholesaler Distributors' (NAW) Distribution Research and Education Foundation (DREF) study, titled "Facing the Forces of Change: Future Scenarios for Wholesale Distribution," is now available. The study included surveys of 1,600 manufacturers, distributors, and customers across 50 different industries and 75 in-depth interviews with supply chain and distribution channel experts. The study is designed to provide manufacturers, wholesaler-distributors, suppliers, and their customers with insight into shifts in the industry environment through 2006 and a scenario-planning methodology to help companies prepare for the future. For more information visit www.nawpubs.org or call 202-872-0885.

Euromonitor adds consumer lifestyles module

Euromonitor International has added a Consumer Lifestyles module to its Web-based Global Market Information Database (GMID). The component offers analysis of consumer preferences and key market drivers across 60

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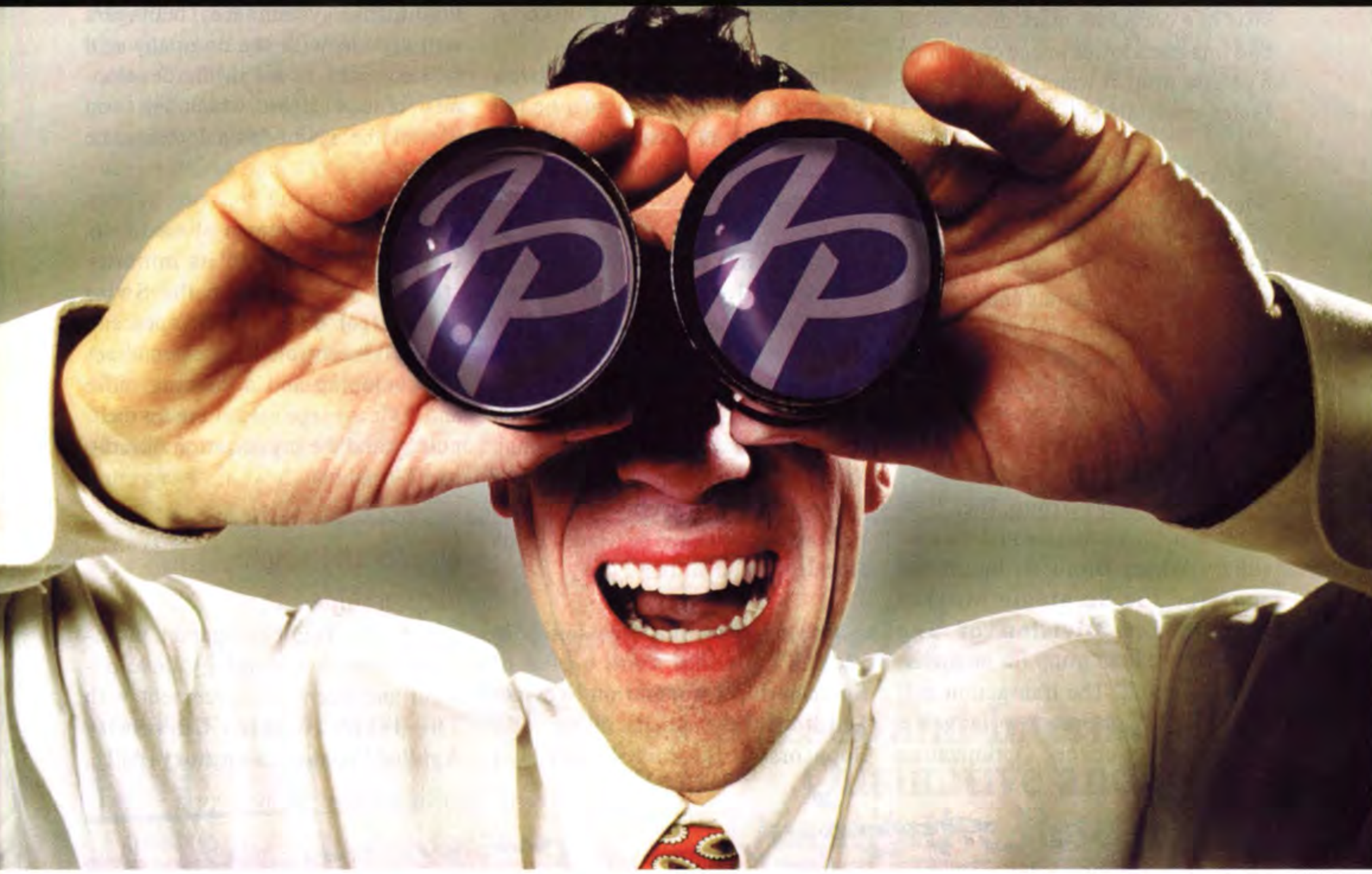
Now! A Hop, Skip And a Jump From Our Manhattan Office...



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Research Industry News

News notes

Chicago-based **Research International** has adopted a new worldwide corporate identity which reflects substantial changes made within the firm. The new identity consists of a corporate mark made up of two images: a lower image containing a precise drop of water, and an upper image containing an ocean wave.

Stamford, Conn., research firm **Nielsen//NetRatings**, has received government approval to conduct Internet research in China. In compliance with regulations and to localize the service offering, the firm has involved a Chinese company for software development and testing.

Acquisitions

BrandPartners Group, Inc., New York, announced that through its subsidiary Willey Brothers, Inc. it has acquired the **Strategic Market Intelligence Division** of The Commonwealth Group for an undisclosed amount. The transaction will allow Willey Brothers to launch a new Branch Network Optimization Service for banks and other financial service companies. Under terms of the deal, Michael Purchia, a founder of The Commonwealth Group, and certain key employees of the Strategic Market Intelligence Division have joined Willey Brothers.

Cincinnati-based **MarketVision Research, Inc.**, has purchased **McLauchlan & Associates**, a full-service research firm also based in Cincinnati.

Irwin Broh & Associates, a Des Plaines, Ill., research firm, has acquired **HealthFocus Inc.**, an Atlanta research and consulting firm specializing in the health and nutrition markets. HealthFocus will now operate as HealthFocus International, an independent operating division of Irwin Broh & Associates. It will remain in Atlanta and be headed by its founder, Linda Gilbert.

Taylor Nelson Sofres has agreed to acquire the entire share capital of **Sponsorship Information Services Limited** (SiS) and its interests in Sponsorship Information Services Asia Pte. Limited and NetResult Limited. SiS monitors and evaluates sponsorship of major sporting events, such as UEFA Champions League football matches, Formula One, and ATP Tour Tennis, using its branded monitoring system. Key managers will remain with the company and will continue to aid in the development of the business, which will form part of the TNS Media Intelligence sector.

Nuremberg, Germany-based **GfK Group** has increased its minority stake of 49 percent in the **Swiss Telecontrol Group** to 100 percent. Swiss Telecontrol Group specializes in developing and producing radio and TV coverage measurement technology and the organization of radio and TV panels.

Alliances/strategic partnerships

Arbitron Inc. has signed a multi-year research technology development and licensing agreement with **The Johns Hopkins University Applied Physics Laboratory** (APL),

Research Calendar

Frost & Sullivan will hold its annual conference on advanced marketing research techniques on November 4-8 at the Sheraton World Resort in Orlando, Fla. For more information visit http://conferences.frost.com/AMR.

Tragon Corporation will hold a workshop titled "Ensuring Consumer-Defined Product Quality" on November 6-7 at the Sheraton Palo Alto, Palo Alto, Calif. For more information call 800-841-1177 or visit www.tragon.com.

Research firm The Looking Glass will hold a one-day conference at its Syosset, N.J., facility on focus group backroom effectiveness on November 2, 9, and 16. For more information visit www.ResearchOnResearch.com or call Sharon Livingston at 516-992-5666.

The Philadelphia and Mid-Atlantic Chapters of the Marketing Research Association (MRA), and the Washington, D.C., and Ohio-Pennsylvania Chapters of the Qualitative Research Consultants Association (QRCA) are co-sponsoring "Focus on Research," a one-day seminar on qualitative methods on November 16 at the Columbus Club, Union Station, Washington, D.C. For more information contact John F. Bradley at 610-789-1370.

The European Society for Opinion and Marketing Research (ESOMAR) and the Advertising Research Foundation (ARF) will hold a conference on advertising effectiveness on December 2-4 in Hong Kong. For more information visit www.esomar.nl.

in Laurel, Md. Under this agreement, APL will provide research and development assistance to enhance Arbitron's audience measurement capabilities and services, including its Portable People Meter audience measurement system.

Sao Paulo-based **IBOPE eSurvey**, part of the IBOPE.com holding company, and Seattle-based **Global Market Insite, Inc**. (GMI) have signed an enterprise licensing agreement for GMI's Net-MR research management application. IBOPE eSurvey plans to integrate Net-MR into its online operations for overall management of projects, including panel management, data collection, analysis, and reporting.

Chicago-based **SPSS MR** has become an official distributor of Vancouver, B.C.-based **Techneos's** Entryware software for MCAPI (mobile computer-assisted personal interviewing). Designed for use with handheld computers, the Entryware system is used for collecting survey data at remote locations.

ActiveGroup, an Atlanta-based provider of streaming media services for marketing research, has formed a partnership with **AcuPOLL Research, Inc.**, to provide AcuPOLL clients the ability to hear the audio track from AcuPOLL research sessions in real time over the Internet.

Association/organization news

Larry Mock has been named president and CEO of **The Council for Marketing and Opinion Research** (CMOR), Harrison, N.Y.

After five years as director general of the **European Society for Opinion and Marketing Research** (ESOMAR), Juergen Schwoerer will relinquish his position at the end of 2001. "We are grateful for the many contributions Juergen has made to ESOMAR. The Society is well placed to fulfill its global mandate and promote the best of research for better decisions, worldwide," says ESOMAR President John Kelly. A new appointment is expected in the first half of 2002. Until the new appointment is made, the role of the director general will be assumed by Mario van Hamersveld.

The Qualitative Research Consultants Association has named its officers for the 2001-2002 year: Jim Bryson, president; Dorrie Paynter, vice president; Elaine Gingold, treasurer; Gillian Tuffin, secretary. Other members of the 2001-2002 board of directors are Elizabeth Berry, Diane Harris, Hy Mariampolski, George Sloan, and Susan Sweet.

The Southwest Chapter of the **Marketing Research Association** has completed a successful Second Annual Scholarship Program. The

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Exploring marketing ideas with perceptual maps

By Susie Li

Editor's note: Susie Li is manager of customer targeting and planning at Sanofi-Synthelabo, a New York pharmaceutical firm. She can be reached at susie.li@us.sanofi.com.

Making marketing strategies is a complex process requiring research, judgment, and creativity. Marketing research helps marketers establish an objective (or, simulated/virtual) marketplace to understand their customers and their products, or answering questions like: How do my customers use my product? What are the strengths and weakness of my product relative to my competition? Where does my product fit in the overall market consuming such products? Who are the targeted customers for my product?

Once this structured framework is established and understood, it then becomes a guide and analytic platform for creative strategists to design innovative, targeted strategies (to fill the gaps, or to raise the existing product to a higher ground, etc.).

A comprehensive product research project, namely, a portfolio analysis, should provide all the following information:

1) What (is the overall competitive market structure for this product)? Systematically map the entire market, partition it into a competitive hierarchy by studying consumer preferences, consumers' product usage, product substitution and switching behaviors in the past.

2) Why (do consumers buy our or our competitors' products)? Study the desired benefits of products and fulfillment of those benefits, from the perspective of the consumers.

3) Who (are the customers for our or our competitors' products)? Develop consumer segmentation based on their lifestyle, life cycle, and product usage pattern.

4) How (do we better manage or market our product)? Identify consumers' unmet needs and desirable product features or growth/niche opportunities; optimize pricing or promotional strategies; market to targeted customers or segments; create well-defined, consumer-focused product-positioning strategies to maximize volume and profits.

Steps 1, 2, and 3 are intensive analytic work calling for various quantitative or qualitative models, whereas Step 4 is a guided creative process. Perceptual mapping is one of the many techniques used in the analytic steps, and an extremely popular one.

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War Stories

True-life tales in marketing research

By Art Shulman

Editor's note: War Stories is a semi-regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. He can be reached at 818-782-4252 or at artshulman@aol.com.

Some time ago, Sharon Livingston of Executive Solutions, a Laurel Hollow, N.Y., research firm, had an interesting experience when she conducted a focus group very near to the city where her parents lived. Without Livingston's knowledge, someone in her office had told her parents the exact location of the facility at which she was moderating. So her parents, together with her aunt and uncle, headed to the facility, planning to surprise her.

They arrived just as the focus group was starting and told the host they were there to see Sharon Livingston. Thinking they were additional clients, the host ushered them into the backroom, where they sat just in back of the ledge behind the mirror. The large group of real clients no doubt wondered who they were. (The agency people probably thought they were from the company end, and the company people probably thought they were from the agency. So no one said anything.)

Her mother unwrapped the bagels and cream cheese she'd brought, and as they noshed, the family listened in. Finally, the clients figured out who the mystery people were when the proud mother loudly exclaimed, "Look at my Sharon! Isn't she cute?"

When the group was over, Livingston headed to the backroom, ready to be debriefed. When she opened the door and suddenly saw her family, she almost dropped dead on the spot.

In another group, Livingston was testing beach chairs. One particularly overweight woman sat in the test product and couldn't extricate herself. They finally had to break the chair apart to get her out.

During one group among denture wearers, the discussion turned to tartar and plaque. When one man said something Livingston just couldn't understand, he removed his denture, thrust it in her face and asked, "Is this what you're talking about, honey?"

For all of you who dread giving presentations, Livingston tells about a speaker delivering a talk on how to avoid presentation jitters. The speaker's technique was to take two steps forward, two steps backward, then two steps forward again, and deliver the presentation.

But he didn't get to take the second set of two steps forward, because he fell off the podium while taking the two steps backward.

A client of mine, who prefers to remain anonymous, though she is now notorious within her own company, was conducting focus groups on one of the company's new recreational products. Because a particular point of interest was how consumers would actually use the product, the sessions were videotaped.

At the end of the evening the hostess at the facility handed my client a videotape of the night's proceedings. The client brought the videotape to the office the next day, and placed it on her desk. One of the marketing people who hadn't been able to attend the group sessions came by to ask if he could view the videotape. "Sure," my client answered, "it's on my desk."

My client left on a week-long business trip a few minutes later, and when she returned, she got the news: the focus groups had been taped over a porno movie.

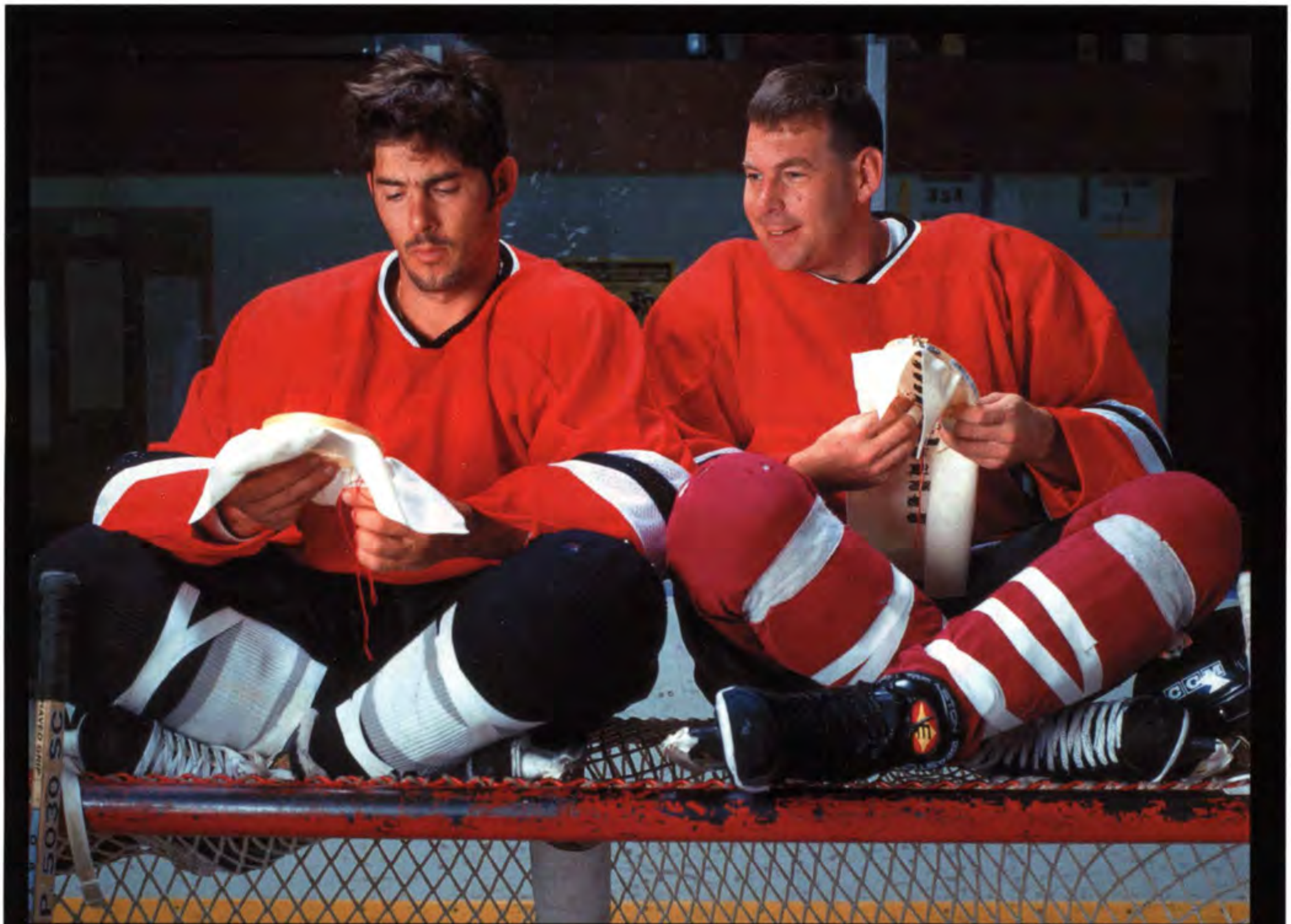
Since the group discussions did not last the full length of the tape, once the groups were over, there remained many minutes of steamy porno action which the marketing group watched with fascination.

The research world apparently was a lot more interesting than the marketing group expected.

My client denied knowledge of the licentious contents, but her denials were acknowledged by comments such as, "Uh-huh," or "Sure." When she confronted the marketing person about why he watched that portion of the tape at all, he said he was waiting for the protagonists to use the company's test product.

My client told her boss that she would never use that facility again. But to her surprise, he replied, "Why not? I think we should use them more often."

In future issues, we'll report on more quirky, loopy and strange happenings in the world of market research. If you'd like your story to be told — anything related to research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires — please e-mail me at artshulman@aol.com.



Software Review

Global Market Insite's Net-MR suite

By Tim Macer

Editor's note: This issue marks the debut of our new Software Review column. Four times per year, reviewer Tim Macer, a U.K.-based independent specialist and adviser in the use of technology for survey research, will take a look at software of interest to researchers. He can be reached at tim@macer.co.uk.

While most of us are still adjusting to online research as an increasingly legitimate mode of collecting data from the Internet, one new software supplier, Seattle-based Global Market Insite (GMI), is encouraging its customers to turn every aspect of their research activities into an online experience. It's a challenging idea that could be seen either as a tech-led solution looking for a problem or a bold new way to unite and streamline a fragmented research industry in much the way that the 20-foot steel container transformed and modernized a technically-challenged shipping industry in the last century.

This month, GMI launches version 2.0 of its Net-MR suite. With the product's emphasis on the Internet, it is easy to overlook the huge potential Net-MR has to become the versatile and streamlining steel container of marketing research. That's because Net-MR is also a Web-based CATI system, CAPI system, project management and data delivery tool. It produces paper questionnaires, very sophisticated tables and charts, and even incorporates software for running focus groups.

Net-MR is a Java-based ASP solution, so you have no software to install or maintain. You just need a decent Internet connection (stable 56K or ISDN will do) and a PC running an up-to-date browser. Beyond that, the software and all your work are held off-site on GMI's servers. Log in and you are largely unaware that you are not using software installed locally. The Java environment reduces the need for lumbering screen refreshes and brings you familiar drop-down menus, tool tips and the kind of zippy response you don't necessarily associate with the Web.

Version 2 aims to provide a complete environment to the full-service research agency, independent research practitioner, fieldwork specialist or in-house research facility. After logging in, you are presented with clean, simple navigation to all the suite's integrated modules. The system encourages good housekeeping from the outset: you must start your project in the project management tool and describe the project, its users, geographies and timings before going on to develop the script. There are even integrated accounting and budgeting facilities as a part of project management suite. It's a true multi-user system, so while one person is building the interview, someone else can be designing the sample or the quota

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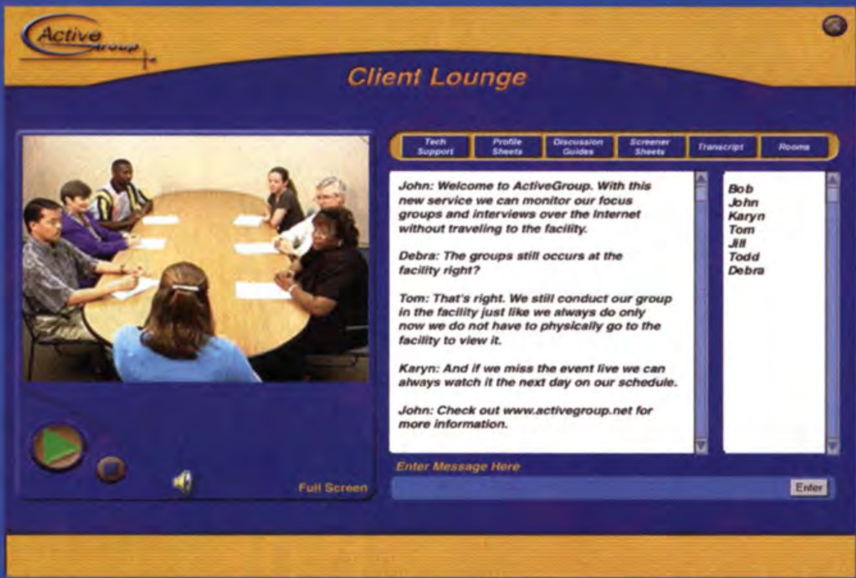
Net-MR, version 2.0, from Global Market Insite (www.gmi-mr.com)

A Java-based ASP product with CATI, CAPI, project management, and data delivery capabilities, Net-MR harnesses the strengths of the Web to provide an all-in-one suite of research tools.

Pros
- Comprehensive multi-mode data collection
- 100% ASP solution; no software to install
- Excellent panel management module
- Ingenious online/offline Web-CATI module

Cons
- CATI features are limited
- Tricky routing syntax
- Online documentation a bit dry
- Previous versions have been buggy

View your focus groups over the Internet



Over 120 focus group facilities now give you the ability to view your focus groups and in-depth interviews live or on-demand over the Internet. No more expensive travel, no scheduling conflicts, no being out of the office for 3 days for one night of groups.

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Seeking the right mix

By Joseph Rydholm
QMRR editor

Hamilton Beach talks to consumers before introducing small appliance lines in Mexico and Europe

While Hamilton Beach is well-known in the U.S. as a maker of small kitchen appliances like blenders, toasters, and mixers, it's not a household name around the world. So when the firm set its sights on expanding into Europe and Mexico with a new product line, research was definitely in order.

"In Europe we had a brand name that is virtually unknown, or so we thought, and we wanted to confirm if that was true," says David Israel, international marketing manager at Hamilton Beach, Richmond, Va. "We had a product line that had been designed for the American consumer and we wanted to see how it would fare against European designs and with European consumers. We went to Mexico doing the same thing, knowing that the Mexican consumer is a little more prone to buy U.S. products and hoping to confirm that the brand was much better established and had a higher awareness and power as a maker of small electrics."

The research in Europe involved focus groups; in Mexico it was a mixture of qualitative and quantitative. "The European research was more taking that first step to see if our line would work with the brand and the pricing we were thinking about," Israel says. "In Mexico we were looking to confirm specifics and determine what features we were going to put on a product, knowing that the brand is strong and that we have a pretty good retail environment in which to sell these products. We really wanted to dig deeper in Mexico, in terms of refining that product selection."

Because of the low brand awareness in Europe, one of the research objectives there was to understand how important brand was in the purchase process, says Stephen Phillips, senior vice president of BAIGlobal, the Tarrytown, N.Y., research firm that conducted the focus groups in the U.K.

"When we were showing the items to the focus groups, we showed them by type. We got them to look at and touch the products and then come back and talk about them in general, spontaneous terms and then talk about purchase interest before prompting them on any particular aspect. In this way we could see how important brand and design were in terms of pushing overall reaction and purchase interest."

For the most part, brand wasn't very important in Europe, Phillips says. "Brand held some sort of trust value in this category but the purchase point is low enough for casual purchases to not matter too much. So if you buy a brand that isn't trustworthy, it's OK because it's not too much money. But that's not true in other markets such as Mexico where the amount of money spent is far more important."

In Mexico, the brand awareness was much higher, Israel says. "We thought we were in a much better position to bring the line into the Mexican market, because of several factors. Obviously Mexico is a lot closer geographically. And Mexican consumers also have a lot of the same tastes as Americans and have been exposed to the same types of products trickling in from the U.S.

"Additionally, this is a country where our brand had been present, and people not only recognize but have very high associations of it with quality products that they would want to put in their shopping carts. So we wanted to confirm that, figure out which categories had the highest opportunities, and within those categories which products would give us the most bang for our buck."

Focused on design

The research showed that European consumers are much more focused than American consumers on design. They like colors, rounded shapes, and good-looking appliances, especially those they plan to leave out on their kitchen counters. "U.S. appliances tend to be white, off-white or black. In the groups with European consumers, the one product that we tested that had color in it was the one that was most favorably received. It was a bright blue kettle," Israel says.

European consumers are also not as interested in product features. "That was a huge surprise to us," Israel says. "They took one look at an 18-speed blender and said, 'Wow, that's going to confuse me. I have no idea what to do with 18 speeds. Give me two or three and I'm good.'"

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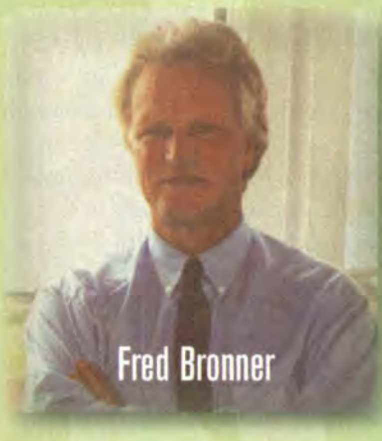
Q&A



Research in Denmark, Germany, and the Netherlands

Editor's note: For his annual contribution to our international research issue, our West Coast ad rep/roving reporter Lane Weiss traveled to Denmark, Germany, and the Netherlands to interview principals of research firms in those countries. In Denmark he spoke with Erik Liljeberg, director of Vilstrup Research, Copenhagen. In Germany he talked to John Attfield, managing director, RMM Marketing Research, Hamburg. And in the Netherlands he interviewed Fred Bronner, general manager of Veldkamp, an Amsterdam research firm. He also visited Berlin to attend a conference on new product research in the 21st century, organized by AEMRI, the Association of European Market Research Institutes.

Quirk's: How is marketing research viewed by the public in your country?

Erik Liljeberg: Generally the view is positive but not as positive as it has been. The Danish research industry is doing some work to find out what to do in order to improve the perception of the population.

Our response rates are higher than in the States but they are declining. But the majority of the population of Denmark is still interested in taking part in marketing research.

The awareness is high. We are small country with approximately four million adults and Danish market research companies do approximately one-and-a-half million interviews per year so about one-third of the population is interviewed each year.

Fred Bronner: A negative factor in the Netherlands is confusion between marketing and marketing research. But we did research about participating in research and we found about 10 percent will always participate, 10 percent will never participate, and 80 percent say it depends on the subject, the time of day they are approached, etc. We have a "your opinion counts" advertising program on radio and

television with about 20 research agencies that communicates the importance of participating in research.

John Attfield: I don't think it has a particularly positive image in Germany. It's not so negative that you can't work here. I don't think that refusal rates are exceptionally high here compared to other European markets. But I think there is a lot of skepticism, due to a variety of factors. In Germany one big factor is the whole question of privacy and data protection because there are very, very big concerns in Germany about Big Brother and the authorities. There is always a high refusal rate to disclose things like household income. There are concerns about, am I being watched, am I being filmed, those kinds of things. So there are definitely issues in terms of public perception.

Quirk's: What research methods are most commonly used in your country?

Liljeberg: In Denmark the vast majority of interviews are made by telephone. Telephone has taken over the position of face-to-face interviews. We only use face-to-face interviewing when the research demands it. Postal interviews are used but not to a very high degree, which has to do with the size of the country. We have a rather small, densely populated country compared to our neighbors in Sweden, where they are much more used to postal interviewing because of the distances.

Bronner: In the Netherlands, at the moment, face-to-face interviewing is very difficult because we have to pay more taxes for interviewers than we did some years ago, and it is difficult to get interviewers because the job market is doing well, so in the whole of the Dutch research market — the 35 largest agencies — face-to-face interviewing is now about 10 percent. We see a decreasing importance of face-to-face and a growing importance of Internet panels and Web interviewing.

Attfield: In Germany the most

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common is probably the telephone interview, whether CATI or on paper. There are a lot of CATI studios in Germany. There's a lot of studio work, studio tests, focus groups. Street interviewing is not so common because of the difficulties of conducting street interviews. You have to have a license from the local authorities to intercept and invite respondents into a hall. So there are some cities where there are a lot of test studios because it's easier to get permission there from local authorities.

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

Liljeberg: Yes. We have, as do the other Scandinavian countries, a very high Internet access — two-thirds of the population has access to the Internet either at work or at home. So we have high coverage, which makes it feasible to do interviewing using the Internet. It is growing rapidly. We still don't have population-representative studies done via the Internet because we still miss one-third of the population and we still haven't found the weighting methods to compensate for that. But it is coming and growing rapidly.

Bronner: We use a kind of hybrid, mixed-mode method because not everyone in Holland has access to the Internet — about 65 to 70 percent of the population has access. So in a sample you can approach 60-70 percent via Internet and 30 percent you have to do by telephone or other method. Ten years ago we would use only one method of research, face-to-face, telephone, etc. But at the moment we mix modes. We approach clients and give them a choice of e-mail, paper, Internet, etc.

We acquire respondents for the Internet panel by interviewing people in their homes and asking if they have a PC and access to the Internet and we ask them to join the panel. I think that is an advantage because some agencies in the Netherlands acquire panelists via the Internet, which gets the Internet enthusiasts in your sample. By acquiring them by classical means, you get a better sample.

Attfield: Internet is certainly becoming more feasible in Germany and it certainly is becoming more trendy. I think that will only increase because despite all the problems with e-commerce as a whole it's not so difficult to conduct research online. So there are a lot companies that offer panels or various online research methods. Internet penetration is becoming high enough in Germany to make online research viable.

Quirk's: What are some of the ways you see the Internet affecting market research?

Liljeberg: It affects it in the sense that it can be one of the tools that we have to improve the position of marketing research in the population because it makes it easier to tell the respondents, you don't have to do the interview now, you can do it when you feel like it, when you are prepared to do it. So it is less intrusive.

Bronner: It makes data collection easier but the danger is, people don't look at the quality of the sample. They just collect by pop-up screens a lot of interviews and nobody knows what the sample is. I compare it always to the situation in the U.S. in the 1930s. There was a famous example of a publication that, from a sample of two million respondents, predicted that [Alf] Landon would be president. And Gallup, with a sample of 400 people predicted that [Franklin] Roosevelt would be president. So that was the first time that everybody realized that it was not the size of the sample it was the quality of the sample.

We laughed at that story when we heard it from teachers in school but we are in the same situation again. People are selling huge Internet samples but nobody knows the quality of the sample. So we say, you can use the Internet, but you have to acquire and build your sample carefully.

Attfield: It's a young methodology, so people are making all the mistakes that you see with any new method. I think in the end it will simply become another tool.

Quirk's: What are some of the problems facing marketing research in your country and around the globe?

Liljeberg: As a representative of the Danish research industry, we see some problems with the newcomers to the market. It is very easy to enter the industry. You just have a computer and a telephone line and you are in business. But these firms are not always very good at what they are doing so they affect the industry negatively. The way we can improve it is to introduce better quality assurance systems, which we are working on on a European basis with EFAMRO [the European Federation of Associations of Market Research Organisations]. Last year we introduced the EMRQS, the European Market Research Quality Standards, which are now in place in many countries. CASRO (the Council of American Survey Research Organizations) is interested in that as well so they may become global standards.

Bronner: The main threat is non-response, followed by privacy legislation, research by non-specialist agencies, the difficulty of getting interviewers in the current labor market, confusion between telemarketing and research, competition from universities, and lower prices from suppliers in other countries.

Attfield: I think it's some of the things we have discussed already: the problems of public perception, the pressures that always come from clients to make questionnaires longer, to try to find different ways of getting more private information, which people are unwilling to disclose.

Quirk's: Are there privacy laws in your country that make it difficult to conduct legitimate marketing research? Does telemarketing have a damaging effect on legitimate research?

Liljeberg: Researching under the guise of sales does occur but not too much. We do have privacy laws in Denmark, as in almost all European countries, based on a directive from the European Union, which all member countries have to put in their national laws. So there is a data privacy law which says that we have to contact the data registrar to do the research, especially if the research is about sensitive areas like race, religion, sexual attitudes, diseases, etc. We have a clear distinction between telemarketing and marketing research in the law. We feel that Danish legislation is quite favorable to our industry as compared to other European countries.

Bronner: We have not faced severe regulations but there will come European rules. For example in Germany there is the rule that you cannot do cold-calling, without an introduction, to participate in research. First you have their information and then you can phone them.

So if there is a European rule based on the German rule, there will be a problem. Then you have to turn to panels, because people have to give their approval to participate in the research.

