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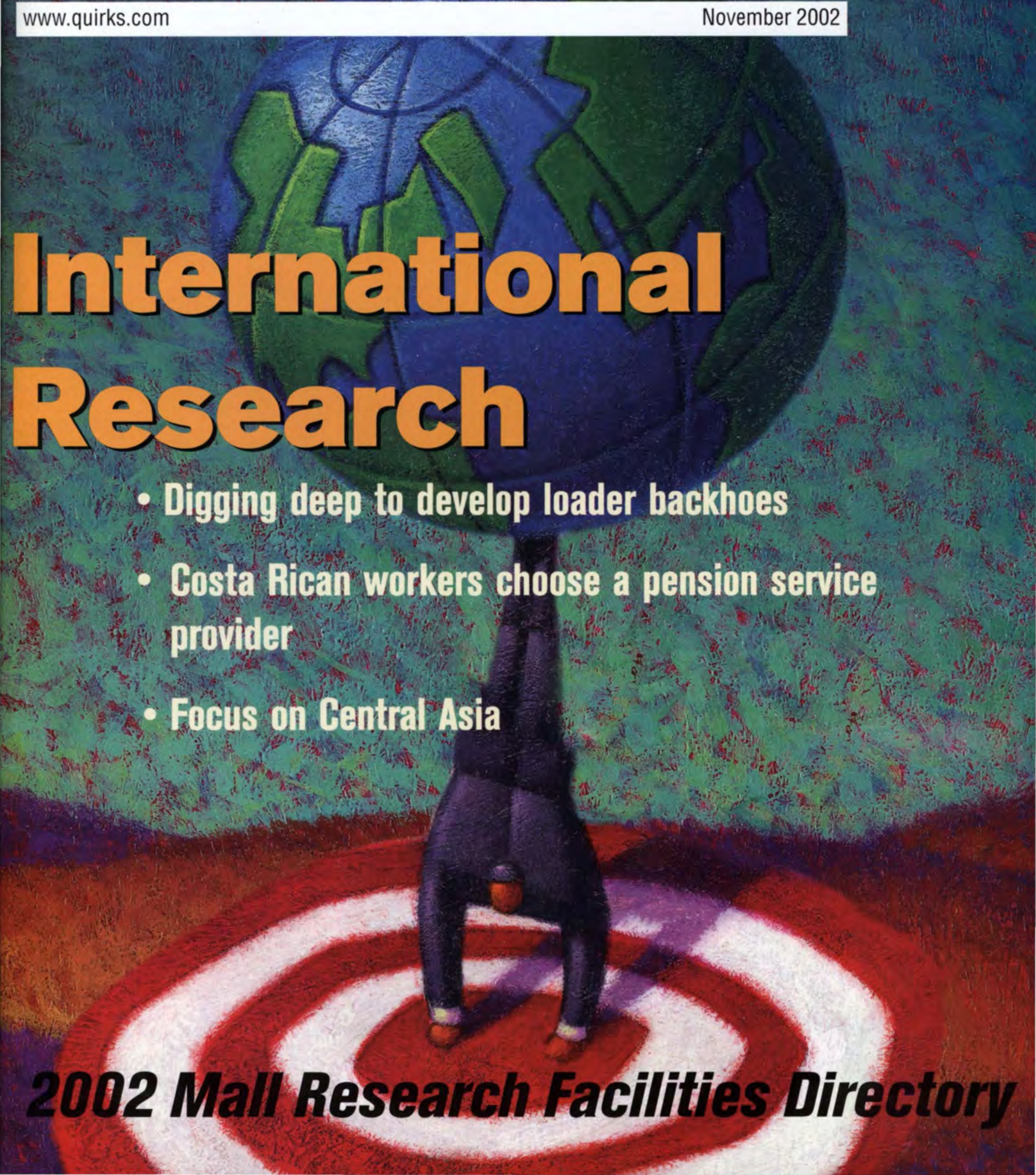

International Research

- Digging deep to develop loader backhoes
- Costa Rican workers choose a pension service provider
- Focus on Central Asia

2002 Mall Research Facilities Directory


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Quirk's Marketing Research Review

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November 2002

CONTENTS

FEATURES

Case History

Techniques

Columns

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DEPARTMENTS

Hearty breakfasts are back

The traditional breakfast meal of eggs and bacon or sausage is coming back into fashion, according to NPDFoodworld's "Breakfast in America" Report. When Americans eat breakfast at home, the consumption of these foods, popular in the 1950s, is at a 10-year high.

The annual number of eatings per capita of all types of egg/omelette dishes at breakfast is at 33 in 2002 as compared to 31 in 1993 and a low of 27 in 1998. Scrambled eggs, in particular, at 15 eatings per year are also at their highest point since 1993.

When it comes to sausage, Americans ate them an average of 10 times per year at breakfast in 2002, the most since 1993 when they were eaten an average of nine times. The low point for sausage consumption was also in 1998 when annual eatings per capita were at seven. Eatings of bacon have been on the increase since 1998 when it was at a low of 12. In 2002, bacon was eaten an average of 13 times. All data is for years ending in February.

Americans also skipped breakfast more than at any time since 1998. Fifty breakfast meals were skipped, on average, in 2002 nearing the high of 51 reached in 1998. Young adults in the 18-34 year range are least likely to find time for breakfast, skipping almost one out of every four — twice the national average.

Over three-quarters of all breakfasts are still eaten at home (77 percent compared to 49 percent of lunches and 75 percent of dinners), but the in-home breakfast has been steadily losing share, not only to skipping but also to other eating venues and brown-bag breakfasts. NPD shows that restaurant breakfasts are at their highest share since 1993, accounting for eight percent of total breakfast meals in 2002 versus six percent 10 years ago. Although holding a small share of the meal occasion, brown-bag breakfasts also reached a 10-year peak this year — 2 percent versus 1 percent in 1993.

"Increased time pressures have been threatening the breakfast meal for a while," says Arnie Schwartz, vice president, NPD's National Eating Trends. "It's matter of having something satisfying where and when you have time to eat it. Over the years, restaurants have been doing a good job of making breakfasts portable and tasty. At the same time, the influx of portable, packaged breakfast options is filling a gap, although our need for speed in the morning is growing faster than these products are being created."

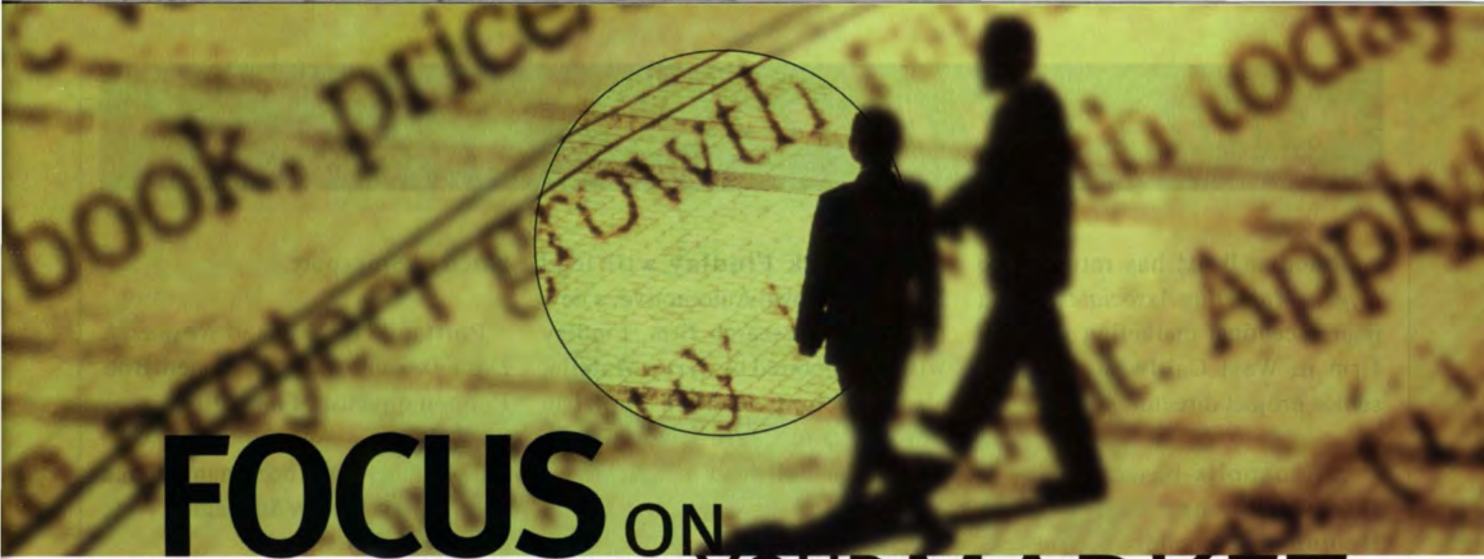
NPDFoodworld's National Eating Trends service maintains a diary panel of 2,000 households. For a two-week period, each household completes a daily diary for all household members. Respondents are demographically and geographically matched to Census Bureau statistics. For more information visit www.npdfoodworld.com.

Europeans drink Americans under the table

Research from Chicago research firm Mintel on alcoholic drinking trends across the U.S., U.K., France, Spain, Germany and Italy finds 62 percent of Americans drinking alcoholic beverages either in-home or elsewhere. Substantially higher is drinking in the U.K. (nearly 90 percent), closely followed by France, with 88 percent of the French consuming alcohol. Meanwhile, just over three quarters of the Spanish enjoy a tipple. With health awareness high in Germany, in part also as a result of the ongoing financial crises in the health insurance system, and discussions over a ban on alcohol advertising, all alcoholic drinks in Germany are under something of a cloud. Over a third of Germans claim to be teetotalers.

In terms of drinking and age, it would seem that the British and French share the same drinking trends. Once the French and British get a taste for alcohol, they never seem to want to give it up. In contrast, American, Spanish and German interest in alcohol dwindles at retirement age. Some 78 percent of U.K. consumers under age 20 drink alcohol; consumption peaks at 93 percent among the 45-54-year-old age group and from there the decline is moderate, with 85 percent of those age 65 and over enjoying a drink. A similar scenario exists in France, where 89 percent of those age 65 and over remain drinkers. American interest in drinking peaks in the 25-44 age group at 71 percent and then falls to below 50 percent for those Americans 65 or older. In Spain, alcohol consumption peaks among those age 25-44 and declines to under 60 percent of those age 65 and over, while in Germany usage declines to just 55 percent of this older age range. "It is interesting to note that drinking at a young age is highest in the U.K. where giving children alcohol is frowned upon. In Italy,

continued on p. 74



Phaedra Britt has returned to *Hygeia Marketing Associates, Inc.*, a pharmaceutical marketing research firm in West Caldwell, N.J., as senior project director.

Indianapolis-based *Walker Information* has named **Doug Hooton** vice president, new ventures.

Robert Simmons II has been named president and CEO of *Northstar Interviewing Service, Inc.*, Minneapolis.

London-based research firm *MORI* has named **Peter Hutton** group development director. **Greg Smith** will replace Hutton as head of MORI's corporate and consumer division.

Paris-based *Ipsos* has named **Henri Wallard** CEO.