Attfield: The issue in Germany hasn't been telemarketing so much as privacy in general. In England there is much more concern about telemarketing. There you have to give people the assurance that you won't try to sell them anything. In Germany you have to assure them their data will be kept anonymous. The ADM, the main professional research association here, spends a lot of time negotiating with the government to try to establish the difference between research and telemarketing and so far it has been successful, so there are fewer restrictions on research than on telemarketing.

Quirk's: How has the consolidation in the market research industry, both in the U.S. and around the world, affected the industry? Is consolidation helpful or harmful?

Liljeberg: The consolidation has affected the industry simply by reducing the number of suppliers. But it has made it easier and better to market good, branded research products so I think it is helpful.

Bronner: At the moment, a lot of multinational research companies have acquired companies in the Netherlands, so some years ago everybody was a Dutch agency, but at the moment the main agencies have been bought by multinationals and you get more uniform products. So it is an advantage because you can do research in a number of countries using the same approach and compare the results. But the freedom is less because you have all kinds of standard products.

Attfield: I think that if companies need to invest in new techniques, such as online techniques or techniques that are expensive to introduce, then they have to have some new capital to do that. The main way that has been happening is that larger companies have been taking over smaller companies, hopefully to invest in them so they can make positive developments in the future. In that sense I think it is helpful. The negative side is that it reduces the variety that exists.

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

Liljeberg: In some cases yes, in others, no! I don't think the picture is very clear. Some of our clients know what they are buying and use what they are buying. Some just buy field and tab and do all the interpretation and analysis themselves, in other cases we do it for them and discuss the results afterwards. But other of our clients buy it out of habit and do not exploit the material as fully as they might.

Bronner: I am very optimistic about the future of market research because all our clients will be flooded with data because they have data from research, client databases, they have data, data, data! And market researchers can serve as a kind of rescue brigade to help them analyze the data.

Attfield: We are mainly a fieldwork provider but clients do tend to have an expectation to squeeze more out of the questionnaire than is realistic in terms of questionnaire length. But apart from that, I have usually encountered a reasonably good understanding of the strengths and weaknesses of the different techniques.

Quirk's: What things could marketing research companies be doing to help their clients make more effective use of marketing research data?

Liljeberg: We think there is a need to build up better skills and a better image in the field of marketing research. The traditional view of the research industry is that they deliver their data and perhaps a report but they do not help the company enough to use the data in their organization. So what we need and what we work hard on in our company is to raise our skills in being good consultants and giving clients advice.

Bronner: There is much more demand for benchmarks to carry out research in a comparable way. There is also another development in the Netherlands: there is a lot of combination of qualitative and quantitative research. They are not so separate as 10 years ago. People start with qualitative research and follow up with quantitative research and expect that it will fit together. Another development here is that we are growing from marketing researcher to information manager because we have to connect internal databases with marketing research.

Attfield: Because of our position, almost all of our work is with companies who are operating internationally. We do research in Germany for overseas companies and conduct research overseas for German companies so I think that something very important for us is to help clients understand national differences or differences in the character of international markets.

Quirk's: Have you seen trends in the use of marketing research in your country? Are certain kinds of companies or industries doing more or less research or doing research for the first time?

Liljeberg: The picture is as it has always been. There are always new clients on the market. Other companies have always done research. Some companies may reduce their budgets but that is based on their own consolidation. When two or three or four client companies go through a merger, the number of clients goes down. We see a tendency toward more qualitative and less quantitative research.

Bronner: We see that marketing research is growing and we are talking to people in companies at a higher level than before. Previously we would talk only to the marketing research departments but now we are talking to management. We are doing a lot of segmentation work because there is the belief that there isn't one uniform market but there are segments in the market and companies need to approach each one with different marketing instruments. We also see an enormous growth in advertising response research. For every medium — direct mail, television, print advertising, newspaper — there is a desire to measure response. And that is because of the accountability discussion that came in the mid-1990s. Companies were spending a lot of money for advertising but didn't know what worked and what didn't so that discussion stimulated advertising response research.

Attfield: From what we see, this tends to follow general trends of technical innovation. That means that you'll have an upsurge in the demand for research among, for example, telecommunications companies after the liberalization, or an upsurge in demand for research from mobile phone firms. But then they will go into reverse and we will have a demand for research in traditional industries like food or clothing. It's difficult to see a clear trend except that anything related to high-tech is in the long run becoming more important, especially because a lot of those companies are young companies that don't know much about their markets.

Quirk's: Are the research departments in the client companies growing or shrinking? Are client companies looking at research providers as consultants in information management?

Liljeberg: We have the field and tab, data-gathering suppliers and we have the consultants providing the added value to the figures. But the old days of research companies just doing data collection and traditional reporting doesn't work any more. You can do just the data collection, but if you do much more than that then you have to do *much* more, including the consultancy.

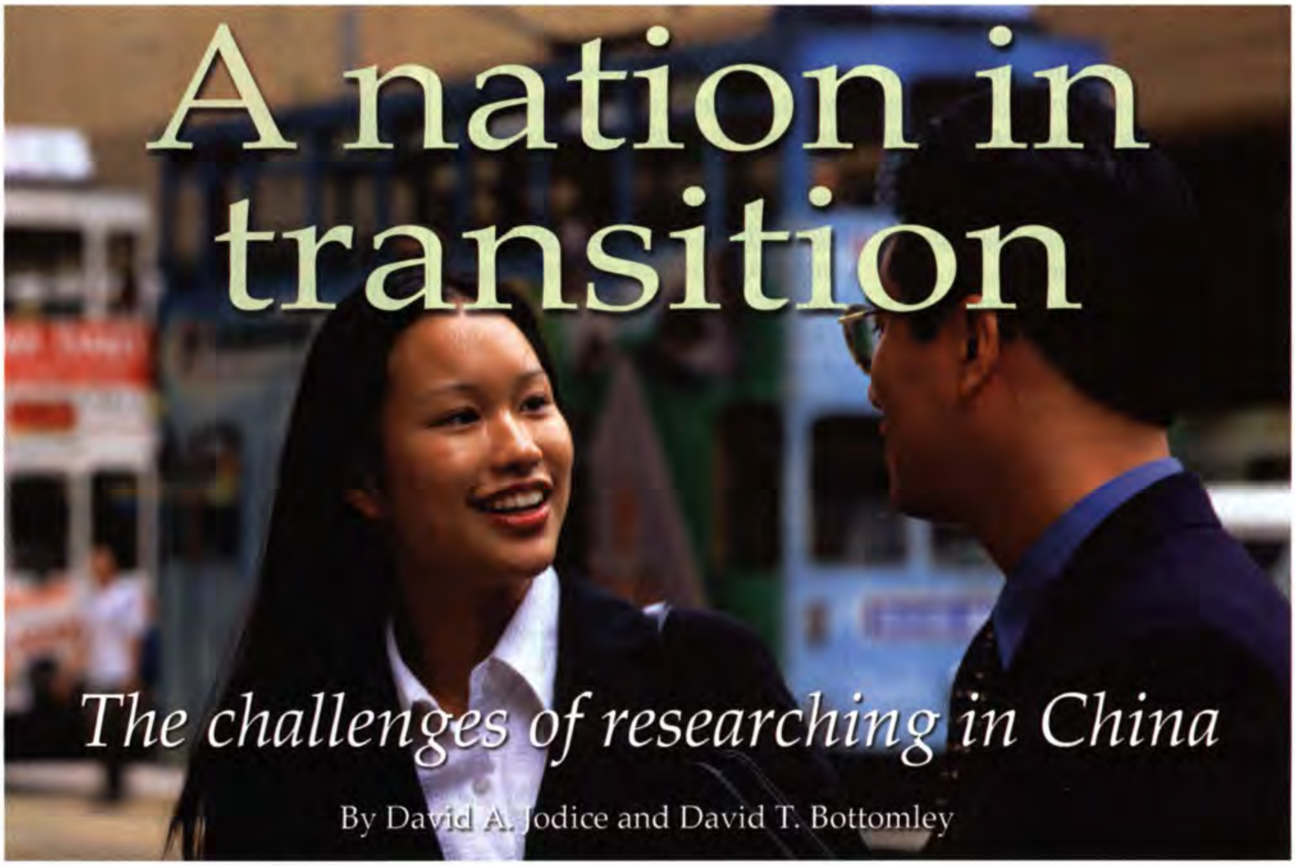
Attfield: I don't think the research departments in client companies are shrinking. I think that they do remain important, though you do hear of cutbacks. I think you encounter so many different attitudes toward marketing research from clients that I couldn't generalize.

Quirk's: How has globalization of the world economy affected marketing research? Do you think more companies will rely on a global marketing approach or will they tailor their marketing efforts, and by extension their marketing research efforts, to each country?

Liljeberg: It's true that the world economy is undergoing a globalization. But still there are so many cultural differences between the different parts of the world that we haven't come to a true global marketing approach. On the other hand, the fit to each country is too small. Many European companies and especially U.S. and Japanese companies don't know Denmark, they don't know Sweden, they don't know Norway. They may know Scandinavia — they have a regional approach in what they are doing and their local organization is Nordic-based — but they have a regional approach. So we as research suppliers to make sure that, though we are Danish and to that extent we are local, we have a very good network in Scandinavia in order to meet the needs of the big international companies.

Bronner: The multinationals in marketing research are growing and a lot of companies will do research in many countries. The globalization affects market research because more uniform procedures are used. So this is an advantage for the client because he can compare results across all the countries. But it has required researchers to do things the same way that researchers in other countries do them, so perhaps it has limited them to a certain extent.

Attfield: There are very, very few global brands where you can do the same thing in every market. In terms of Germany I think there are relatively few companies that conduct global research. Germany is still relatively parochial. What we see is a large amount of global research conducted from the States or from England and my sense is that that will continue to grow.



A nation in transition

The challenges of researching in China

By David A. Jodice and David T. Bottomley

Editor's note: David A. Jodice is president of D3 Systems, Vienna, Va. He can be reached at 703-255-0884 or at jodiceda@aol.com. David T. Bottomley is managing director of Asia Marketing Research Directions, Hong Kong. He can be reached at 852-2516-6717 or at dtb@hk.super.net.

China presents market researchers with challenges foreign to those encountered in developed nations. In some ways, the techniques and practices that have to be used — door-to-door surveys being a prime example — are, to Western eyes, those of the past.

But the profound revolution occurring today in China is rapidly changing the situation. The revolution is economic, not political, and one of the major benefits for people has been a remarkable — staggering to many non-Chinese — increase in communication facilities.

The Chinese government has very successfully implemented policies of making color television sets and telephones accessible to everyone. Phones have become so accessible that about 85 percent of homes in urban areas now have fixed line handsets with 100 million mobile sets currently in use, a number that is expected to double in the next few years.

The high proportion of homes with fixed line phones means that market researchers are now able, for many types of surveys, to change from door-to-door to telephone techniques.

Initially, people were suspicious about market researchers' calls but with increasing usage, they more readily answer telephone questionnaires. Computer-assisted telephone interviewing (CATI) systems will soon be common in this vast and rapidly modernizing land.

In rural China, however, the fixed-line take-up has not been as rapid as in the cities — only about 59 percent of homes have them installed — and so in mid-2000 in setting out to conduct a survey in rural regions as well as the cities, knocking on doors was still the only practicable technique for interviewers to use.

The survey was the first part of a three-wave study designed to measure Chinese consumers' purchasing aspirations and to assess the social and economic issues that are important to them. The second wave was fielded in March and the third wave in the autumn.

The study, "China in Transition: a national survey of Chinese consumers' appliance purchasing, media interests and economic conditions," is believed to be one of the first to tackle rural China on a large scale and to provide a comparative analysis of urban and rural urban Chinese attitudes.

Both waves were conducted in the 11 largest cities and in two different sets of 10 provinces. The cities were

Shanghai, Beijing, Tianjin, Wuhan, Shanyang, Guangzhou, Chonqung, Harbin, Nanjing, Xi'an, and Chengdu, which had a combined population in 1998 of 43.24 million, ranging from about 9 million in Shanghai to 2 million in Chengdu. The sample of 1,650 persons, aged 18 to 60, was distributed in proportion to the city urban populations.

In the first wave, the provinces, which had a population of about 570 million people in 1998, were Guangdong, Jiangsu, Heilongjiang, Shandong, Jiangzi, Henan, Sichuan, Guizhou, Ningxia and Shanxi. In the second wave, the provinces, which had a population in 1998 of 455 million, were Anhui, Hebei, Shandong, Henan, Sichuan, Zhejiang, Fujian, Ningxia, Hunan, and Yunan.

One county was selected in each province and within those counties interviews were conducted in clusters of small towns, typically with populations of 5,000 to 15,000 people. All were in agricultural districts. The sample of 1,500 persons, also aged 18 to 60 years, was distributed across the 10 provinces proportionately to their populations (after excluding any urban areas covered in the major cities' sample).

Less arduous

The economic revolution is also producing a rapid improvement in China's transport system, making fieldwork far less arduous than even five years ago, especially in rural areas. Then, roads were narrow and filled with cyclists, agricultural vehicles and trucks; drivers believed vigorous use of horns could somehow miraculously lift their vehicles over the throng.

Now, rural road travel is much faster along modern toll-roads and even in the more remote regions there are super-highways with attractively painted signs in Chinese and English, green painted railings and crash barriers and speed limits of 110 kph and 120 kph.

But the revolution has still not progressed sufficiently to overcome a variety of other difficulties not encountered by researchers operating in developed countries. Apart from communication limitations, suspicion about the purpose of research, a lack of up-to-date demographic data, and the lack of a strong pool of experienced interviewers provide challenges.

When in Australia earlier this year, one of us (David Bottomley) asked colleagues about current sampling and interviewing practices. "You know, I haven't been asked questions like that for 20 years," one replied. And of course, that is the situation in countries with established market research industries. It is assumed that any well-known company conducts its fieldwork efficiently and clients may concentrate on the results without worrying whether their data are reliable.

Consumer research in China could not develop on any scale until about 20 years ago, when ownership of property by Chinese families became respectable and interviewers could door-knock without exciting the suspicion of authorities.

Even so, local authorities may still intervene. A year ago, four interviewers working just over the border from Hong Kong, in Shenzhen, for Asia Market Research Directions, were called in by police and questioned for some hours. The survey was simply about household use of raisins but the fact that students were knocking on doors late in the evening was suspicious.

From early in 2000 permission for all surveys had to be obtained from the State Statistical Bureau. This proved helpful for our "China in Transition" project where we were working in areas unused to household surveys and all interviewers carried a copy of the official certificate to show to consumers and authorities.

There was one exception in a rural town where the authorities refused to accept the certificate and wanted to prevent the survey. Our astute supervisor realised that the rejection was in no way political and did a deal to hire some facilities from the authorities. The survey went on.

Training, standardizing

Fifty years ago, in Australia, Unilever made a substantial contribution to the market research industry through its thorough training of supervisors and interviewers and by standardizing household selection procedures.

In China, during the past 10 years, Procter & Gamble has made a similar contribution. It has insisted that its research suppliers use standard methods of household sampling, similar quality control checking and has given extra training to research companies' group discussion moderators. As researchers move around to other companies, P & G's methods have diffused through the industry.

The result is that clients are likely to have their city surveys conducted by multi-stage urban sampling with interviews being allocated proportionately to each city region, small administrative districts being sampled within each region with probability proportional to residential population, and clusters of interviews conducted from each sampling point.

Sampling in rural areas is another matter. There is no up-to-date demographic information and a map of the town might not be available. So, for the first wave of our study, an area probability sample was constructed. The researcher prepared a sketch map of the town and gridded it so that lower density areas were allocated larger grids. Grids were then randomly selected and equal numbers of interviews allocated to each selected grid.

In the cities and in the rural towns quality controllers sketched the routes each interviewer was to take and designated which households were to be called on. In that way the interviewers had no discretion about the households where they were to obtain interviews.

Interviewers in China are usually tertiary or senior secondary students who are extremely enthusiastic but inexperienced. To overcome the problems associated with rural areas in which interviews had not previously been conducted, supervisors were brought to Beijing for an intensive, two-day training course on field and reporting methods. Later, rural interviewers were briefed on location and conducted practice interviews, under the guidance of our field managers, before starting their required fieldwork.

Because of the lack of experience, procedures need to be kept simple and supervision more rigorous than in places where experienced interviewers are available. To minimize errors, an independent selection of their routes and a high percentage of quality control checks — up to 40 percent of calls and interviews — needs to be made.

In the field, interviewing actually on a door-step is impractical because most people live in apartments and their doorsteps may converge with those of their neighbors.

So the lengthy (40-minute) interview with its many show cards was conducted indoors. But because most apartments are small and interviewing conditions were cramped, interviewers often sat on beds or on small stools. Lighting often was poor — meaning that no exhibits in red print could be used because they would become almost invisible in the dim light.

The length of the interview (some stretched to 70 minutes) would raise eyebrows among researchers (and probably respondents) in other countries where market research is common, but in China respondents show remarkable patience in answering questions. Perhaps the relative novelty of research is the reason.

Increasing viability

As we have shown, conducting marketing research in China is certainly different from conducting it in Western countries. But an improving infrastructure, increasing acceptance by the public, and an adherence to the same kind of standardized procedures used in more developed markets ensure that research in China will continue increasing in viability.

Simplifying research in Japan

Efficient communication is the key

By Lyn Montgomery

Editor's note: Lyn Montgomery, managing director of Strategic Outlooks Pty. Ltd., Balmain, Australia, can be reached at lyn@strategicoutlooks.com.au.

Cultural and economic differences between countries have posed significant problems for the move to make market research an international product. Many articles have been written about how overlooking cultural and regional issues leads to poor research practices. The problem is not in accommodating different cultures, but in recognizing that the researcher's own culture is already embodied in the research practices. Applying the Golden Rule, and considering how to approach our own culture from an unfamiliar viewpoint will improve the quality of international research.

Any market researcher who fails to appreciate the global nature of business must have a lot of trouble finding work. However, turning market research services into a global product has required a steep learning curve.

There are endless numbers of cultural and economic issues that can affect how well different methods of market research can be applied to countries less familiar with research per se. Such issues include language differences; business and interpersonal protocols; and availability of communication systems such as telephones, fax, e-mail, etc.

As market researchers approach an unfamiliar country they require an understanding of how to avoid alienating respondents or contaminating data by using unsuitable practices. Achieving this understanding requires background research — certainly a daunting task, given the overwhelming body of information that must be sifted through.

A better way of approaching this is to turn the problem around and, instead of trying to understand how international factors affect market research, study what assumptions market research makes about culture.

There is one obvious benefit to this approach that comes to mind: the principles of market research are easier for market researchers to understand than the principles of unfamiliar cultures. And this is doubly true of cultures such as Japan.

Cultural hurdles

It is generally recognized that the biggest challenge for English-speaking businesses in entering the Japanese market is the cultural hurdle. Culture in this sense is a broad spectrum of habits and peculiarities used in day-to-day communication.

The following demonstrates the processes and reasoning behind some market analysis studies we have done in Japan.

The key lesson is that problems don't emerge from incompatible cultures, but from lack of understanding of the differences between cultures.

Where do we start?

The start of any market research study involves systematically collating all relevant information. This involves a wide variety of material from a number of sources.

You will need to know who the respondents will be, where they are, what they do, and why the information they supply is important.

This information can be obtained from sources such as company prospectuses, industry and customer databases, Web sites, or the media. In many instances the company commissioning the research provides this information.

It is fairly easy to find information about the use of language, business etiquette, technology coverage and business practices. The question is what information will affect the research project, and how.

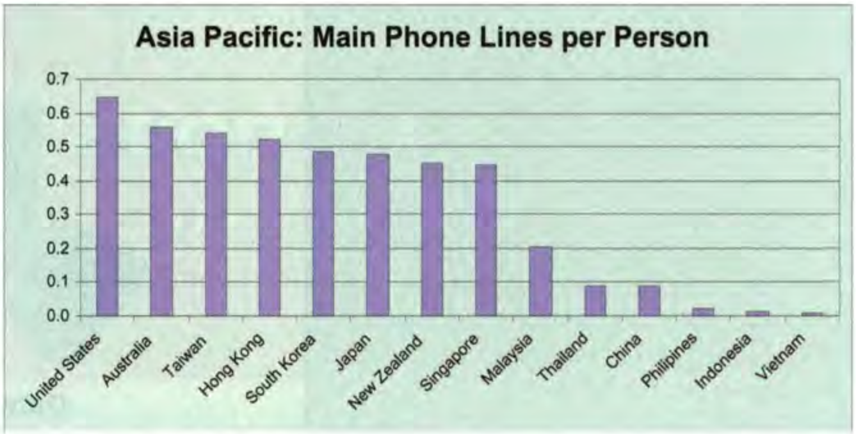
Despite the differences between Japanese and Western culture, the principles underlying the differences are much the same as any culture. All cultures have formal and informal systems of courtesy, ways of introducing yourself, or how to respect authority etc. If there are differences then is there anything fundamental to the study that needs to be changed?

Probably not. When all these questions have been answered you will usually be left with two valuable groups of information: how to be courteous, and how to communicate.

By considering cultural differences in this manner the researcher has gained a quality foundation for the survey design, and has acquired key information for its implementation.

How is the study developed?

As we have already stated there are obvious development issues such as language differences and their correct translation that will affect the design. Also there are those even more important issues, such as the appropriate way to be polite or how to communicate, to be considered.



Another consideration is the communication medium. It is important to consider the coverage of telephones and computers before conducting phone or e-mail surveys.

The graph shows an approximate distribution of telephones through the Asia-Pacific region.

Clearly countries like the United States and Australia, with a greater access to telephones, have developed a degree of familiarity with such technologies. Consequently it is necessary to recognize that there is a cultural assumption within the telephone research process.

It follows that cold-calling will have different rates of acceptance. No business wants its valuable assets tied up in unprofitable activities. The rarer the availability of telephone lines the more resistant respondents will be to unsolicited calls.

Market research relies on clear communication for accurate transfer of information. Practices developed in Western countries assume specific parameters about how we communicate. By focusing on the principle of communication before the details, it becomes easier to develop flexible methodologies that will work in any cultural situation.

What is unique about questionnaire design?

Language differences are the most obvious problem in research design. Obviously the translation from English needs close attention.

Steven Lewis has pointed out in an earlier (November 1999) edition of *Quirk's* that a common term such as "very satisfied" is frequently misunderstood when translated from English. His suggestion is to use more definitive terms such as "totally satisfied" that are less confusing.

However, the point of a Likert-style question is to plot attitudes on a numerical scale. As such we believe it is more important to focus on the number selection when prompting respondents. This overcomes trying to fix an interpretation on satisfaction, which will normally be a subjective experience.

Additionally, questions written in English may translate into much longer sentences in character-based languages. It is common courtesy, not to mention common sense, to keep a questionnaire as short as possible. All questionnaires should therefore be retested after translation to ensure that the continuity of the questions has also been translated. The researcher should bear in mind what it is he wants to know, rather than keeping the questions rigidly to a formula that works in Western culture. Focus on the outcome required, not just the input.

Again, the key is communication. If the questionnaire is precise and properly directed it shouldn't be misinterpreted in any culture.

How do you conduct interviews?

The key here is not to go in cold.

From our experience, telephone surveys are very difficult to conduct in Japan. However over the last three years there has been greater acceptance of this methodology by Japanese businesses. One of the problems faced by researchers is the advanced market penetration of telemarketing. For this reason prospective respondents often ask immediately "What are you selling?"

To overcome this the introduction script needs to be precise in explaining the purpose of the call, and you need to target the respondent carefully.

What is our experience?

To highlight the foregoing, we will recount our experience with two studies in Japan. One was conducted on our behalf some three years ago by a large Japanese market research company. The second was conducted in 2000 using native Japanese speakers resident in Australia.

Study 1

The purpose of the study was to ascertain market potential for a specialized software package. The commissioning company wanted to enter the Japanese market, and wished to understand market attitudes to such products; measure market penetration of similar products; and assess potential for its particular product.

As the commissioning company was operating within a tight time frame, a mail survey was not possible, although at that time that would have been preferable. At the time we had limited experience in the Japanese market, and, understanding the cultural differences, we used a Japanese company for the fieldwork. They advised us of the difficulties of the telephone survey, but finally agreed to conduct one, given our time constraints.

We designed the survey structure and questionnaire, and they undertook the telephone survey. They translated the questionnaire, and we deferred to their expertise in changing the wording and construction to suit the local culture.

A major problem we encountered was in sample selection. We sought businesses in various tiers by operating revenue, and it took several weeks of explanation and discussion before we received a sample breakdown. During the process of interviewing we then discovered that the various categories within the sample had been misinterpreted by the field company. This led to three times as many interviews as required within one category, with virtually no interviews in another.

Every problem encountered took many e-mails and telephone calls to clarify and resolve. In some instances the difficulties were never resolved.

Another issue was listing of the companies contacted. In our business-to-business surveys we routinely provide our customer with a list of the companies contacted. We believe this is extremely important in reassuring the customer that we have contacted companies whose input is valid to the research.

The Japanese company at first declined to supply such a list, stating that it was their property, they had conducted the survey, and we had no rights to it. Finally they reluctantly agreed to provide it in Japanese, and we had it translated. This caused considerable delay in delivery of the final report to our customer. Had we understood earlier the cultural bias inherent in this situation it could have been resolved more easily.

A problem that tainted the whole survey was that our selected subcontractor did not have the required level of specialist knowledge of IT products and services. This was mainly due to the rarity at that time of conducting attitudinal research on behalf of information technology vendors. This caused additional complications in communicating our requirements.

Because of the higher cost of living and higher wages in Japan, the cost of the fieldwork was around three times what it would have been in Australia, and seriously eroded our margin.

None of this implies any lack of professionalism on the part of the Japanese company. It is an example of the difficulty in communicating on a very technical subject between two cultures.

Study 2

Another market study we conducted in December 2000 looked at ascertaining the potential for a particular type of technology amongst large

Japanese companies. Recalling previous disappointing experiences we elected to conduct the fieldwork ourselves. Once again because of our client's tight time frame a mail survey was not feasible. This was not such a problem because Japanese attitudes to telephone surveys had changed somewhat in the intervening time.

We employed two mature, native-speaking Japanese with excellent English skills. Both had been living in Australia for many years.

Our client had provided us with a list of "customers." This turned out to be a list of people in the accounts payable department, and not the correct contacts for our survey.

Our methodology was to call the contact listed, and endeavor to find the correct person. This was quite time-consuming in terms of explaining the role of the person we wanted to talk to. Once this individual had been identified we sent an introductory fax explaining the purpose and content of the survey. This was then followed up with a telephone call to:

- establish willingness to participate in the survey;
- determine the most appropriate method for completing the survey;
- set up a time to conduct the interview.

We then conducted the interviews either by faxing the survey instrument to the respondent, or by telephone, depending on what had been agreed. In this situation we benefited from respondent input on the best way of conducting the study.

After the survey we sent a brief summary of the report results to the respondents. This was offered instead of some sort of monetary or voucher incentive. An important consideration in surveying in Japan is that some form of reward is expected for participation. This aligns with the overall cultural expectation of courtesy and respect for value provided by another.

Many advantages arose from conducting this survey ourselves. Using Japanese speakers resident in Australia meant they had a good understanding of both cultures. Any problems arising during the survey could be dealt with immediately instead of by protracted and confusing conversations between Japan and us.

Finally it was considerably less expensive for our client, and returned a better margin for us.

Focusing on clear and courteous communication, rather than spending resources allaying fears about "cultural differences" achieved these results.

Recognize and appreciate

International market research does not require intensive and time-consuming studies of obscure cultural quirks. The core practice in market research is the efficient communication of information.

If you recognize and appreciate the unique characteristics of Western culture and understand that other cultures will have their own unique characteristics you can respect the differences and work with them.

Expanding horizons

Web-enabled technologies helping globalize marketing research

By Raymond Pettit and Robert Monster

Editor's note: Raymond Pettit is president of ERP Associates, a Ridgewood, N.J., research firm. He can be reached at erpmetro@optonline.net. Robert Monster is founder and CEO of Global Market Insite, an Issaquah, Wash., research firm. He can be reached at rwmonster@gmimr.com.

A rapidly emerging trend affecting the market research industry today is globalization. Globalization is no longer an option but a strategic necessity for all but the most specialized or localized firms. Global mergers and acquisitions, International profit centers, worldwide marketing, global branding, and cross-border business models have put increasing demands on the market research profession to provide new and effective solutions. This globalization of the client sector has challenged the market research industry to follow a path already well worn by other professional services providers.

In the past 20 years, the pace of globalization has been accelerated by the growth of the Internet infrastructure and the rise of networked communications. Economic boundaries are blurring. The rules are changing. Increasingly, firms are expanding globally as opportunities abound to:

- reach more customers;
- increase economies of scale;
- adjust, control, or lengthen product life cycles;
- make use of less restrictive sourcing policies;
- redeploy work to markets with lower operating costs;
- take advantage of worldwide consumer demand for greater varieties of products at lower prices.

To realize these potential opportunities, however, requires infrastructure for communication, management, marketing, and research that enables global coverage, but also allows local involvement. While it is tempting to rely on software and technology to achieve this, for the market research industry the road to gathering customer knowledge and delivering insights to clients is still a combined effort of tried-and-true market research techniques and creative use of new tools and processes. The key to useful and actionable research still lies in combining the proper use of appropriate data collection methods and thoughtful, high-quality analytics.

Without question, the Internet has opened the door to entirely new ways

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to gather, analyze and deliver data. Researchers can now offer customized research, multi-method online, and multi-mode (online and offline) approaches using a platform designed and based on online enabling technologies. In the vast majority of cases — particularly in the emerging customer relationship management (CRM) analytics space — this serves to enrich the overall market research process and add needed value and business intelligence at key customer touch points along the market research value chain.

Why go global?

Students of globalization will know the familiar arguments for why companies go global. For the non-initiated, there are five main reasons why becoming global has ceased to be an option in most industries and has become a requirement for most medium- to large-sized corporations.

1. Pursuit of growth: In the quest for continued growth, many companies have no choice but to look abroad. Developed country markets are increasingly saturated within mature product and service sectors. Thus, growth requires a continuous effort to locate fresh opportunities in emerging markets, as well as rapidly expanding the global distribution of new products. As a result, the term "global market share" is increasingly present in modern business vocabulary.

2. Cost reduction: A company with global presence will have an advantage over a company that cannot leverage the relatively large differences in labor costs between world economies. Utilization of fixed assets is significantly enhanced vis-à-vis a domestically focused competitor. Similar models exist in data processing, e.g., the use of Indian or Eastern European data processing centers to serve U.S. and Western Europe.

3. Market responsiveness: When a company expands to other countries, it must often adapt at least some features of its products and/or processes to the local environment. This adaptation requires generating local knowledge. Some of this research may in turn be irrelevant outside the local market. Local market understanding on a global scale provides the basis for making targeted changes that can add value. For example, most consumer product companies will confirm that Japanese consumers have highly discriminating tastes and can be exceedingly articulate in communicating their unmet needs to researchers who ask using anonymous methods such as self-administered interviews (online or offline).

4. Globalization of customers: The phrase "globalization of customers" can actually refer to both "clients" (who are worldwide businesses) as well as "customers" — people who are internationally mobile (such as executives served by credit card companies or serviced by hotels around the world). Three main reasons dictate why a company may seek to serve individual global customers. First, customers may strongly prefer worldwide consistency and coordination in products and services. Second, for the sake of efficiencies, customers may favor dealing with a smaller number of partners or service providers on a regular basis. Third, allowing a customer to deal with different suppliers in other countries brings the risk that the customer may choose that competitor at home as well.

5. Competitive response: If a competitor starts to globalize, they can use their global presence to advantage vis-à-vis domestically focused firms. Initially, global companies can leverage this advantage by capturing new markets while pursuing efficiencies on a global scale. Soon, they can profit from knowledge exchange and development and begin to provide a coordinated source of supply to global customers. Finally, they can use multimarket presence to subsidize and wage a focused attack in a competitor's home market. As a result, in today's world, it is dangerous to be a latemover to a global strategy.

Globalization, characterized by mega-mergers and foreign direct investment, is an accelerating trend. Even the current economic slow-down will not reverse this trend.

The 2001 Honomichl report confirmed that the pace of global consolidation also continues in market research, with approximately 60 percent of the industry represented by 25 top firms based on revenues. This global consolidation is occurring to some degree as a sub-component of the large media conglomerates such as VNU, WPP, IPG, and Omnicon. It is also happening among the more focused business intelligence firms such as IMS, TNS, IPSOS, GfK and Intage, nearly all of whom are global in their view.

Challenges to globalizing market research

A key driver of globalization is undeniably the pervasiveness of the Internet as an affordable means of communicating and gathering data over long distances. This has also created the framework for using the Internet, and particularly Web-based enabling technologies, to do, among other things, surveys among consumers across the world.

Following on the heels of the acceptance of online surveying in highly industrialized countries, there has been an increasing trend towards managing the entire research process using the Internet as the enabling platform. Although the difficulties of carrying out cross-border surveys are well known to the market research profession, a compelling need still exists for an integrated centrally-managed system for planning projects of this nature, executing them, and delivering results to the global client.

In fact, the first steps toward meeting this need are emerging in the form of Web-enabled systems that use Internet technologies to construct an integrated global market research infrastructure. Companies are moving rapidly to develop these enabling systems for use by market research companies. These solutions allow the development, deployment, collection, analysis and dissemination of a broad spectrum of research across the enterprise and around the world.

Solutions for globalizing market research

Given the demand on market research to deliver a single real-time view of global research data, the fundamental model for data aggregation must change. The historical model is inadequate for the demands of the end-client who must make global decisions in less time than ever before. Consider the comparison shown in the chart.

	Traditional Model	New Model
Data collection	Batch process	Real-time process
Sample source	Ad hoc recruited	Sourced from profiled panels
Project management	Offline	Online using Web-based tools
Data delivery	Batch data files and paper	Online
Data archiving	Non-mineable flat files	Scalable SQL/OLAP databases

The difference in work processes can be illustrated in the following comparison.

Traditional model

The traditional model (Figure 1) is based on batch collection often collating data from a variety of data formats, and perhaps using a variety of different data collection vendors. The result is long lead-times and higher risk of errors due to batch data processing. Data delivery is managed entirely in batch, usually in non-electronic form such as printed or faxed tabulation reports. Analysis beyond the basics requires the additional step of a skilled quantitative researcher and possibly another loop back to the graphics department to turn results and recommendations into a report.

FIGURE 1:

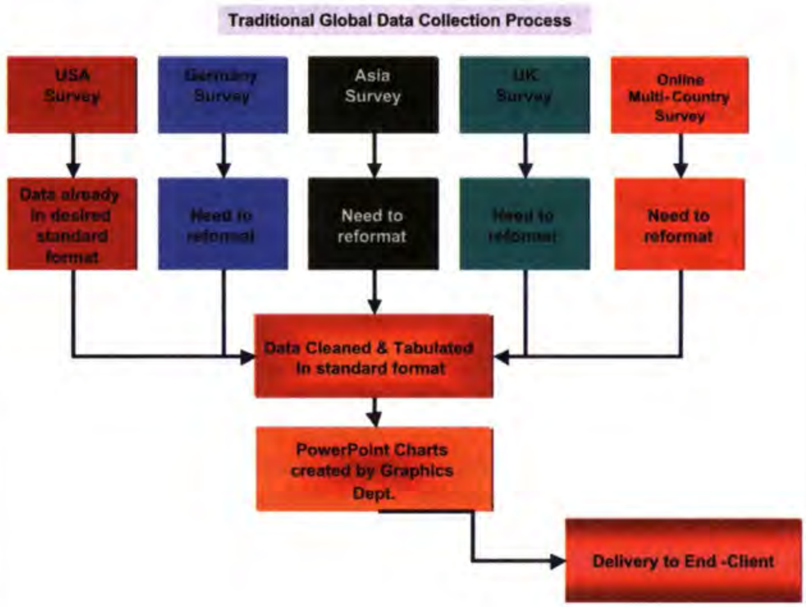
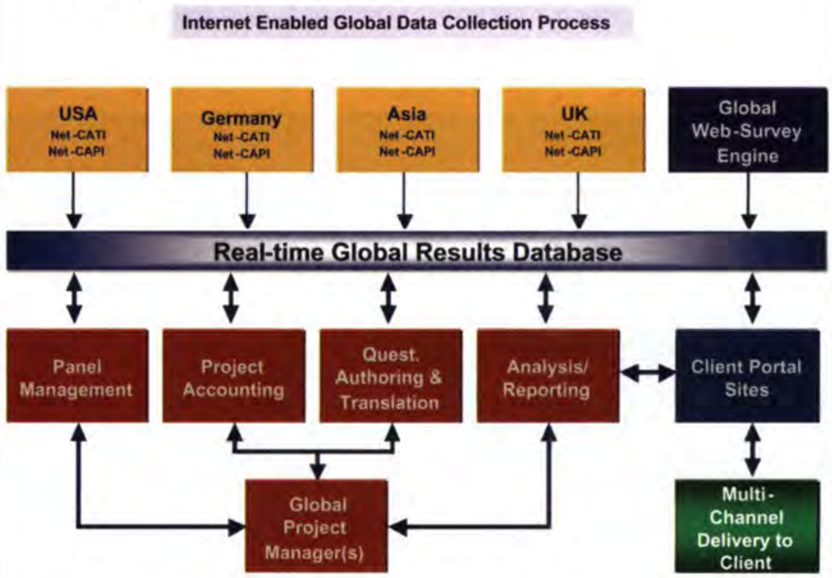


FIGURE 2:



Updated Internet-centric model

The updated model (Figure 2) leverages net-centric technologies while working with traditional Web survey engines. The data is centrally collected into scalable relational databases that can be managed in real-time using Web-based tools, and which can be accessed securely by clients using online portals. Thus, data access/reports can be continuous, filtered through analytic experts, or published online and delivered directly to the client's desktop.

The importance of panels

The restructuring of business

Research Design	CATI	Online with Lists	Online with Panel
Data collection	CATI from 6 call centers in 4 countries	Online/Self-administered interview	Online/Self-administered interview
Sampling method	RDD List	Purchased list of non-profiled respondents	Profiled panel
Notification method	Telephone	Bulk e-mail	Targeted e-mail
Incentive	None	Sweepstakes	Points program
	CATI	**Online with Lists**	**Online with Panel**
Productivity			
Cooperation rate	24%	3%	50%
% of respondents eligible	30%	30%	95%
Required number of respondent contacts	138,889	1,111,111	17,544
Person hours elapsed including call center and customer service	11,574	60	10
Data processing hours	170	10	5
	CATI	**Online with Lists**	**Online with Panel**
Budget*			
Data collection	$173,611	$35,000	$14,947
Data processing	$10,200	$600	$300
Telecom/IT costs	$34,722	$1,500	$600
Pre-recruitment/list	$4,166	$33,333	$15,790
Timeline			
- Top-line results	8-10 weeks	2-5 days	2-4 days
- Clean data	9-12 weeks	3-7 days	3-5 days
Respondent incentives	Negligible	$15,000	$67,544
Total research cost	$222,699	$85,433	$99,181
Methodology risk			
- Representativeness	Low risk	Medium/High risk	Low risk
- Interviewer bias	Moderate risk	None	None

* Data collection costs only. Analysis excludes project management and translation costs that are assumed to be roughly equivalent in each example.

processes is one key component to leveraging the efficiency gains made possible via the Internet. A further major structural change that is, in part, attributable to the Internet, is the expanded use of panels, particularly global access panels.

In an era of rapidly declining cooperation rates for CATI, there is almost no choice but to consider using panels for online research. One year ago, this was a subject of debate but the anti-panel sentiment is rapidly declining, particularly in markets where high-quality managed panels are available and online penetration levels are considerable.

For global research, the current pool of single-source respondent panels is surprisingly small. However, recent announcements in the industry suggest a growing interest in expanding and extending global panel operations. As of this writing, there are serious plans to either develop or purchase global panels going on throughout the industry. Such developments indicate just how important panels have become to any company that wants to provide online research services.

For the moment, the economics of panel access are also increasingly in favor of the research buyer. A year ago, the price per completed interview for panel usage in the USA was close to $10. Today, the price is closer to $5 and falling. This trend may eventually be repeated outside of the USA but in 2001, panels in most countries have not been commoditized and pricing is still sufficiently attractive for research suppliers to build global panels.

To illustrate the transformation in the architecture made possible by the Internet, consider the comparative case study shown in the chart of a global market research firm conducting a 10-country study requiring 1,000 15-minute quantitative interviews in each country.

Conclusion

The globalization of business is redefining what a client wants and expects from market research efforts. Challenges notwithstanding, at a fundamental level, global clients want:

- to be able to compare results between countries using consistent methods and assumptions;
- to achieve enterprise-wide understanding of geographically dispersed consumers;
- to develop work processes that enable faster global innovation.

The evolution of the market research industry, as driven by internal and external forces, continues to be played out on an emerging global landscape. Based on today's unique convergence of trends and pressures, it is possible to fast-forward to a market research industry that displays the following characteristics:

- Internet-based market research will be the standard for managing and deploying quantitative multi-country consumer research;
- the analysis of multi-country results will be conducted via Web-based applications rather than desktop PCs;
- consumer research data will be closely integrated into global enterprise computing systems;
- large portions of custom, omnibus and tracking research, perhaps the majority, will be conducted using managed panels.

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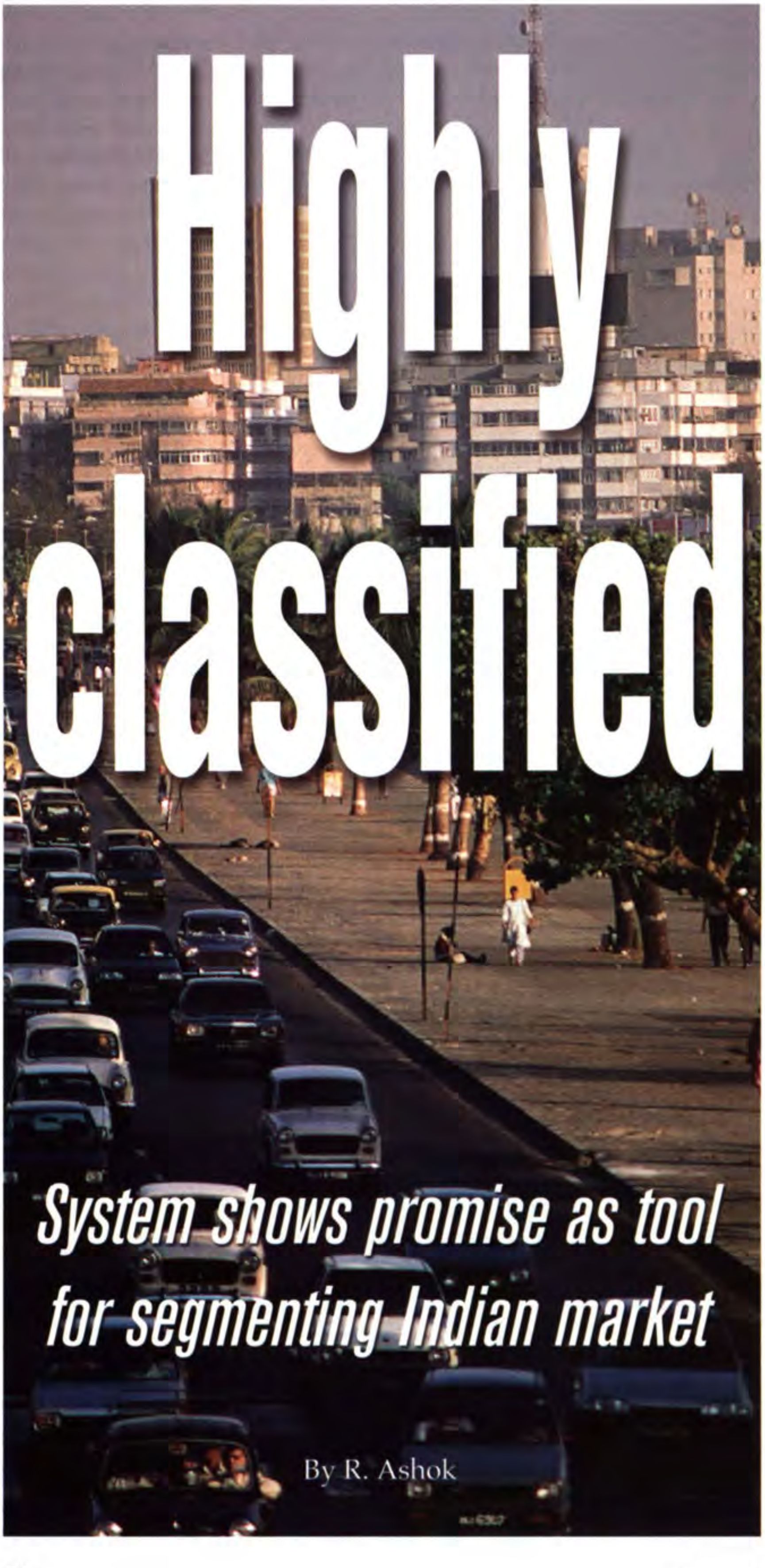


Editor's note: R. Ashok, general manager at India-based ORG-MARG Research Pvt. Ltd., can be reached at ashok@chn-org-marg.com.

India is a diverse and complex country. There are as many as 14 officially recognized languages and several more dialects. The population of a billion sees followers of five major religions. The country is divided politically into 25 states, each with its own government, and there are three or four sociocultural regions in each state.

All this means that the marketer of a product cannot think in terms of a pan-Indian consumer but has to be very careful about which segments he is addressing. The research industry naturally has to keep pace with these needs and has had to constantly update itself on techniques for gathering information, for analyzing data, and significantly for segmenting consumers.

This article is about the socio-economic classification system in use in India today, which was developed nearly a decade ago.

Market research in India has moved away from using income to define target audiences and has started using socio-economic classification (SEC) instead. The Indian SEC system is a classification based on the combination of the education and the occupation of the chief wage earner of the household (see the grid on p. 52 for reference). There are eight levels — from A1 to E2. The SEC system was first developed in India through the efforts of the Market Research Society of India (MRSI), and was then validated by a series of efforts, including a paper by this author in 1992.

Less than 15 percent of the population falls under SEC A1. The correlation between SEC and income is high but far from perfect.

The basic reasons for developing a

SEC system were the following:

1. Income can discriminate between consumers and non-consumers for certain products, but not for others.

2. Income is not stable over time whereas SEC is, i.e., the cut-offs of high and low income will vary quite rapidly over time.

3. Income is often understated.

The last has been proved by large-scale studies that compared household expenses with claimed income. Over 80 percent of upper income respondents were found to have regular monthly expenses well in excess of their stated monthly household income (MHI), and this proportion was not much lower among lower income respondents too.

The second of the three reasons is also beyond dispute. Salary levels in India have undergone a huge change in the 1990s; annual incomes of 1 million-plus rupees are earned by thousands of families today, but were the privilege of the very rich a decade ago.

This article examines the first reason stated in the context of a few product categories. The method used is that of a selectivity index, which compares the extent to which target audience definitions using surrogate variables SEC and monthly household income (MHI) match with the actual target audience as measured by very large-scale studies — specifically the Indian Readership Survey.

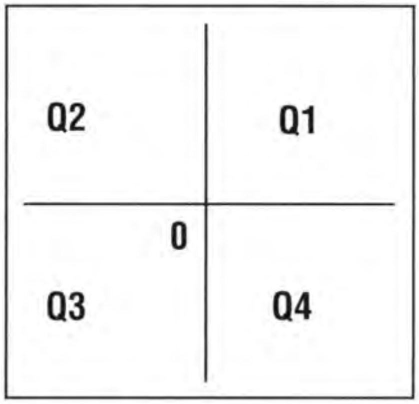
To understand the index, let us consider the following situation: a manufacturer of color TVs would like to target current owners of black-and-white TV sets. He therefore defines such people in terms of a surrogate variable such as MHI and prepares a media plan under the assumption that by covering the persons defined by the surrogate variable, he is also covering the actual market for his product.

The index compares the efficiency of SEC and MHI in performing this role of surrogate variable.

GRID FOR SEC CODE: SEC GRID
Based on the chief wage earner's education and occupation

Education	Illiterate	School up to 4 years	School 5-9 years	SSC/ HSC	Some college but not graduate	Graduate/ post-graduate-general	Graduate/ post-graduate-professional
Occupation							
1. Unskilled workers	E2	E2	E1	D	D	D	D
2. Skilled workers	E2	E1	D	C	C	B2	B2
3. Petty Traders	E2	D	D	C	C	B2	B2
4. Shopowners	D	D	C	B2	B1	A2	A2
5. Businessmen / Industrialist with no. of employees :							
- None	D	C	B2	B1	A2	A2	A1
- 1-9	C	B2	B2	B1	A2	A1	A1
- 10+	B1	B1	A2	A2	A1	A1	A1
6. Self-employed professionals	D	D	D	B2	B1	A2	A1
7. Clerical / Salesmen	D	D	D	C	B2	B1	B1
8. Supervisory level	D	D	C	C	B2	B1	A2
9. Officers / Executives - Junior	C	C	C	B2	B1	A2	A2
10. Officer/Executives - Middle/Senior	B1	B1	B1	B1	A2	A1	A1

The actual calculation is as below:



The first quadrant represents the overlap between the actual target audience and the segment defined by the surrogate variable. The second quadrant represents the portion of the target audience missed out by the surrogate variable. The third quadrant is the segment that is neither part of the target audience nor defined by the surrogate variable, and is therefore of no interest to us. The fourth quadrant is the segment defined by the surrogate variable but not part of the target audience, and is hence the wastage.

The selectivity index S is = $\frac{Q1*100}{(Q1+Q2+Q4)}$

A high selectivity index (maximum possible = 100) indicates that the variable is useful for targeting. When the index is low, it could be either because of high wastage, or because of high "missing out." High wastage indicates the need for further refinement of the variable, while high missing out means that the marketer is working with an

	Performance of SEC in comparison with MHI		
	Better	Equally good	Worse
Air conditioner		✔	
Microwave oven		✔	
Motor cycles		✔	
Electric Iron	✔		
Detergent powder/liquid	✔		
Color TV		✔	
Toilet soap		✔	
Washing cake/bar	✔		
Loose tea		✔	
Floor/toilet cleaners		✔	
English daily newspapers	✔		
Financial daily newspapers		✔	

imperfect understanding of the product penetration, which is definitely worse than a high wastage score.

The results summarized in the chart clearly indicate that SEC does not perform worse than MHI for any product category and actually performs better for some.

The results show that SEC performs as well as MHI for durables; this is a significant change from 10 years ago when SEC performed worse than MHI for durables. This can be attributed to the increasing penetration of durables, which has made them less of a preserve of the very rich.

SEC is on the whole better for household goods, especially for premium category products. Not surprisingly, SEC performs better for English newspapers. The parity on financial dailies is a natural consequence of the fact that India's investing and entrepreneurial community is not necessarily the most educated. The most educated people in India are typically in government or private employment.

Some of the categories show a high wastage. This strongly indicates that neither SEC not MHI is able to accurately fine-tune the target definition. Clearly there is a need for a new variable to be developed. Merely combining SEC and MHI will not serve the purpose. One option being pursued actively is monthly household expenses, which seems to function adequately for fast-moving goods and leisure products.

Further refinement

Market research in India has been evolving rapidly to tackle the increasing needs of marketers operating in a complex environment. One of the key evolutions was the development of an socio-economic system of classifying consumers around a decade ago. While SEC is an improvement on income, data from large-scale studies show that further refinement is now called for.

One possible solution is to introduce further levels in the SEC system. This is being done by combining SEC with household expenses to see if a combined system yields better results. The appropriate questions are now being put on to large-scale surveys. The results are expected by early January.

Where do we go from here?

In a letter to clients, one researcher offers advice and perspectives in the wake of September 11

Editor's note: The following is an edited version of a letter sent by Charles Colby, president of Rockbridge Associates, a Great Falls, Va., research firm, to clients shortly after the terrorist attacks on September 11. He can be reached at 703-757-5213 ext. 12.

To all our Clients and Colleagues:

Like all Americans, we at Rockbridge are deeply moved and disturbed by the events of September 11. We hope that you have not been personally affected, and that your friends, family and coworkers are safe. For those of you who have personally lost family or friends in the attack on America, our hearts and prayers go out to you.

Shortly after the attacks, President Bush told the country that the best thing Americans could do right now is "go back to work." In that spirit, I am writing this letter to discuss the ramifications of the September 11 events on marketing decision-making and market research. We are already facing short-term disruptions, including an adverse impact on surveying and travel. We are also likely to face consequences that are longer term, such as a change in consumer values, a shift in how business is conducted, and the possibility of having to live with military and economic uncertainty over a period of months and years.

The following paragraphs cover: how our clients are responding to events; observations from other crisis situations in the past 20+ years; and suggestions for how you can act.

Short-term ramifications

• Impact on interviewing. The most immediate effect of the attack on America for the market research profession is a disruption in surveying. In the days immediately following the attack, there was a strong feeling in the marketing community that any kind of direct solicitation, including surveys, would be insensitive.

With the agreement of our clients, Rockbridge decided to reschedule virtually all studies that were due to be in the field during the week of the attacks. We have been and will continue to be sensitive and flexible in scheduling. Going forward, researchers and marketers will need to be sensitive to whom we are surveying, where they are located, the timing of when we contact them, what the topic of the research is, and how we approach respondents. Our research directors will discuss individual situations with clients and colleagues to make the best decisions possible as events unfold.

We recommend that new dates be arranged as quickly as possible when interviewing is rescheduled. Despite

the fact that interviewing volumes in the industry have been lower than last year, there may be bottlenecks in telephone centers because schedule changes are so widespread.

• Dealing with the "history effect." From a survey validity standpoint, there is the worry that events of historic proportions will skew responses to any surveys or polling conducted too close in time to those events. While opinions may be temporarily skewed by historic events, it has been our experience that commercial market research results are more immediately affected by events directly related to the company, product, or industry that is the subject of the research rather than to world events generally. Unless in an affected industry (say, an airline), we recommend that clients press on with research, and not bring marketing and research programs grinding to a halt in the face of momentous events. In deciding whether to delay research because of a possible history effect, we recommend greater attention to external factors directly related to your company or industry than to the broader effect of recent events.

• Impact on travel. We face a temporary disruption in travel (or at the very least increased inconvenience of travel), which may affect your ability to conduct qualitative research such as focus groups. As a general principle, I feel we should all attempt to travel, both to support this vital part of our economy — the hotel, air, and meetings industry — and as part of our mission to "go back to work." We may actually find business travel to be more affordable and comfortable than anticipated because of excess capacity.

In a situation where travel is not desirable, or where adequate travel options are not available, there are research approaches that can be used without sacrificing qualitative research as a vital tool for listening to customers. Qualitative research may be particularly important in a volatile world where attitudes and behaviors may be rapidly changing in fundamental ways. There are some proven options to traveling out of town which you might consider (see sidebar).

Options for conducting focus groups without travel

Telephone focus groups — this technique offers a surprisingly high level of interaction and balanced participation. By relying on an advanced teleconference link and specialized facilitating methods, you can achieve the same quality as in face-to-face focus groups.

Online focus groups — with over half of all households having online access, this method is suitable for most studies. The level of interaction is not as good, but there are advantages. You can present exhibits or visit Web sites during the focus group, and some populations such as teens are more comfortable communicating in this medium.

Videoconferencing — you can watch focus groups live from a remote location through a videoconferencing network.

Alternative markets — you can often get diverse representation from markets that are less than a day's drive from your offices. For example, we often advise our clients in the Washington, D.C. area to use markets such as Baltimore and Richmond for a different demographic.

Long-range ramifications

The recent events are significant enough to cause major changes that marketers and researchers need to take into account. The events are akin to Pearl Harbor or the economic collapse in the 1930s. It can be argued that all such pivotal events create a shared experience among a generation that leads to a dramatic shift in beliefs (for an interesting source on how history effects generational cohorts, read the book *Generations*, which is reviewed on our Web site, www.rockresearch.com). Consequently, I think there are three major issues that we will face in the years to come: changes in values, changes in how consumers conduct business, and economic uncertainty.

• Changes in values. I remember conducting a study among youth in the midst of the Iran hostage crisis and being surprised to find a strong patriotic attitude. Those familiar with the mood of the decade before the hostage crisis, the 1970s, will know that this reflected a very sudden and dramatic shift in opinion driven by the news. The momentous events of 2001 will have a far greater impact than other crises of recent memory on how consumers and businesses think and behave.

Wise marketers will want to stay in touch with their customers and learn how they have changed. Customers will have different expectations and will bond with different kinds of companies than in the past. We cannot say for sure what these changes will be (that's why we conduct research), but we can speculate. In the 1990s, there was a tendency for companies to cultivate an "edge" in their image — there was a benefit to being seen as innovative, independent, and a bit rebellious. In the new world, customers may seek stability — they may look to organizations that position themselves as being strong and cooperative. The coming decade may be filled with events that change what consumers need and expect, and it is important to learn what these needs are and respond to them.

The implication is that marketers should not stop listening. It is important to engage customers in a dialogue through research in order to learn what to say and do to help customers, reassure them, and survive financially.

Management will also want to know what has happened in the past, and how this learning might be applied to the future. For example, a colleague in a company that relies on sophisticated models for predicting consumer response indicated that the models lost their validity after the attacks as consumers suddenly behaved differently than they would in "normal" times. One way to address this problem is to tap data archives. More fortunate companies will have longitudinal survey databases that go back over a decade or more. Marketers can also look at non-survey internal databases, and syndicated sources of information on consumer behavior. Consumer behavior benchmarks to examine would include reactions to events such as the World Trade Center bombing in 1993, the Gulf War in 1991 and the stock market crash in 1987.

• A shift to e-services. We predict that a number of factors may accelerate the shift to online models of doing business. Even before September 11, we have observed that despite a slowdown in household penetration of computers and Internet access, e-services have continued to grow. Consumers and businesses are going online to purchase small items (e.g., tickets to events) and big-ticket items such as durables, to subscribe and unsubscribe services, to pay bills, to gather account information, and to communicate with governments and associations.

In the future, consumers may limit their visits to public places such as malls. We may also see a return of fuel shortages as we did in the face of oil embargoes in the 1970s. Economic factors may also propel services providers to speed up their e-commerce initiatives in order to lower costs. Companies who already have stable e-service platforms in place may institute programs to promote their use more widely among customers. Decisions to make will include who to target, what message to use, how to design systems that make customers feel in control, and how to price and bundle e-service options.

In planning for next year's budget, it would be wise to dedicate dollars for market research, promotion, and development in these areas. Market research initiatives on e-service typically include qualitative research to test service site elements, usability testing, customer satisfaction tracking (e-quality), and communications research focused on lowering barriers of resistance to online commerce. This is also the time to join think-tanks that help organizations with their e-service initiatives, such as the newly formed Center for e-Services at the University of Maryland.

• Economic uncertainty. We cannot predict what will happen in the economy, but we are concerned that uncertainty will result in budget cuts that affect the marketing function. Prior to the crisis, certain sectors such as technology, lodging, and advertising were already experiencing downturns. Economic uncertainty will exacerbate problems for certain sectors such as airlines and insurance, and there are likely to be ripple effects that will impact all of us.

To my colleagues in marketing and research functions, I suggest that now is the time to demonstrate value and to accomplish more with limited resources. Here are a few specific suggestions:

• Leverage existing data sources — conduct new analyses on old databases for fresh learning and deeper insight about your business. For example, a past positioning study can be turned into a market segmentation analysis that aids in more targeted communications. The possibilities for added-value analysis are limitless, and usually involve some advanced data modeling; the databases can include one-time surveys, tracking studies and syndicated studies that you have rights to using. (You should be aware that you usually have the right to request datasets from suppliers so long as identifying information is removed.) Not only do you provide new information for clients, but also you show the value of past research.

• Commission studies that help management save money — an important question will be: where can we cut back on our products and services without seriously affecting customer satisfaction? Special studies, often involving trade-off methodologies (e.g., conjoint designs), can help answer this question.

• Conduct customer surveys via the Web — more of our survey work has shifted from telephone, mail, and malls to the Web. Such surveys usually involve an e-mail invitation with a link to a survey Web site. This method can prove very economical when surveying customers who are prone to cooperate.

• Engage clients in a discussion about their needs — I directed a research function for a banking concern during a major downturn and found it more important than ever to meet with each of my internal clients to discuss their information needs. I achieved newfound respect for my department, while being able to fine-tune my program to help them spend marketing dollars more efficiently.

As a final comment, I want to let you know that Rockbridge is ready to stand behind all of our clients as a partner in what may be challenging times ahead. I invite you to contact me personally (I am at extension 12) and any Rockbridge staff to discuss solutions to problems that arise.

God bless America!

Designing a questionnaire that dives beneath the surface

By Gillian Humphreys and Joanne McNeish

Editor's note: Gillian Humphreys is a vice president and a board director of NFO CFgroup, a Toronto research firm. She can be reached at gillH@cfgroup.ca. Joanne McNeish is acting director, marketing research at Canada Post Corporation, Ottawa. She can be reached at joanne.mcneish@canadapost.postescanada.ca.

Before diving right into the topic of questionnaire design, we would first like to set the stage by describing our overall philosophy to research. We believe that a good researcher, and indeed a good research user, should be a diver who plunges beneath the surface of the information gleaned from customers.

Of course, the realities of time and budget constraints often dictate how deeply we can dive and what equipment we require. Sometimes we need a mouthpiece and mask to skim the surface; other times we'll become deep sea divers with full scuba equipment. However, it's imperative before asking your customers a single question that you ask yourself many questions. This leads to the most important part of the research process.

Our focus in this article is on customers, those purchasers of products with whom we already have a relationship. They could be business customers or consumers.

Setting objectives

This first step in any research project is the written statement of clear research objectives. This is critical in developing a good working relationship between the ultimate user of the research and the research consultant. Beginning with unclear objectives can end in wasted time, effort and money, ultimately leading to dissatisfaction with the outcome of the research. In addition, the choice of data collection method, the questionnaire content, and the analysis plan are all driven by these

objectives. Our guidelines for researchers are:

• Don't expect a survey to make a decision for you. It will simply give you information enabling you to make a better decision than you would without this knowledge.

• Research cannot correct market conditions, share levels, customer awareness or perception; it can only measure them.

• Be sure you know what decision you're trying to make before embarking on the research process.

• Focus on your information needs. Don't be tempted to expand your list to include things that might be "nice to know," but are irrelevant to the issue at hand.

• The fewer and more specific the objectives, the better.

• Recognize that it's unlikely that any survey can answer all your questions.

• Agreeing on what action will be taken and on what basis before the research starts will help clarify the objectives. In fact, defining the action standards will increase the odds that the research will in fact be used to make decisions.

• Always consider the time and budget available, as well as the ability to take action on the information gathered.

In some circumstances, the best choice is not to do any research at all. For instance, when the business decision has already been made, or must be made before any results can possibly be available, or when the available budget is simply inadequate for the type of research required. And surveys can't replace your need to think through your problem and decide what to do.

Finally, to ensure understanding and satisfaction with the outcome of the research, we recommend that you provide the objectives in writing and gain agreement from all those who will be involved in the process.

Designing the questionnaire

General considerations

• What is a questionnaire? A questionnaire is a set of questions designed to generate the data points necessary for accomplishing the objectives of a research study. It provides standardization and uniformity in the data-gathering process so each respondent sees or hears the same words or questions and, where an interviewer is involved, that person asks identical questions. A lack of standardization and uniformity can lead to non-sampling errors and impede your ability to project the answers to the population you're evaluating. Moreover, you increase the risk of making a wrong decision or taking a wrong action based on the research.

• How many questions? Once objectives are set, you can start formulating your questions. Is there a "right" number of questions? As with the objectives, the questionnaire should be short, to-the-point, and effective. Typically, we believe we should be asking for no more than 15 minutes of a customer's time. To do this, we always keep the objectives on hand when designing or reviewing a questionnaire to ensure each question actually relates to a specific objective. This way, you don't waste your customer's valuable time with nice-to-know questions.

• How should it flow? There should also be a logical flow to your questions. A questionnaire should be viewed as the launching pad for a conversation between the interviewer and the respondent or, in the case of self-completed questionnaires by mail or the Internet, between your company and the respondent. Not only is it very frustrating for a respondent to make this conversation disjointed, but it can also influence the quality of the information gathered.

The chart below gives you a general overview of typical questionnaire sequencing. The key to effective question sequencing is ensuring success for the respondent as he or she moves through the questionnaire. First, you must get the right person answering the questions and early on give him or her the sense that "This is easy, I know the answers to these questions." Then you can begin to progress to questions requiring more thought on the part of the respondent. Finally, consumer or business demographic information

Location	Type	Examples
Introduction	Qualifying questions	Are you the person who is responsible for media planning or choosing advertising or direct mail vehicles for your company?
First few questions	Warm-ups	Which media vehicles have you used in the past 12 months?
Next group of questions	Transitions	For each medium, do think you will be using it more, less or the same in the future?
Middle to near the end	Difficult and complicated	When making decisions about various media vehicles there are a number of criteria that may or may not be important. For each criterion, please circle whether you think this is an "extremely important," "very important," "fairly important," "not very important" or "not at all important" factor in your decision.
Last group of questions	Classification and demographics	What is your company's annual advertising budget?

that's not a necessary part of screening the respondent should come last. These questions are of little interest to the respondent (but of great interest to the researcher), but they signal respondents that the interview is almost over.

Remember, most respondents want to cooperate and will generally try to answer any question, however silly or irrelevant. But the fact that you *can* ask almost any question doesn't mean you *should*.

One other important consideration with the questionnaire is the process that must take place after the interview is complete. The respondents' answers must be simple to tabulate, fast to check for completeness, easy to translate into clear data elements for analysis, and simple to transfer back into findings responding to the objectives of the research.

How to use qualitative research to refine the questions

In a world of increasingly faster decisions, it's tempting to bypass the research process and move directly into the development and execution of a quantitative study without the benefit of qualitative research and/or a pretest of the questionnaire with your target respondent.

This would be a mistake. Using qualitative research before quantitative helps ensure you're targeting the appropriate people, using meaningful language on the questionnaire, and can substantiate numerically the motivations developed at this stage.

You can use qualitative research simply to pretest the quantitative questionnaire so you can observe and record the unspoken reaction to it. This allows you to make improvements and changes to the questionnaires before you begin the data collection process.

However, at an earlier stage in questionnaire development, qualitative research can best be used to help you:

- hear and understand the language of the customer;
- educate yourself to an unfamiliar environment, in particular, needs-satisfaction, usage situations and problems;
- gain insights into topics that might otherwise be impossible to pursue with structured research methods;
- identify the sequence of information most appropriate for the respondent;
- provide contextual information about the market that can be substantiated numerically in the subsequent quantitative study.

You can also conduct qualitative research after the quantitative to help explain your findings and provide additional insights into the "hard numbers."

How to word the questions

Communicating clearly is even more important in the wording of a questionnaire. The ability to gain accurate insight from the data depends largely on using simple words, asking questions with specific, rather than general, references, and speaking in the language the respondent typically uses in the situation being explored.

An added concern in Canada is the need to conduct surveys in English and French at a minimum and in more languages if the company's target group includes an ethnic population or operates in foreign markets.

There are three general question types where mistakes are most often made:

1) Non-specific questions. There are some words that are used so often that we believe we understand their meaning. In fact, there meaning depends more on the reader's or listener's interpretation.

A question asked like this, "What media do you use regularly?" leaves the definition of "regularly" to each respondent for interpretation.

Note also that the use of the word "media" may not be appropriate with a consumer respondent, but is clear and meaningful to a respondent who makes media-buying decisions.

Asked for a specified time period, you control and understand the answer to the question, "Which media have you used in the past 12 months?"

2) Leading questions. A leading question leads the respondent toward a specific response because of the wording or the structure of the question itself. If you truly are interested in obtaining information, rather than simply supporting your own opinion, you must not lead your respondents in any particular direction. Even if you're using your survey results for advocacy, as support in a legal conflict, or for promotional purposes, your credibility will be undermined if the questions are leading.

A leading question would be, "Over the past year, Company A has taken steps to ensure that all courier shipments are delivered by 10 a.m. Would you say that Company A courier deliveries now generally arrive earlier than they did a year ago, or not?"