Based in *Millward Brown's* Detroit office, **Nick Findlay** will lead Millward Brown Automotive, a new automotive research firm. Findlay will be supported by **Jerry Matella**, also in Detroit, **Stephen Popiel** in Toronto, and **Clare Evans** in the U.K., who will lead the practice's European initiatives.

Lars Andersen, managing director of *Millward Brown Denmark* and *Millward Brown Norway*, has been named managing director of *Millward Brown Sweden*. Also joining the Stockholm office are **Anne Hansson** and **Mimi Diego**.

At Hong Kong-based *Asia Market Intelligence* (AMI), which will rebrand as Synovate in January, **Bruce Wells** has moved to London to take up the post of global director Synovate ViewsCast. **Chan Siew Hoong** has joined AMI Singapore as director. **Cho Jin Ho** has been named associate director, technical solutions. He will be based in Singapore.

Portland, Ore.-based *Research Data Design, Inc.* has named **Bob Poppen** director of operations.

Jack Lloyd has been named vice president at *Market Strategies, Inc.*, Livonia, Mich.

NFO WorldGroup, Northwood, Ohio, has named **Kathleen Lee** marketing manager for NFO USA, working in the company's Chicago office.

NOP World Health, East Hanover, N.J., has named **Barry Zimmerman**

Zimmerman

executive vice president, strategic account development.

On the retirement of **David Jenkins** as CEO of the *Kantar Group* at the end of this year, **Eric Salama**, WPP's director of strategy, will become chairman and CEO of the Kantar Group, WPP's information and consultancy arm.

Research International has appointed new managing directors in Denmark and Norway: **Simon Svegaard** has joined in Denmark and **Trond Myhrvold** in Norway.

Greenwich, Conn.-based *NFO Healthcare* has named **Larry Levin** as executive vice president of its new syndicated research division.

Media testing approach doesn't require special players

Greenfield Online, Wilton, Conn., has launched a new media testing capability that enables clients to test video segments without requiring consumers to use or download special plug-ins or media players. The Greenfield Online application is compatible with most viewers' browsers, and the segment downloads passively during the course of survey participation. The technology automatically detects viewers' connection speed and streams the appropriate bit per second. As a result, all respondents view the same-quality media segment. Viewers must have a special ID to view media, which will be disabled after completion of the survey, thus preventing piracy and distribution. Segments are compressed to ensure efficient downloads no matter what size/resolution. Media can be accepted in any format. For more information visit www.greenfield.com.

New Web-based feedback system

Perseus Development Corporation, a Braintree, Mass., survey software firm, and Data Driven Decisions Inc. (3D Group) have developed an automated 360-degree Web-based feedback system. The system can be used for applications including performance appraisals, employee development, training needs assessments, attitude surveys, customer satisfaction surveys, etc. Human resource administrators will be able to e-mail a Web link and access code to one or more feedback recipients and invite them to complete a 360-degree survey. The administrator will be able to specify the timeframe the survey is open and have the ability to upload data from separate data files into the Web database containing survey responses. They can track survey completion progress on any individual feedback recipient or group of recipients and be able to customize report format and content to fit individual company's preferences. Reports can be designed from a library of templates and contain options to compute various statistics across multiple items and multiple raters. Once the survey is tallied, feedback reports will be generated and distributed automatically. After receiving the feedback reports, 3D Group provides consultative services to help companies interpret results and coach individual managers. For more information visit call 781-848-8100 or visit www.perseus.com.

ArcReader 8.2 download now available

Redlands, Calif., GIS firm ESRI is now offering the ArcReader 8.2 standalone version for download at www.esri.com/arcreader. ArcReader is designed for viewing and sharing any published map file (PMF) authored by the ArcGIS Publisher extension to ArcView, ArcEditor, and ArcInfo. Anyone with ArcReader can now view maps that reference a variety of geographic data. The PMF preserves a live connection to the data so the user's data view is dynamic. ArcReader is built from the same ArcObjects component technology as ArcView, ArcEditor, and ArcInfo. ArcReader shares a common look and feel with all the ArcGIS Desktop products, allowing users to view, explore, and print maps. For more information visit www.esri.com/arcreader or call 800-447-9778.

Nielsen//NetRatings broadens digital media coverage

New York-based Nielsen//NetRatings is expanding its service to combine measurement of Web-based traffic with Internet applications and browser channel audience data, including measurement of AOL proprietary channels. Debuting in Q4 2002, the "digital media universe" measurement will track the use of instant messaging, media players, media sharing applications, ISP applications, wireless content systems, Web phones, news and information toolbars, connected games, weather applications, auction assistants and shopping assistants. For more information visit www.nielsen-netratings.com.

New source of European research reports

Dublin-based Research & Markets is a new aggregator of market research in Europe, providing research in areas such as banking and financial services, biotech, competitive and market intelligence, demographics, energy and natural resources, retailing and services, and transport and shipping. At www.researchandmarkets.com, visitors can browse industry categories or search by a specific keyword or phrase. When you have found your chosen publication, click on its title to see more information including abstracts, executive summaries, samples and indexes/tables of contents. Users can also submit a request for market research assistance and the customer service team will respond via phone, e-mail or fax.

Doane debuts corn seed study

Doane Marketing Research, Inc., St. Louis, is now offering a syndicated product entitled U.S. Farm Corn Seed Study - 2002. Over 4,500 corn growers provided information pertaining to specific hybrids planted, associated acres, planting rates, discounts

continued on p. 82

Research Industry News

News notes

Harris Interactive, Rochester, N.Y., and **NCS Pearson** announced an agreement to distribute the survey research tool CSMpact for Schools to school districts within the United States. CSMpact for Schools helps districts consider the input of a variety of stakeholder groups when making decisions. The distribution agreement will begin in the 2002-2003 school year, and key aspects of the system will be presented at the Technology and Learning Conference, November 12-14 in Dallas.

Germany-based **GfK-Nürnberg e.V.** and the Economics and Social Sciences faculty at Erlangen-Nuremberg University have signed an agreement whereby the Market Information Management department will receive financing and support for a further three years. The agreement also provides for one or two study grants from 2003 onwards which will be awarded each year to graduates wishing to complete an MBA in market research at the University of Georgia, Athens, Ga. The agreement between GfK and the Economics and Social Sciences faculty to set up and promote the Market Information Management department at the Erlangen-Nuremberg Friedrich-Alexander University was first signed in December 1998. GfK-Nürnberg e.V., which has provided support for the department amounting to EUR 307,000 over the past three years, will provide additional funds of EUR 384,000 over the coming three years. Of this, EUR 45,000 will benefit students who continue their studies at the University of Georgia.

London-based **Millward Brown** has announced a change to the licensing of its techniques in Sweden. The license, held by Demoskop AB since September 1997, has now reverted to Millward Brown, which in the future will be supplying its products and services directly to the Swedish market.

Knowledge Networks, a Menlo Park, Calif., research firm, has received $15.5 million in new financing from investors.

On September 30th, shareholders of **Ipsos S.A.** and LT Participations were asked to approve the merger between the two entities of the Ipsos group. LT Participations is a personal holding company of the Ipsos group. Its capital is under the control of Jean-Marc Lech and Didier Truchot, the two Ipsos co-chairmen, for about 67 percent of the Ipsos stock. Eurazeo and Société Générale (through SG Capital Développement and FCPR Sogecap Développement) hold most of the remaining stock. LT Participations held, as its unique asset, 37 percent of Ipsos shares and 53 percent of its voting rights.

Before Ipsos will carry out the merger operation, LT Participations will proceed with a capital increase at market price in order to cover its debt. Lech and Truchot will jointly participate in this capital increase

continued on p. 66

Research Calendar

Tragon Corporation will hold a workshop titled "Ensuring Consumer-Defined Product Quality" on November 4-6 at the Sheraton Palo Alto, Palo Alto, Calif. For more information visit www.tragon.com.

The Marketing Research Association (MRA) will hold its education conference and technology forum on November 6-8 at Marriott's Camelback Resort, Scottsdale, Ariz. For more information visit www.mra-net.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on qualitative research on November 10-12 in Boston. For more information visit www.esomar.nl.

The American Marketing Association (AMA) will hold its advanced school of marketing research techniques on November 10-15 at the University of Georgia, Athens, Ga. For more information visit www.marketingpower.com.

The Society of Insurance Research will hold its annual conference at the Hyatt Riverfront Hotel, Savannah, Ga., on November 17-20. For more information visit www.sirnet.org.

GIS Day 2002 will be held on November 20 at various sites worldwide. For more information visit www.gisday.com.

The American Marketing Association (AMA) will hold its 2002 Explor Awards and Forum on November 21-22 at the Hilton Hotel & Towers, Chicago. For more information visit www.marketingpower.com.

The U.K-based Association for Qualitative Research (AQR) will hold its annual conference on November 29 at One Whitehall Place, The Royal Horseguards Hotel, London. For more information visit www.aqr.org.uk.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its Asia Pacific conference on December 1-3 in Singapore. For more information visit www.esomar.nl.

News spotlight

Research business successful in Spain

According to a study by The **European Society for Opinion and Marketing Research** (ESOMAR), revenues of the marketing research industry in Spain totaled $275 million in 2001.

Spain has the eighth largest market for market research in the world according to this study. It is topped only by the U.S., Japan and Canada outside of Europe, and by Germany, the U.K., France and Italy within Europe.

Surveys conducted by AEDEMO (the Spanish association of market research professionals), show that while growth slowed to 3 percent during the last year, the sector grew by an average of 7.8 percent per year (6 percent if adjusted for inflation) over the past five years, which is well above the economic growth rate.

Nevertheless, Spain clearly lags behind many other countries such as the U.S., the U.K., Australia and the Netherlands if the level of research expenditure is compared with advertising expenditure or GDP per capita, indicators that are often used to benchmark the relative sales of marketing research.

One reason for this is the fact that until recently no significant multinational company or even regional headquarter of a multinational company was located in Spain. This is now changing as companies like Telefonica, Endesa and Repsol-YPF, which were previously quasi-monopolies operating in the utilities and domestic telecom market, began to invest abroad. This also applies to banks such as SCH or BBVA. Their operations are mainly in Latin America and have given birth to the first truly Spanish multinationals.

Who is buying the research? Forty-three percent of research is commissioned by manufacturing companies. Other key sectors which commission and use research in Spain are media and advertising (12 percent), utilities, postal service and telecommunications (12 percent) and the public sector.

The vast majority (80 percent) of research in the Spain is commissioned by domestic clients and a much smaller proportion (20 percent) by clients outside of the country. Over three quarters (80 percent) is consumer research and less than a third (28 percent) for non-consumer research.

Other significant trends relate to changes in the type of studies conducted and data collection techniques. Continuous studies now represent around 45 percent of the total research sales, a proportion which is in line with the worldwide share identified by ESOMAR's industry survey.

A major change in the past years has been a shift away from face-to-face interviewing (now accounting for 38 percent of all interviews) to telephone interviewing (41 percent of all interviews). It is noteworthy that just five years ago, face-to-face represented 63 percent of the total, while telephone accounted for a mere 26 percent. Postal interviewing is stable, at the level of 6 percent.