A non-leading version of this would be, "Compared with a year ago, would you say that Company A courier deliveries now generally arrive earlier or later (ROTATE EARLIER/LATER) than they did, or would you say there is no difference?"

Presenting the words "earlier" first and "later" second to some respondents and presenting the others with the reverse further decreases the likelihood of leading your respondents toward any particular view.

3) Sensitive questions. Respondents are often willing to reveal quite intimate details about themselves when questioned, but only if you create a trusting environment. This means the questions must be appropriately written, the interviewers well-trained, and the interviewer given sufficient time to establish rapport with the respondent. An experienced, well-trained interviewer will approach the interview situation with confidence. Not only does this create a rapport and put respondents at ease, but it also encourages an environment in which, if a question is clearly not deterring the interviewer, the respondent is likelier to answer.

Interviewers who are uncomfortable asking a respondent for sensitive information, such as financial data, are much likelier to meet with resistance from the respondent than interviewers who treat this type of question as if it's of no special importance to them.

Creating a sense of trust is particularly important in the case of Web surveys. Clearly, respondents must be assured their information is secure. Sensitivity to some extent is in the eye of the beholder, with respondent perceptions of who is asking the questions, and for what purpose, influencing willingness to cooperate. This is particularly true in the case of Web-based research where the challenges in signaling these important pieces of information are much more apparent.

In an e-mail or on a Web-based survey, the respondent often lacks the normal cues to the identity of the company, the country from which they're operating, and the security that their personal information is not being shared without their knowledge. Unlike telephone numbers or addresses, respondents know there is no directory of e-mail addresses.

Some businesses have specific rules prohibiting employees from completing surveys. Fortunately, there are very few of these companies.

Detailed competitive information is probably the hardest type of data to obtain from a survey. There is a separate branch of marketing research called competitive intelligence. Competitive intelligence focuses on the collection of information about companies rather than the behavior and attitudes of individuals or organizations.

For instance, it's unrealistic to expect a customer to share with an interviewer the details of pricing arrangements they might have in place with your competitors, even if the information is being collected by a neutral third party. You can sometimes gather this type of information from a mystery shopping project, combined with secondary research from Web sites, for instance, rather than an individual.

One question you should never ask

A marketing research questionnaire is a vehicle through which you can ask almost any question. However, there is one question you should never ask. Research can reflect the image of your organization. Never, as part of the research, ask a respondent if a sales representative could call on him or her or try to sell that person a product. People then feel tricked, and their opinion of the organization or brand drops accordingly, along with their opinion of legitimate marketing research.

The bias question: survey sponsorship

Although, undoubtedly, the identification of your company in customer surveys improves your response levels, it can also create a positive or negative bias in responses. Bias in research terms is exactly that — an unknown impact on the outcome. In some cases, where, for instance, you're asking customers to compare you or your products with your competitors', it's clearly inappropriate to identify yourself if you want a clean, unbiased assessment.

For Web-based surveys, it's beneficial to have a recognizable survey sponsor since there are often no visual clues as to who is asking the questions and what will be done with the information. However, in most cases, it's more appropriate to have a strong visual identity for, and support from, the research company that you're using rather than for your own company.

Exploring the impact of incentives

In the U.S., most surveys offer incentives, in part because once this practice has been introduced, the more respondents come to expect a reward and are less willing to cooperate without it. We have largely avoided this situation in Canada where respondents still provide information for free.

Why do respondents participate in surveys?

- the interview is an opportunity for social interaction with a sympathetic listener;
- respondents are curious about the interview experience;
- respondents have a sincere desire to help companies develop better products or services.

Typically, in Canada, we offer incentives only for long or complex surveys, Internet surveys, or business surveys. The main advantages to offering incentives are the improvement of response rates, hence representativeness, and the creation of good public relations, particularly when survey sponsorship is transparent and revealed.

There are disadvantages, however, namely the introduction of bias (e.g., are those who participate different from those who don't?) and cost, particularly if you are surveying a large customer base.

The most common forms of incentives are money and prize draws. For the latter, you must conform to Canadian law, which is quite stringent, particularly in Quebec. The literature suggests that small dollar amounts are the most compelling, and, contrary to intuition, a larger monetary amount does not necessarily improve response rates. In fact, it often reduces response rates to a level equal to or lower than no incentive at all.

How frequent should customer contact be?

Your customers are your most valuable resource, so it's important not to over-utilize them. No matter how good the questionnaire, too many requests will reduce the response rate, and will also reflect poorly on your organization.

Customer contact from a large organization can often be so frequent it's annoying. For example, we discovered that the contract signer of a large retail organization had been contacted seven times in one year to complete a survey of one sort or another. It seems different groups were conducting research on different products at different times of the year. On the seventh request to participate in research, the client insisted on talking with the marketing research manager to explain his problem. He commented that, while he had been happy to provide information through a questionnaire, he was not planning to do so in the future because there was never any noticeable change in the areas he considered important. Needless to say, we have improved our structural approach to research and worked directly with this customer on the issues of importance to him. Luckily, in this scenario, the respondent let us know that he was dissatisfied with the research process. What impression are you leaving with your customers?

The problem is, you are often selling a number of different products to the same company. There are different points of contact within a customer company that are necessary to consider to get to the user rather than a contract signer or other gatekeeper.

Large companies are often inundated with requests for information and often from the wrong, or inappropriate, person. On the other hand, interviewers often ignore smaller companies because their dollar value is not high. It's much easier, however, to get to the decision-makers in smaller companies, and they are typically more willing to participate in surveys.

Do people lie on surveys?

Marketing research has as its basic tenet the anonymity of the respondent. It provides objective information on the group rather than the individual. Database marketing aims to sell products to specific individuals. In the ideal world of the marketer, the merging of databases with marketing research would benefit the customer and the selling organization by allowing for:

• a true understanding of the value and potential of a segment;

• the best way to communicate with the customer;

• meaningful enhancements to products specific to individual customers.

Since marketers are interested mainly in the most profitable customers, and customers know this, they are increasingly concerned with the way their personal information is being used. They don't understand the distinctions between the two disciplines, and they're either not seeing the benefits promised to them or they've come to expect more benefits over time (e.g., more points, greater discounts).

Canadians are beginning to react by reclaiming control of the situation. Their ability to influence governments has resulted in the passage of privacy legislation (Bill C-6). And consumers are using technology, such as answering machines and anonymity software (call screening) to provide an additional layer of privacy protection.

Most importantly, they are:

• refusing to participate at all (declining response rates);

• refusing to participate without an incentive;

• refusing to provide certain information;

• refusing to provide accurate information.

Despite these limitations, we still find remarkable consistency when repeating studies. So, if people lie on surveys, they do so systematically — an unlikely hypothesis.

Why spend time and money designing an effective questionnaire?

Representativeness depends mainly on two things: proper sampling procedures and good response rates. It's important to understand, though, that even if a finding is statistically significant, it may have no real meaning or significance, nor help you understand a good approximation of the truth of the product experience.

Customers are less likely to refuse an interview and more willing to give honest opinions if:

• they are the right person to answer the questions;

• they are assured of confidentiality;

• they are approached in a professional way;

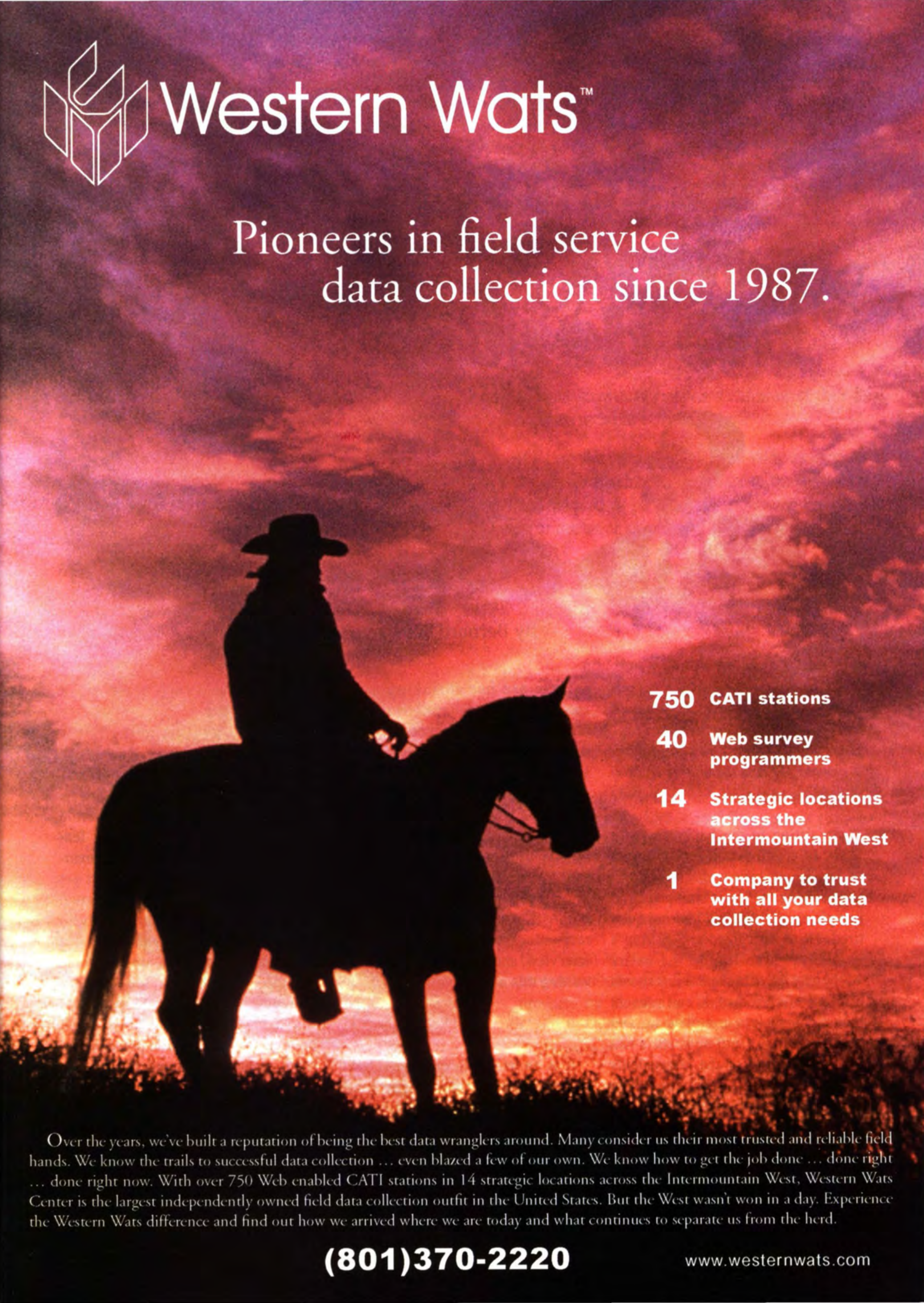
• the survey is brief;

• the questions are well written;

• the questionnaire flows in a logical fashion.

Successful project

Once you've determined how best and how far to dive beneath the surface and what "equipment" you'll need for the dive, then you can carry out a successful research project, including a well-designed questionnaire.



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Yeasayers, naysayers and the dead-on truth

By Bernard Schwartz

Editor's note: Bernard Schwartz is a senior project director at Genactis, a Fort Washington, Pa., research firm. He can be reached at bschwartz@genactis.com or at 267-464-3025.

I am sitting in the backroom of a focus group facility watching a female interviewer chat with a gastroenterologist. She is slumped over, perspiring slightly, and looking quite tired. He is energized and having a wonderful time telling the entire world why the data she has just shown him on how Product X can prevent breast cancer is a complete lie and bogus research. Until now, she's had it easy, as many of the respondents were polite and a few were even enthusiastic. One even exclaimed, "If this data is really true, this is great news." This current guy is systematically taking the product concept apart, fact by fact, and he's correct in his views more often than not.

I can see her shrinking away, increasingly discouraged by the negativity of this intelligent, articulate respondent. She is losing confidence, showing obvious fatigue. She hangs in there, though, and completes the interview. The respondent stomps out of the interview triumphantly; she slinks into the back, expecting us backroom types to be severely critical of the interview. Despite her obvious discomfort, I am delighted with the respondent and the outcome of the interview, and I began to think about writing this article for her.

***

It is an axiom in qualitative marketing research that, in any given research project you are likely to encounter a few yeasayers and naysayers. These are respondents who view the world in their own, predetermined way of thinking, and tend to view any given product or concept through a consistently optimistic or pessimistic lens.

Yeasayers will take extra effort to please the interviewer. They try to identify the "right," expected answers to interview questions. They invariably approve of the interviewer and the product; they can point out features and benefits that even the manufacturer of the product has not yet thought of. Yeasayers are the "good guys and gals" who consistently to seek affection and affiliation.

Naysayers, of course, are the people who take extra pains to see the negative side of everything. They doubt that things will work, they don't believe any information presented to them, they hate all underlying concepts. These folks will make an extra effort to tell the moderator what is wrong with the product, and they are masters at pointing out flaws in everything.

Of course, lots of the people we conduct research with are objective,

neutral respondents with good judgement and an open approach. These middle-of-the-roaders can be counted on to be "fair," and they can provide you with their objective views. In my experience, however, even these respondents tend to lean one way or the other, and you must be aware of their yea or nay tendencies in order manage them.

How to recognize true yeasayers and naysayers

First let's consider the naysayers. This group tends to trouble researchers the most, and at times, interviewers can have a real, visceral reaction to naysayers. The best way to identify a naysayer is to monitor your feelings and reactions during the interview and recognize what is going on quickly.

Some fairly sure signs of a naysayer include the following:

• You begin to feel anxious, unsure of the direction the interview or group is taking.

• Naysayers can drain your energy and make you feel tired — these people are not easygoing or easy respondents.

• As the interview progresses, you begin to feel worried about how your client is reacting to all this negativity.

• You begin to anticipate rejection, anger, and negativity as you ask questions.

• You begin to use questions that may suggest or require a negative response, for example, "You are probably not going to like this either, but..." You struggle to remain cool and objective.

For yeasayers, the same process of self-monitoring applies. You are less likely to have a gut reaction to these good guys, and the realization that you are dealing with a yeasayer can sometimes be gradual. Your respondent could be a yeasayer when:

• You recognize that s/he is overtly trying to please you.

• The respondent deliberately, somewhat artificially uses your first name many times during the interview.

• They avoid thinking critically, even when a negative aspect of the product or service is being considered.

• You become concerned that the respondent is not being honest or thinking critically; the responses just don't ring true.

• The unrelenting positive responses become boring to you.

• The respondent uses his/her positive energy to control the interview, go off the subject, or dismiss your agenda

Coping with yea- and naysayers

First, you must value both personality types for what they can bring to the research process. Yeasayers can point you toward the most positive aspects of a product or idea — the best yeasayers can put a positive spin on almost anything. They can develop a unique selling proposition on the hoof, for example.

When dealing with yeasayers, I've found the following can help.

• Practice "unconditional positive regard." Value the respondent's positive outlook for what it can bring to your research without judging him or her as a person.

• Yeasayers should be challenged to personalize their observations, and elaborate on ideas or comments: "What does that feature mean to you?" "Tell me more about why that is an important feature. What could it mean to you?"

• Yeasayers can test objections voiced by naysayers in prior interviews. Often a strong, bright yeasayer can refute or deflate the strongly voiced objections of naysayers.

Naysayers, on the other hand, constitute the acid test for a concept or idea. These respondents excel at using their great intelligence and personal resources to find out why things don't or won't work. Really effective naysayers are the cynics, skeptics, and Doubting Thomases who are needed if we are to help clients refine ideas or product concepts. They can deflate grandiose, wrong-minded ideas with a single phrase. Always keep in mind that naysayers are doing their best to help by identifying all that is wrong. After all, you asked them to evaluate something, and they can't help but do so critically. Naysaying, by definition, is how naysayers think — it's what they do! It is their job to identify what is wrong, not what is right. They will only identify and recognize positive things reluctantly, and it is much more fun to be critical and rejecting. If you haven't figured it out yet, I REALLY LIKE NAYSAYERS.

When you are dealing with a true, hard-core naysayer, I've found that the following principles can help.

• As with yeasayers, unconditional positive regard applies at all times. It is the interviewer's job to accept the respondent for what s/he brings to the interview, to find value in what is being offered, and to harness their unique intellectual skills to achieve research goals.

• Be careful not to dismiss the negative attitude; embrace it when you can. If they have used their energy and intelligence to tell you what is wrong, use all of your skills to get naysayers to tell you more of what is wrong (and perhaps how to fix it)!

— "Why won't that work?"

— "What could that mean to the product?"

— "How can it be fixed? How would you fix it?"

— "If that issue were fixed, how would it affect your view of the product?"

• Make the negative energy (or your perceptions of negative energy) into something positive. After all, you and this naysayer are working together happily to identify and solve problems, appraise a concept, evaluate something. A naysayer is really a friend, colleague, and collaborator with a unique, valid point of view — even if it may be a little hard to take, at times.

• After hearing them out and allowing them to vent fully, the interviewer can then invite and encourage positive answers. "Now that you've pointed out all the problems so thoroughly, what's good/new/different about this?"

• Some interviewers effectively use humor with naysayers, for example, "There's no need to sugarcoat it, Mr. _______, just say what you mean," or "Gee whiz, is there anything good about this thing?" This can work for some naysayers, where a short laugh and some relief from the tension gets them back to reality.

• In a focus group, trust the group to help you place the naysayer's comments in perspective. If the naysayer is overwhelmingly negative to the point of weighting the entire group's viewpoint, appeal to both the naysayer and the entire group to change the direction of the conversation. "We've spent a lot of time pointing out the flaws here, what are the positives?" Move on to the positive part of the agenda, or change the focus so respondents with a positive point of view are able to voice their opinions, too.

You can use the comments of yea- and naysayers to challenge middle-of-the-roaders' views and opinions, too. Can their moderate views withstand the more intense reactions of strong proponents and detractors? How much conviction do these middle-ground respondents really have for the product or concept?

Yeasaying, naysaying and qualitative analysis

OK, so in any given research project you are likely to run into some people at the extreme positive or negative end of the spectrum. If there were a normal distribution curve, the standard bell curve, most respondents would fall into the middle-of-the-road range, with smaller numbers at either extreme end.

In a "normal" situation, the bell curve clearly peaks at just about the middle and most respondents are neither yea- nor naysaying, and only a minority of respondents manage to be passionate either way. In this case, the analytic process involves characterizing a fairly uniform range of opinion, with few outliers serving to "inform" the middle range of opinion. It is important to avoid single respondent weighting, or allow your few nay- or yeasayers to overly influence your research findings. The analyst should carefully note the "conventional wisdom" emerging from the middle-of-the-roaders while acknowledging, perhaps, the minority points of outliers.

On the other hand, if your research has not awakened any strong feeling from any respondents, be concerned. Worry about your methodology, analysis, and your client's product. What about the interviewing itself: Is it bland? Are you asking questions that will give you a good read of the subject?

The fact is that whatever the stimulus is, it has failed to awaken the ire or interest of either yea- or naysayers.

When the bell curve is skewed toward negative or positive respondents, you can be more confident that the product is attracting the interest and perhaps passion of the subjects. In fact, clearer research findings might result from a graph that is skewed either toward positive findings or negativity. In either case, you certainly will have more to talk about!

Where the voices of these habitual "outliers" emerge strongly in a project, analysts need to get a handle on how great that impact has been on their views. Before forming conclusions and recommendations, you need to understand what the main threads of the research are, and how strongly habitual advocates have influenced them. Has your encounter with one or two characters contributed overly much to your view of the issues? Have you overly identified with outliers?

One possible approach to analysis in the face of large numbers of yea- or naysayers is to methodically review interview notes, tape transcripts, transcriptions and literally count the positive and negative reactions. Is the trend of the interviews numerically positive or negative? What is the range of opinion on any given issue? How sensible and relevant are dissenting (positive and negative) opinions? Have one or two articulate respondents overly influenced your views? Where you have been exposed to several strong yea- or naysayers, it can be helpful to verify gut feelings and your topline conclusions with objective analysis of the impact yea- and naysayers have had on your findings.

Harness energies

Strong characters, these yeasayers and naysayers. But to be an effective qualitative researcher and analyst, we need to harness their personal energies, make their intellects work for us, and then keep their voices in perspective. These folks are always a challenge, but in my opinion are often valuable respondents.

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matrix.

Net-MR incorporates the most sophisticated sampling and panel management tools I have seen to date. You use the same module whether you want to load in some RDD sample from a regular supplier, or if you want to tap into one of GMI's research-ready managed online panels. Or, you can build your own panel.

Portal-building

There are even portal-building tools to let you create the Web site you need to allow your panel members to interact with you, manage their profiles, check out their points and air their grievances — another module lets you take care of incentive payments too. None of this is difficult — there is even a wizard to help you build a portal.

Of particular interest to the research agency will be the tools that also let you create portals for your clients to use. You can offer clients real-time access to their projects and results at any level of sophistication you choose. For instance, you may only offer published results to one client, while allowing sneak previews of projects in action to another. To one you can offer the crosstab tool with filtering and to another offer weighting and sig tests as well. It is here, in the dissemination of results, where I believe the Internet will come into its own in marketing research.

New look

In version 2.0, the survey-authoring tool has been given a new look. It is productive to use, making it quick and easy to write questions or import them from Word documents. There is a new "overview" tool, which makes it easier to see the question and routing structure at a glance. But I had hoped the new version offered a slightly more visual way of specifying routing logic, which still relies on some rather cryptic codes. Of all the modules, survey authoring is the one that still seems a little unrefined, which could be a barrier to non-technical users. There is a lot of online help available, but again it could do with some better structuring and some decent examples.

Where the design tool excels is in the ease of testing and previewing the survey, which you can see as a "printed" questionnaire, or an online survey. With any online survey tool, testing is everything, as mistakes can be hard to spot and are costly to correct after fieldwork has started. In Net-MR, playing through the interview is never more than two mouse-clicks away.

And as if that is not enough, Net-MR segues effortlessly into its qualitative sister, Net-Focus. This offers advanced online focus group capabilities combined with the option to use the main Net-MR tool to collect qual/quant data from snap polls, or even feed back the groups' results using the Net-MR analyzer tool in real-time. And there's more that I don't have space to tell you about.

Innovation

U.S.-based TNS Intersearch started using Net-MR a year ago for some of its Web surveys and has recently completed a complex CAPI project with the product. Ian Kiernan, the firm's senior vice president of operations, finds GMI's vision and its approach to development refreshing. "The speed of innovation is unreal," he reports. "It is quite unbelievable what they have done in so short a time. We were the first to use Net-CAPI — it was just a vision to start with, but we said what we wanted to achieve, and they pulled this out of their back pocket. We were using 80 different field service companies for one project — a large consumer study — and had to find a more efficient way to manage it. To give you an idea of the complexity of this study, this was a 90-minute interview."

In case you were wondering how a Web-based tool can offer a CAPI capability, the secret is in the Java, and in another kind of portal you can create: the interviewer portal. Interviewers can use this to pick up their latest assignments on their laptops by logging into the Internet. If any interviews are done with an open Internet connection, the data are transferred back immediately, which is how CATI works. But once the assignment has been opened, interviewers can go offline and the Java applet running in the browser keeps the interview running and can store any number of interviews in an XML database ready for automatic transfer the next time an Internet connection is opened.

Intersearch used this to take all of its suppliers online so they all accessed the same surveys and data through the Net-MR interviewer portals. This meant interviewers only needed to connect briefly each day but quotas could be adjusted constantly, and the client could observe the data coming in at a much earlier stage.

There were some problems along the way, and Kiernan sounds a note of caution that some of the tools still lack the "industrial strength" he is seeking. "The CATI solution, in particular, still lacks depth. But my expectation is that by end of the year they will be close to having a real CATI product."

Harness the Internet

Kiernan sees GMI as a firm with a vision, and it is a vision he shares: to harness the Internet to reduce the cost of ownership for technology and make it easier to collaborate across the globe with co-workers, suppliers and clients.

"Most people don't know just how huge the cost is of having local servers and DP staff in multiple centers," Kiernan says. "And it takes a long time to get projects into the field, programming in different versions and on different packages. The opportunity to use shared infrastructure across the world will be a tremendous step forward. You can use the power of the Web to do things you currently cannot do — monitoring quality and productivity on remote fieldwork, or having people working at home."

One system

By contrast, ResearchLab is a new start-up full-service agency in Oslo, Norway. To founder and President Ulf Andersen, Net-MR offered the opportunity to use the same tool across all interviewing methods. "My goal is to have one system that is completely channel-independent for us in our data collection," he says. "We chose this because it has three vital elements integrated into one solution: interviewing, reporting, and panel management."

Net-MR is used collaboratively within ResearchLab for all studies. Apart from Web surveys, the majority of fieldwork is outsourced. Andersen's long-term goal is to work with suppliers also using Net-MR, and he is about to embark on a 9,000-interview Web-CAPI project with a partner in neighboring Sweden. He reports no problem with importing data from other packages and has found the SPSS import works well. It means all the surveys can be analyzed and published to clients using the same tools.

"Our clients particularly like the Analyzer module and the client portal functionality where they get all their projects reported through one portal. Very little training is required: it takes about an hour. For our clients, it's a real selling point, yet it's very easy for us to administer."

As at Intersearch, there have been some software issues. "You need to be very competent to find the problem," cautions Andersen. "But as soon as you discover these things, I must say GMI do their best to fix them quickly."

Growth pains

When a product comes from nowhere to outstrip long-established rivals in just two years, some growth pains are inevitable. But like a popular new band's second album, version two can be make or break for a developer: the wider market expects reliability while early adopters are looking for more innovation. The challenge for GMI is now to deliver both in equal measure.

Survey Monitor

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Britain, France, Germany, Spain and Italy. For more information visit www.tnsofres.com.

Testing with virtual prototypes shows potential

One of the toughest challenges faced by a product design team is concept selection — comparing any number of potential product ideas in order to choose a winner. Traditionally, companies have relied on physical prototypes or statistical analysis to test the whims of consumers. Now the Internet introduces a tantalizing option: virtual prototypes. "It's a market research tool that has a promising future," says Stanford Business School marketing professor V. "Seenu" Srinivasan.

In a research study, Srinivasan tested the ability of Internet-based virtual prototypes to accurately predict consumer choice. He concluded that virtual prototypes provide nearly the same results as physical prototypes. Furthermore, virtual prototypes cost considerably less to build and test than their physical counterparts, so design teams using Internet-based product research could potentially afford to explore a much larger number of concepts. "In short, the Web can help to reduce the uncertainty in a new product introduction by allowing more ideas to be concept tested in parallel," says Srinivasan, who is the Ernest C. Arbuckle professor of marketing and management science at the Business School.

Working with research coauthor Ely Dahan, an assistant professor of management science at MIT's Sloan School of Management, Srinivasan pitted the virtual prototype against conventional market research methods including both physical prototypes and non-visual, attribute-only conjoint analysis. Nine concepts for a new portable bicycle pump competed against two existing bike pumps in the tests, which surveyed respondents who were university students screened for bicycle use. Characteristics such as price, time for inflation, size, ease of inflation, and durability were included as product attributes. Both still-picture and animated virtual prototype tests produced market shares that closely mirrored those obtained with the physical products. And, the visual prototypes outperformed the set of predictions produced in the attribute-only conjoint analysis, which failed to capture the aesthetic and usability aspects of the product.

The attribute-only conjoint analysis identified the top three products in correct order. However, it predicted market shares for the top three products to be well below those achieved using physical prototypes. This sort of forecasting gap may be filled at least in part by the realistic animations of virtual prototyping. Indeed, a breakthrough in virtual prototyping that allowed the researchers to conduct their study has been the development of virtual reality markup language (VRML), which produces high-quality color animation within very compact data files that can be easily downloaded by consumer research participants.

Yet virtual prototypes are not perfect. Sometimes there is a disconnect between the results of a physical prototype and a virtual one. In the Dahan-Srinivasan study, the Web-based survey predicted that a bike pump nicknamed Gecko could compete against the two commercially available products and ranked fourth in the market. But when customers handled the real thing, Gecko couldn't score. It ranked last. One reason may be that the computer renderings of Gecko made it look and feel better in virtual reality. The fit and finish of the rubber material that gave Gecko its green, lizard-like texture and appearance was not of high quality, but that only became obvious when consumers actually touched the prototype.

The crucial question is which product characteristics are most accurately communicated only through a physical prototype? Sensory experiences such as smell, touch and taste have yet to be mastered in a virtual environment. "It remains to be seen which goods are best suited to virtual, visual testing, but we expect that many durable goods categories can be represented accurately using animation and compared using the simulated shopping experience," says Srinivasan. For unfamiliar products, an educational step could precede the concept tests, say the coauthors. For more information visit http://mitsloan.mit.edu/vc.

Not so world-wide after all

In the developed world, the Internet is literally in your face. Opportunities to go online are everywhere, and an estimated 400 million people use the World Wide Web daily.

Yet according to Minneapolis research firm Ipsos-Reid, billions of people have neither heard of the Internet nor have any intention of going online anytime soon. Even in countries such as the United States, Canada, Sweden, and the Netherlands, about one-third of people who could use the Internet choose not to. In fact, of the world's 6 billion citizens, only about 6 percent are online. Why?

"The answer is twofold," says Brian Cruikshank, a senior vice president with Ipsos-Reid and leader of the company's global technology practice. "In the developed world, a substantial number of people who could very easily go online have decided not to. They see no compelling reason to be on the Web. The hype and the promise of the Internet clearly hasn't impressed them — not yet, at least. For others in nascent, less developed markets, the cost of accessing the Internet competes with the cost for basic necessities and access availability is very limited outside of urban areas."

Ipsos-Reid talked to people in 30 countries who aren't on the Internet and who say they have no plans to be. The most frequently mentioned reasons for staying offline are "have no need for the Internet" (40 percent), "no computer" (33 percent), "no interest" (25 percent), "don't know how to use it" (16 percent), "cost" (12 percent), or "no time" (10 percent).

In lesser-developed countries, where access to the Internet is a significant problem because of poverty and lack of a modern communications infrastructure, cost and access are cited as barriers more often than they are in major industrialized countries.

In urban India and urban South Africa, only one-quarter of the population has access to the Internet, and fewer than 10 percent of people report being recent users, the company found. In urban Russia, 83 percent of respondents reported having no Internet access at all.

"Those growing up on the Internet will one day make up the bulk of the population and there will be very few non-users down the road," Cruikshank says. "But that's maybe an entire generation away in many developing markets. In the meantime, you still have a massive group — that is not going to disappear overnight — of potential users who have the means yet are still not convinced of the Web's merits.

"The next crest of the Internet wave will come from markets that are already well along the way — particularly in Western Europe — with the most capacity for upside surprises, since their social structures and communications infrastructures offer few barriers," Cruikshank says. "In these countries, it's simply a matter of time before more people go online. We have already started to see Europeans representing a larger proportion of the global Internet population."

The study offers the caveat that in other parts of the world, there are simply not enough access opportunities to go around. In other words, there are more adults with intentions of going online than there are adults with Internet access. These countries include South Korea and urban markets in Malaysia, India, Mexico, and South Africa.

"Far from being dead, the Internet has a large growth potential everywhere, but progress is destined to be slower than its most enthusiastic advocates might have envisioned a few years ago," says Cruikshank. To expand the reach of the Web in developing countries public venues such as libraries, schools, offices and Internet cafés will have to play a more crucial role.

Still, widespread availability is a long way off in the most populated areas of the world. Overall, Ipsos-Reid found that 98 percent of respondents own a television, 51 percent own a cell phone, 48 percent own a home computer but only 36 percent have home Internet access. For more information call Brian Cruikshank at 612-573-8507 or visit www.angus-reid.com.

Survey measures levels of trust in various industries

A recent survey, The M Booth/Harris Trust Monitor, reports huge differences in the levels of public trust in different industries. When asked the question "How much would you trust the following industries to do the right thing if faced with a serious problem with one of their products?" the percentages of those who say they would trust them (including those who would trust them "somewhat") varies from 60 percent for food companies and 59 percent for both banks and retailers, to 12 percent for tobacco companies, 18 percent for entertainment companies and 19 percent for oil companies.

The list included three industries in health care:

• Pharmaceutical and drug companies ranked number five in the list of 16 industries, with 48 percent of the public saying they would trust them (at least somewhat) and 36 percent saying they would distrust them (at least somewhat).

• Biotech companies were much less well known; fully 43 percent said they would neither trust nor distrust them. Of the remainder, more said they would distrust (33 percent) than trust them (24 percent).

• Health insurance and managed care companies had among the highest level of distrust (58 percent), with only 26 percent saying they would trust them; so the ratio of distrust to trust is worse than two-to-one. Only the tobacco industry (73 percent) and the oil industry (60 percent) have higher levels of distrust. For more information visit www.harrisinteractive.com/news/newsletters_healthcare.asp.

Asian-Americans most confident about retirement

The 2001 Minority Retirement Confidence Survey (MRCS) shows that almost 72 percent of Asian-Americans report feeling confident they will have enough money to live comfortably throughout their retirement, while only 54 percent of African-Americans and 45 percent of Hispanic-Americans believe the same.

The survey, in its fourth year, is conducted and co-sponsored by Mathew Greenwald & Associates (Greenwald), a Washington, D.C. research firm. Other sponsors include the nonpartisan Employee Benefits Research Institute (EBRI), and the American Savings Education Council (ASEC). The MRCS is part of the annual Retirement Confidence Survey (RCS) which tracks the behaviors and activities of American workers and retirees (ages 25 and older) as they relate to retirement planning and confidence levels.

"This year's Minority Retirement Confidence Survey results suggests that demographic and cultural factors may contribute to the differences these specific groups have towards planning for retirement," says Mathew Greenwald, president of Greenwald. "For example, we found in the Hispanic-American population, there are considerable differences between those born in the United States versus those born abroad. Among Asian-Americans, higher levels of education and household income, as well as cultural factors, may impact the higher degree of confidence."

In some instances minority groups are consistent in their beliefs. Six in 10 (62 percent of Hispanic-Americans, 60 percent of African-Americans, and 60 percent of Asian-Americans) in each group believe they will continue working after retirement. Similarly, six in 10 (59 percent of Hispanic-Americans, 61 percent of African-Americans, and 64 percent of Asian-Americans) expect to receive retirement income from an employer through a defined benefit plan.

Additional key findings on minority retirement planning and savings include: Among those who save, 75 percent of Asian-Americans, 70 percent of Hispanic-Americans, and 66 percent of African-Americans have used a work-related savings plan to save for retirement. When those who do not contribute to the retirement plan they are offered by their employer are asked why not, 12 percent of Asian-Americans, 16 percent of Hispanic-Americans and 36 percent of African-Americans say they "can't afford to" or "need money for obligations."

As for other additional retirement income, 32 percent of Asian-Americans, 29 percent of Hispanic-Americans, and 37 percent of African-Americans expect monetary support from their children or other family members will help support them during this period of their lives. For more information visit www.greenwaldresearch.com or www.asec.org.

Research Industry News

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program offered monetary awards to members and employees of member companies to encourage and assist educational pursuits among those in the marketing research industry. Coursework eligible for assistance was broad enough to allow applicants to enhance or develop skills primary as well as ancillary to marketing research. Education could include such topics as software applications, moderator training, writing techniques and the Principals of Marketing Research program sponsored by the national MRA.

The program was so well-received in 2000 that the board this year decided to award up to $5,000 in scholarships. The eight 2001 Scholarship Award recipients are: Gloria Mellinger, Survey Sampling, Inc, Principals of Marketing Research, MRII Institute, University of Georgia, $500 award; Carmen Muniz, Galloway Research Service, Introduction to SPSS Syntax, $500; Gabriel Maltos, Galloway Research Service, Introduction to SPSS Syntax, $500; Stephanie Smith, WestGroup Research, Fundamentals of Moderating, Riva Training Institute, $500; Melissa McCumber, Galloway Research Service, Beginning Access Class, $450; Charles Dickinson, Clearwater Research, Inc., Introduction to ArcView, Boise University, $500; Thomas Hogan, Galloway Research Service, Managerial Economics, University of San Antonio, $450; Andrea Feher, Survey Sampling Inc., Global Management Integration, Sacred Heart University, $500.

Awards

The Council of Better Business Bureaus, Inc., has announced Indianapolis research firm **Walker Information** as one of two winners of the 2001 National Torch Award for Marketplace Ethics in its category based on company size. The award recognizes companies for their honorable business practices and long-term value.

New accounts/projects

Access Worldwide Communications, Inc., Los Angeles, has announced the expansion of an agreement with **ACNielsen U.S.** for multicultural research services conducted in support of the ACNielsen Homescan Hispanic Panel. ACNielsen is Access Worldwide's largest research client.

Schaumburg, Ill.-based **ACNielsen U.S.** announced that **Pharmavite Corporation** has selected the market research firm as its new preferred provider of syndicated market research.

Information Resources, Chicago, has expanded its partnership with retail food supplier **ConAgra Foods** and is now the primary supplier of consumer information and analytics to the company. The term of the new agreement is three years.

Princeton, N.J.-based **Opinion Research Corporation** has been awarded a $4.7 million contract by the **Centers for Disease Control and Prevention** (CDC) to implement National Youth Risk Behavior Surveys (YRBS). Under this contract, the company's ORC Macro Social Research Business will, among other things, collect data from national samples of students in the United States in grades nine through 12 to evaluate health risk behaviors that contribute to the leading causes of mortality, morbidity and social problems within this group. The new contract runs through early 2006.

New companies/new locations

Marketing Systems Group, Fort Washington, Pa., has opened two new branch offices: one in St. Louis for GENESYS sample customer service; and one in Research Triangle, N.C., for PRO-T-S telephony system support.

Opinion Dynamics Corporation, Cambridge, Mass., has opened a new office in San Diego.

Database marketing executives Donald J. Holtz and Andrea D. Shantz have launched **Benchmarketing Analytics LLC** to help companies with their CRM programs. The firm is located at 55 Walls Drive, Suite 205, Fairfield, Conn., 06430. Phone 203-254-8311.E-mail Djholtz1@aol.com.

Specializing in customer and employee satisfaction research, Lisa Thomas has opened **LFT Market Research Services** at 2281 Fairlane Dr., Suite 100, Largo, Fla., 33771. Phone 727-581-6811. E-mail lthomas@lftresearch.com. Web www.lftresearch.com.

GfK North America has launched its worldwide business intelligence division, GfK Database Solutions, which will integrate marketing research, database marketing, and customer relationship management.

Company earnings reports

Consolidated revenues for Paris-based **Ipsos** in the first half of the current financial year rose to EUR 216.9 million, up 64 percent from the same period last year. Operating profit outpaced revenues at EUR 13.9 million, up 91 percent over the first half of 2000, and now represents 6.4 percent of revenues compared with 5.5 percent for the same period last year. Since the start of the year, the group has pursued its strategy of external growth, with the acquisition of NPD's custom market research divisions (renamed Ipsos-NPD) integrated on January 1st. Ipsos also acquired Demoskop in Poland and Riehle Research in the United States.

Nuremberg, Germany-based **GfK Group** increased total revenue by 13.4 percent from EUR 223.9 million to EUR 253.8 million in the first six months of the year, confirming its target growth of 15 percent to EUR 550 million, for the year as a whole.

Data Use

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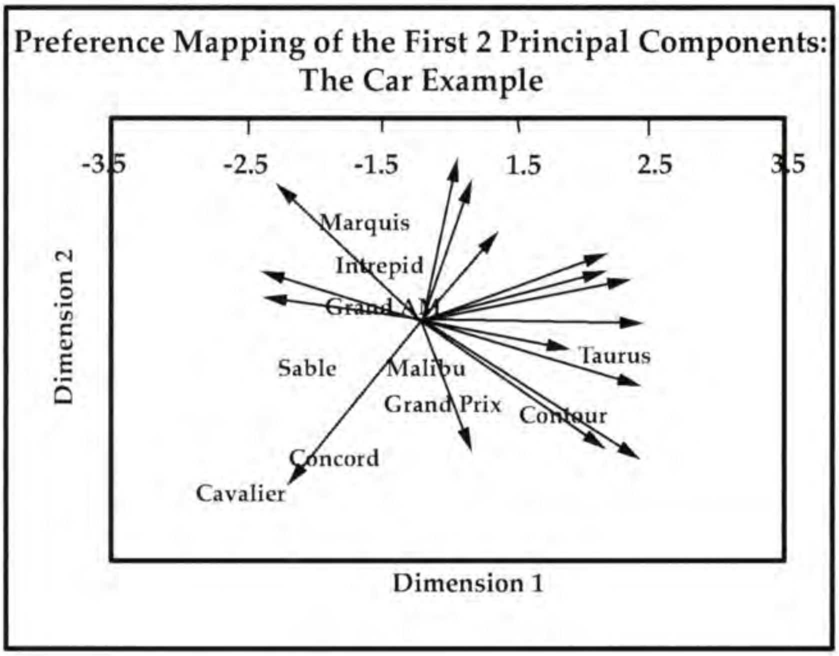
Its beauty is in its graphical display: Simpler to interpret than a listing of numerical results, it quickly points to potential relationships, connections, and patterns in the data. Its deficiency is that the graph is only an approximate representation of the real data, because of the amount of data condensation/transformation the procedure requires. Therefore, perceptual mapping should not be used alone to reach any conclusions, and must be accompanied by other mathematical means to verify its findings. In general, perceptual mapping is a powerful tool for exploring data, and for coming up with hypotheses.

Consumer researchers especially appreciate the feature of perceptual mapping in compacting complex consumer behavioral data (usually a vast amount of multi-dimensional psychometric measurements) into a concise, easy-to-show format. Simple techniques like this not only help researchers avoid taking the wrong paths, but also open them to fresh possibilities not obvious from traditional methods.

There are three ways of producing perceptual maps, although most people are familiar with only one: the MDS map. The three types of maps are produced by three different techniques and have different usages:

1. Preference map
2. Multidimensional scaling (MDS) map
3. Correspondence map

Each map requires a different view of the input data, and the maps are used to study different aspects of the marketing problem. In the following sections, I will explain in general how to create the preference map and the MDS map, how to examine the results, and how to use the results to generate new ideas. Then I will present a correspondence map example in more detail, linking the input data with the output map, and a creative (somewhat ad-hoc) application of the correspondence analysis.



1. Preference map (for study of consumer preferences)

A basic preference map shows consumers' preferences for a set of products. It is more useful than presenting a table of mean ratings. In a typical preference analysis, consumers are surveyed for their preferences for a set of products. For example, 15 consumers are asked to rate their preferences for 10 U.S.-made cars on a rating from 1 to 10 (1 is the least preferred, 10 is the most preferred).

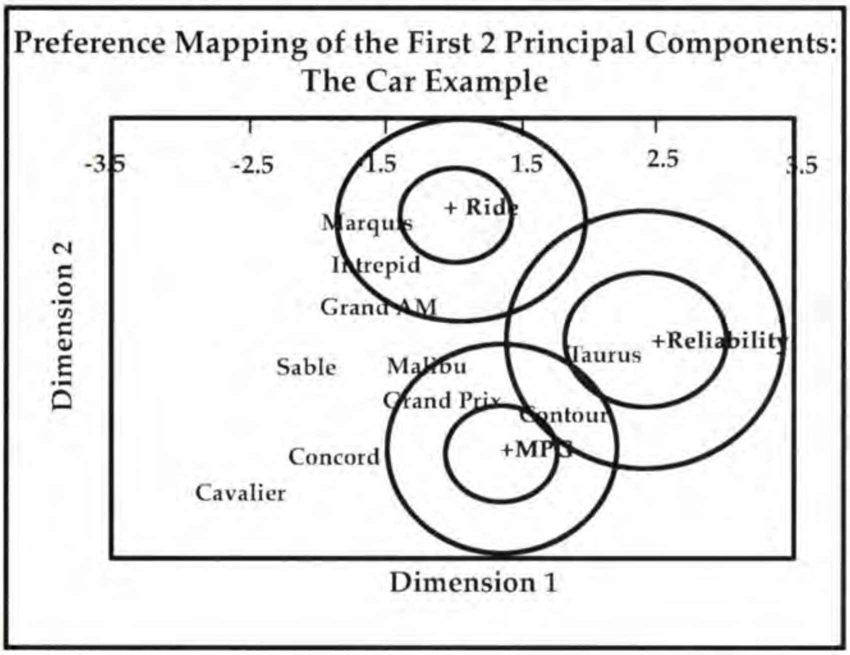
The data is shown in the table below. Preference analysis performs a principal component analysis on the rating data, and then plots the first two principal components from the analysis to create an approximate two-dimensional display of the consumer preferences for the 10 cars.

Reading the basic map: The points on the map above are cars. The placement of the points has everything to do with consumers' ratings. The arrows are the individual consumers who rated the cars. Cars that project farther along a consumer's vector are more strongly preferred by that consumer.

To interpret the two axes (i.e., the

		Consumer Rating														
Brand	**Model**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**	**14**	**15**
Ford	Taurus	4	1	1	7	9	9	2	4	9	6	1	7	5	4	2
Ford	Contour	1	4	5	7	6	7	9	2	6	7	3	4	3	2	6
Mercury	Sable	7	3	6	8	5	8	9	2	9	5	8	3	4	7	3
Mercury	Marquis	4	6	7	3	4	7	8	3	5	3	8	7	6	2	9
Chevrolet	Cavalier	3	1	7	5	4	2	6	5	4	4	2	9	5	6	5
Chevrolet	Malibu	3	3	4	3	2	6	2	3	2	7	4	6	5	4	7
Pontiac	Grand AM	6	5	2	8	9	6	5	9	1	2	1	5	8	4	9
Pontiac	Grand Prix	6	5	8	9	6	5	2	4	4	7	3	8	9	4	2
Dodge	Intrepid	8	1	5	6	7	7	4	2	8	3	8	6	5	9	3
Chrysler	Concord	8	3	7	4	8	5	6	2	9	4	3	7	6	9	2

principal components or the dimensions) can be tricky. The first thing to remember is that cars at the positive end of either dimension are preferred to those at the negative end. Dimension 1 is usually related to consumers' overall preference. However, it takes judgment to interpret the meaning of Dimension 2, usually by observing the placement of the cars and knowledge of those cars. Dimension 2 in the car example appears to be related to vehicle ride or fuel economy (we will confirm that later).



Preference Mapping of the First 2 Principal Components: The Car Example

Variation

Sometimes, in order to confirm the meaning of Dimension 2, a researcher may ask the consumers to rate three more attributes, like vehicle ride, miles per gallon, and reliability. The researcher then projects the new attribute information onto the original scatter plot of cars to produce an "ideal-point" model of preference mapping.

The overlay plot shows you which cars are closest to the ideal level of vehicle ride/miles per gallon/reliability. For our car example, Marquis has the shortest distance from the ideal point for the attribute Ride, therefore closest to ideal ride; similarly, Taurus is closest to the ideal point of Reliability; Contour is closest to the ideal point of MPG.

For insights and ideas, ask the following:

• What products do most consumers like?

• Where is my product positioned relative to my competitors' products?

• What new consumers should I target for my product?

• What new products should I create for consumer segments where there is interest but currently few products available?

Comparing the first map with the second map, you can postulate that there is a segment of consumers interested in upscale cars which are reliable and ride well (consumer vectors pointing to Ride and Reliability, where there is no car). These are potential buyers for luxury cars which will not break down easily (think Lexus or Acura).

2. Multidimensional scaling map (for analysis of product competitiveness)

Multidimensional scaling is a graphic technique for analyzing the similarities (or dissimilarities) between products. It is not meant for studying consumer preference, but for analyzing competitive positioning of the products in the minds of the consumers. In this exercise, you will create an approximate plot of product points such that distances between points mirror the degree of their similarity. You can also use this plot to learn something about the unknown attributes that may underlie consumers' perception of these products' similarities.

The data: For a multidimensional scaling survey, it would be ideal, but highly impractical, to ask every consumer to rate the degree of similarity (or dissimilarity) between all possible pairs of products, because the number of pairs of products to rate would be too large if there are many products. Alternatively, each consumer is asked to place the products into groups of similar products. Consumers can decide as many or as few groups as they like (see chart below).

Consumer	Car Model										
ID	Taurus	Contour	Sable	Marquis	Cavalier	Malibu	GrandAm	GrandPrix	Intrepid	Concord	# Groups
1	1	1	3	4	5	3	3	1	3	1	5
2	1	1	3	3	2	3	3	1	2	2	3
3	1	1	4	4	2	4	4	3	4	2	4
4	1	2	2	1	3	4	4	1	2	1	4
5	1	2	3	3	2	4	4	1	4	1	4
6	3	1	6	3	4	2	2	1	6	5	6
7	4	2	2	4	4	3	3	2	3	2	4
8	1	2	3	1	1	3	3	2	3	2	3
9	1	2	2	2	1	3	3	1	3	1	3
10	4	5	2	4	6	2	3	5	2	1	6

Each row of the data contains the groups of similar cars perceived by a particular consumer. For example, Consumer 2 created three groups of similar cars: group one contains Taurus, Contour, Grand Prix; group two contains Cavalier, Intrepid, and Concord, and so on.

Multidimensional scaling performs an initial principal component analysis of the original data, and then improves on the solution iteratively. When the solution can no longer be improved, the procedure stops and produces an optimal two-dimensional map of product distances (below).

Reading the basic map: Points on the map are actual products. Points close together are perceived by the consumers as being similar. In general:

• Points that are closely clustered together are competing against each other.

• Points that share the same point or are almost on top of each other are substitute products for each other.

• Study (or estimate) the hidden attributes that describe the dimensions of the plot. These attributes/dimensions can help explain how consumers judge the degree of similarity between products. You may learn something from the consumers to redesign your product for better perception.

• If the dimensions are not directly interpretable then perhaps the directions as pointed to by the products, through the space defined by the dimensions, may be interpretable.

Again, for insights and ideas, consider the following:

• What products are substitutes for each other?

• What products compete with each other?

• How do consumers view the competitive positioning of my product? (Which products compete directly against my product? Which products can my new product hope to compete against?)

• What is the consumers' overall perception of the competitive marketplace?

• How should I reposition my product to better compete in this market?

3. Correspondence map to explore information in any frequency table

Correspondence analysis is an ingenious device to explore the associative relationships and clustering patterns in the frequency data. For example, you can use the correspondence map to examine the association between a categorical variable that identifies a group of customers and another categorical variable that distinguishes your product. It is even equipped to display multiple categorical variables simultaneously (such as in multi-way tables of frequency), each having a large number of levels, although with some sacrifice (i.e., the distances between all points in the plot become meaningless).

Simple correspondence map

The following two-variable frequency table of car by income shows these associations by visual inspection:

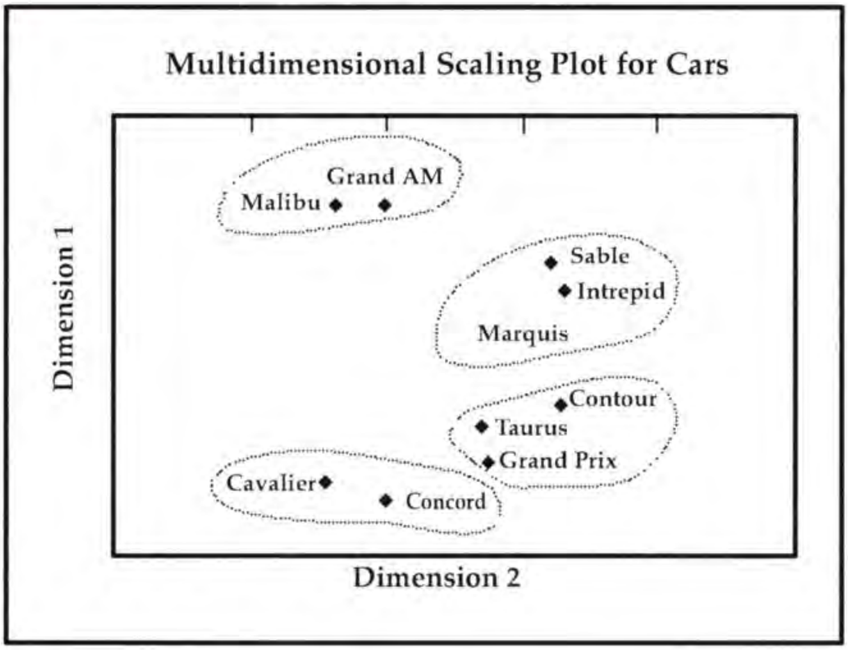
• the lower income level is associated with Cavalier and Contour;

• the middle income level is associated with Sable;

• the upper income level is associated with Intrepid, Grand Am, and Grand Prix.

Using these frequency counts, we can construct row and column profiles

Car Model	Income			
Frequency	Lower	Middle	Upper	Total Row
Dodge Intrepid	2	7	16	25
Chevrolet Cavalier	49	7	3	59
Pontiac Grand Am	4	5	23	32
Mercury Sable	4	49	5	58
Ford Contour	15	2	5	22
Pontiac Grand Prix	1	7	14	22
Total Column	75	77	66	218

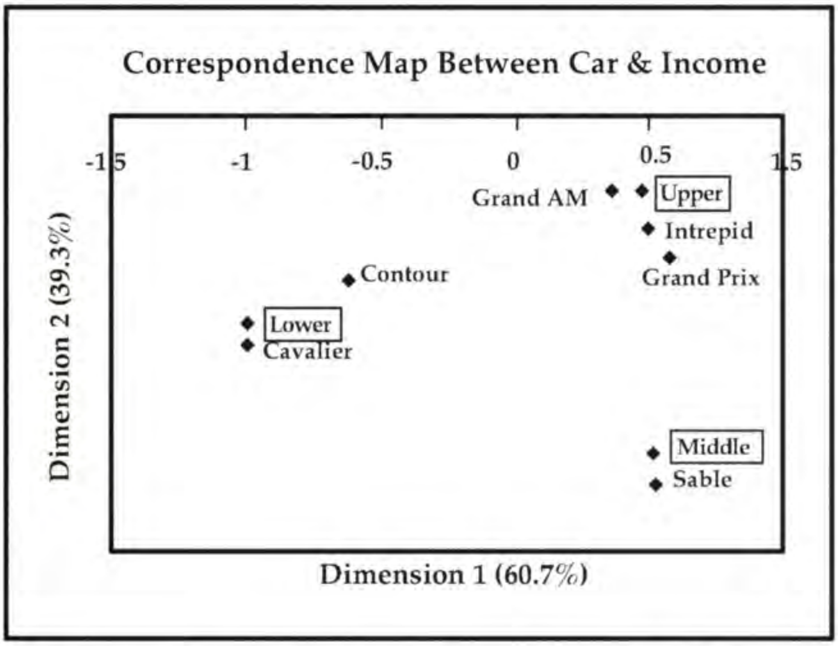


(see above): row (or car model) profiles are simply row percentages divided by 100; similarly, column (or income) profiles are column percentages divided by 100.

These row and column profiles can be thought of as points in a higher-dimensional space. For example, the six-row (car model) profiles form points in three (column- or income-) dimensions:

	(Lower,	Middle,	Upper)
1. Intrepid	(0.08,	**0.28**,	**0.64**)
2. Cavalier	(**0.83**,	0.12,	0.05)
3. Grand Am	(0.13,	0.16,	**0.72**)
4. Sable	(0.07,	**0.84**,	0.09)
5. Contour	(**0.68**,	0.09,	0.23)
6. Grand Prix	(0.05,	**0.32**,	**0.64**)

Similarly, the three column (income) profiles form points in six-row (car



model) dimensions.

Note that to accurately describe these profile points in a plot, we would need at least a three-dimensional plot (lesser of the three columns and six rows) — which would be impossible to fathom with human eyes. We can, however, use correspondence analysis to perform a variation of principal component analysis appropriate for categorical data on these row and column profiles, and retain only the first two dimensions (or principal components) for plotting an approximate representation of the row and column profiles.

	(Intrepid,	Cavalier,	Grand Am,	Sable,	Contour,	Grand Prix)
1. Lower	(0.03,	**0.65**,	0.05,	0.05,	**0.20**,	0.13)
2. Middle	(0.09,	0.09,	0.06,	**0.64**,	0.03,	0.09)
3. Upper	(**0.24**,	0.05,	**0.35**,	0.08,	0.08,	0.21)

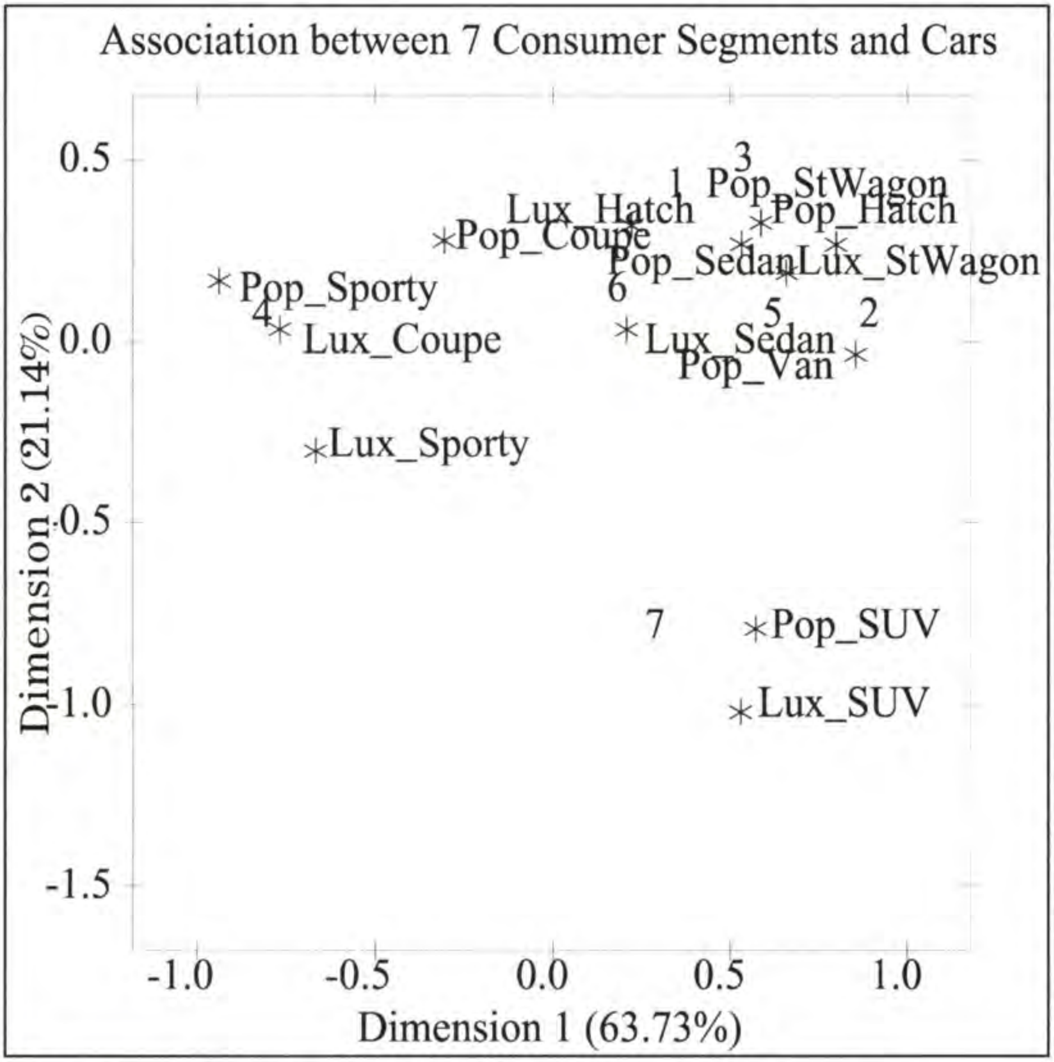
**Numbers in boldface are more significant than others in influencing the associations.*

Each row or column profile is now displayed as a point in this plot. The plot shows the association between various levels of the row (car model) profiles with those of the column (income) profiles. However, owing to data transformation, absolute distances between the row and column profiles have lost meaning. We can only examine the "cluster pattern" and "relative distances between clusters." The more clustered the points are, the more associated the row or column levels are with each other; conversely, the further apart the clusters are from each other, the more distinct their relationships are. This correspondence map graphically confirms the relationships we have observed earlier.

One word of caution: Association does not imply causation. While the points appear clustered together, they are not necessarily linked in a cause-and-effect manner. For example, we know that certain income levels tend to own certain cars from our correspondence map, but we can't be sure if those income levels caused those cars

	Consumer Segment						
Car Type	1	2	3	4	5	6	7
Lux_Coupe	59	0	17	706	45	127	115
Lux_Sporty	58	45	0	1136	30	187	449
Lux_Sedan	60	73	57	122	66	100	102
Lux_Hatch	146	200	143	263	111	225	81
Lux_StWagon	148	188	17	32	101	107	74
Lux_SUV	23	88	17	4	90	75	400
Pop_Coupe	93	0	157	397	48	125	90
Pop_Sporty	69	11	35	1125	39	133	67
Pop_Sedan	96	64	96	37	94	96	76
Pop_Hatch	208	211	258	77	199	199	151
Pop_StWagon	62	188	42	11	95	87	36
Pop_Van	53	188	84	5	350	50	169
Pop_SUV	37	122	28	7	34	54	274

** Note: "Lux_Coupe" stands for luxury coupe; "Pop_St Wagon" for popular station wagon.*



to be purchased. A correspondence map can describe a phenomenon, but cannot tell if one variable causes the other. You will need mathematical modeling, like logistic regression, to investigate the causal relationships.

Multiple correspondence map

Things get a lot more interesting when you try to make sense of multi-way frequency tables. Looking at a crosstabulation to figure out the relationship between two variables is easy. Beyond that, the task becomes much more difficult. For example, if you have four variables, you may have to examine six crosstabs to guess at the intertwined relationships. Multiple correspondence analysis is especially effective at simplifying these complex multi-way tables, and making them into a single display similar to that generated by the simple correspondence analysis (except there will be more points on the map). You read the multiple correspondence map much the same way as you would a simple correspondence map.

An example of using a simple correspondence map to solve a puzzle

Situation: The marketing department of a major car manufacturer would like to refine their customer-targeting strategy. A consumer segmentation was done by a department based on consumers' lifestyle demographics only, without regard to the types of cars they drive. The marketing department wants to know what types of cars these segments are most likely to buy without redoing the segmentation.

Solution: To quickly find out the types of cars most likely owned by the individual segments, the analyst quickly tabulates the frequency of car types by consumer segments. The table is shown at left.

A simple correspondence map (above) is produced based on this frequency table.

This plot provides the analyst with some valuable insight into the relationship between the types of cars and segments:

- Segment 4 tends to own performance-types of cars, be they luxury or popular sporty cars. This is a young, stylish and performance-conscious group of customers.
- Segment 6 tends toward sedan types of cars, be they luxury or popular sedans. This segment values the comfort, stability, and safety of a traditional large car.
- Segments 2 and 3 tend to own station wagons or vans. These segments are family-, children-, or cargo-oriented, and value cars with ample luggage/cargo space.
- Segment 7 prefers SUVs, be they luxury or popular SUVs. This segment of consumers may like the dominant, rugged, and protected road feel of the SUV.

In this example, car personality also matches nicely with owner personality (which is described by the demographic characteristics of the relevant consumer segments), thereby increasing the "face validity" of this analysis.

Hamilton Beach

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"We thought that product features may not be as powerful a determinant as it is in the U.S., where if you double the number of speeds, that is definitely added value," Phillips says. "But in Europe it became a negative."

Commenting on the overall design of the Hamilton Beach products, respondents used terms like "clunky" and "sturdy." "The word 'American' meant almost professional use. It meant large, big capacity...the stereotypical huge American kitchen with an enormous fridge/freezer in it. And when they were evaluating the designs and using the word 'American' it was quite appealing to people but as a trendy, niche product, as opposed to a generic mainstream product," Phillips says.

"Which is an opportunity," Israel says, "but isn't going to generate any significant volume, at least not when you are competing against companies that have been in the marketplace for a long time."

Natural setting

The groups in Europe were designed to give consumers ample opportunity to examine the products. "From going around to the shops in the U.S. and Europe you see how easy it is in a retail environment for consumers to examine these products," Phillips says. "We tried to make it similar to what they would experience while shopping so they would have the opportunity to really think about the products in as natural a setting as possible, given the set up of the focus group environment."

To understand Europe's different retail environment, the research probed the buying process. For example, in the U.S., mass merchandisers like Wal-Mart and Target are often where consumers buy their kitchen electrics, whereas in Europe, consumers can also go to specialty shops.

"One of the things we did to understand the purchase decision-making process was get people to talk through, in a case history manner, their last purchase," Phillips says. "For example, 'Describe for me the last purchase you made in this particular category. When was the first time you thought about it? Who was there when you were thinking about it? What was the prompt to buy a new one? Was it at home with your husband and someone was moaning about the rust on the kettle? Or were you in the retail environment and you looked over and there was an attractive toaster?'"

What makes a line?

The research also highlighted the differing ways consumers and Hamilton Beach product designers define a product line. To the designers, uniformity of things like the color of the knobs on the appliances and the fonts used in the instructions makes a group of products into a product line. But European consumers felt product attributes such as color and shape defined a product line.

"At one point during the discussion guide we were talking to people about ranges of appliances, asking whether they were interested in a range and if the products they were being shown constituted a range. There was a lot disagreement. People did not see it as a range because the overall design pattern wasn't the same," Phillips says.

"The products were designed from scratch to be a range. We felt that details such as the fonts, knob shapes, and colors made it a range," Israel says. "On the other hand, I think Europeans are used to more dramatic ways of making things look alike by using the same types of curve, dramatic colors, or accents that go beyond just changing the color on a knob or a button."

Many notes

Though a thorough discussion guide was developed prior to the European groups, Israel says, respondents raised a number of interesting points and prompted the dispatching of many notes to the moderator from the backroom. "I think we had become a bit deadened to [the focus group process] in the U.S. and somewhat in Mexico because we have a pretty good idea of what the consumer wants and needs and what their attitudes are. But in Europe, the respondents would say something and we would have to run in with a note that said, 'We want you to probe this a little more because we hadn't even thought of that!' This really kept us on our toes and made the experience fun and interesting."

No matter where in the world the research is being conducted, Israel and Phillips reiterate the importance of making sure moderators are fully briefed on the research and business objectives behind the interviews. "That gives them the ability to respond to and latch onto specific comments and take them and run with them. So if something comes up — for example respondents saying they want fewer speeds on a blender instead of more speeds, which is kind of counterintuitive — you allow the moderator the time and flexibility to explore those kinds of things," Phillips says.

Helping retailers

In both the European and Mexican research, one of the goals was to explore the role that research can play in negotiating with retailers. "In the U.S., you would be taking some of your research results and using that as leverage with retailers. That's not really the case in Latin America," Phillips says.

"U.S. retailers expect you to research a product to death before you even offer it to them," Israel says. "An idea we fully support because it increases the chance that your product will succeed. But that practice is not as nearly as prevalent in Europe, which was a little surprising. Perhaps the manufacturers do the research but don't share it with the retailers in Europe. In any case,

the retailers certainly weren't used to a manufacturer coming to them and saying, 'Here is what my consumer said and here is why I think you should sell this product.' In the States it's common practice."

Two outcomes

Two research projects, two parts of the world, two different outcomes. In one case, the research gave the go-ahead to proceed with the product launch; in the other, it raised a stop sign. "We went in knowing that we didn't have an ideal line for Europe. We were hoping to be pleasantly surprised and we weren't. There was hope that you could launch the line as a price-driven line with good retailing. But it became clear that that wasn't really an option," Israel says.

"On the Mexican side it was the complete opposite. We found that it would have great acceptance. The name is strong, the products are good, the features are right. The line has been launched and we just have some preliminary results right now but it's doing quite well.

"In the case of the European line, we will change the whole line and go back and do the same kind of research, knowing what we know from the first groups. That would put us where we were during the groups in Mexico, defining what we would put on the product, where we would sell it, how much we would ask for it, instead of getting a global view of what consumers think."