Qualitatively Speaking

Virgins or veterans?

Who makes up that respondent database?

By Ron Sellers

Editor's note: Ron Sellers is president of Ellison Research, Phoenix. He can be reached at ronsellers@ellisonresearch.com or at 602-493-3500.

Most focus group facilities have them, and they're generally taken for granted as much as the microphones in the ceiling or the bowls of M&Ms in the back room.

Respondent databases.

With all there is to worry about in a qualitative project, it can be tempting for the researcher to tell a facility who they want in the groups, and let the facility worry about where to find those people.

After holding three different sets of groups at two different facilities in Phoenix in a space of 18 months, and somehow having the same individual show up as a respondent for each project (on three totally different topics), I think it is definitely time to re-examine that approach.

Properly obtained and managed, respondent databases can solve a lot of the headaches for recruiters. Databases are made up of people who know who the facility is when they're called, and have already expressed their willingness to participate in groups if they qualify. Sure makes life easier.

I have some facilities I've used again and again, and I trust how they build and use their database. But what happens when client preference or a new market forces me to use a facility with which I have no experience?

First, I want to know how their database is built. Do they include people who call them and say, "I want to do focus groups"? If so, I'll pass. You know the person calling that facility has just opened the phone book and called all the other facilities in an attempt at some easy money once or twice a month. (We get those calls and e-mails all the time, even though we don't have a focus group facility.)

Second, I want to know how often people are contacted for any type of research. Not just how often they participate in focus groups, but how often they're contacted. The more those people are called, the more they have an idea of how to answer screening questions to make sure they're qualified for the recruit. In addition, some facilities will not use respondents more than every six months for focus groups, but will gladly contact them more frequently for in-depth interviews, taste tests, etc.

Third, I've learned to rely on the following test. When I contact a facility, I ask for a cost if they recruit from their database, and a cost if they recruit virgin respondents (i.e., from RDD sample, directories, or some other relatively comprehensive source).

What I've discovered has been fascinating, and fairly predictive of what my experience with the facility will be like. Some facility directors are nearly panicked by this request. "Recruiting from the general public is almost impossible!" they wail. These directors then demand much more recruiting time, charge far higher prices, and are already setting me up for eventual failure when they say, "We'll attempt this for you, but we don't know how well it's going to work if you don't use our database."

continued on p. 85

Post-stratification in survey research

By Robert Kushner

Editor's note: Robert Kushner is a research consultant at Directions Research, Inc., Cincinnati. He can be reached at 513-651-2990 or at bkushner@directionsrsch.com.

Many times after survey data has been collected researchers have need to weight the results in order to provide a greater emphasis on a key variable or to adjust for sub-groups (strata) that have been over or under-sampled.

Additionally, the desire is to draw interviews from a population proportionate to certain sub-groups sizes. However, many times interviews cannot be placed into the appropriate strata until all the sampling has been performed.

When these instances occur, post-stratification is used to adjust the degree of influence each stratum has on the study results. Post-stratification of results involves the weighting of data after collection and is used many times by researchers when certain stratum may be over- or under-represented and results based on the total sample may be otherwise distorted.

When no weighting occurs, each respondent is "counted" once (i.e., each respondent receives a weight of one). When weighting is used to post-stratify results, the weight (or influence) respondents are given can be more or less than one. Following are some common examples of data weighting used for post-stratification purposes.

Examples

Quota to rep weighting

In the example shown in Table 1 the goal is to adjust the influence the respondents from each region have on the total. The weights to be applied reflect a ratio of the relative size of each region (in terms of the relevant variable, region population) and the actual region quotas. Thus, the goal is to offer greater influence to the larger regions and less influ-

continued on p. 70

Table 1

	# of Total Population	% of Total Population	# of Total Interviews	% of Total Interviews	Respondent Weight
Region 1	11,319,000	36.47	200	25.00	1.459
Region 2	6,045,000	19.48	200	25.00	0.779
Region 3	3,995,000	12.87	200	25.00	0.515
Region 4	9,679,000	31.18	200	25.00	1.247
Total	31,038,000	100.00	800	100.00	

Unearthing the truth

In the U.S. and overseas, CNH Global talks to loader backhoe users to develop new models

By Jim Jastrzembski and Barbara Leable

Editor's note: Jim Jastrzembski is president, Strategic Business Research, Inc., Chicago. He can be reached at jimjast@yahoo.com. Barbara Leable is project manager, marketing research at CNH Global, Racine, Wis. She can be reached at barbara.leable@cnh.com.

Awakened at dawn, they emerge and rumble down the road to sites where they will exert enormous strength. Big yellow hydraulic wonders of engineering ingenuity moving massive amounts of soil, sand and rocks as operators build roads, homes, and shopping centers, or dig trenches for fiber optic cable and water pipelines.

There are the many types of construction equipment, without which modern construction would not be possible. The most versatile and most often purchased type is the loader backhoe.

How do engineers identify design advancements to keep the product line fresh and responsive to market needs? How do they make sure the design advancements are appropriate for the varied needs of a global marketplace? And how does marketing research pave the way for success in global construction equipment markets?

This is a case study of how one of the oldest and most successful construction equipment companies used marketing research to develop advanced designs for loader backhoes.

Wide range

Jerome Increase Case founded the Racine, Wis.-based Case Corporation in 1842. Case has been a market leader for 160 years in both the agricultural and construction machinery markets by designing a wide range of innovative machines. Early machines included steam engines and threshers to help farmers quickly harvest the nation's crops. One of Case's biggest successes was the development of the loader backhoe in 1957.

With the front end, or loader, operators lift sand, soil and gravel to fill in foundations of new homes, cover newly placed sewer pipes, or clean up after repairs to underground cables. They level and smooth the ground for shopping center parking lots. Landscapers attach forks to deliver pallets of bushes and trees. Municipal crews use the loader for demolition and removal of concrete during summer street repairs and for plowing the snow from winter storms.

The back end, or backhoe, is just as versatile. Contractors dig trenches to find underground water pipe leaks, install septic tanks and bury cables. Telephone and electric companies dig holes for their ubiquitous poles. Construction companies dig trenches for storm sewers and use the backhoe to lift the heavy cement sewer pipes and place them in the trenches. Nurseries and golf courses add special drilling attachments to allow them to dig precise holes for planting trees.

Case becomes CNH Global

Corporate mergers, acquisitions, and joint ventures have brought Case together with other famous names in construction and agricultural equipment: New Holland, International Harvester, Kobelco, Hitachi and Fiat — each brand a market success on its own. Recently these successful brands were given a new corporate identity: CNH Global. CNH Global now sells equipment in nearly every country in the world.

A frequent result of corporate mergers and acquisitions is that the newly merged corporation has multiple products competing in the same market. CNH Global is no exception. In particular, CNH Global has three strong brands competing in the global loader backhoe market.

As CNH Global plans for the future, the three loader backhoes will be differentiated in ways that create unique benefits to each brand's customers, yet preserve the historic strengths of each brand. Engineering and marketing want advanced models of each brand to result in market share growth.

To design the next series of loader backhoe models, engineers were facing several key questions:

• How do loader backhoe operators view the various brands of loader backhoes?

• What are the engineering performance differences of each brand — whether grounded in real engineering design or just perceived performance?

• What changes should be made in designing models for each of the CNH Global brands of loader backhoe to both bypass competition and differentiate the CNH brands?

For answers to these questions, the global engineering team turned to marketing research.

Strategic objectives

Two strategic objectives guided both the specific research objectives as well as all the planning and design of the marketing research project. As one CNH Global senior engineer put it: "Let's do this right. The next series of loader backhoe models — a major capital investment — will stem from this research."

While quality research data was the driver for advanced design decisions, budget was not unlimited. So the challenge was to assure dependable results — strong enough to justify a major capital investment — within a reasonable budget. Accomplishing this tradeoff required new ways of doing market research on construction equipment.

The other strategic objective was to identify loader backhoe design advancements desired by the worldwide market at prices the markets were willing to pay. Pursuant to this, nearly 30 executives and engineers from around the world had to agree on a

continued on p. 78

The future is now

Editor's note: Carlos Denton is general manager of CID/Gallup, S.A., a San José, Costa Rica research firm. He can be reached at cdenton@cidgallup.com.

In 2000, Costa Rican workers were required to select a pension service provider from a list of nine banking and financial institutions. Research conducted for Banco Interfin, a relative newcomer, permitted the San Jose-based bank to develop a competitive strategy which overcame the fears of many potential clients.

Two waves of quantitative research permitted the bank to identify its target customers and to determine what might motivate them to choose its pension program over those offered by competitors. Today the bank manages a respectable share of the $5.6 billion collected nationally each year from workers for this program, and much of its success comes from the research-based promotion and advertising strategy.

The challenge

In 1999, the Costa Rican government signed into law a national pension program for its 1.5 million workers, a program to be funded by a 3 percent contribution of total wages paid. There is no deduction from paychecks — the total cost is covered by employers. Workers do not make financial contributions to this program, but they were required to select a service provider from a list of nine no later than November 2000.

The deadline posed a unique challenge for those conducting the research and creating the marketing program. It meant there was no room for coming back another time if research data was deemed insufficient.

The nine potential service providers, including Banco Interfin, were selected by the government based on a variety of criteria, including financial stability and demonstrated administrative ability to run a large program such as this one.

The competitive challenge for the bank was threefold:

First, once the worker signup period was completed, all those who had

Costa Rican workers choose what they want from a pension service provider

By Carlos Denton

not selected a provider were to be automatically assigned to the government-owned Banco Popular. It was necessary to recruit as many clients as possible during this period, because after November, the market would essentially be limited to new workers.

Second, between 1949 and 1990 private banking was banned by the national constitution of Costa Rica. Private institutions such as Banco Interfin, at the time that the pension law was enacted, had only existed for about 10 years. Government-owned banks continued to receive 75 percent of all deposits made in the country because Costa Ricans in general were wary of non-state-owned institutions.

Third, there could be little or no difference at the financial level between the pension programs of the nine competitors. Interest paid, withdrawal policies and administrative costs were all established in the legislation. Customers had to be attracted on the basis of institutional image and service.

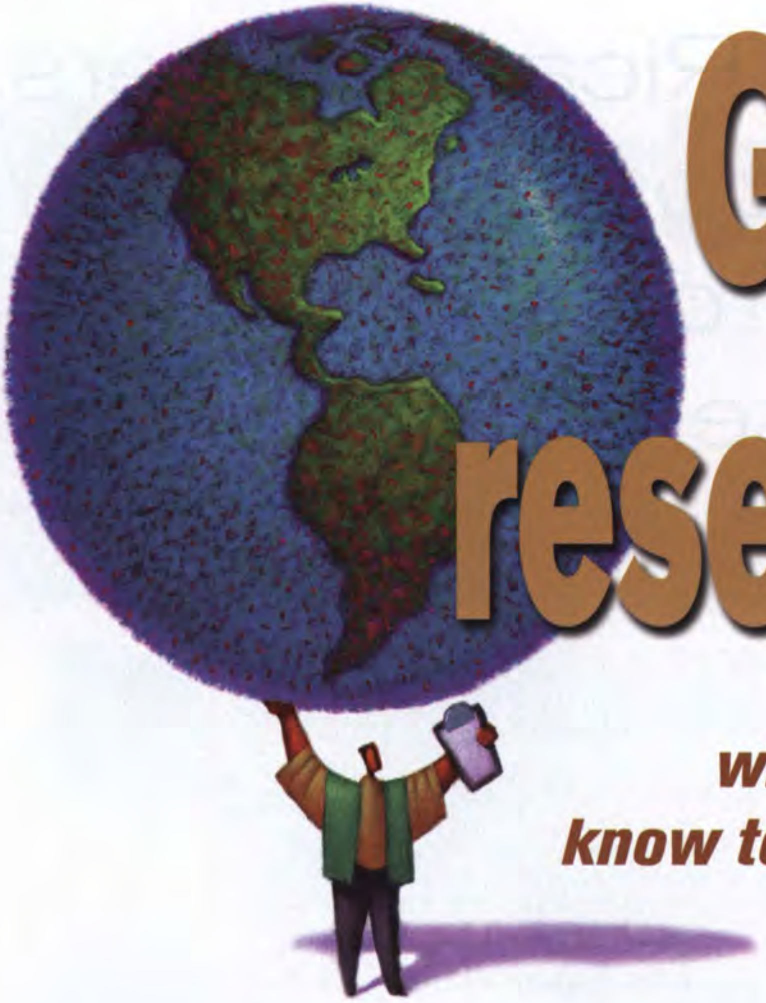
Gather basic information

The objective of the first wave of the research program conducted by Banco Interfin was to gather basic information about Costa Ricans and their relations with the national banking system. Using national omnibus survey questions, two important findings emerged. The first of these was that 61 percent of adult Costa Ricans had, in 2000, no relationship of any kind with the national banking system. Of the 36 percent of the adult sample which reported working (either independently or as an employee), more than half claimed to be earning the minimum wage, which at that time was around $200 a month. Many of these were paid in cash, and those who received paychecks visited a bank every 15 days, but only to cash the checks.

Second, top-of-mind recall on a national adult sample of bank names was in the single digits for Banco Interfin, while total spontaneous and aided recall for the bank was in the low 20s.

This data was produced some five months prior to the November deadline for signing up workers for the pension program. On the basis of this

continued on p. 86



Global research:

what you need to know to be successful

By Barbara Smela

Editor's note: Barbara Smela is international research director at Maritz Research, Fenton, Mo. She can be reached at barbara.smela@maritz.com.

Globalization is the latest buzzword to casually trip off everyone's tongue, often followed by the phrase "cultural sensitivity" as a descriptor of what one needs in order to successfully engage in a global business. Dig a little deeper, though, and the definitions begin to lose their power.

Is globalization anything more than working in multiple countries? Is cultural sensitivity anything more than knowing that one should be cautious with criticism, if not totally silent, when traveling in another country? And most importantly, what effect does globalization have on your company?

In the case of marketing research, a business discipline in which total strangers ask questions — sometimes very intimate questions — a much more comprehensive knowledge of globalization and its partner, cultural sensitivity, is crucial.

So what considerations need to be made before deciding what your global research strategy will be? How will partnering with a global research company ensure the success of your project?

It's safe to say that more and more people are beginning to realize that differences exist between domestic and global research. Beyond a surface agreement, however, most are hard-pressed to point out precisely what those differences might be.

While it is increasingly understood that it doesn't work to transplant a research study from the United States to most other countries — in some cases without any modifications — the reasons it doesn't work remain a puzzle for many. To go to the next step, companies need to come to the understanding that sometimes modifications aren't enough — a project might need to be totally restructured to meet differing global needs and capabilities.

Companies need to begin with the recognition that they are working in a global economy, that globalization is an essential business strategy that every multinational company must follow, and that knowledge of the global mar-

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Companies also need to understand the distinction between global studies and multi-country studies. Although both refer to studies conducted in multiple countries more or less simultaneously, the term "global research" is reserved for studies that have a single purpose and that will be analyzed in total to develop corporate strategies and tactics. Generally speaking, if the results are separately reported to each country manager but no individual "owns" the aggregate analysis, it is a multi-country study, not global. This article is primarily concerned with the latter.

Carrying out global research sometimes requires intricate and unusual project management skills. Companies must follow new research designs appropriate for the region, practice cultural sensitivity in all phases of a project and, above all, rely on partners' and consultants' local knowledge as they can be your company's greatest resource.

Let's look at the various research stages to determine precisely where global differences are most likely to be found, what those differences might mean to your project, and how to manage them so that you accomplish your goals without leaving an unpleasant trail.

Charting the landscape

A research project can be subdivided into roughly six areas. The areas in which differences exist — listed in descending order of the magnitude of these differences — are: planning, execution, design, quality control, analysis, and interpretation.

Planning

When planning a global study, the most important word to remember throughout the life of the project is timing. A request for proposal or a fielding bid sent from North America to Asia on Thursday afternoon won't even be seen until Monday morning. If the local contact responds immediately, which can't be guaranteed, a reply might come by the following Tuesday. If questions arise, and they always do, the process begins all over again.

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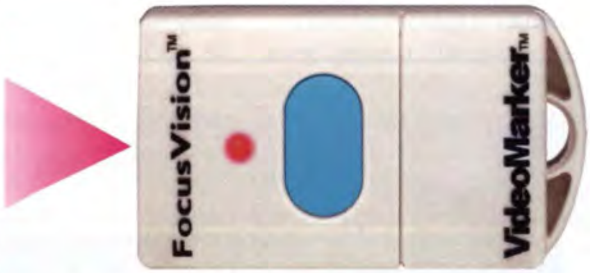

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Usable information might not be available until Thursday or Friday — not the standard 24- or 48-hour turnaround that those conducting research in the United States are accustomed to! That 12-hour difference on the clock is, in reality, much more than 12 hours. Therefore, it is wise to be cautious about making promises.

To minimize this problem, be very specific with your request and expect specificity in return. "Ballpark figures" generally are not a good idea because they contain too many assumptions, and assumptions often lead to serious misunderstandings in the global research arena.

If you don't know, ask. And impress on your local contacts that they should not assume. If they're not sure about something, they should also ask. If they have been told to do something inappropriate in their country or culture, they should tell you. Nothing is more dangerous than a foreign contact that does exactly what you tell them to do — or what they think you told them to do.

Also, everyone involved in the project must understand that any project-related problems, particularly those that have an impact on cost and/or timing, must be communicated immediately.

Basic guidelines to be agreed upon in advance are:

• Stick to schedules, timing and budgets.

• Solicit input from partners/suppliers.

• Establish communications procedures, i.e., coordination with suppliers/clients.

• When in doubt, ask questions.

Depending on the region of the world in which you are conducting business, it often is wise to correspond using multiple methods. For example, send an e-mail, back it up with a voice-mail and, for extra insurance, consider sending a fax. Always ask for confirmation that the message has been received and make sure that you confirm everything in writing.

Solicit input from local contacts during the planning phase because it will save valuable time later. Check on vacation periods and holidays that fall within the fieldwork period and remember that the importance of holidays is not always obvious.

One example is Mother's Day in Mexico. The holiday always occurs on May 10, not the second Sunday in May, as in the United States. Although not formally the case, all companies in Mexico close around noon on Mother's Day to allow employees to spend the day with their mothers. It turns out to be the busiest traffic day of the year in Mexico — more so than Christmas or Easter. If you haven't been in Mexico on Mother's Day, or no one has told you about it, you could conceivably lose a valuable day of fieldwork.

Every country has similar "semi-official" holidays. Think about the day after Thanksgiving in the United States, which, for most companies, is an unofficial day off.

Many people know that conducting research in Europe, particularly southern Europe, is problematic during the summer months, but they generally don't know why. The comment frequently heard is, "Surely they don't close down the entire company in the summer."

Well, yes, they often do. Europeans are accustomed to much longer vacations than Americans, and it is sometimes more efficient for a company to close completely than to operate with a skeleton staff. Even when companies do remain open by staggering their staffs with half-on and half-off at any given time, it is important to decide whether you really want to conduct your studies during those periods.

Some guidelines:

• With a skeleton crew, everything takes longer and efficiency suffers.

• Response rates decline significantly, simply because fewer potential respondents are available.

• Respondent behavior is different during holiday times.

• The best staff members are most likely not available. The top moderators/interviewers/field staff usually get their choice of vacation times and will take the prime periods.

Execution

The execution stage, if careful planning and a proper design have been put into place, can be relatively problem-free. However, issues might arise that often could have been resolved at the outset. Some points to consider:

• What are the local nuances in respondent availability, sample, lists, maps, field execution, and quality control?

• How do you control quality when you can't be there?

• What are the translation (language) issues?

In many countries, it is becoming more and more difficult to recruit respondents who are professionals or managers. It is wise to seek out the best recruitment method with the help of those with local knowledge. Gathering the appropriate sample is very different outside of the United States. American companies are accustomed to being able to find very finely tuned samples, e.g., Hispanic women between age 30 and 45 who go to Weight Watchers and have more than one child. Such micro sampling is rare outside of the United States.

Simply being able to identify women with children might be difficult in some countries. By the same token, lists often do not exist or government regulations prohibit the use of lists. Maps are frequently useless or include large areas that are unmapped. Once again, it is critical to work as a team with local contacts since those contacts have worked with these obstacles and can help find the best sources of information.

Field execution often involves the unexpected. Many countries — especially former Communist-controlled countries — have a hard time with the concept of brand preference since — until very recently — the public simply bought whatever was available. There was no choice, nor was there always even a single brand. For example, cans of evaporated milk were simply labeled "evaporated milk."

A similar misstep is to ask (as one of many options), "Do you buy it when it is on sale?" This is a very common term in the United States, but the concept of marking prices down is unknown in many countries. A common interpretation is that "on sale" simply means that it is available; in other words, it is for sale at the corner store.

It is also valuable to remember that scaling is interpreted differently. Using a 10-point scale on a questionnaire can lead, in some countries, to most responses coming in at the extremes. However, the exact same scale in another country can lead to most responses clustering around 5 or 6 — when no real differences exist between the two populations. Knowing the culture is invaluable in interpreting differences.

There are many country or regional fieldwork differences. For example, in Arab countries, men interview men and women interview women — always. In Brazil, it is considered rude to cut short the "get acquainted" period of a focus group and the groups tend to be very social. A normal two-hour focus group elsewhere tends to go on for three hours or more in Brazil and, at the conclusion, participants often exchange telephone numbers and make arrangements to meet for lunch. In India, observers should be prepared to visit a private home and sit on a bed to watch focus groups on closed-circuit television in a bedroom next to the room where the groups are taking place.

Language issues can be narrowed to two major areas; both tied to translations. The first point to remember is that literal translations are generally not a good idea since language takes on different meanings, or perhaps has no meaning, in a foreign context. Decide what it is that you want to know and use a functional equivalent, e.g., the earlier "on sale" example should be reworded to get across the idea of whether the respondent buys the product only when it is available at a reduced price.