Larger part

Research in the international arena is becoming the larger part of designing products, Israel says. "I think it might be where the U.S. was a few years ago. You can't just put products out there and expect people to buy them just because they have your name on them and are sold at a recognized retailer. More manufacturers every day are catering to specific needs or wants that consumers have and I think that trend is going to continue."

Product & Service Update

continued from p. 12

countries worldwide. The new Consumer Lifestyles database will indicate which factors are affecting consumer decision- making and spending habits, and provide analysis of the factors that will determine future expenditure patterns. Its coverage of over 200 countries (with detailed coverage of 52 core countries) constitutes 90 percent of the world's population and 95 percent of worldwide consumer expenditure. For more information call Tim Walker at 312-922-1115 ext. 300.

ATP completes Quantum conversion

ATP Ltd., a provider of IT services to the market research industry, has completed the Quantum to triple-s conversion program, qtsss, which is available as a free download from www.triple-s.org. The program is available for SCO Unix, Solaris, and as a console application for Windows. SPSS MR supplied the source code of nqtspss as the basis for the new program — this contained the underlying structures for Quantum programs which made the qtsss program development quicker. For more information contact Raz Khan at raz@atp.co.uk.

Product assesses doctors' reactions to sales calls

Pharmaceutical companies now have real-time, online access to physician assessments of sales call effectiveness, including the messages presented and their impact on prescribing, with FastNet Tracker. New from Livingston, N.J.-based Market Measures Interactive (MMI), FastNet Tracker delivers a view of doctors' reactions to a company's own and competitive sales visits — with findings sorted by product, specialty, geography, and message type. The information can be used to refine messaging, respond to market changes, defend against competitive threats and optimize promotional ROI. Based on e-mail interviews with target physicians, FastNet Tracker offers evaluative measures for determining and improving call impact. Findings reveal: the main messages the physician heard; the time spent on the product detail; the doctor's perception of the believability and importance of the messages shared during the presentation; "head-to-head" comparisons between a company's own products and its competition; and the call's effect on prescribing — including the "cause-effect" link between the detail and the prescription choice. For more information contact Joel Bradus at 800-456-4405, ext.121 or visit www.mmi-research.com.

StatSoft updates data mining product

Tulsa, Okla.-based StatSoft, Inc. has released STATISTICA Enterprise-wide Data Mining System version 6 (Data Miner), a set of data mining tools designed to enable users to analyze their data to uncover hidden trends, explain known patterns, and predict the future. STATISTICA Data Miner features a large selection of algorithms for classification, prediction, clustering, and modeling as well as an icon-based interface. The data mining solutions in STATISTICA Data Miner are driven by procedures from five modules: General Slicer/Dicer with OLAP, General Classifier, General Modeler/Multivariate Explorer, General Forecaster/General Neural Networks Explorer. Users choose between graph types to visualize their data after cleaning, slicing, and drilling down and can publish these results via the Web (options for complete Web enablement available). When data change, analyses and results can be set to update automatically. For more information visit www.statsoft.com.

Catapult releases InquisiteCorporate survey software

Austin, Texas-based Catapult Systems Corp., has released InquisiteCorporate, a survey development, deployment, and management software product. InquisiteCorporate can scale an unlimited number of users and respondents. In addition, the software supports a variety of survey mediums, including Web-based surveys, e-mail surveys, and scannable paper forms. Other key features include: centralized control, allowing a single central manager to activate and deactivate surveys, limit responses, assess the history of one or more surveys, analyze data, and publish results; enhanced security, allowing passwords to control access to administrative functions, reports and survey data; online reporting tools designed to simplify analysis and distribution of survey results across multiple users; skip logic/branching; respondent authentication, verifying respondents only took the survey once, ensuring accurate results; and customization, enabling customers to build surveys that match the look and feel of a company's existing collateral. For additional information visit www.inquisite.com.

Briefly

Barry Leeds & Associates, New York, is now offering WebShop, an **Internet-based research tool** that provides real-time reporting on customer service and consumer opinions toward the financial industry. For more information call Paul Lubin at 212-889-5941 or visit www.barryleedsassoc.com.

London-based NOP Research Group is now offering The Customer Access Trail, or CAT, a new **syndicated tracking study of Great Britain consumers**. Consumers will be asked about their travel and shopping habits. For more information contact Carol Bernasconi at c.bernasconi@nop.co.uk.

B. N. Newman is now offering **focus group transcription and editing services**. For more information call 956-943-4241 or e-mail bnnewman@aol.com.

"Mobile Marketing — The evolution of a new marketing channel," **a report on mobile marketing and "m-commerce"** in the U.S. and Europe, is now available from CyTexx Media. For more information visit www.cytexx.de/report/engl.

The Physicians Advisory Council, an **Internet panel of medical professionals** administered by Arlington, Texas-based research firm Decision Analyst, has expanded into Western Europe. The panel's site has been translated into French and German and physicians in the U.K., France, and Germany are being recruited.

San Diego marketing information firm Claritas Inc., has launched MyBestProfiles, the **fourth Web site in its MyBest series** of sites designed to provide access to marketing information. The other three sites are MyBestProspects, MyBestCustomers and MyBestLists. For more information visit www.claritas.com.

Information Resources, Inc., Chicago, has expanded by 10,000 households its InfoScan **multi-outlet electronic household panel**, through which it tracks purchases of consumer products by individual households. The addition brings the number of households in the panel to 65,000.

QuestionBuilder.com, East Quogue, N.Y., has released version 3.5 of its QuestionBuilder.com **online survey and questionnaire development product**.

Profile Marketing Research, Lake Worth, Fla., has joined with Mature Marketing and Research, Boston, to conduct a **national probability sample of the Boomer generation**. Categories include automotive, financial services, Internet/PC usage, and travel and leisure. For a free copy e-mail Leslie Harris at mmrharris@aol.com.

MarketResearch.com is now offering several **reports from Packaged Facts**: "The U.S. Market for Feminine Hygiene Products," "The U.S. Pet Supplies Market," "The U.S. Market for Men's Grooming Products," "The U.S. Market for Plus Size Apparel," "Coffee and Tea Market: 2001," and "The U.S. Hispanic Market."

Redlands, Calif.-based GIS software firm ESRI is now offering ArcLogistics Route 3, a new release of its **desktop routing and scheduling solution** designed to help businesses and organizations deliver goods or services more efficiently. For more information visit www.esri.com/arclogistics.

DemographicsNow.com has **enhanced its product offerings** to include: new data, including current year data for consumer expenditures with 180 variables, marriage and family, educational attainment and population by gender; a new look and feel; and the ability to obtain maps and reports for multiple drive times from the selected locations.

Chicago litigation and communication consulting firm Zagnoli McEvoy Foley Ltd. has introduced zOpinion, a **custom online survey service**. For more information visit www.zopinion.com.

Cheskin, a Redwood Shores, Calif., research firm, has released "The Wireless Future - A Look At Youth Unplugged," a **study examining wireless communication and mobile technology behaviors** and attitudes of young people from 13 to 24. The 44-page report includes the results of a quantitative survey in addition to insights from experts in the wireless, mobile device, digital communications, and gaming industries. For more information visit www.cheskin.com.

The American Productivity & Quality Center (APQC) has released a new study entitled **"New Product Development: Gaining and Using Market Insight."** Eleven organizations, including 3M, Maytag, and Xerox, participated in the study, in which the APQC sought to understand the specific tools, methods, and techniques used by innovative organizations to ensure that their products have customers. An executive summary and more information can be found at www.apqc.org/pubs.

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Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 952-854-5101. Fax 952-854-8191. Or visit www.quirks.com/mod_market/index.htm.

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2001 Mall Research Facilities Directory

This directory was developed by mailing forms to firms that we identified as operating permanent mall interviewing facilities. In addition to each company's vital information, we've included a breakdown of mall customers' income levels, the number of interviewing stations available, and a line of codes showing the interviewing facility's features.

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Alabama

Birmingham

Graham & Associates, Inc.
Century Plaza
7580 Century Plaza, Suite 266
Birmingham, AL 35210
Ph. 205-443-5399
Fax 205-443-5389
E-mail: grahampga@aol.com
www.grahammktres.com
Becky South, Supervisor
Income: H-20% M-50% L-30%
Stations: 6 C K P O

Gadsden

Graham & Associates, Inc.
Gadsden Mall
1001 Rainbow Dr.
Gadsden, AL 35901
Ph. 205-443-5399
Fax 205-443-5389
E-mail: grahampga@aol.com
www.grahammktres.com
Cora Wilson, Supervisor
Income: H-25% M-50% L-25%
Stations: 5 C K

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5901 University Dr., #86
Huntsville, AL 35806
Ph. 205-443-5399
Fax 205-443-5389
E-mail: grahampga@aol.com
www.grahammktres.com
Loretta Gunn, Supervisor
Income: H-50% M-30% L-20%
Stations: 5 C K P O

Mobile

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

Montgomery

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

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

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Phoenix

Car-Lene Research, Inc.
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Tempe, AZ 85282
Ph. 480-839-4606
Fax 480-839-4619
E-mail: phoenixt@carleneresearch.com
www.carleneresearch.com
Kelly Cummings, Manager
Income: H-20% M-50% L-30%
Stations: 6 C K P O
(See advertisement on p. 107)

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

Creative Consumer Research
Factory Stores of America Mall
2050 S. Roslyn
Mesa, AZ 85208
Ph. 480-557-6666
Fax 480-557-6534
E-mail: ccrphnx@aol.com
Income: H-20% M-60% L-20%
Stations: 3 C
(See advertisement on p. 127)

Cunningham Field & Research Service
Metro Center Mall
9617 N. Metro Center Pkwy. W., Suite 1214
Phoenix, AZ 85051
Ph. 904-677-5644
Fax 904-677-5534
E-mail: phom@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-10% M-70% L-20%
Stations: 5 C K P O
(See advertisement on p. 101)

Friedman Marketing Services
Consumer Opinion Center
Desert Sky Mall
7611-118 W. Thomas Rd.
Phoenix, AZ 85033
Ph. 623-849-8080 or 914-698-9591
Fax 623-849-8083
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Terry Wood
Income: H-25% M-50% L-25%
Stations: 14 C K P O
(See advertisement on p. 119)

Friedman Marketing Services
Consumer Opinion Center
Paradise Valley Mall
4550 E. Cactus, #416
Phoenix, AZ 85032
Ph. 602-494-7813 or 914-698-9591
Fax 602-996-7465
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Karen Tews
Income: H-50% M-25% L-25%
Stations: 10 C K P O
(See advertisement on p. 119)

Friedman Marketing Services
Phoenix Research
Christown Mall
1739 W. Bethany Home Rd.
Phoenix, AZ 85015
Ph. 602-242-4868 or 914-698-9591
Fax 602-242-4910
E-mail: gvigeant@roper.com
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Lance Carrington
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Stations: 11 C K P O
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Quick Test/Heakin
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Mesa, AZ 85206
Ph. 480-985-2866
Fax 480-985-6321
E-mail: info@quicktest.com
www.quicktest.com
Ali Arastu, Manager
Income: H-3% M-37% L-60%
Stations: 7 C K P O
(See advertisement on p. 103)

Tucson

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Tucson Mall
4500 N. Oracle, #341
Tucson, AZ 85705
Ph. 520-292-0966
Fax 520-292-0800
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Laura Metelovski, Manager
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Stations: 8 C K P O
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Arkansas

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Central Mall
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Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-40% M-50% L-10%
Stations: 8 C K P O

California

Bakersfield

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

Fresno

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

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

Los Angeles
(See also Orange County)

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

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

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

Cunningham Field & Research Service
Northridge Fashion Center
9301 Tampa Ave., Suite 169A
Northridge, CA 91324
Ph. 904-677-5644
Fax 904-677-5534
E-mail: losn@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-30% L-30%
Stations: 5 C K O
(See advertisement on p. 101)

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

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

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

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

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

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

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

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

PKM Research Services, Inc.
The Plaza at West Covina Mall
1514 Plaza Dr.
West Covina, CA 91790
Ph. 626-856-3883
Fax 626-856-3886
E-mail: pkoer@aol.com
Erika Saucedo, Manager
Income: H-20% M-45% L-35%
Stations: 6 C P O

Quick Test/Heakin
Lakewood Center Mall
Space 25
Lakewood, CA 90712
Ph. 562-633-7344
Fax 562-633-3791
E-mail: info@quicktest.com
www.quicktest.com
Lisa Fleming, Manager
Income: H-32% M-36% L-32%
Stations: 7 C K
(See advertisement on p. 103)

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

Orange County
(See also Los Angeles)

Car-Lene Research, Inc.
The Promenade Mall
40820 Winchester Rd., Suite 2292
Temecula, CA 92591
Ph. 909-296-0606
Fax 909-296-0605
E-mail: sandiego@carleneresearch.com
www.carleneresearch.com
Christie Thompson, Manager
Income: H-35% M-45% L-20%
Stations: 5 C K P O
(See advertisement on p. 107)

Quick Test/Heakin
Santa Ana/Mainplace
2800 N. Main St., Suite 2088
Santa Ana, CA 92705
Ph. 714-547-8300
Fax 714-547-8998
E-mail: info@quicktest.com
www.quicktest.com
Rosemary Sandoval, Manager
Income: H-33% M-34% L-33%
Stations: 10 C K P O
(See advertisement on p. 103)

San Bernardino/ Riverside

Car-Lene Research, Inc.
Ontario Mills Mall
1 Mills Cir., #508
Ontario, CA 91764
Ph. 909-481-7666
Fax 909-481-7706
E-mail: laontario@carleneresearch.com
www.carleneresearch.com
Tracy Nuno, Manager
Income: H-35% M-45% L-20%
Stations: 4 C K P O
(See advertisement on p. 107)

Quick Test/Heakin
Galleria at Tyler, Suite 1042
Riverside, CA 92503
Ph. 909-637-1100
Fax 909-637-1191
E-mail: info@quicktest.com
www.quicktest.com
Jo-Anna Walb, Manager
Income: H-25% M-55% L-20%
Stations: 12 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Moreno Valley Mall
22500 Towne Circle, #1105
Moreno Valley, CA 92553
Ph. 909-653-3200
Fax 909-653-3255
E-mail: info@quicktest.com
www.quicktest.com
Jim Scott, Manager
Income: H-24% M-46% L-30%
Stations: 10 C K P O
(See advertisement on p. 103)

San Diego

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

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

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

Novick Ayres Research
2235 El Camino Real, #G
Oceanside, CA 92054
Ph. 760-967-1307
Fax 760-967-4143
E-mail: novayr@pacbell.net
Suzette Novick, Owner
Income: H-20% M-60% L-10%
Stations: 3 C K P O

Quick Test/Heakin
Parkway Plaza
415 Parkway Plaza, Suite 304
El Cajon, CA 92020
Ph. 619-444-7700
Fax 619-444-4157
E-mail: info@quicktest.com
www.quicktest.com
Adrian Mesa, Manager
Income: NA
Stations: 6 C K P O
(See advertisement on p. 103)

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

San Francisco Bay/ San Jose Area

Car-Lene Research, Inc.
County East Mall
2550 Somersville Rd.
Antioch, CA 94509
Ph. 925-706-9103
Fax 925-706-0437
E-mail: sanfrana@carleneresearch.com
www.carleneresearch.com
Kimberly Burks, Manager
Income: H-38% M-36% L-26%
Stations: 4 C K P O
(See advertisement on p. 107)

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

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

Cunningham Field & Research Service
New Park Mall
1129 New Park Mall
Newark, CA 94560
Ph. 904-677-5644
Fax 904-677-5534
E-mail: SANN@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-20%
Stations: 5 C K P O
(See advertisement on p. 101)

Cunningham Field & Research Service
Santa Rosa Plaza
2047A Santa Rosa Plaza
Santa Rosa, CA 95401
Ph. 904-677-5644
Fax 904-677-5534
E-mail: sanf@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 5 C K P O
(See advertisement on p. 101)

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

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

Quick Test/Heakin
Southland Mall
688 Southland Mall
Hayward, CA 94545
Ph. 510-785-4650
Fax 510-785-0641
E-mail: info@quicktest.com
www.quicktest.com
Martha Galicinao, Manager
Income: H-5% M-20% L-75%
Stations: 9 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
West Valley Mall
3200 Naglee Rd., Suite 406
Tracy, CA 95376
Ph. 209-839-0532
Fax 209-839-0705
E-mail: info@quicktest.com
www.quicktest.com
Ayala Saltzman, Manager
Income: H-20% M-75% L-5%
Stations: 11 C K P O
(See advertisement on p. 103)

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

Ventura/Santa Barbara

Reyes Research
1013 Colina Vista
Ventura, CA 93003
Ph. 805-278-1444
Fax 805-278-1447
E-mail: arvind@reyesresearch.com
www.reyesresearch.com
Michele Reyes, Owner
Income: H-25% M-40% L-35%
Stations: 10 C K P O

Colorado

Boulder

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

Car-Lene Research, Inc.
Twin Peaks Mall
1250 S. Hover Rd., Suite 45
Longmont, CO 80501
Ph. 303-682-0131
Fax 303-682-0118
E-mail: denverl@carleneresearch.com
www.carleneresearch.com
Dannette Blake, Manager
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 107)

Colorado Springs

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

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

The Springs Research
750 Citadel Dr. E., Suite 3122
Colorado Springs, CO 80909
Ph. 719-597-9869
Fax 719-597-9869
Esther Brewer, Owner
Income: H-26% M-40% L-34%
Stations: 8 C K P O

Denver

Car-Lene Research, Inc.
Thornton Town Center
10001 Grant St.
Thorton, CO 80229
Ph. 303-452-2696
Fax 303-452-2630
E-mail: denver@carleneresearch.com
www.carleneresearch.com
Cindy Rodriguez, Manager
Income: H-25% M-60% L-15%
Stations: 4 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Aurora Mall
14200 E. Alameda, Suite 1041
Aurora, CO 80012
Ph. 904-677-5644
Fax 904-677-5534
E-mail: DENV@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-25% M-60% L-15%
Stations: 4 C K P O
(See advertisement on p. 101)

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

Quick Test/Heakin
Southglenn Mall, Space 0730
6911 S. University Blvd.
Littleton, CO 80122
Ph. 303-937-0144
Fax 303-937-0502
E-mail: info@quicktest.com
www.quicktest.com
Jackie Stepanich, Manager
Income: H-2% M-80% L-18%
Stations: 4 C K P O
(See advertisement on p. 103)

Connecticut

Danbury

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

Hartford

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

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

New Haven

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

Quick Test/Heakin
Westfield Shopping Town
470 Lewis Ave., Suite 4039
Meriden, CT 06451
Ph. 203-639-8100
Fax 203-639-4775
E-mail: info@quicktest.com
www.quicktest.com
Tracie Bentz, Manager
Income: H-20% M-60% L-20%
Stations: 4 C K P O
(See advertisement on p. 103)

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

Waterbury

Cunningham Field & Research Service
Brass Mill Center
495 Union St., Suite 1102
Waterbury, CT 06706
Ph. 904-677-5644
Fax 904-677-5534
E-mail: WATE@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-30% L-50%
Stations: 5 C K P O
(See advertisement on p. 101)

Development II, inc.
107 Middle Quarter
P.O. Box 992
Woodbury, CT 06798
Ph. 203-263-0580
Fax 203-266-4697
E-mail: steve@development2.com
www.development2.com
Income: NA
Stations: NA

District of Columbia

Car-Lene Research, Inc.
Potomac Mills Mall
2700 Potomac Mills Cir.
Woodbridge, VA 22192
Ph. 703-497-4444
Fax 703-497-0999
E-mail: dc@carleneresearch.com
www.carleneresearch.com
Yvonnie Fayson, Manager
Income: H-25% M-45% L-30%
Stations: 4 C K P O
(See advertisement on p. 107)

Consumer Pulse of Washington
The Mall at Manassas
8300 Sudley Rd.
Manassas, VA 20109
Ph. 703-442-0960 or 800-336-0159
Fax 703-442-0967
E-mail: washington@consumerpulse.com
www.consumerpulse.com
Jeff Davis, Director
Income: H-25% M-55% L-20%
Stations: 8 C K P

Cunningham Field & Research Service
Springfield Mall
6691B Springfield Mall
Springfield, VA 22150
Ph. 904-677-5644
Fax 904-677-5534
E-mail: WASH@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-70% L-10%
Stations: 3 C K P O
(See advertisement on p. 101)

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

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

Florida

Daytona Beach

Cunningham Field & Research Service
Volusia Mall
1700 International Speedway Blvd., Suite 386
Daytona Beach, FL 32114
Ph. 904-677-5644
Fax 904-677-5534
E-mail: DAYT@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-10% M-70% L-20%
Stations: 6 C K P O
(See advertisement on p. 101)

Fort Lauderdale

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Car-Lene Research, Inc.
(Opening October 2001)
Sawgrass Mills Mall
12801 W. Sunrise Blvd.
Sunrise, FL 33323
Ph. 847-940-2000
E-mail: info@carleneresearch.com
www.carleneresearch.com
Income: NA
Stations: NA
(See advertisement on p. 107)

Carolana Research
Oakbrook Mall
7207 W. Oakland Park Blvd.
Fort Lauderdale, FL 33313
Ph. 954-741-2234
Fax 954-742-3733
E-mail: carolana2@cs.com
Carol Nadell, President
Income: H-25% M-50% L-25%
Stations: 6 C K P O

Mars Research
Fashion Mall at Plantation
321 N. University Dr., Suite B-11-A
Fort Lauderdale, FL 33324
Ph. 954-755-2805 or 877-755-2805
Fax 954-755-3061
E-mail: info@marsresearch.com
www.marsresearch.com
Lois Stermer, Vice President
Income: H-60% M-30% L-10%
Stations: 4 C P

Quick Test/Heakin
Coral Square Mall
9569 W. Atlantic Blvd.
Coral Springs, FL 33071
Ph. 954-753-4466
Fax 954-753-4981
E-mail: info@quicktest.com
www.quicktest.com
Linda Boneville
Income: H-34% M-56% L-10%
Stations: 14 C K P O
(See advertisement on p. 103)

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

Fort Myers

Quick Test/Heakin
Edison Mall
4125 Cleveland Ave., Suite 23
Fort Myers, FL 33901
Ph. 941-939-1200
Fax 941-939-1413
E-mail: info@quicktest.com
www.quicktest.com
Rod Gruber, Manager
Income: H-30% M-40% L-30%
Stations: 12 C K P O
(See advertisement on p. 103)

Jacksonville

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

Cunningham Field & Research Service
Orange Park Mall
1910 Wells Rd., Suite 1002
Orange Park, FL 32073
Ph. 904-677-5644
Fax 904-677-5534
E-mail: JACK@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-70% L-10%
Stations: 6 C K P O
(See advertisement on p. 101)

Quick Test/Heakin
The Avenues Mall
10300 Southside Blvd., Suite 168
Jacksonville, FL 32256
Ph. 904-363-1480
Fax 904-363-2281
E-mail: info@quicktest.com
www.quicktest.com
Kathy Paddock, Manager
Income: H-20% M-43% L-37%
Stations: 12 C K P
(See advertisement on p. 103)

Melbourne

Quick Test/Heakin
Melbourne Square Mall
1700 W. New Haven Ave., Suite 203
Melbourne, FL 32904
Ph. 321-729-9809
Fax 321-729-9551
E-mail: info@quicktest.com
www.quicktest.com
Vicki Crosthwaite, Manager
Income: H-30% M-50% L-20%
Stations: 10 C K P O
(See advertisement on p. 103)

Miami

Consumer Reaction Research
Focus World International, Inc.
Miller Square Mall
13790 S.W. 56 St.
Miami, FL 33175
Ph. 732-946-0100
Fax 732-946-0107
E-mail: focusworld@att.net
www.focusworldint.com
Gary Eichenholtz, CEO/CFO
Income: H-10% M-60% L-30%
Stations: 6

Cunningham Field & Research Service
Pembroke Lakes Mall
11401 Pines Blvd., Suite 702
Pembroke Pines, FL 33026
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MIAM@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-20%
Stations: 6 C K P O
(See advertisement on p. 101)

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

Quick Test/Heakin
Miami International Mall
1455 N.W. 107th Ave., Suite 687
Miami, FL 33172
Ph. 305-591-1388
Fax 305-592-1188
E-mail: info@quicktest.com
www.quicktest.com
Denise Ramos, Manager
Income: H-30% M-60% L-10%
Stations: 11 C K P O
(See advertisement on p. 103)

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Orlando

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

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

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

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

Quick Test/Heakin
Lake Square Mall
10401-082 Highway 441
Leesburg, FL 34788
Ph. 352-365-0505
Fax 352-365-2005
E-mail: info@quicktest.com
www.quicktest.com
Koko Gough, Manager
Income: H-9% M-28% L-63%
Stations: 6 C K O
(See advertisement on p. 103)

Sarasota/Bradenton

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

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

Tallahassee

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

Tampa/St. Petersburg

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

C & C Market Research, Inc.
Lakeshore Mall
901 U.S. Hwy. 27 N. #41
Sebring, FL 33870
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Income: H-45% M-45% L-10%
Stations: 8 C K P O

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

Car-Lene Research, Inc.
West Shore Plaza
350 West Shore Plaza
Tampa, FL 33609
Ph. 813-289-8202
Fax 813-289-8302
E-mail: tampaw@carleneresearch.com
www.carleneresearch.com
Sharon Brandy, Manager
Income: H-44% M-33% L-23%
Stations: 4 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Brandon Towne Center
334 Brandon Towne Center
Brandon, FL 33511
Ph. 904-677-5644
Fax 904-677-5534
E-mail: TAMB@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-10% M-80% L-10%
Stations: 5 C K P O
(See advertisement on p. 101)

Cunningham Field & Research Service
Countryside Mall
27001 US Hwy. 19 N., Suite 2074
Clearwater, FL 33761
Ph. 904-677-5644
Fax 904-677-5534
E-mail: TAMC@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-20%
Stations: 6 C K P O
(See advertisement on p. 101)

Gulf State Research Center
Eagle Ridge Mall
433 Eagle Ridge Dr., Suite 211
Lake Wales, FL 33859
Ph. 800-357-8842 or 863-676-3676
Fax 863-676-0471
E-mail: gulfstatefla@aol.com
Tim Villar, Vice President
Income: H-34% M-49% L-17%
Stations: 6 C K P O

Quick Test/Heakin
Citrus Park Town Center Mall
7852 Citrus Park Town Center Mall
Tampa, FL 33625
Ph. 813-926-3222
Fax 813-926-4091
E-mail: info@quicktest.com
www.quicktest.com
Lori Hulett-Knapp, Manager
Income: H-30% M-60% L-10%
Stations: 7 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Gulf View Square Mall
9409 U.S. Hwy. 19 N., Suite 299
Port Richey, FL 34668
Ph. 727-847-2222
Fax 727-842-8541
E-mail: info@quicktest.com
www.quicktest.com
Curtisha McThenney, Manager
Income: H-10% M-30% L-60%
Stations: 6 P
(See advertisement on p. 103)

Suburban Associates
Lakeland Square Mall, Store #510
3800 U.S. Hwy. 98 N.
Lakeland, FL 33809
Ph. 863-858-9639
Fax 863-858-8639
E-mail: lakeland@subassoc.com
www.subassoc.com
Income: H-10% M-70% L-20%
Stations: 10 C K P

West Palm Beach/ Boca Raton

Quick Test/Heakin
Boynton Beach Mall
801 N. Congress Ave., Suite 283
Boynton Beach, FL 33426
Ph. 561-733-8998
Fax 561-733-9918
E-mail: info@quicktest.com
www.quicktest.com
Suzann Davis, Manager
Income: H-34% M-56% L-10%
Stations: 10 C K P O
(See advertisement on p. 103)

Georgia

Athens

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

Atlanta

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

Car-Lene Research, Inc.
North Dekalb Mall
2050 Lawrenceville Hwy., Suite 2005
Decatur, GA 30033
Ph. 404-728-8810
Fax 404-633-9841
E-mail: atlanta@carleneresearch.com
www.carleneresearch.com
Marci Bennett, Office Manager
Income: H-27% M-40% L-33%
Stations: 6 C K P O
(See advertisement on p. 107)

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

Car-Lene Research, Inc.
(Opening November 2001)
Discover Mills
5900 Sugarloaf Pkwy., Space #216
Lawrenceville, GA 30043
Ph. 847-940-2000
E-mail: info@carleneresearch.com
www.carleneresearch.com
Income: NA
Stations: NA C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
North Point Mall
1002 N. Point Cir.
Alpharetta, GA 30022
Ph. 904-677-5644
Fax 904-677-5534
E-mail: ATLA@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-35% M-55% L-10%
Stations: 7 C K P O
(See advertisement on p. 101)

Cunningham Field & Research Service
The Malls at Stonecrest
2929 Turner Hill Rd., Suite 1430
Lithonia, GA 30038
Ph. 386-677-5644
Fax 386-677-5534
E-mail: ATLL@cunninghamresearch.com
www.cunninghamresearch.com
Income: NA
Stations: 4 C K P O
(See advertisement on p. 101)

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

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

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

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

Barbara Nolan Market Research
Town Center at Cobb
Space 3018, 400 Earnst Barrett Pkwy.
Hennesaw, GA 30144
Ph. 678-581-1393
Fax 678-581-1392
E-mail: BNMR165@attglobal.net
Income: H-55% M-45% L-15%
Stations: 15 K P O

Quick Test/Heakin
Gwinnett Place Mall
2100 Pleasant Hill Rd.
Duluth, GA 30096
Ph. 770-476-0714
Fax 770-476-3194
E-mail: info@quicktest.com
www.quicktest.com
Gayle Haggett, Manager
Income: H-34% M-37% L-29%
Stations: 10 C K P O
(See advertisement on p. 103)

CODES

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

Stations - number of interviewing stations

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

NA - information not available

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

Gainesville

Cunningham Field & Research Service
Lakeshore Mall
150 Pearl Nix Pkwy., Suite C6
Gainesville, GA 30501
Ph. 904-677-5644
Fax 904-677-5534
E-mail: ATLG@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 101)

Quick Test/Heakin
Mall of Georgia
3333 Buford Dr., Suite 1098
Buford, GA 30519
Ph. 770-831-5099
Fax 770-831-5012
E-mail: info@quicktest.com
www.quicktest.com
Jennifer Jordan, Manager
Income: H-25% M-46% L-29%
Stations: 10 C K P O
(See advertisement on p. 103)

Idaho

Boise

Consumer Opinion Services, Inc.
Boise Towne Square
350 N. Milwaukee St., Suite 2141
Boise, ID 83704
Ph. 208-323-8584 or 206-241-6050 for bids
Fax 208-323-8593
E-mail: cosboise@earthlink.net
www.cosvc.com
Robert Corbin, Manager
Income: H-15% M-60% L-25%
Stations: 9 C K P
(See advertisement on p. 129)

Illinois

Chicago

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

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

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

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

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

Car-Lene Research, Inc.
Yorktown Center
266 D Yorktown Center
Lombard, IL 60148
Ph. 630-705-1303
Fax 630-705-1304
E-mail: chicagoy@carleneresearch.com
www.carleneresearch.com
Marlene Szafranski, Manager
Income: H-45% M-45% L-10%
Stations: 4 C K P O
(See advertisement on p. 107)

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

Consumer Pulse of Chicago
Stratford Square Mall #D24
424 Stratford Square
Bloomingdale, IL 60108
Ph. 630-894-9103 or 800-336-0159
Fax 630-894-9105
E-mail: chicago@consumerpulse.com
www.consumerpulse.com
Steve Lehman, Director
Income: H-30% M-50% L-20%
Stations: 10 C K P O

Car-Lene Research
is all you need
We now have 70 locations nationwide

- Alburquerque
- Atlanta (5)
- Baltimore (2
- Boston
- Boulder
- Charlotte
- Chicago (4)
- Cincinatti
- Cleveland
- Dallas (3)
- Denver (3)
- Des Moines
- Detroit
- Ft. Lauderdale (2)
- Ft. Worth (2)
- High Point
- Houston (2)
- Los Angeles (2)
- Louisville
- Milwaukee (2)
- Minneapolis (2)
- Nashville (2)
- New Orleans
- New York (2)
- Omaha
- Ontario, Canada
- Orlando
- Philadelphia (4)
- Phoenix (2)
- Pittsburgh (3)
- Rochester (3)
- St. Louis (2)
- San Antonio
- San Diego
- San Francisco (2)
- Seattle
- Tampa (2)
- Tucson
- Washington, D.C.

Karen Canzoneri
PRESIDENT

ALL OFFICES INCLUDE

- Multiple PCs
- Permanent mall Facilities
- Full Kitchens
- Commercial Tests
- Taste Tests
- Executive Interviewing
- Telephones Studies
- Group Sessions
- Audits and Store Checks
- Mystery Shopper Studies
- Door-to-Door Interviewing

Car-Lene
RESEARCH, INC.