The second language point is to decide precisely how translations are handled. Using someone in the office who is fluent in the language or even a native of the country can save money but provide poor translations. Language is dynamic and someone who has been away from her native country for a long period of time is unlikely to be up-to-date on the language. After the initial translation takes place, a second translation should be carried out, preferably by a professional translation service.

Design

The design stage is another area in which substantial differences can be found between domestic and international research projects. Some basic questions to consider:

• Is the design appropriate for the country/region?

• Is the methodology appropriate?

• Is the country choice appropriate for the client's needs?

Once again, seek local expertise to determine whether your design is appropriate. For example, a telephone survey is not appropriate in countries in which telephone penetration is very low; and in some countries it is considered rude if an interview is too long.

Determining the accepted length of a telephone interview in a given country also is important. Studies conducted for a credit card company likely will not be highly successful in Japan, which is a cash-based economy. Mail surveys are not successful in some countries in which mail delivery is relatively unreliable. An alternative in some countries might be to use a courier service.

In some countries, a national survey is not possible for a variety of reasons, including unsafe areas, transportation or communications difficulties, or simply the fact that 80-90 percent of the population lives in the major urban areas and the additional information will not add enough information to your database to offset the tremendous additional cost.

Following are some other up-front questions that will help avoid missteps and embarrassment:

• Is it wise to mix males and females in focus groups?

• Where will focus groups be held? In some countries, women are free to participate in groups, but only in private homes.

• What about incentives? They vary a great deal according to local norms.

• Is cash expected, is it offensive, or are incentives even legal?

Quality control

Quality control always is a major concern. Unfortunately, corruption — sometimes blatant, but usually camouflaged — occasionally presents a problem. Locals might subcontract for one price and charge back at a highly inflated rate; might subcontract to an unqualified company owned by a relative; or might actually fabricate entire portions of the study.

The most important decision you will make involves who your local supplier will be. There is no substitute for experience. This is where a global research company's knowledge of local suppliers can really pay off. Regardless of who chooses the local supplier, make sure you are comfortable with them — someone you know and trust. Continue to monitor them and don't be afraid to pull out if you discover serious problems.

Since company representatives can't always be "on the ground," immense care is needed to obtain the right information. This can be done through excellent project management, absolute attention to detail, and a willingness to question at the first sign of trouble. It is necessary to create an enforceable system that can be communicated, monitored, and will lead to constant improvement.

Analysis and interpretation

Analysis and interpretation are the areas within international research that are most similar to U.S. models; but even here it is important to be on the lookout for anomalies. Interpretations are generally made from a cultural perspective and can be tricky when they are exported to other regions. Once again, this is a time to confer with your consultant and to understand any cultural explanation for the interpretation.

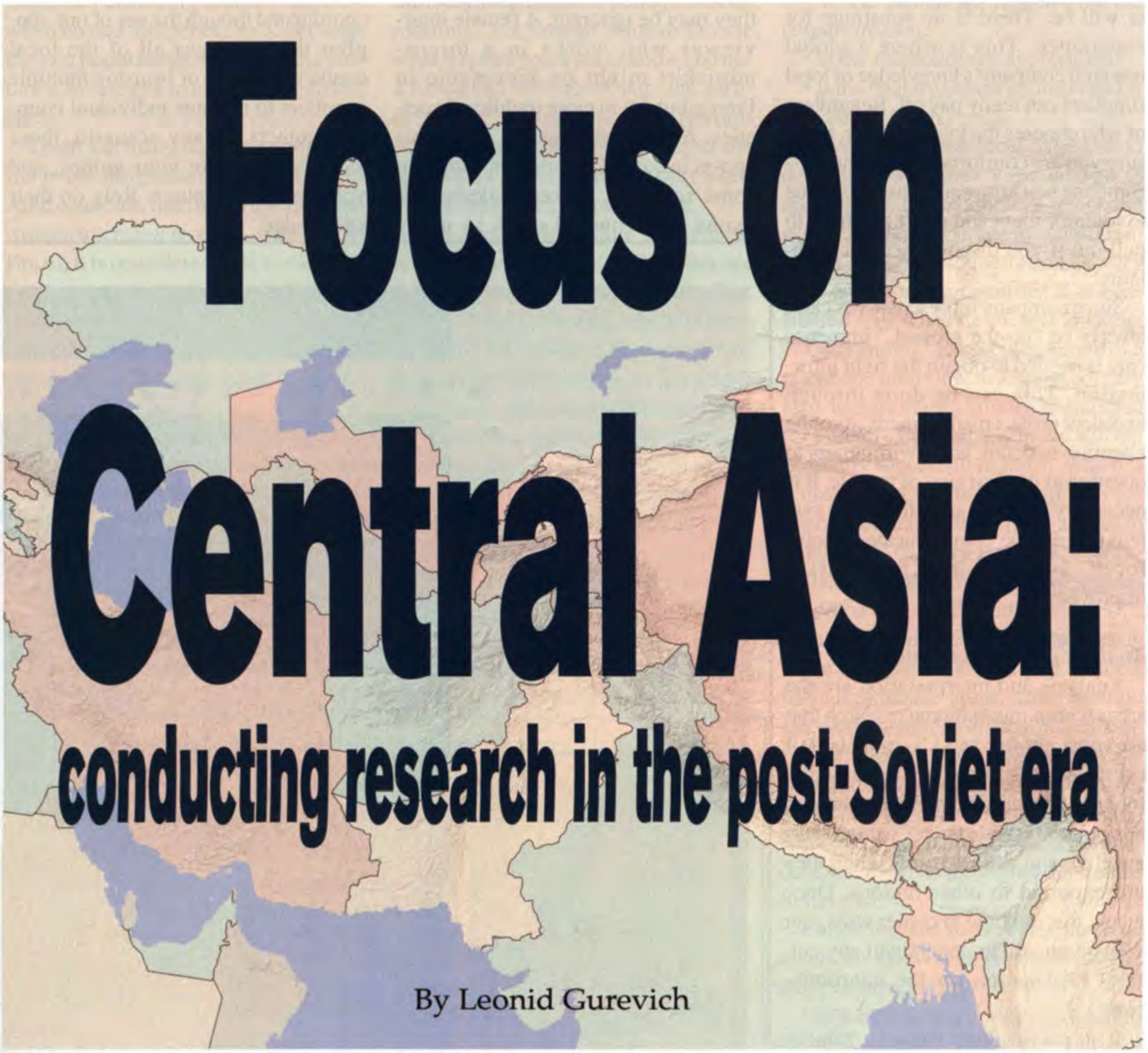
It is particularly risky to blindly accept cross-national differences in a multi-country study. For example, in comparing scores between countries, 86 percent of the customers in Germany might give a top box rating, compared to 40 percent in Portugal. It may very well indicate a cultural difference and does not necessarily mean that the Portuguese managing director should be fired.

Cultural sensitivity

So, we come back to cultural sensitivity. It is a leitmotif that runs throughout the course of a study, although there are specific norms and customs to always keep in mind.

Public behavior, clothing and criticism are those areas most likely to engender negative opinions when foreigners flout local norms about which they may be ignorant. A female interviewer who works in a microminiskirt might be acceptable in France but not in more traditional societies. A male who openly shows his appreciation of women is taboo in some societies. Mixed male/female teams are frowned upon in many places. Taking photographs, a harmless activity in most countries, is a serious breach of etiquette in others.

International research might be coordinated though the use of one supplier that manages all of the local country contacts, or by using multiple suppliers to manage individual country contacts. In any scenario, these local contacts are your guides, and your greatest resource. Rely on their knowledge.



Focus on Central Asia: conducting research in the post-Soviet era

By Leonid Gurevich

Editor's note: Leonid Gurevich is a general director of BISAM Central Asia, a Kazakhstan-based research firm. He can be reached at bisam@asdc.kz.

Until the tragedy of the September 11, 2001, the Central Asian region had been far less familiar to the Western public than other parts of the Asian continent — South Asia, Southeast Asia, the Middle East, and even Siberia. Having become a crucial prospective battle front with international terrorism, Central Asia has naturally drawn increased attention from the world community. However, there has also emerged a serious danger that Central Asia may become associated with terrorism, drugs and instability, thus inhibiting the open use of the region's rich economic potentials and human resources in world markets.

In reality, however, the only zone of instability in Central Asia is Afghanistan. The other states of Kazakhstan, Kyrgizstan, Tajikistan, Turkmenistan and Uzbekistan — all former Republics of the Soviet Union — have preserved and strengthened state control over their territories, and so maintained a high standard of civil peace, despite their unfavorable proximity to Afghanistan.

Kazakhstan, Kyrgizstan, Tajikistan, Turkmenistan and Uzbekistan unanimously demonstrated their readiness to actively participate in the antiterrorism coalition, while Uzbekistan, Tajikistan and Kyrgizstan offered their territories for U.S. military bases. This will promote the existing orientation of Central Asian states to the West, and enhance their integration into world markets.

Social, economic and political features of region states

The total territory covered by Kazakhstan, Kyrgizstan, Tajikistan,

Turkmenistan and Uzbekistan is almost four million square kilometers, with a combined population of more than 55 million people.

These countries are well known for their natural resources. Kazakhstan and Turkmenistan possess huge oil and gas reserves. Perhaps these countries would have already been among the world's largest energy exporters if transportation problems had been completely solved. Yet transportation issues are currently being solved, resulting in large-scale competition among American, British, French, Italian, Russian and Chinese companies in the oil and gas markets of Central Asia.

Figure 1

There are also extremely rich mineral deposits throughout all Central Asian states. Kazakhstan, for instance, is a world leader in the extraction of chromium, copper, zinc, bauxite, phosphate and cadmium. Uzbekistan is a world leader in gold extraction.

All the Central Asian states played a significant role in the economy of the former USSR. In these countries, mainly in Kazakhstan and Uzbekistan, and to a lesser degree in Kyrgizstan, large metallurgical plants and up-to-date military and industrial complexes were built. Nowadays many of these enterprises do not function since they were unable to find or keep a sufficient market for their products in new economic conditions. However in Kazakhstan a significant number of these plants resumed functioning after being transferred to foreign ownership or being placed under foreign management. Virtually the whole of Kazakhstan's heavy industry is currently controlled by international companies, or companies with significant foreign involvement and accountability. Persistent attempts were made in Uzbekistan and Turkmenistan to preserve the production structures left by the Soviet system. However in recent times the governments of these states have accelerated market reforms and instituted far-reaching policies of attracting foreign investors.

The Central Asian market of mass consumer goods is mostly saturated by imported products, especially in Kyrgizstan. However the domestic food industry shows a tendency towards persistent growth, especially in Kazakhstan. This poses serious problems for Western companies supplying Central Asian markets with confectioneries, tobacco products, juices and soft drinks. Large-scale marketing studies have been initiated in response. However with increased production, local food industries have increased their demand for imported technologies.

In the second half of 1998 to the first half of 1999, all the Central Asian states of the former Soviet Union fell victim to the world financial crisis, though to different extents. Yet, in the second half of 1999, they all officially declared economic improvements, and these were confirmed in their respective GDP statistics. However the relational dynamics of GDP, in directly comparable USD equivalents, turned out to be more complex.

Income levels and purchasing power in Central Asian states, as in all other former Soviet Republics, are not high. Indeed, some of these countries can be regarded as the poorest countries in the world. For instance, the average monthly salary in Tajikistan is less than \$10, whereas in Kyrgizstan it is only about \$20. Yet at the same time, Kazakhstan has the highest average salary levels among Central Asian countries with about \$110 per month. Uzbekistan, with an average monthly salary of \$60, is behind Russia and Kazakhstan. The average monthly income per head in Central Asian states is shown in Figure 2.

Income calculation is based on real rates of local currencies to the U.S. dollar (in Kazakhstan, Kyrgizstan and Tajikistan the real rate does not significantly differ from the official rate, while in Uzbekistan it is two to three times higher than the official rate, and in Turkmenistan it is four to five times higher than the official rate).

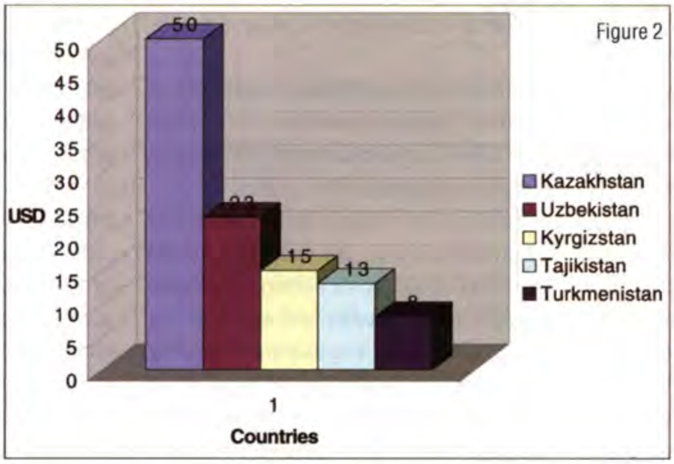


Figure 2

However the real incomes in Central Asian states are higher than those indicated in the official statistics. Many residents are occupied in so-called "shuttle" businesses, in street trading, and in black market intermediary transactions. The often quite large incomes of local political elites are not entered into state statistics. Their purchasing power in local markets, and the high demand for expensive and prestigious goods, often surprises foreigners who begin working in Kazakhstan and Uzbekistan.

After the collapse of the Soviet Union, Central Asian states entered into different programs of political development. The greatest adherence to Western standards of democracy was demonstrated by Kyrgizstan. However the patriarchal mentality of the major part of the population had stayed intact throughout the Soviet era, when trends towards tribalism actually intensified after gaining state independence. These mentalities and trends led to the elevation of authoritative tendencies and political destabilization.

In Kazakhstan, however, political and interethnic stability has been preserved and even strengthened during the years of independence. Presidential authority exists in balance with an established multiparty system and a high level of independent mass media.

There is certainly an authoritarian regime in Uzbekistan. However its power was insufficient to prevent the rise of a religious extremism that was manifested in military and terrorist actions. The elimination of Islamic fundamentalism is the highest priority task of the Uzbek government at present. While on the one hand this situation hampers the development of democratic tendencies, on the other hand it encourages further Uzbekistan orientation toward economic, military and political cooperation with the West.

Tajikistan succeeded in stopping the tribal civil war that began after its declaration of independence. Today its authoritarian presidency, supported by military help from Russia, is able to suppress new conflicts.

Turkmenistan is a country with a totalitarian regime based on the cult of presidential personality. In August 2002 President Niazov was declared to be President for Life.

However, despite all their existing political differences, the Central Asian states are similar in their aspiration to maximize foreign investment.

It must be emphasized that the populations of Central Asian states are highly educated and qualified. These states can be regarded as typical developing countries, based on indicators of life qualities, and, to some degree, production levels and technologies. However, if judgement is based on the level and the quality of education, and on the networked development of secondary schools, universities and scientific bodies, then these countries, and particularly Kazakhstan, are directly comparable with the developed world. This opens opportunities for implementing different marketing research types and strategies, developing appropriate personnel recruitment for these situations, and using modern research technologies.

Conducting marketing research in Central Asian countries

1. Choosing the company and determining its capacities.

Ten years ago, when market economies were just emerging from the ruins of the Soviet Union, Western companies conducted marketing research in the region exclusively thorough mediators. The stages were normally at least two or three levels deep. Western companies assigned research projects to international (American or western European) research companies, which were themselves establishing partnerships with Russian or Turkish research companies, which in turn were searching for executors in the Central Asian states. The responsibilities in such cases were appointed in a standard scheme. The Western company usually elaborated research strategies and tools, analyzed data and made the final report and presentation. The local executor normally organized fieldwork and entered data, mainly into databases such as the SPSS program, while Russian or Turkish mediatory companies only checked the entered data.

With the development of a local research industry, Western clients have frequently excluded the Russian or Turkish mediator stage. Yet there was a degree of hesitation over entrusting the whole research cycle to local companies. As a result, the cost of marketing information from Central Asia was between five and 10 times more expensive than if local companies had carried out this research and data handling internally.

The experiences of Western companies that have entrusted both the fieldwork and the analytical part of the projects to local companies have been positive. The benefits and reduced costs are quite apparent. The reports compiled by local researchers correspond with internationally accepted standards. Yet the contents of such reports benefit from local researchers being better informed of the specifics of their region, and not omitting any important information.

Before 1998, Coca-Cola considered it possible to utilize local companies only in the fieldwork and data entry aspects of its tracking projects in Kazakhstan, and even that limited aspect was under Russian supervision. Beginning from 1998, our company, then known as BILESIM International Kazakhstan, became an executor of Coca-Cola projects in Kazakhstan. We collected information for Coca-Cola projects and sent it to the American firm that was concurrently developing research tools and strategies.

At the beginning of 2002, Coca-Cola considered it possible to assign the whole research cycle, from the elaboration of research tools, to the preparation of final report and its presentation to BISAM, which successfully completed this project in the summer of 2002.

Currently there are several local professional research organizations capable of conducting projects to internationally accepted levels. The majority of these companies are concentrated in Kazakhstan.

Those companies with international levels of research capability and experience are members of a professional body, KAPIOR — the Kazakhstani Association of Professional Researchers of Public Opinion and the Market.

Current KAPIOR members consist of BRIF Central Asia, the previously mentioned BISAM Central Asia, the Research Group "Central Asian Project", the Centre of Public Opinion Research CIOM, and the Market Consult Group. The first three organizations mentioned above are members of The European Society for Opinion and Marketing Research (ESOMAR). The heads and specialists of these companies frequently participate at ESOMAR congresses and seminars. Each of the KAPIOR members is capable of conducting qualitative and quantitative research projects for different types of goods and markets. BISAM and BRIF companies have research networks throughout all the Central Asian region.

2. Statistical data. Capacities of desk research.

The quality of demographic statistics is variable in Central Asian states. The first census since independence in Kazakhstan and Kyrgizstan was conducted in 1999. Numerous publications, based on census data, feature detailed analyses of regions and settlements, and include crosstabulations of major demographic indicators. The indicators that have not been included in publications may be ordered from statistics agencies of the mentioned countries.

In Tajikistan, the census was conducted in January 2002. However, when using the materials of the census, a generally low level of statistical registration in this country should be taken into account. The latest census in Turkmenistan took place in January 1995. There are plans for conducting a selective (5 percent) census in 2004.

The most unreliable demographic category, of all the Central Asian state statistics, is income. Collecting information about income through direct questions is ineffective in the post-Soviet region, due to a significant share of family income being derived from unofficial processes outside the taxation systems. This includes incomes from black market transactions, street trading, wages from tax-avoiding funds, and bribery. For these reasons, statistics agencies in Central Asian states began recalculating income levels based on actual expenditures on selected items that had been suggested by the respondents of representative surveys. However, such an approach considerably undervalues the real incomes of wealthy and middle classes, since there are no accounts of the postponed purchases, or savings.

Since 2002 attempts had been made by Kazakhstani statistics agencies to estimate undeclared incomes. However such estimation does not present accurate figures.

In Uzbekistan, and particularly in Turkmenistan, official income and expenditure statistics, and any other monetary indicators, are significantly distorted by the great difference between the official and the real rates of national currencies.

The quality of production, finance, and commerce statistics in different Central Asian states is also variable. In Kazakhstan and Kyrgizstan numerous special collections have been published of monthly analytical reports concerning the social and economic development of these countries. Accurate data of imports, exports, macroeconomic, and sector development can be obtained. However the reliability of official statistics is uneven for different goods and products. For beer and alcoholic beverages, for instance, there is a significant share of unregistered production and smuggled products.

Obtaining even minimal data about production, exports, or imports in Uzbekistan, Tajikistan and Turkmenistan demands huge efforts that often involve dealing with unofficial channels and confidential connections.

3. The possibilities and peculiarities of consumer research.

Consumer research in Central Asia may be conducted through diverse methods of data collection from traditional face-to-face interviews, to mystery shopping strategies. However door-to-door interviews proved to be the most effective method.

Due to high educational levels it is possible to use questionnaires with structurally complicated questions, transference instructions, and filter questions.

To determine lifestyles or consumption habits, it is possible to combine a questionnaire survey with observations. BISAM, for instance, has conducted home visits with interviewers observing and videotaping the washing procedures, and photographing the house interior.

The acceptable interview length is one hour, though the most efficient interviews are thought to last 30-35 minutes.

The focus group method is popular and very effective. Both urban and rural residents participate readily in focus groups, though the compensation rate is not high — from $1-2 in rural areas, up to $15 in elite districts of large cities.

The recruitment of focus group participants does not have substantial national and local differences. Yet it is important to be aware that, across Uzbekistan, Turkmenistan, Tajikistan, and in south regions of Kyrgizstan, men and women should not be present in the same focus group. In Kazakhstan there are no such restrictions in either urban or rural areas. Telephone surveys are possible in large cities where 70-80 percent of households are connected. In small cities and rural areas the telephone connection level is extremely low.

Internet communication is growing rapidly in all Central Asian countries. In the cities of Kazakhstan and Kyrgizstan, 8 percent of families use the Internet, compared with only 2 percent in 1999. According to existing projections, approximately 30 percent of households will be using the Internet in the urban areas of the mentioned countries by 2010. Internet access will be enabled not only through computers, but also through mobile phones. In Kazakhstan mobile phone usage almost doubles each year. Currently, however, online surveys in Kazakhstan and Kyrgizstan are biased in favor of elite consumers or a minority of Internet users.

In general, there are no lifestyle or traditional factors in Central Asia that might hamper market research.

4. Competitive environments and corporate market potential.

Central Asian companies are significantly more experienced in consumer research than in business-to-business, non-consumer, or corporate consumer research. Yet these types of research projects are growing rapidly in number, and corporate market investigations have become an important field of expertise.

Problems in the development of these research directions are attributable to the initial phase of uncertainty and inexperience of Central Asian businesses in the post-Soviet era. Not so long ago the initial post-Soviet markets were dominated by a wide variety of crime, including organized racketeering. For this reason, local companies are still very suspicious of any kinds of inquiries about them. Since this tendency is exacerbated by the Soviet legacy of habitually restricting information from the public, it becomes clear why Central Asian enterprises and firms often perceive as confidential even basic information. For example, it is very difficult to obtain data on production and sales volume, and on the introduction of new technologies, even though the disclosure of such information has clearly apparent, demonstrable benefits, for the companies concerned.