CORPORATE OFFICE
430 Lake Cook Road, Deerfield, IL 60015 • 847.940.2000 • www.carleneresearch.com

CODES

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

Stations - number of interviewing stations

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

NA - information not available

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

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

Cunningham Field & Research Service
Gurnee Mills Mall
6170 W. Grand Ave., Suite 588
Gurnee, IL 60031-4548
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CHIG@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 101)

Cunningham Field & Research Service
Lincoln Mall
146B Lincoln Mall
Matteson, IL 60443
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CHIL@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-80% L-0%
Stations: 6 C K P O
(See advertisement on p. 101)

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

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

Mid-America Rsch./Facts In Focus
Randhurst Center
999 N. Elmhurst Rd., Suite 17
Mt. Prospect, IL 60056
Ph. 847-392-9770 or 847-392-0800
Fax 847-392-9891
E-mail: marrandhurst@att.net.com
Lori Tomeleoni
Income: H-33% M-52% L-15%
Stations: 20 C K P O

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

Quick Test/Heakin
Golf Mill Center
373 Golf Mill Center
Niles, IL 60714
Ph. 847-824-6550
Fax 847-824-6552
E-mail: info@quicktest.com
www.quicktest.com
Susan Habel, Manager
Income: H-22% M-65% L-13%
Stations: 10 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Louis Joliet Mall
1166 Louis Joliet Mall
Joliet, IL 60435
Ph. 815-439-2053
Fax 815-439-2162
E-mail: info@quicktest.com
www.quicktest.com
Molly Vaught, Manager
Income: H-34% M-39% L-27%
Stations: 8 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
North Riverside Park Mall
7501 W. Cermak Rd.
North Riverside, IL 60546
Ph. 708-447-9208
Fax 708-447-9268
E-mail: info@quicktest.com
www.quicktest.com
Kelly Parsons, Manager
Income: H-18% M-50% L-32%
Stations: 8 C K P O
(See advertisement on p. 103)

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

Peoria

Scotti Research, Inc.
Northwoods Mall
4501 War Memorial
Peoria, IL 61613
Ph. 309-682-4254
Fax 309-673-5942
E-mail: scotti@umtec.com
Nancy Matheis, President
Income: H-25% M-50% L-25%
Stations: 6 C K P

Indiana

Evansville

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

Indianapolis

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Gore/Knauff Research LLC
College Mall
2894 E. 3rd St., Suite B03
Bloomington, IN 47407
Ph. 812-485-2160
Fax 812-485-2164
E-mail: bloomingtonmall@goreknauffresearch.com
Jim Knauff, Owner
Income: H-25% M-60% L-15%
Stations: 5 C

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

Indianapolis Research Company, Inc.
Lafayette Square Mall
3919 Lafayette Rd., #394
Indianapolis, IN 46254
Ph. 317-299-5605
Fax 317-299-5620
E-mail: ircmelissa@aol.com
Income: H-35% M-45% L-20%
Stations: 6 C K P

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

Terre Haute

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

Iowa

Des Moines

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

T.L. Grantham & Associates, Inc.
Park Fair Mall
100 E. Euclid Ave., Suite 167
Des Moines, IA 50313
Ph. 515-288-7156
Fax 515-698-5573
E-mail: tgrantham@tlgrantham.com
www.tlgrantham.com
Teresa Grantham, President
Income: H-15% M-65% L-20%
Stations: 7 C K P O

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

Davenport

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

Kansas

Kansas City

(See Kansas City, MO)

Wichita

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

Kentucky

Louisville

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

MRK, Inc.
Mid City Mall
1250 Bardstown Rd.
Louisville, KY 40204
Ph. 502-458-4159
Fax 502-456-5776
E-mail: marylea@mrkresearch.com
www.mrkresearch.com
Mary Lea Quick, President
Income: H-40% M-50% L-10%
Stations: 7 C K P O

Personal Opinion, Inc.
Bashford Manor Mall
3600 Bardstown Rd.
Louisville, KY 40218
Ph. 502-899-2400
Fax 502-899-2404
E-mail: lschulz@personalopinion.org
www.personalopinion.org
Linda Schulz, Director Marketing Research
Income: H-20% M-60% L-20%
Stations: 6 C K P O

Personal Opinion, Inc.
River Falls Mall
951 E. Hwy. 131
Clarksville, IN 47129
Ph. 502-899-2400
Fax 502-899-2404
E-mail: lschulz@personalopinion.org
www.personalopinion.org
Linda Schulz, Director Marketing Research
Income: H-20% M-55% L-25%
Stations: 9 C K P O

Paducah

(See Cape Girardeau, MO)

Louisiana

New Orleans

Car-Lene Research, Inc.
North Shore Square Mall
5038 North Shore Blvd., Suite 5038
Slidell, LA 70460
Ph. 985-847-0405
Fax 985-847-0042
E-mail: neworleans@carleneresearch.com
www.carleneresearch.com
Joshua Barger, Manager
Income: H-40% M-45% L-15%
Stations: 6 C K P O
(See advertisement on p. 107)

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

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

Quick Test/Heakin
Esplanade Mall
1401 W. Esplanade
Kenner, LA 70065
Ph. 504-464-9188
Fax 504-464-9936
E-mail: info@quicktest.com
www.quicktest.com
Jason Wilks, Manager
Income: H-21% M-45% L-34%
Stations: 12 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Lakeside Mall
3301 Veterans Blvd., Suite 201
Metairie, LA 70002
Ph. 504-828-4354
Fax 504-828-9757
E-mail: info@quicktest.com
www.quicktest.com
Christy Felder, Manager
Income: H-20% M-40% L-20%
Stations: 4 C K O
(See advertisement on p. 103)

Maryland

Baltimore

Car-Lene Research, Inc.
Arundel Mills
7000 Arundel Mills Blvd., Space 324
Hanover, MD 21076
Ph. 443-755-8880
Fax 443-755-8884
E-mail: baltimorea@carleneresearch.com
www.carleneresearch.com
Sylvia Yeager, Manager
Income: H-30% M-55% L-15%
Stations: 5 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Towson Town Center
825 Dulaney Valley Rd., #1105
Towson, MD 21204
Ph. 410-823-7900
Fax 410-823-7868
E-mail: baltimore@carleneresearch.com
www.carleneresearch.com
Sylvia Sandler, Manager
Income: H-45% M-35% L-20%
Stations: 4 C K P O
(See advertisement on p. 107)

Consumer Pulse of Baltimore
The Mall in Columbia
10300 Little Patuxent Pkwy.
Columbia, MD 21044
Ph. 703-442-0960 or 800-336-0159
Fax 703-442-0967
E-mail: washington@consumerpulse.com
www.consumerpulse.com
Jeff Davis, Director
Income: H-30% M-50% L-20%
Stations: 10 C K P

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

Quick Test/Heakin
Owings Mills Town Center
10300 Mill Run Circle, Suite 1155
Owings Mills, MD 21117
Ph. 410-998-3939
Fax 410-998-3555
E-mail: info@quicktest.com
www.quicktest.com
Randi Stone, Manager
Income: H-46% M-41% L-13%
Stations: 10 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
White Marsh Mall
8200 Perry Hall Blvd., Suite 1045
Baltimore, MD 21236
Ph. 410-933-9400
Fax 410-933-9440
E-mail: info@quicktest.com
www.quicktest.com
Joanne Rogers, Manager
Income: H-37% M-45% L-18%
Stations: 10 C K P O
(See advertisement on p. 103)

Massachusetts

Boston

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

Cunningham Field & Research Service
Natick Mall
1245 Worchester St., Suite 1004
Natick, MA 01760-1553
Ph. 904-677-5644
Fax 904-677-5534
E-mail: BOST@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 5 C K P O
(See advertisement on p. 101)

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

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

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

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

Quick Test/Heakin
Watertown Mall
550 Arsenal St.
Watertown, MA 02472
Ph. 617-924-8486
Fax 617-923-0261
E-mail: info@quicktest.com
www.quicktest.com
Bonnie MacDonald, Manager
Income: H-20% M-50% L-30%
Stations: 9 C K P O
(See advertisement on p. 103)

Springfield

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

Quick Test/Heakin
Holyoke Mall at Ingleside
50 Holyoke Rd.
Holyoke, MA 01040
Ph. 413-533-6180
Fax 413-532-6855
E-mail: info@quicktest.com
www.quicktest.com
Debbie Mullaly, Manager
Income: H-15% M-55% L-30%
Stations: 8 C K
(See advertisement on p. 103)

Michigan

Detroit

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

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

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

Cunningham Field & Research Service
Great Lakes Crossing
4144 Baldwin Rd., Suite 419
Auburn Hills, MI 48326
Ph. 904-677-5644
Fax 904-677-5534
E-mail: detr@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 101)

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

Quick Test/Heakin
Macomb Mall
32441 Gratiot, Suite 440
Roseville, MI 48066
Ph. 810-294-3232
Fax 810-294-3759
E-mail: info@quicktest.com
www.quicktest.com
Diana Chalou, Manager
Income: H-31% M-41% L-28%
Stations: 8 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Southland Center Mall
23000 Eureka Rd.
Taylor, MI 48180
Ph. 734-287-3600
Fax 734-287-3840
E-mail: info@quicktest.com
www.quicktest.com
Renee Paul, Manager
Income: H-25% M-50% L-25%
Stations: 11 C K P O
(See advertisement on p. 103)

Grand Rapids

Barnes Research, Inc.
Rogers Plaza
1004 Rogers Plaza Dr.
Wyoming, MI 49509
Ph. 616-363-7643
Fax 616-363-8227
E-mail: bids@barnesresearch.com
Della Welch, Vice President
Income: H-25% M-50% L-25%
Stations: 10 C K P

Minnesota

Duluth

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

Minneapolis/St. Paul

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

Car-Lene Research, Inc.
Southdale Mall
940 Southdale Center
Edina, MN 55435
Ph. 952-922-1444
Fax 952-922-1999
E-mail: minsouthdale@carleneresearch.com
www.carleneresearch.com
David Wilson, Manager
Income: H-35% M-25% L-40%
Stations: 6 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Maplewood Mall
3001 White Bear Ave N., Suite 2013
Maplewood, MN 55109
Ph. 904-677-5644
Fax 904-677-5534
E-mail: MINM@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 7 C K P O
(See advertisement on p. 101)

Cunningham Field & Research Service
Northtown Mall
310 Northtown Dr.
Blaine, MN 55434
Ph. 904-677-5644
Fax 904-677-5534
E-mail: minn@cunninghamresearch.com
www.cunninghamresearch.com
Susan Hoffman, Manager
Income: H-20% M-80% L-0%
Stations: 4 C K P O
(See advertisement on p. 101)

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

Quick Test/Heakin
Mall of America
300 E. Broadway
Bloomington, MN 55425
Ph. 612-854-3535
Fax 612-854-4375
E-mail: info@quicktest.com
www.quicktest.com
Elena Johnson, Manager
Income: H-25% M-50% L-25%
Stations: 14 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Ridgedale Mall
12745 Wayzata Blvd.
Minnetonka, MN 55305
Ph. 952-512-3838
Fax 952-512-0011
E-mail: info@quicktest.com
www.quicktest.com
Darryl Ott, Manager
Income: H-30% M-40% L-30%
Stations: 10 C K P O
(See advertisement on p. 103)

Mississippi

Jackson

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

Missouri

Cape Girardeau

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

Kansas City

C & C Market Research, Inc.
Metro North Mall
400 N.W. Barry Rd., Suite 143
Kansas City, MO 64155
Ph. 501-785-5637 or 816-436-9545
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-35% M-55% L-10%
Stations: 5 C K P O

Quick Test/Heakin
1026 Independence Center
Independence, MO 64057
Ph. 816-795-0706
Fax 816-795-1416
E-mail: info@quicktest.com
www.quicktest.com
Carmon Harshberger, Manager
Income: H-23% M-48% L-29%
Stations: 10 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Bannister Mall
5600 E. Banister Rd., #102
Kansas City, MO 64137
Ph. 816-767-8300
Fax 816-761-0110
E-mail: info@quicktest.com
www.quicktest.com
Debbie Culver, Manager
Income: H-24% M-55% L-21%
Stations: 10 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
The Great Mall of the Great Plains
20383 W. 151st St.
Olathe, KS 66061
Ph. 913-782-5110
Fax 913-782-5506
E-mail: info@quicktest.com
www.quicktest.com
Robin Isreal, Manager
Income: H-30% M-40% L-30%
Stations: 9 C K O
(See advertisement on p. 103)

CODES

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

Stations - number of interviewing stations

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

NA - information not available

St. Louis

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

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

Cunningham Field & Research Service
St. Claire Square Mall
134 St. Clair Square, #125
Fairview Heights, IL 62208
Ph. 904-677-5644
Fax 904-677-5534
E-mail: STLO@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-40% L-30%
Stations: 5 C K P O
(See advertisement on p. 101)

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

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

Quick Test/Heakin
505 Northwest Plaza
St. Louis, MO 63074
Ph. 314-291-8888
Fax 314-291-8581
E-mail: info@quicktest.com
www.quicktest.com
Becky Ross, Manager
Income: H-2% M-55% L-43%
Stations: 10 C K P O
(See advertisement on p. 103)

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

Springfield

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

Nebraska

Omaha

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

Cunningham Field & Research Service
Crossroads Mall
7400 Dodge St., Suite B-2
Omaha, NE 68114
Ph. 904-677-5644
Fax 904-677-5534
E-mail: omah@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-45% L-25%
Stations: 6 C K P O
(See advertisement on p. 101)

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

Nevada

Las Vegas

Cunningham Field & Research Service
The Galleria at Sunset
1300 W. Sunset Rd., Suite 1324
Henderson, NV 89014
Ph. 904-677-5644
Fax 904-677-5534
E-mail: LASV@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 6 C K P O
(See advertisement on p. 101)

Las Vegas Surveys, Inc.
The Boulevard Mall
3860 S. Maryland Pkwy., Suite 201
Las Vegas, NV 89109
Ph. 800-797-9877 or 702-650-5500
Fax 702-650-0729
E-mail: info@lasvegassurveys.com
www.lasvegassurveys.com
Eric Sousa, President
Income: H-60% M-30% L-10%
Stations: 4 C K P O
(See advertisement on p. 115)

New Hampshire

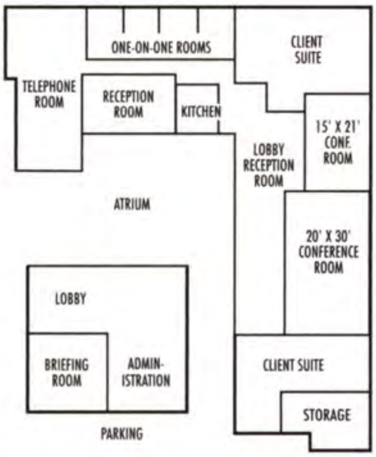
Concord

Cunningham Field & Research Service
Steeplegate Mall
270 London Rd., Suite 1164
Concord, NH 03301
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CONC@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-60% L-20%
Stations: 5 C K O
(See advertisement on p. 101)

Don't Gamble In Las Vegas
Place a sure Bet on Las Vegas Surveys!

- ***20 Years Experience*** in Las Vegas (We ***Know*** Las Vegas)
- The Leader in Focus Groups (Best Overall Rating – 1999 *Impulse Survey*)
- New Mall Facility Open (The Best of Las Vegas)

- 3 New Focus Group facilities w/ Full Serv. Business Suites
- 2 Executive Meeting Rooms
- 5 One-on-One Rooms w/ Client Viewing
- 2 Blocks From Convention Center/Mall
- Recruiting/Focus Groups/One-on-Ones
- Executive/Professional/Media
- Telephone Interviews
- Mall Intercepts
- Conventions
- Radio Music Tests
- Mock Jury Trials
- Hispanic Research Capabilities



3405 So. Cambridge St.
Las Vegas, NV 89109
(800) 797-9877
(702) 650-5500
Fax: (702) 650-0729
E-mail: lvsurveys@aol.com

THE OPINION CENTER
THE BOULEVARD MALL

Largest Las Vegas Mall

150 Stores, 4 Major Dept. Stores
1.2 million sq. ft.

3680 S. Maryland Pkwy. Suite 201
Las Vegas, NV 89109

Las Vegas Surveys Inc

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Nashua/Manchester

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

New Jersey

Northern New Jersey

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

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

Consumer Pulse of New York
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, Director
Income: H-50% M-35% L-15%
Stations: 13 C K P O

Consumer Reaction Research
Focus World International, Inc.
Brunswick Square Mall
Rte. 18
East Brunswick, NJ
Ph. 732-946-0100
Fax 732-946-0107
E-mail: focusworld@att.net
www.focusworldint.com
Gary Eichenholtz, CEO/CFO
Income: H-50% M-40% L-10%
Stations: 8 C K P

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

Cunningham Field & Research Service
Raceway Mall
3710 Rte. 9, Suite 238A
Freehold, NJ 07728
Ph. 904-677-5644
Fax 904-677-5534
E-mail: FREE@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-50% M-40% L-10%
Stations: 6 C K P O
(See advertisement on p. 101)

Ebony Marketing Research, Inc.
Newport Shopping Mall
30 Mall Dr. W.
Jersey City, NJ 07310
Ph. 718-217-0842
Fax 718-320-3996
E-mail: emr@interport.net
www.ebonymktg.com
Income: H-10% M-90% L-0%
Stations: 8 C P O

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

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

Quick Test/Heakin
Woodbridge Center
195 Woodbridge Center Dr., Suite 195
Woodbridge, NJ 07095
Ph. 732-326-9779
Fax 732-326-9646
E-mail: info@quicktest.com
www.quicktest.com
Shannon Braun, Manager
Income: H-45% M-35% L-20%
Stations: 12 C K P O
(See advertisement on p. 103)

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

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

Southern New Jersey
(See Philadelphia, PA)

New Mexico

Albuquerque

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

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

Santa Fe

Quick Test/Heakin
Villa Linda Mall
1124 Villa Linda Mall
Santa Fe, NM 87505
Ph. 505-471-1699
Fax 505-438-3846
E-mail: info@quicktest.com
www.quicktest.com
Leah Leyendecker, Manager
Income: H-20% M-50% L-30%
Stations: 7 C K P O
(See advertisement on p. 103)

New York

Albany

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

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

Quick Test/Heakin
Crossgates Mall
1 Crossgates Mall Rd.
Albany, NY 12203
Ph. 518-456-8641
Fax 518-456-8642
E-mail: info@quicktest.com
www.quicktest.com
Pat Figler, Manager
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 103)

J.L. Whalen Markette Research, Inc.
22 Clifton Country Rd., Suite 224
Clifton Park, NY 12065
Ph. 518-383-1661
Fax 518-371-0791
E-mail: markette@worldnet.att.net
Income: H-60% M-30% L-10%
Stations: 6 C K P O

Buffalo

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

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

Buffalo Survey & Research, Inc.
McKinley Mall
McKinley Pkwy. & Milestrip Rd.
Buffalo, NY 14219
Ph. 716-845-6262
Fax 716-834-6499
E-mail: buffalosur@aol.com
David Levin, Vice President
Income: H-15% M-75% L-10%
Stations: 8 C K P O

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

Opinions, Ltd.
Chautauqua Mall
318 E. Fairmount Ave., Suite 404
Lakewood, NY 14750
Ph. 440-893-0300
Fax 716-763-9278
E-mail: mark@whereopinionscount.com
www.whereopinionscount.com
Mark Kikel, Owner
Income: H-25% M-50% L-25%
Stations: 7 C K

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

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

New York City

(See also Northern New Jersey)

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

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

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

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

Ebony Marketing Research, Inc.
173-14 Warwick Crescent
Jamaica, NY 11432
Ph. 718-526-3204
Fax 718-526-3312
E-mail: ebonymktg@yahoo.com
www.ebonymktg.com
Income: H-0% M-55% L-45%
Stations: 6 C K

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

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

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

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

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

Quick Test/Heakin
Kings Plaza Mall
5422 Kings Plaza
Brooklyn, NY 11234
Ph. 718-338-3388
Fax 718-692-4365
E-mail: info@quicktest.com
www.quicktest.com
Kelly Devlin, Manager
Income: H-20% M-45% L-35%
Stations: 15 C K P
(See advertisement on p. 103)

Quick Test/Heakin
Sunrise Mall
855 Sunrise Mall
Massapequa, NY 11758
Ph. 516-541-5100
Fax 516-541-1099
E-mail: info@quicktest.com
www.quicktest.com
Sue Savin, Manager
Income: H-15% M-80% L-5%
Stations: 12 C K P O
(See advertisement on p. 103)

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

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

Poughkeepsie

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Rochester

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

Car-Lene Research, Inc.
Irondequoit Mall
54 Irondequoit Dr.
Rochester, NY 14622
Ph. 716-342-7630
Fax 716-342-9047
E-mail: rochiron@carleneresearch.com
www.carleneresearch.com
Helen Elliot, Manager
Income: H-33% M-39% L-28%
Stations: 3 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Market Place Mall
301- Miracle Mile Dr.
Rochester, NY 14623
Ph. 716-424-3203
Fax 716-292-0523
E-mail: rochmarket@carleneresearch.com
www.carleneresearch.com
Barbi White, Manager
Income: H-32% M-37% L-31%
Stations: 6 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Eastview Mall
602 Eastview Mall
Victor, NY 14564
Ph. 904-677-5644
Fax 904-677-5534
E-mail: ROCH@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-35% M-45% L-20%
Stations: 5 C K P O
(See advertisement on p. 101)

Syracuse

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

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

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

North Carolina

Asheville

Cunningham Field & Research Service
Ashville Mall
3 S. Tunnel Rd., Suite L-34
Ashville, NC 28805
Ph. 904-677-5644
Fax 904-677-5534
E-mail: ASHE@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-50% L-30%
Stations: 6 C K P
(See advertisement on p. 101)

South East Market Research
800 Brevard Rd., Suite 516
Asheville, NC 28806
Ph. 865-546-7678
Fax 865-546-7684
E-mail: v.philips@bellsouth.net
Vicki Phillips, Owner
Income: H-40% M-30% L-30%
Stations: 6 C K P

Charlotte

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

Consumer Pulse of Charlotte
Eastland Mall
5625 Central Ave.
Charlotte, NC 28212
Ph. 704-536-6067 or 800-336-0159
Fax 704-536-2238
E-mail: charlotte@consumerpulse.com
www.consumerpulse.com
Daniel Bashaw, Manager
Income: H-20% M-60% L-20%
Stations: 7 C K P O

Cunningham Field & Research Service
Carolina Place
11025 Carolina Place Pkwy., Suite D32A
Pineville, NC 28134
Ph. 904-677-5644
Fax 904-677-5534
E-mail: chap@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-45% M-35% L-20%
Stations: 5 C K P O
(See advertisement on p. 101)

Cunningham Field & Research Service
Eastridge Mall
246 N. New Hope Rd., Suite E-120
Gastonia, NC 28054
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CHAR@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-10%
Stations: 6 C K P O
(See advertisement on p. 101)

Greensboro/ Winston-Salem

Car-Lene Research, Inc.
Oak Hollow Mall
921 E. Chester Dr., Hwy. 68, #1130
High Point, NC 27262
Ph. 336-882-0992
Fax 336-882-0999
E-mail: highpoint@carleneresearch.com
www.carleneresearch.com
Lee Pietryk, Manager
Income: H-25% M-50% L-25%
Stations: 4 C K P O
(See advertisement on p. 107)

Homer Market Research Associates, Inc.
333 Four Seasons Town Centre
Greensboro, NC 27407
Ph. 336-294-9415
Fax 336-294-6116
E-mail: homermktresearch@msn.com
www.homer-research.com
Jan Homer, Exec. Vice President
Income: H-25% M-45% L-30%
Stations: 10 C K P O

W.H. Long Marketing, Inc.
Golden Gate Shopping Center
2250 Golden Gate Dr.
Greensboro, NC 27408
Ph. 336-292-4146
Fax 336-299-6165
John Voss, Vice President
Income: H-33% M-34% L-33%
Stations: 8 C K P O

Raleigh/Durham

Cunningham Field & Research Service
Cary Towne Center
1105 Walnut St., Suite E103A
Cary, NC 27511
Ph. 904-677-5644
Fax 904-677-5534
E-mail: RALE@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 6 C K P O
(See advertisement on p. 101)

Ohio

Akron

Cunningham Field & Research Service
Chapel Hill Mall
2000 Brittain Rd., Suite 465
Akron, OH 44310
Ph. 904-677-5644
Fax 904-677-5534
E-mail: AKRO@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-70% L-10%
Stations: 6 C K P O
(See advertisement on p. 101)

Quick Test/Heakin
Rolling Acres Mall
2400 Romig Rd.
Akron, OH 44320
Ph. 330-745-8883
Fax 330-745-7881
E-mail: info@quicktest.com
www.quicktest.com
Debbie Moore, Manager
Income: H-10% M-70% L-20%
Stations: 6 C K
(See advertisement on p. 103)

Cincinnati

B & B Research Services, Inc.
Eastgate Mall
4601 Eastgate Ave.
Cincinnati, OH 45245
Ph. 513-753-4111
Fax 513-753-6194
E-mail: bbresearchserv@aol.com
Jim Moler, Project Director
Income: H-20% M-60% L-20%
Stations: 8 C K P O

Car-Lene Research, Inc.
Forest Fair Mall
514 Forest Fair Dr., Space #2042
Cincinnati, OH 45240
Ph. 513-671-0696
Fax 513-671-1851
E-mail: info@carleneresearch.com
www.carleneresearch.com
Kelly Scharding, Manager
Income: H-36% M-48% L-16%
Stations: 5 C K P O
(See advertisement on p. 107)

Consumer Pulse of Cincinnati
Northgate Mall
9663A Colerain Ave.
Cincinnati, OH 45251
Ph. 513-385-8228 or 800-336-0159
Fax 513-385-2140
E-mail: cincinnati@consumerpulse.com
www.consumerpulse.com
Phil Brantley, Director
Income: H-30% M-50% L-20%
Stations: 8 C K P

Cunningham Field & Research Service
Tri County Mall
11700 Princeton Rd., Suite E-207
Cincinnati, OH 45246
Ph. 904-677-5644
Fax 904-677-5534
E-mail: CINC@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 5 C K P
(See advertisement on p. 101)

Quick Test/Heakin
Florence Mall
1150 Florence Mall
Florence, KY 41042
Ph. 859-282-1333
Fax 859-282-6333
E-mail: info@quicktest.com
www.quicktest.com
Anita Noel, Manager
Income: H-30% M-40% L-30%
Stations: NA K P O
(See advertisement on p. 103)

Cleveland

Car-Lene Research, Inc.
Great Northern Mall
924 Great Northern Mall
North Olmsted, OH 44070
Ph. 440-979-0200
Fax 440-979-1163
E-mail: cleveland@carleneresearch.com
www.carleneresearch.com
Christine Readence, Manager
Income: H-32% M-31% L-37%
Stations: 5 C K P O
(See advertisement on p. 107)

OPINIONation
4301 Ridge Rd.
Cleveland, OH 44144
Ph. 216-351-4644
Fax 216-351-7876
E-mail: OPINION@ix.netcom.com
www.opinionation.com
Eric Silver, Operations Manager
Income: H-20% M-70% L-10%
Stations: 8 C K P

Opinions, Ltd.
Sandusky Mall
4314 Milan Rd., #340
Sandusky, OH 44870
Ph. 440-893-0300
Fax 419-626-4798
E-mail: info@whereopinionscount.com
www.whereopinionscount.com
Mark Kikel, Owner
Income: H-17% M-62% L-21%
Stations: 7 C

Questions, Inc.
Great Lakes Mall
7850 Mentor Rd.
Mentor, OH 44060
Ph. 440-255-9940
Fax 440-974-0001
E-mail: wiscoron@aol.com
Ron Weingarten, President
Income: H-20% M-60% L-20%
Stations: 7 C K

Quick Test/Heakin
Richmond Town Square
691 Richmond Rd.
Richmond Heights, OH 44143
Ph. 440-473-1000
Fax 440-442-1205
E-mail: info@quicktest.com
www.quicktest.com
Cheryl Ripley, Manager
Income: H-28% M-52% L-20%
Stations: 10 C K P O
(See advertisement on p. 103)

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Columbus

T.I.M.E. Market Research
745 Indian Mound Mall
771 S. 30th St.
Heath, OH 43056
Ph. 740-788-8808
Fax 740-788-8809
E-mail: timesub@infinet.com
Shawn Bishop, Manager
Income: H-10% M-60% L-30%
Stations: 10 C K P O

Toledo

Barbara Nolan Market Research
Franklin Park Mall
5001 Monroe St., Suite 2005
Toledo, OH 43623
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR167@attglobal.net
Income: H-25% M-50% L-25%
Stations: 6 C K P O

Youngstown

McCarthy Associates
Eastwood Mall
Unit #911
Niles, OH 44446
Ph. 315-431-0660
Fax 315-431-0672
E-mail: mccarthyfield@cs.com
Income: H-3% M-50% L-20%
Stations: 6 C K P

Opinions, Ltd.
Southern Park Mall
7401 Market St., #869
Boardman, OH 44512
Ph. 440-893-0300
Fax 330-965-1192
E-mail: info@whereopinionscount.com
www.whereopinionscount.com
Mark Kikel, Owner
Income: H-24% M-57% L-19%
Stations: 10 C K P

Oklahoma

Oklahoma City

C & C Market Research, Inc.
Central Mall
200 "C" Ave., #109
Lawton, OK 73501
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-35% M-55% L-10%
Stations: 8 C K P O

Quick Test/Heakin
Cross Roads Mall
1153 Cross Roads Mall
Oklahoma City, OK 73149
Ph. 405-631-9738
Fax 405-632-0750
E-mail: info@quicktest.com
www.quicktest.com
Pat Johnson, Manager
Income: H-4% M-25% L-61%
Stations: 6 C K P O
(See advertisement on p. 103)

Tulsa

C & C Market Research, Inc.
Arrowhead Mall
501 N. Main St., Suite 75
Muskogee, OK 74401
Ph. 501-785-5637
Fax 501-785-5637
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-40% M-45% L-15%
Stations: 9 C K P O

Cunningham Field & Research Service
Promenade Mall
4107 S. Yale, Suite LA 107
Tulsa, OK 74135
Ph. 904-677-5644
Fax 904-677-5534
E-mail: TULP@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 6 C K P O
(See advertisement on p. 101)

Oregon

Eugene

Quick Test/Heakin
Gateway Mall
3000 Gateway St., #502
Springfield, OR 97477
Ph. 541-747-1333
Fax 541-747-1334
E-mail: info@quicktest.com
www.quicktest.com
Lori Kempton, Manager
Income: NA
Stations: NA
(See advertisement on p. 103)

Portland

Consumer Opinion Services, Inc.
1206 Jantzen Beach Center
Portland, OR 97217
Ph. 503-240-8159 or 206-241-6050 for bids
Fax 503-240-8161
E-mail: info@cosvc.com
www.cosvc.com
Kelly Ross, Manager
Income: H-5% M-50% L-45%
Stations: 8 C K P
(See advertisement on p. 129)

Consumer Opinion Services, Inc.
991 Lloyd Center
Portland, OR 97232
Ph. 503-281-1278 or 206-241-6050 for bids
Fax 503-281-1017
E-mail: alicia@portlandopinion.com
www.cosvc.com
Alicia Olson, Manager
Income: H-15% M-55% L-30%
Stations: 9 C K P O
(See advertisement on p. 129)

Consumer Pulse of Portland
Clackamas Town Center
12000 S.E. 82nd Ave.
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, Manager
Income: H-25% M-55% L-20%
Stations: 8 C K P

Cunningham Field & Research Service
Lloyd Center
2201 Lloyd Center, Suite B110A
Portland, OR 97232
Ph. 386-677-5644
Fax 386-677-5534
www.cunninghamresearch.com
Income: NA
Stations: 4 C K P O
(See advertisement on p. 101)

Pennsylvania

Erie

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

Philadelphia/ Southern New Jersey

Car-Lene Research, Inc.
Echelon Mall
2070 Echelon Mall, Suite 245
Voorhees, NJ 08043-1903
Ph. 856-772-2411
Fax 856-772-2421
E-mail: phile@carleneresearch.com
www.carleneresearch.com
Helen Dobkin, Manager
Income: H-40% M-50% L-10%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Franklin Mills Mall
1749 Franklin Mills Circle, #159
Philadelphia, PA 19154
Ph. 215-612-8005
Fax 215-612-8006
E-mail: philf@carleneresearch.com
www.carleneresearch.com
Mickey Kiely, Manager
Income: H-25% M-65% L-10%
Stations: 5 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Oxford Valley Mall
2300 E. Lincoln Hwy, #108
Langhorne, PA 19047
Ph. 215-750-7202
Fax 215-750-9622
E-mail: philo@carleneresearch.com
www.carleneresearch.com
Joshua Stillman, Manager
Income: H-23% M-65% L-12%
Stations: 7 C K P O
(See advertisement on p. 107)

Consumer Pulse of Philadelphia
One Plymouth Meeting Office Center & Plymouth Meeting Mall, #2145
Plymouth Meeting, PA 19462
Ph. 610-825-6636 or 800-336-0159
Fax 610-825-6805
E-mail: philadelphia@consumerpulse.com
www.consumerpulse.com
Eleanor Yates, Director
Income: H-20% M-60% L-20%
Stations: 15 C K P O

Cunningham Field & Research Service
Deptford Mall
1750 Deptford Center Rd., #2D-06
Deptford, NJ 08096
Ph. 904-677-5644
Fax 904-677-5534
E-mail: PHIL@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-35% M-40% L-25%
Stations: 6 C K P O
(See advertisement on p. 101)

JRA, J. Reckner Associates, Inc.
Philadelphia - Mall
Montgomery Mall, Store 152
North Wales, PA 19454-3909
Ph. 215-362-1060
Fax 215-362-7569
E-mail: akeeley@reckner.com
www.reckner.com
Alice Keeley, Manager
Income: H-48% M-28% L-24%
Stations: 15 C K P O
(See advertisement on p. 123)

JRP Marketing Research Services
279 Granite Run Mall
Media, PA 19063
Ph. 610-565-7821
Fax 610-565-4403
E-mail: jrpmark@jrpmr.com
www.jrpmr.com
Kathleen McCarty, V.P. Field Svcs.
Income: H-30% M-40% L-30%
Stations: 10 C K P O
(See advertisement on p. 39)

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

Quick Test/Heakin
Cherry Hill Mall
Rte. 38 & Haddonfield Rd.
Cherry Hill, NJ 08002
Ph. 856-910-1000
Fax 856-910-1010
E-mail: info@quicktest.com
www.quicktest.com
Tammy Stevens, Manager
Income: H-35% M-39% L-26%
Stations: 10 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Neshaminy Mall
109 Neshaminy Mall
Bensalem, PA 19020
Ph. 215-322-0400
Fax 215-322-5412
E-mail: info@quicktest.com
www.quicktest.com
Charna Mandell, Manager
Income: H-5% M-80% L-15%
Stations: 11 C K P O
(See advertisement on p. 103)

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Pittsburgh

Car-Lene Research, Inc.
Monroeville Mall, Rm. 144
Monroeville, PA 15146
Ph. 412-373-3670
Fax 412-373-5076
E-mail: pittsburg@carleneresearch.com
www.carleneresearch.com
Kathleen Hanlin, Manager
Income: H-15% M-45% L-40%
Stations: 7 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
South Hills Village
301 S. Hills Village, Space #1380B
Pittsburgh, PA 15241
Ph. 412-854-0622
Fax 412-854-0626
E-mail: pittsburghs@carleneresearch.com
www.carleneresearch.com
Income: H-60% M-30% L-10%
Stations: 6 C K P O
(See advertisement on p. 107)