Despite such systemic problems, our firm has managed to gain credibility among business circles, and has developed methods of studying corporate entities, producers and sellers. These include interviews of the standardized, semi-structured, and in-depth types. These methods also include the study of enterprises using focus groups at a managerial level. In our study of the bank services available to legal entities, for example, financial directors, and the accountants of transportation and trade companies, interacted successfully in focus groups.

Question & Answer

Research in Canada

Editor's note: For his annual contribution to our international research issue, our West Coast ad rep/roving reporter Lane Weiss stayed close to home, traveling to Montreal to speak with Elaine Rioux, president and CEO of Montreal-based Contemporary Research Centre.

Quirk's: *What research methods are most commonly used in Canada and in the province of Quebec?*

Elaine Rioux: Telephone is the biggest, followed by focus groups and then all of the other techniques such as mall research.

Is Internet research becoming more popular?

There is a slow increase in Internet research. It is far from taking over any of the standard methodologies. But it is very feasible.

What are some of the ways you see the Internet affecting market research?

The No. 1 effect I have seen recently in going to research conferences in the U.S. involves incentives. Telephone is the biggest research method here in Canada and we are used to doing studies for which we don't pay respondents, unless it's medical and you have to provide some kind of incentive. What Internet research is doing is creating this pool of cooperating respondents who expect to get paid in some fashion or another. It may not be actual money but they may earn points, for example.

Do language issues have an effect on conducting research there? If so, how do you compensate for those effects?

The official language here in Montreal is French so there is an effect because you have to think about simul-

taneous translation, you have to use a local moderator because you have to have someone who can speak French. The rest of Canada is in English. A lot of people feel that if you have a translation from France you can bring it here but that doesn't work. French there and French here are very different, just as the English in North America is different from the English in Britain.

Do you often conduct some interviews in French and some in English?

Absolutely. It depends on where you are doing the research. If you are doing it solely in Montreal, it's going to be in French. If you are doing it in the rest of Canada, it will be in English.

Do clients specify that interviews must be conducted in French or in English, or does it depend on the subject matter that is being researched?

We have clients, mostly our American clients, who will call up and want to do research here in Montreal and they want us to get English-speaking respondents and nine out of 10 times we'll say no because you're not getting the true representation of this market. It would be like going to Toronto and trying to find French-speaking respondents. You're not researching the right people, so we as researchers are not doing you a service by letting that happen.

If you are talking to someone in Quebec about the new packaging for Tide soap, for example, it doesn't make sense to do the groups in English. Why are you forcing people to use English when their advertising is in French, the TV is French? If you want to know the Montreal market, the Quebec market, you have to do the research in French.

What are some of the problems facing marketing research in Canada and around the globe?

Certainly the same things are having an effect here in Canada as in the U.S. The pool of respondents that are ready to do any kind of research is getting smaller and smaller. As all the polls are showing, cooperation rates are down so it is making it harder and harder to do research. It's making it more expensive because of the cooperation rate.

Are there privacy laws in Canada that make it difficult to conduct legitimate marketing research? Does telemarketing have a damaging effect on legitimate research?

First, on the privacy law issue, right now there is nothing specific. But we have to be very careful and keep an eye on what is going on in the U.S. and go to conferences such as those put on by CMOR [the Council for Marketing and Opinion Research]. Canada is very influenced by what goes on in the U.S. So if it becomes an issue in the U.S., it may later become an issue in Canada.

CAMRO [the Canadian Association of Marketing Research Organizations] is keeping an eye on that. It could become an issue because telemarketing has been a problem since the beginning due to the effect it has on respondent cooperation. People are getting more calls at home and you say no and yet the telemarketers persist. There has also been sugging. It has made people leery.

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?

Personally, I think it is helpful. I don't think we really have much choice. Look at the other industries outside of research that are consolidating. The smaller organizations are getting hurt, but really for research companies to be part of the game long-term, they have to look at what clients want now. They want service quicker, they want to deal with one person. With larger firms, they get to call one person and they can handle the entire world for them. That is an added value. Plus at the same time, if you can form partnerships with other firms, you can help your clients. If people are doing business here in Canada, I want them to call me or another firm here because we can understand all the nuances and differences in our cultures.

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?*

I think the majority do, but like anything, you have clients who want the sun, the sky and the moon and they don't want to pay for it. There are those who, when you get the information for them, it's not the answers they want to hear. But I think you get that in any kind of business. You have reasonable and you have unreasonable. The majority are reasonable.

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

There will always be a few clients who don't listen, just as there are bad researchers who fudge the data and hurt us all. But the people I have been fortunate to work with are coming up with great ideas. I see more partnerships forming with the end-user client and the actual consultant/researcher. And I think everybody has something to gain by that.

Have you seen trends in the use of marketing research in Canada? Are certain kinds of companies or industries doing more or less research, or doing research for the first time?

Our volume has decreased but the number of clients is the same. The U.S. economy definitely effects the Canadian economy. Probably about 35-40 percent of our clients are in the U.S. They're just doing fewer projects. We often will deal with U.S-based research firms who need a Canadian partner and as their business volume has decreased, that of course effects us. At the MRA conference in June in Washington, I talked to other research firms who said that their volume was good but not where their expectations had been. Everybody is worried.

As for trends in the kind of research being conducted, I have seen more and more companies wanting to get closer to consumers and see how they live and use products. It's like all the reality-based TV shows that are on these days. I call it reality marketing research.

Are the research departments in the client companies growing or shrinking? Are client companies looking at research providers as consultants in information management, or still just as data-gatherers?

In the '90s, there was downsizing and companies went the consultant route and cut down their marketing research departments. They are still doing that; they are not increasing their MR departments. So there hasn't been any great change. If a company is set up so that they use a marketing research firm just as a data gatherer, and the client company is going to do the analysis themselves internally, they have stayed with that mentality.

But if you are smart as an end-user company, you are using someone on the outside to conduct your research because you are going to get an unbiased opinion, hopefully, and get the true facts and have someone really analyze it. When you depend solely on internal people, you aren't getting any fresh ideas or an outside perspective.

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?

It's fine to be global, but everybody needs to listen to each individual country. When we are educating our clients, we say it's great to be global but there are distinctions. In Canada for example, Quebec has always been culturally very different from everybody else. But you have that in the U.S. as well. What works in New York won't necessarily work in Paris or Beijing. When you are globalizing you have to get good advice from within those different countries.

QuickLink

To read some of Lane Weiss's past Q&As, visit www.quirks.com and enter Article QuickLink number 296 (research in Germany and France), 529 (Egypt and Israel), 731 (Denmark, Germany, The Netherlands), or 377 (Belgium, France).

Drawing a few from many

Using panel research to penetrate the Asian market

By Al Fitzgerald

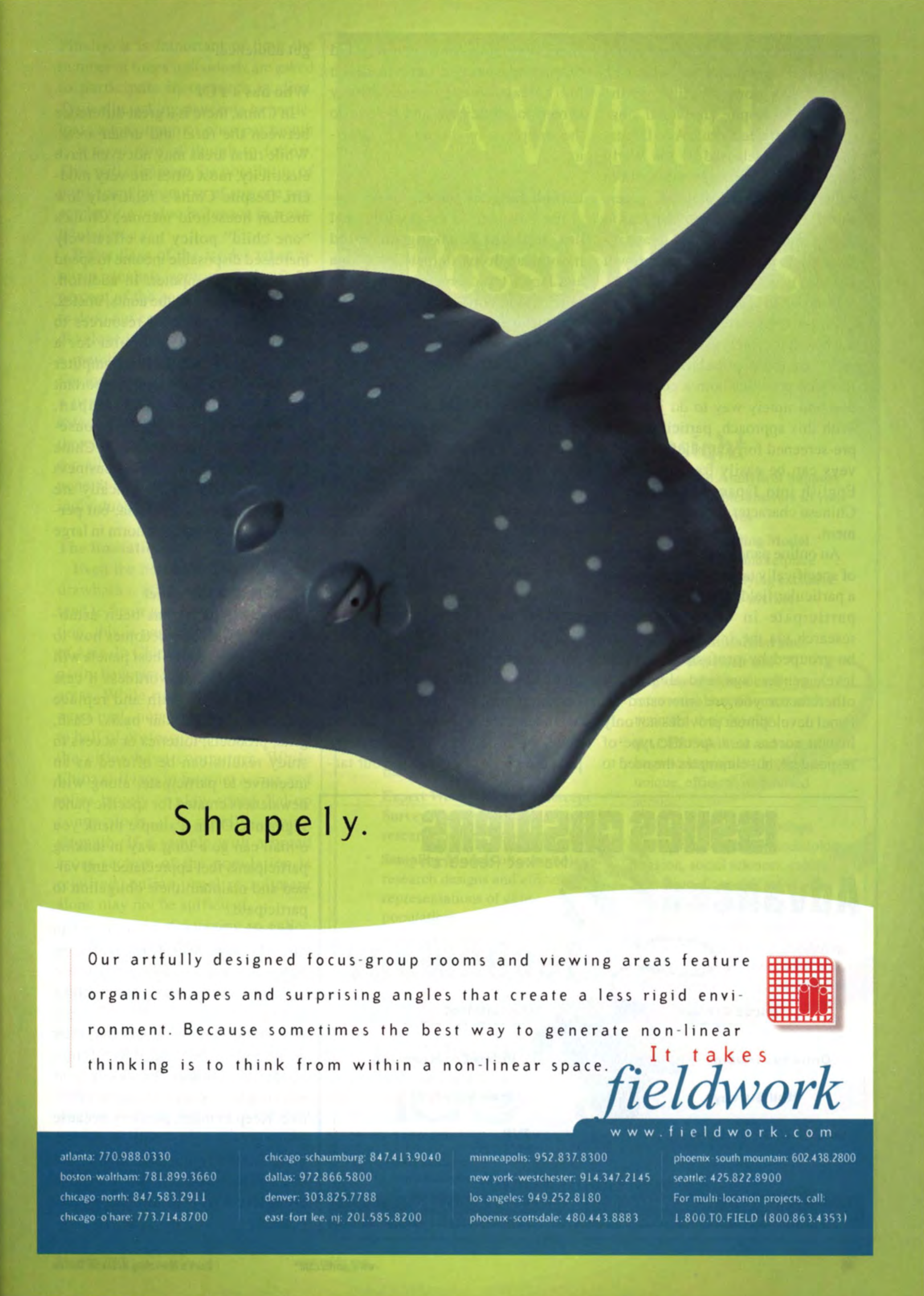
Editor's note: Al Fitzgerald is president and founder of Answers Research, Inc., Solana Beach, Calif. He can be reached at info@answersresearch.com.

We've all experienced firsthand how the Internet does indeed make the world a smaller place. And we also know the Internet has in some ways not yet reached its much-touted potential for marketers. Publicly traded dot-coms (that have lasted the industry shake-out) have leveled off to reasonable double-digit share prices, and advertisers have learned that a banner ad does not equal instant market-share leadership. Within this reevaluation of the online sector, market researchers have continued to tap into Web-based resources. One of the most significant ways in which the Internet can be used to reach customers across the globe is through online panel studies. While reduced costs are often recognized immediately as a benefit, the fact that online panels can often cut the data collection time by 90 percent or more should not be overlooked.