Data Information, Inc.
Century III Mall
3075 Clairton Blvd., Suite 934
Pittsburgh, PA 15123
Ph. 412-655-8690
Fax 412-655-8693
E-mail: datainfo@nauticom.net
Diane Palyo-Foster, V.P., Mgr. of Operations
Income: H-40% M-49% L-11%
Stations: 11 C K P O

Noble Interviewing Service, Inc.
North Hills Village Mall
4801 McKnight Rd.
Pittsburgh, PA 15237
Ph. 412-343-6455
Fax 412-343-3288
Income: H-30% M-40% L-30%
Stations: 6 K P O

Quick Test/Heakin
Ross Park Mall
1000 Ross Park Mall Rd., Suite 115
Pittsburgh, PA 15237
Ph. 412-369-4545
Fax 412-369-4473
E-mail: info@quicktest.com
www.quicktest.com
Mary Zandier, Manager
Income: H-40% M-48% L-12%
Stations: 13 C K P O
(See advertisement on p. 103)

Rhode Island

Providence

Performance Plus
Providence Place Mall
80 Providence Place
Providence, RI 02903
Ph. 508-872-1287
Fax 508-879-7108
E-mail: info@performanceplusboston.com
www.performanceplusboston.com
Shirley Shames, President
Income: H-40% M-40% L-20%
Stations: 8 C K P O

South Carolina

Charleston

Quick Test/Heakin
Northwoods Mall
E1B Northwoods Mall
2150 Northwoods Blvd.
North Charleston, SC 29406
Ph. 843-553-0030
Fax 843-553-0526
E-mail: info@quicktest.com
www.quicktest.com
Judy Hart, Manager
Income: H-5% M-80% L-15%
Stations: 7 C K P O
(See advertisement on p. 103)

Spartanburg/Greenville

C & C Market Research, Inc.
205 W. Blackstock Rd., #290
Spartanburg, SC 29301
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-50% M-40% L-10%
Stations: 7 C K P O

Tennessee

Knoxville

South East Market Research
3001 Knoxville Center Dr., Suite 2169
Knoxville, TN 37924
Ph. 865-546-7678
Fax 865-546-7684
E-mail: v.philips@bellsouth.net
Vicki Phillips, Director
Income: H-30% M-40% L-30%
Stations: 6 C K P O

Memphis

Friedman Marketing Services
Consumer Opinion Center
4435 Mall of Memphis
Ste. 1, Space P-231
Memphis, TN 38118
Ph. 901-368-5449 or 914-698-9591
Fax 901-368-1390
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Rosemarie O'Sullivam
Income: H-25% M-50% L-25%
Stations: 6 C K P O
(See advertisement on p. 119)

Friedman Marketing Services
Consumer Opinion Center
Raleigh Springs Mall
3423 Raleigh Springs Mall
Memphis, TN 38128
Ph. 901-382-9970 or 914-698-9591
Fax 901-382-9929
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Denise Raupp
Income: H-40% M-40% L-20%
Stations: 10 C K O
(See advertisement on p. 119)

Quick Test/Heakin
6080 Hickory Ridge Mall, Suite 215
Memphis, TN 38115
Ph. 901-360-0400
Fax 901-360-8213
E-mail: info@quicktest.com
www.quicktest.com
Sylvia Sargent, Manager
Income: H-35% M-44% L-21%
Stations: 8 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Wolfchase Galleria
2760 N. Germantown Pkwy., Suite 102
Memphis, TN 38133
Ph. 901-381-4811
Fax 901-381-4138
E-mail: info@quicktest.com
www.quicktest.com
Katy Hagen, Manager
Income: H-61% M-30% L-9%
Stations: 8 C K P O
(See advertisement on p. 103)

Nashville

Car-Lene Research, Inc.
Bellevue Center
7620 Hwy. 70 S., #257a
Nashville, TN 37221
Ph. 615-646-7044
Fax 615-646-7062
E-mail: nashvilleb@carleneresearch.com
www.carleneresearch.com
Bobby Gajewsky, Manager
Income: H-47% M-34% L-19%
Stations: 5 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Stones River Mall
1720 Old Fort Parkway
Murfreesboro, TN 37129
Ph. 615-907-0037
Fax 615-907-0039
E-mail: nashville@carleneresearch.com
www.carleneresearch.com
Toni White, Manager
Income: H-30% M-45% L-25%
Stations: 5 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Cool Springs Galleria
1800 Galleria Blvd., Suite 1320
Franklin, TN 37064
Ph. 904-677-5644
Fax 904-677-5534
E-mail: NASH@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-80% L-0%
Stations: 3 C K P O
(See advertisement on p. 101)

Gore/Knauff Research LLC
Governor Square Mall
Clarksville, TN 37040
Ph. 812-485-2160
Fax 812-485-2164
E-mail: clarksvillemall@goreknauffresearch.com
Jim Knauff, Owner
Income: H-25% M-55% L-20%
Stations: 7 C P

Quick Test/Heakin
Hickory Hollow Mall
1123 Hickory Hollow Mall
Antioch, TN 37013
Ph. 615-731-0900
Fax 615-731-2022
E-mail: info@quicktest.com
www.quicktest.com
Kay Alexander, Manager
Income: H-25% M-60% L-15%
Stations: 7 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Rivergate Mall
1000 Rivergate Pkwy., Suite A10
Goodlettsville, TN 37072
Ph. 615-859-4484
Fax 615-851-0717
E-mail: info@quicktest.com
www.quicktest.com
Marilyn Sixton, Manager
Income: H-20% M-50% L-30%
Stations: 7 C K P O
(See advertisement on p. 103)

Texas

Austin

Barbara Nolan Market Research
Lakeline Mall
11200 Lakeline Mall Dr., Space J-1
Cedar Park, TX 78613
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR151@attglobal.net
Income: H-25% M-50% L-25%
Stations: 6 C K P O

Quick Test/Heakin
Barton Creek Square
2901 Capital of Texas Hwy., P-9
Austin, TX 78746
Ph. 512-327-8787
Fax 512-327-7460
E-mail: info@quicktest.com
www.quicktest.com
George De La Rosa, Manager
Income: H-20% M-40% L-40%
Stations: 10 C K P O
(See advertisement on p. 103)

Corpus Christi

Quick Test/Heakin
Sunrise Mall
5858 S. Padre Island Dr., Suite 37C
Corpus Christi, TX 78412
Ph. 361-993-6200
Fax 361-991-7380
E-mail: info@quicktest.com
www.quicktest.com
Lorna Turner, Manager
Income: H-20% M-50% L-30%
Stations: 6 C K P O
(See advertisement on p. 103)

Dallas/Ft. Worth

C & C Market Research, Inc.
Valley View Mall
13331 Preston Rd., #1073
Dallas, TX 75240
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-50% M-40% L-10%
Stations: 6 C K P O

Car-Lene Research, Inc.
Collin Creek Mall
811 N. Central Expwy., Suite 2245
Plano, TX 75075
Ph. 972-424-8587
Fax 972-424-7467
E-mail: dallascc@carleneresearch.com
www.carleneresearch.com
Mona Hinton, Manager
Income: H-60% M-30% L-10%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Grapevine Mills Mall
3000 Grapevine Mills Pkwy., Suite 208
Grapevine, TX 76051
Ph. 972-724-6816
Fax 972-724-6819
E-mail: dallasg@carleneresearch.com
www.carleneresearch.com
Debbie Middleton, Manager
Income: H-53% M-35% L-12%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
North Hills Mall
7624 Grapevine Hwy. N., Suite 728
North Richland Hills, TX 76180
Ph. 817-595-3737
Fax 817-595-1988
E-mail: dallasn@carleneresearch.com
www.carleneresearch.com
Sharon White, Manager
Income: H-57% M-31% L-12%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Richardson Square Mall
501 S. Plano Rd.
Richardson, TX 75081
Ph. 972-783-1935
Fax 972-680-3652
E-mail: dallasr@carleneresearch.com
www.carleneresearch.com
Ruba Jamaluddin, Manager
Income: H-50% M-35% L-15%
Stations: 5 C K P O
(See advertisement on p. 107)

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Car-Lene Research, Inc.
Six Flags Mall
2911 E. Division, #409A
Arlington, TX 76011
Ph. 817-633-6020
Fax 817-633-4460
E-mail: dallasa@carleneresearch.com
www.carleneresearch.com
Patricia Palmer, Manager
Income: H-25% M-55% L-20%
Stations: 6 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Stonebriar Center
2601 Preston Rd., Suite 2112
Frisco, TX 75034
Ph. 904-677-5644
Fax 904-677-5534
E-mail: DALL@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 6 C K P O
(See advertisement on p. 101)

Quick Test/Heakin
5005 Northeast Mall
1101 Melbourne Rd.
Hurst, TX 76053
Ph. 817-595-4195
Fax 817-595-2860
E-mail: info@quicktest.com
www.quicktest.com
Melodie Henderson, Manager
Income: H-55% M-25% L-20%
Stations: 12 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Hulen Mall
4800 S. Hulen, #101
Fort Worth, TX 76132
Ph. 817-263-2900
Fax 817-263-1195
E-mail: info@quicktest.com
www.quicktest.com
Scott Eady, Manager
Income: H-30% M-45% L-25%
Stations: 12 C
(See advertisement on p. 103)

Quick Test/Heakin
Irving Mall
3680 Irving Mall
Irving, TX 75062
Ph. 972-594-8573
Fax 972-257-0487
E-mail: info@quicktest.com
www.quicktest.com
Erika Hough, Manager
Income: NA
Stations: NA
(See advertisement on p. 103)

Quick Test/Heakin
Vista Ridge Mall
2401 S. Stemmons Fwy., Suite 1008
Lewisville, TX 75067
Ph. 972-315-3555
Fax 972-315-8926
E-mail: info@quicktest.com
www.quicktest.com
Rachel Armstrong, Manager
Income: H-46% M-41% L-13%
Stations: 10 C K P O
(See advertisement on p. 103)

Savitz Field and Focus
The Parks at Arlington Mall
3811 S. Cooper, Suite 2053
Arlington, TX 76015
Ph. 817-467-6437
Fax 817-467-6552
E-mail: information@savitzfieldandfocus.com
www.savitzfieldandfocus.com
Barbara Brodie, Manager
Income: H-35% M-45% L-20%
Stations: 14 C K P O

Houston

C & C Market Research, Inc.
Central Mall
3100 Hwy. 365, #182
Port Arthur, TX 77642
Ph. 501-785-5637
Fax 501-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-40% M-50% L-10%
Stations: 7 C K P O

Car-Lene Research, Inc.
Katy Mills Mall
5000 Katy Mills Circle, Suite 667
Katy, TX 77494
Ph. 281-644-6100
Fax 281-644-6104
E-mail: houstonk@carleneresearch.com
www.carleneresearch.com
Cheryl Sempe, Manager
Income: H-49% M-28% L-23%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Northwest Mall
307 Northwest Mall
Houston, TX 77092
Ph. 713-686-5557
Fax 713-686-5584
E-mail: houston@carleneresearch.com
www.carleneresearch.com
Athena Sempe, Manager
Income: H-35% M-30% L-35%
Stations: 6 C K P O
(See advertisement on p. 107)

Creative Consumer Research
Deerbrook Mall, #1122
20131 Hwy. 59
Humble, TX 77338
Ph. 281-446-9730
Fax 281-446-6649
E-mail: ccrhous@insyn.net
Patricia Pratt, Field Director
Income: H-30% M-39% L-31%
Stations: 10 C K P O
(See advertisement on p.127)

Creative Consumer Research
First Colony Mall
16535 S.W. Frwy., Suite 560
Sugarland, TX 77479
Ph. 281-277-7778
Fax 281-277-7779
E-mail: ccrhous@insyn.net
Patricia Pratt, Field Director
Income: H-50% M-38% L-12%
Stations: 8 C K P O
(See advertisement on p. 127)

Creative Consumer Research
Northline Mall
113 Northline Mall
Houston, TX 77022
Ph. 281-240-9646
Fax 281-240-3497
E-mail: ccrhous@insyn.net
Patricia Pratt, Field Director
Income: H-10% M-31% L-59%
Stations: 6 C P
(See advertisement on p. 127)

Cunningham Field & Research Service
The Woodlands Mall
1201 Lake Woodlands Dr., Suite 1104
The Woodlands, TX 77380
Ph. 904-677-5644
Fax 904-677-5534
E-mail: HOUS@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 4 C K P O
(See advertisement on p. 101)

Gulf State Research Center
1670 San Jacinto Mall
Baytown, TX 77521-8361
Ph. 800-357-8842 or 281-421-7798
Fax 281-421-1976
E-mail: gulfstatefla@aol.com
Tim Villar, Vice President
Income: H-36% M-47% L-17%
Stations: 6 C K P O

CODES

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

Stations - number of interviewing stations

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

NA - information not available

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
Tiffanie Seymour, Office Manager
Income: H-50% M-30% L-20%
Stations: 5 C K P O

Quick Test/Heakin
247 Greenspoint Shopping Mall
Houston, TX 77060
Ph. 281-872-4165
Fax 281-872-7024
E-mail: info@quicktest.com
www.quicktest.com
Lori Pugh, Manager
Income: H-27% M-50% L-23%
Stations: 12 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
Galleria II
5085 Westheimer, Suite 3897
Houston, TX 77056
Ph. 713-871-8542
Fax 713-871-8549
E-mail: info@quicktest.com
www.quicktest.com
Keith Brock, Manager
Income: H-37% M-51% L-12%
Stations: 12 C K P O
(See advertisement on p. 103)

Quick Test/Heakin
West Oaks Mall, Suite 547
1000 W. Oaks Blvd.
Houston, TX 77082
Ph. 281-531-5959
Fax 281-531-6233
E-mail: info@quicktest.com
www.quicktest.com
Linda Hunter, Manager
Income: H-40% M-35% L-25%
Stations: 12 C K P O
(See advertisement on p. 103)

San Antonio

Car-Lene Research, Inc.
North Star Mall
7400 San Pedro, #2060
San Antonio, TX 78216
Ph. 210-340-3595
Fax 210-340-3559
E-mail: sanantonio@carleneresearch.com
www.carleneresearch.com
Aaron Hinton, Manager
Income: H-40% M-41% L-19%
Stations: 8 C K P O
(See advertisement on p. 107)

Creative Consumer Research
McCreeless Mall
South Cross & I-37
San Antonio, TX 78223
Ph. 210-531-9345
Fax 210-673-0094
E-mail: ccrsan@aol.com
Amalia Pena, Project Supervisor
Income: H-10% M-65% L-25%
Stations: 7 C P
(See advertisement on p. 127)

Creative Consumer Research
Westlakes Mall
Marbach Rd. at 410
San Antonio, TX 78227
Ph. 210-673-0802
Fax 210-673-0094
E-mail: ccrsan@aol.com
Amalia Pena, Manager
Income: H-10% M-52% L-38%
Stations: 6 C K
(See advertisement on p. 127)

Cunningham Field & Research Service
Rivercenter Mall
849 E. Commerce St., #403
San Antonio, TX 78205
Ph. 904-677-5644
Fax 904-677-5534
E-mail: sant@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-65% L-15%
Stations: 4 C K
(See advertisement on p. 101)

Friedman Marketing Services
Consumer Opinion Center
Rolling Oaks Mall
6909 Loop 1604 E., Suite 1112
San Antonio, TX 78247
Ph. 210-651-6971 or 914-698-9591
Fax 210-651-5777
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Yvonne Brockman
Income: H-25% M-50% L-25%
Stations: 7 C K
(See advertisement on p. 119)

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

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

Utah

Salt Lake City

Consumer Opinion Services, Inc.
1120 Newgate Mall
Ogden, UT 84405
Ph. 801-778-0380 or 206-241-6050 for bids
Fax 801-778-0383
E-mail: cosogden@sisna.com
www.cosvc.com
Willard Hill, Manager
Income: H-10% M-65% L-25%
Stations: 9 C K P
(See advertisement on p. 129)

Cunningham Field & Research Service
South Towne Center
10450 S. State St., Suite 1331
Sandy, UT 84070
Ph. 904-677-5644
Fax 904-677-5534
E-mail: SALT@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-10% M-80% L-10%
Stations: 4 C K P O
(See advertisement on p. 101)

Utah Market Research Services
Div. of Ruth Nelson Research
Crossroads Plaza Mall
50 S. Main St.
Salt Lake City, UT 84144-0103
Ph. 801-363-8726
Fax 801-321-4904
E-mail: umrs@worldnet.att.net
www.ruthnelsonresearchsvcs.com
Berdene Atkin, Manager
Income: H-40% M-40% L-20%
Stations: 4 C P

Washington

Everett

Consumer Opinion Services, Inc.
Everett Mall
1402 S.E. Everett Mall Way
Everett, WA 98208
Ph. 425-347-2424 or 206-241-6050 for bids
Fax 425-290-8433
E-mail: cosevt@msn.com
www.cosvc.com
Maureen Barbee, Manager
Income: H-10% M-65% L-25%
Stations: 10 C K P
(See advertisement on p. 129)

Kelso

Consumer Opinion Services, Inc.
Three Rivers Mall
351 Three Rivers Dr.
Kelso, WA 98626
Ph. 360-425-8815 or 206-241-6050 for bids
Fax 360-425-3143
E-mail: cos3rivers1@msn.com
www.cosvc.com
Yvone Pecha & Diana Parsons, Managers
Income: H-10% M-60% L-30%
Stations: 12 C K P O
(See advertisement on p. 129)

Seattle/Tacoma

Car-Lene Research, Inc.
Alderwood Mall
3000 184th St. S.W., #861
Lynnwood, WA 98037
Ph. 425-744-8047
Fax 425-744-7809
E-mail: seattle@carleneresearch.com
www.carleneresearch.com
Jean LeBlanc, Manager
Income: H-44% M-27% L-29%
Stations: 6 C K P O
(See advertisement on p. 107)

Cunningham Field & Research Service
Super Mall of the Great N.W.
1101 Super Mall Way., Suite 1239
Auburn, WA 98001
Ph. 904-677-5644
Fax 904-677-5534
E-mail: SEAT@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-0% M-80% L-20%
Stations: 5 C K P O
(See advertisement on p. 101)

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K - kitchen facilities
P - private display room
O - one-way mirror for viewing of stations

NA - information not available

Friedman Marketing Services
Consumer Opinion Center
South Hill Mall
3500 Meridian South
Puyallup, WA 98373
Ph. 253-840-0112 or 914-698-9591
Fax 253-840-0131
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Ted Hubbard
Income: H-30% M-50% L-20%
Stations: 6 C K P O
(See advertisement on p. 119)

Barbara Nolan Market Research
555 Northgate Mall, Suite 220
Seattle, WA 98125
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR160@attglobal.net
Income: H-25% M-50% L-25%
Stations: 6 C K P O

Quick Test/Heakin
Tacoma Mall Shopping Center
4502 S. Steele St., Suite 927
Tacoma, WA 98409
Ph. 253-474-9980
Fax 253-473-1931
E-mail: info@quicktest.com
www.quicktest.com
Karen Grubish, Manager
Income: H-10% M-40% L-50%
Stations: 7 C K P O
(See advertisement on p. 103)

Spokane

Consumer Opinion Services, Inc.
Northtown Mall
4750 N. Division St., Suite 239
Spokane, WA 99207
Ph. 509-487-6173 or 206-241-6050 for bids
Fax 509-487-7205
E-mail: cosspokane@spocom.com
www.cosvc.com
Linda Levely, Manager
Income: H-9% M-61% L-30%
Stations: 8 C K P O
(See advertisement on p. 129)

Cunningham Field & Research Service
Spokane Valley Mall
14700 E. Indiana, #1188
Spokane, WA 99216
Ph. 904-677-5644
Fax 904-677-5534
E-mail: spok@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-50% L-30%
Stations: 6 C K O
(See advertisement on p. 101)

Vancouver

Consumer Opinion Services, Inc.
Vancouver Mall
8700 N.E. Vancouver Mall Dr.
Vancouver, WA 98662
Ph. 360-254-5650 or 206-241-6050 for bids
Fax 360-254-6588
E-mail: vmopinion@aol.com
www.cosvc.com
Alice Hilby, Manager
Income: H-15% M-45% L-40%
Stations: 7 C K P
(See advertisement on p. 129)

West Virginia

Huntington

McMillion Research Service
Huntington Mall, Unit 290
Rte. 60 at I-64
Barboursville, WV 25501
Ph. 304-733-1643
Fax 304-733-0472
E-mail: mcmillhtm@aol.com
www.mcmillionresearch.com
Mary Burton, Manager
Income: H-33% M-48% L-19%
Stations: 7 C K P O
(See advertisement on p. 131)

Wheeling

T.I.M.E. Market Research
280 Ohio Valley Mall
St. Clairsville, OH 43950
Ph. 740-695-6288
Fax 740-695-5163
E-mail: timothyaspenwall@home.com
Tim Aspenwall, Manager
Income: H-10% M-75% L-15%
Stations: 12 C K P O

Wisconsin

Eau Claire

Friedman Marketing Services
Consumer Opinion Center
Oakwood Mall
4800 Golf Rd., Suite 604
Eau Claire, WI 54701
Ph. 715-836-6580 or 914-698-9591
Fax 715-836-6584
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Julie Ogdon
Income: H-25% M-55% L-20%
Stations: 8 C K P O
(See advertisement on p. 119)

Green Bay/Appleton

Friedman Marketing Services
Consumer Opinion Center
Fox River Mall
4301 W. Wisconsin
Appleton, WI 54915
Ph. 920-730-2240 or 914-698-9591
Fax 920-730-2247
E-mail: gvigeant@roper.com
www.friedmanmktg.com
Dawn Marhefke
Income: H-30% M-55% L-15%
Stations: 11 C K P O
(See advertisement on p. 119)

Milwaukee

Car-Lene Research, Inc.
Bayshore Mall
5900 N. Port Washington Rd., Suite 102
Milwaukee, WI 53217
Ph. 414-962-9926
Fax 414-962-3952
E-mail: milwaukeeb@carleneresearch.com
www.carleneresearch.com
Christine Malone, Manager
Income: H-52% M-30% L-18%
Stations: 6 C K P O
(See advertisement on p. 107)

Car-Lene Research, Inc.
Northridge Mall
7700 W. Brown Deer Rd.
Milwaukee, WI 53223
Ph. 414-357-6611
Fax 414-357-7757
E-mail: milwaukee@carleneresearch.com
www.carleneresearch.com
Christine Malone, Manager
Income: H-31% M-31% L-38%
Stations: 4 C K P O
(See advertisement on p. 107)

Consumer Pulse of Milwaukee
The Grand Avenue Mall, #2004A
275 W. Wisconsin Ave.
Milwaukee, WI 53203
Ph. 414-274-6060 or 800-336-0159
Fax 414-274-6068
E-mail: milwaukee@consumerpulse.com
www.consumerpulse.com
Kelly McGrath, Director
Income: H-20% M-60% L-20%
Stations: 8 C K P O

Quick Test/Heakin
Southridge Mall
5300 S. 76 St., Suite 1325
Greendale, WI 53129
Ph. 414-421-2865
Fax 414-421-2990
E-mail: info@quicktest.com
www.quicktest.com
Linda Kelly, Manager
Income: H-20% M-60% L-20%
Stations: 9 C K O
(See advertisement on p. 103)

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O - one-way mirror for viewing of stations

NA - information not available

Canada

British Columbia

Vancouver

Research House, Inc.
Metrotown Centre
181 - 4800 Kingsway
Burnaby, BC V5H 4J2
Canada
Ph. 604-433-2640
Fax 604-266-1640
E-mail: info@research-house.ca
www.research-house.ca
Tammy Braun, Project Director
Income: H-35% M-50% L-15%
Stations: 5 C K P O

Research House, Inc.
Willowbrook Shopping Centre
19705 Fraser Hwy., Unit 504
Langley, BC V3A 7E9
Canada
Ph. 604-433-2640
Fax 604-433-1640
E-mail: info@research-house.ca
www.research-house.ca
Tammy Braun, Project Director
Income: H-25% M-55% L-20%
Stations: 6 C K P

Ontario

Toronto

Canadian Viewpoint, Inc.
9350 Yonge St., Suite 206
Richmond Hill, ON L4C 5G2
Canada
Ph. 905-770-1770 or 888-770-1770
Fax 905-770-1692
E-mail: info@canview.com
www.canview.com
Alan Boucquey, V.P. Operations
Income: H-25% M-50% L-25%
Stations: 4 C K P O

Canadian Viewpoint, Inc.
Centerpoint Mall
6464 Yonge St., Suite N5
Toronto, ON M2M 3X4
Canada
Ph. 905-770-1770 or 888-770-1770
Fax 905-770-1692
E-mail: info@canview.com
www.canview.com
Alan Boucquey, V.P. Operations
Income: H-30% M-60% L-10%
Stations: 3 C K P O

Canadian Viewpoint, Inc.
Eastgate Mall
75 Centennial Pkwy. N.
Hamilton, ON L85 2P2
Canada
Ph. 905-770-1770
Fax 905-770-1692
E-mail: info@canview.com
www.canview.com
Alan Boucquey, V.P. Operations
Income: H-20% M-70% L-10%
Stations: 4 C P O

Canadian Viewpoint, Inc.
Meadowvale Town Center
6677 Battleford Rd.
Mississauga, ON L5N 3R8
Canada
Ph. 905-770-1770
Fax 905-770-1692
E-mail: info@canview.com
www.canview.com
Alan Boucquey, V.P. Operations
Income: H-20% M-70% L-10%
Stations: 4 C K P O

Canadian Viewpoint, Inc.
Oakville Place Mall
Oakville, ON L6H 3H6
Canada
Ph. 905-770-1770
Fax 905-770-1692
E-mail: info@canview.com
www.canview.com
Alan Boucquey, V.P. Operations
Income: NA
Stations: 4 C K P O

Car-Lene Research, Inc.
(Opening Fall 2003)
Vaughan Mills
Toronto, ON
Canada
Ph. 847-940-2000
E-mail: info@carleneresearch.com
www.carleneresearch.com
Income: NA
Stations: NA C K P O
(See advertisement on p. 107)

Network Research Inc.
Eglinton Square
1 Eglinton Square, Suite 205
Toronto, ON M1L 2K1
Canada
Ph. 905-839-7635 or 877-534-1294
Fax 905-839-6937
E-mail: mail@networkfield.com
www.networkfield.com
Income: NA
Stations: NA C K P O

Research House, Inc.
Don Mills Centre
939 Lawrence Ave. E., Store 65
Toronto, ON M3C 1P8
Canada
Ph. 416-488-2333
Fax 416-488-2391
E-mail: info@research-house.ca
www.research-house.ca
Graham Loughton, V.P. Client Services
Income: H-40% M-50% L-10%
Stations: 5 C K P O

Research House, Inc.
Portage Place
1154 Chemong Rd., Store 50B
Peterborough, ON L5B 2C9
Canada
Ph. 416-488-2333
Fax 416-488-2368
E-mail: info@research-house.ca
www.research-house.ca
Income: H-35% M-50% L-15%
Stations: 3 C K P O

Research House, Inc.
Square One Mall
100 City Centre Dr., Unit 2-242
Mississauga, ON L5B 2C9
Canada
Ph. 416-488-2333
Fax 416-488-2391
E-mail: info@research-house.ca
www.research-house.ca
Graham Loughton, V.P. Client Services
Income: H-20% M-55% L-25%
Stations: 4 C K

Research House, Inc.
Woodbine Centre
500 Rexdale Blvd., Suite F7
Rexdale, ON M9V 6K5
Canada
Ph. 416-488-2333
Fax 416-488-2391
E-mail: info@research-house.ca
www.research-house.ca
Income: H-20% M-60% L-20%
Stations: 4 C K P O

Telepoll Canada Inc.
Bramalea City Centre
25 Peel Centre Dr.
Bramalea, ON
Canada
Ph. 416-977-0608
Fax 416-977-8817
E-mail: john@telepoll.net
www.telepoll.net
Magdelane Stark, General Manager
Income: H-20% M-60% L-20%
Stations: 8 K P O

Quebec

Montreal

Quebec Recherches
Centre Commercial, Le Boulevard
4264 rue Jean-Talon est
Montreal, PQ H1S 1J7
Canada
Ph. 514-725-0306
Fax 514-725-0308
E-mail: info@research-house.ca
www.research-house.ca
Mau Lao, Manager
Income: H-20% M-60% L-20%
Stations: 4 C K P O

Quebec Recherches
Les Promenades St. Bruno
1 Boul des Promenades, Suite L025
St. Bruno, PQ J3V 5J5
Canada
Ph. 514-725-0306
Fax 514-725-0308
E-mail: info@research-house.ca
www.research-house.ca
Mau Lao, Manager
Income: H-55% M-30% L-15%
Stations: 3 C K P O

Quebec City

Network Research Inc.
Carrefour Angrignon
7077 Boulevard Newman La Salle
Quebec, PQ N8N 1X1
Canada
Ph. 905-839-7635 or 877-534-1294
Fax 905-839-6937
E-mail: mail@networkfield.com
www.networkfield.com
Income: NA
Stations: NA C K P O

Mexico

EPI Grupo
Galerias
Melchor Ocampo 193, Local H8B
Mexico City, DF 11300
Mexico
Ph. +52-5-260-0925
Fax +52-5-251-5431
E-mail: info@epigrupo.com
www.epigrupo.com
Ricardo Escobedo, President
Income: H-0% M-35% L-65%
Stations: 8 K P

EPI Grupo
Interlomas
Blvd. Interlomas 5, Local AZ-022
Mexico City, DF 52760
Mexico
Ph. +52-5-291-9294
Fax +52-5-251-5431
E-mail: info@epigrupo.com
www.epigrupo.com
Ricardo Escobedo, President
Income: H-80% M-20% L-0%
Stations: 6 K P

EPI Grupo
Plaza Polanco
Jaime Balmes 11, Local 118
Mexico City, DF 11510
Mexico
Ph. +52-5-395-3237
Fax +52-5-251-5431
E-mail: info@epigrupo.com
www.epigrupo.com
Ricardo Escobedo, President
Income: H-5% M-80% L-15%
Stations: 15 K P O

Classified Ads

Index of Advertisers

Qualitatively Speaking

continued from p. 138

recruiter may notice that all the respondents thus far are within the same age range or ethnic group when this particular demographic was not specified. This issue can be raised and changed if necessary.

In addition, there is time to consult clients when facilities find respondents who meet almost all of the specifications for a difficult recruit. If the facility finds a 19-year-old female, truck-driving UFO-abductee who has one blue eye and one green eye, they have to know — is that okay?

• Convenience issues. We can fulfill more of your clients' preferences, including being more likely to reserve your facility of choice. We can even reserve the most appropriate, comfortable room within the facility. Facilities have time to meet client requests such as having computers in the backroom or purchasing sample items. Rooms in preferred hotels are more likely to be available.

Of course, it is not always possible to have the amount of time you'd like for recruiting. When faced with a shorter than optimal recruiting time frame, keep these ideas in mind to help simplify the recruit so the facility can still find the respondents you want to talk to within the limited time frame.

• Keep specifications to a minimum. Include only those specs that are essential to the project.

• Help the field management staff to keep the screener short and simple. This makes the recruiting phone calls shorter, which gives the recruiter more time to make more calls.

• Allow evening interviews for working people, and avoid either recruiting or fielding over holidays, if possible.

Rush situations can't always be helped, but taking these ideas into account when preparing to do a project can greatly improve the return on the time, money, and energy you spend.

Sales Offices

Headquarters: Evan Tweed, Quirk's Marketing Research Review, 8030 Cedar Avenue South, Suite 229, Minneapolis, MN 55425. Phone 952-854-5101. Fax 952-854-8191. E-Mail: evan@quirks.com.

West Coast: Lane Weiss, Lane Weiss & Associates, 10 Black Log Road, Kentfield, CA, 94904. Phone 415-461-1404. Fax 415-461-9555.

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Qualitatively Speaking

Qualitatively Speaking is a regular column in which a revolving cast of authors offers 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 Quirk's Editor Joe Rydholm at joe@quirks.com.

The spec-time continuum

When recruiting for qualitative research, a little extra time can go a long way

By Kris Filpovich

Editor's note: Kris Filpovich is a field manager at Primary Insights, a Lisle, Ill., research firm, and can be reached at kris@primary-insights.com.

"When do you need approval for this project in order to recruit the number of consumers we want to talk to?"

The answer to this question depends on several factors, including:

• the number of respondents needed;

• the difficulty of the recruit (for example, finding toothbrushing humans is easier than finding 19-year-old truckers);

• the number of facilities and cities involved;

• whether product placement is involved.

For a project with fairly basic specifications, three weeks is the optimal time span between project approval and project fielding. For projects with lower incidence, it is beneficial to allow four or more weeks between approval and fielding. The additional time helps us and the facilities find the respondents you need to make your project the best it can be.

The additional time is used in these ways:

• recruiters have more time to contact more consumers;

• alternative methods of recruiting — including placing advertisements and distributing flyers — can be developed, and consumers have time to notice and respond.

Projects involving product placement can also increase the difficulty of a recruit.

• Respondents must agree to spend the necessary time not only for the main interview but also for product pick-up and usage.

• Sometimes product placement involves time-sensitive usage. For example, a company wanting those 19-year-old truck drivers to try special contact lenses during their next encounter with aliens would have to find those who had an alien encounter noted in their datebooks within the usage period.

Time is valuable and goes quickly these days, and we understand that having time between project approval and fielding can seem somewhat luxurious — or perhaps unnecessary and even wasteful. Convincing peers that the time is necessary can be difficult. Here are some of the benefits to keep in mind as you discuss time issues with colleagues and clients.

• Saving your time. The likelihood of empty spots on the schedule is reduced as full recruits with sufficient floaters are possible.

• Saving your money. Facilities can recruit during their normal working hours and will not need to charge additional fees for recruiting during off-hours or using additional resources.

• Fine-tuning specifications and screener questions. A

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