With some 500 million people online worldwide, the Internet has certainly succeeded in bringing the world community together. And with over 100 million Internet users in the Asia-Pacific region and a conservative 30 to 50 million users in China and Japan respectively, online panel development is becoming one of the most efficient ways for marketers to reach their customers. Prior to the recent Internet explosion, when in-person or telephone interviewing were the market research mainstays, it was typical for data collection in China or Japan to last four to eight weeks (or longer) and require enormous budgets. Today, using an online panel, data collection for the same types of studies can be completed in a matter of four to eight days and require far fewer research dollars.

Benefits of including Asia in research

The steady online user growth in China and Japan illustrates the necessity for marketers — particularly from companies offering IT-industry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related products — to explore and target these geographies. Japan's IT industry has grown steadily over the last decade despite an overall sluggish Japanese economy. And Digital Planet 2002, released by the World Information Technology and Services Alliance (WITSA), shows a 15 percent IT spending growth last year in China (this was compared to a staggeringly low 1 percent U.S. growth last year).

In order for foreign companies to gain market share in these Pacific regions, it is critical to understand the needs of these populations. Panel research provides both a cost-effective and timely way to do just that. With this approach, participants are pre-screened for your study and surveys can be easily translated from English into Japanese language or Chinese character for online deployment.

An online panel consists of a group of specifically targeted individuals in a particular field who have agreed to participate in ongoing market research via the Internet. They can be grouped by profession, income level, gender, age, and almost any other factor you are interested in. Panel development provides not only instant access to a specific type of respondent, but eliminates the need to spend valuable time locating and recruiting specific hard-to-reach individuals — they have already agreed to participate and belong to the group you're interested in targeting.

Establishing the panel

The first step to successful panel development is asking qualified individuals to participate. In China and Japan, typical recruitment methods include contacting respondents who have participated in previous studies as well as obtaining names from published lists or public directories. The next step is to send them an invitation via mail, e-mail or telephone to participate in the panel. Interested individuals are asked to provide their e-mail address and complete a brief online registration questionnaire that collects their demographic, firmagraphic and contact information.

It is important to ensure that the panel is projectable to your target market. In some instances, this requires panels that are balanced demographically and according to other key variables such as region, firmagraphics, etc. In order to obtain balanced data, it is essential that the panel be broad enough to encompass the range of people in your target audience.

Who has a PC?

In China, there is a great difference between the rural and urban areas. While rural areas may not even have electricity, most cities are very modern. Despite China's relatively low median household income, China's "one child" policy has effectively increased disposable income to spend on a family computer. In addition, with only one child, the aunts, uncles, and grandparents pool resources to purchase a home computer for a school-aged child. Being computer literate is perceived as very important in both China and Japan. Approximately one half of households in large urban centers in China have access to a PC. On the business side, small businesses typically are not computerized in China, but personal computers are the norm in large enterprises.

Maintaining the panel

Once the panel has been established, the question becomes how to maintain it. Even the best panels will eventually become worthless if care is not taken to retain and replace members on a regular basis. Cash, gifts, products, lotteries or access to study results can be offered as an incentive to participate, along with newsletters created for specific panel segments. Often a simple thank you e-mail can go a long way in making participants feel appreciated and valued and maintain their obligation to participate.

In both China and Japan, gifts can often be very useful incentives. In fact, small and inexpensive gifts can be much more of a motivator in China and Japan than in the U.S. or Europe. Also, reminding members that their opinions are helping shape future products is a benefit. Providing short and simple surveys can also be effective. Keep in mind, possibly because of the greater complexity of the language, a survey that takes 15 minutes in English will often take longer to complete Chinese and Japanese.

Finally, it is important to limit the number of times individuals are asked to participate in research studies. Typically, asking panelists to participate a maximum of once per month is a good rule of thumb to follow. This will eliminate the possibility of participant burnout or of any one person having undue influence in a particular area.

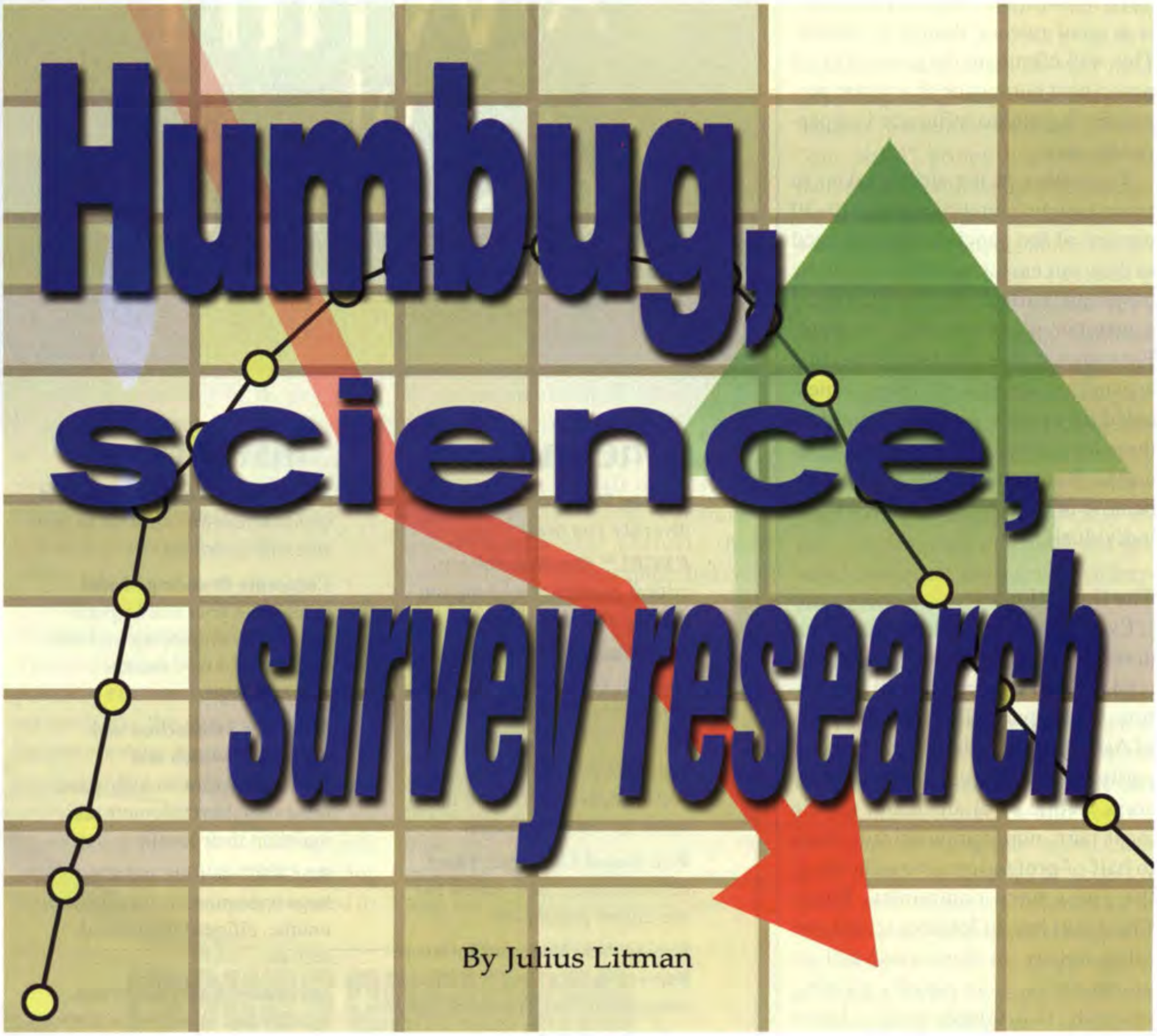
Regardless of the strides taken to retain panelists, approximately 10–30 percent of the panel can be expected to drop out each year. Metrics can be developed to determine at what point a member is considered a dropout. For instance, it can be established that a panel member is no longer interested after they fail to respond to three invitations or after receiving an e-mail bounceback. When this happens, it is important to replace these individuals.

The limitations

Even the best solutions have their drawbacks. While online populations tend to favor a more affluent population, this is particularly true in parts of Asia. In China, there is a great disparity between the cities and the rural areas. While rural areas are, for the most part, non-computerized, close to half of professional households in the cities have computers. While China still lags in Internet access and relies largely on slow-speed dial-up connections, it is rapidly gaining strength. If a sample with a broad cross-section of the population is required, online panel recruitment alone may not be sufficient.

The process of pursuing an online panel can be challenging, but when you think of having to recruit from scratch for each study, the idea becomes more and more appealing. Leveraging the most data for your research dollars is also a great incentive. Perhaps the greatest reward is that limiting the time spent collecting the data increases the time that can be used to analyze and use the information gathered. Now there's motivation enough to consider a panel approach.

Humbug, science, survey research



By Julius Litman

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By the mid-20th century, researchers had settled on probability sampling as the preferred technique for accumulating representative survey samples. This not only provided a scientific approach to ensuring representativeness in survey sampling, but also made possible the application of significance testing to the results obtained.

Sixty-plus years later, today's survey research is plagued by low response rates — a serious, worsening, intractable, and exceedingly well documented phenomenon which has been a salient feature of the survey methods literature since the emergence of polling in the 1930s, and a regular feature of statistical and social science journals since the 1940s.[1]

Nonresponse — the inability to complete interviews with all qualified members of a sample — is of material importance because it adversely affects our ability to draw representative samples. More to the point: nonresponse diminishes survey research by robbing it of its claim to science. This is because: if we can not trust the samples we draw to be "representative," then survey research can not really be trusted to be science.

Ultimately this means survey research is destined to become, and be regarded as, more art than science. Lucrative, when done well; nothing to be sniffed at; and certainly admired when successful in its ability to "read" an audience...but hardly science.

The challenge confronting today's survey researchers then is to reclaim the science. This article argues that by leveraging the Internet to conduct rapid-fire study replications — reproducing results and yielding converging

data — researchers can re-actualize survey research's claim to science.

Survey research science

As practiced today what — if anything — is scientific about survey research?

It's not the questions we ask nor the manner in which we ask them. It's certainly not the response alternatives we provide or the way survey research data are tabulated. Nor is it the analytical schemes or statistical tests we apply.

None of these is in any way scientific. All are matters more of art and judgement, than science. They are almost always driven by budget constraints, and entirely too often by tradition, as in: "Well...this is the way we've always done it."

The one thing, the only thing, that imbues survey research with science is: sampling. It is in our insistence that a sample be scientifically drawn to be representative that science makes an appearance at all in the survey researcher's work.

If sampling is the only scientific aspect of survey research, then today's problems of nonresponse make it difficult for survey research to claim a foundation in science. Stated somewhat differently, if the "representativeness" of our samples is in doubt, then what science there is in survey research…evaporates.

So if the science in survey research can no longer come from adherence to probability sampling, is there some other aspect to the scientific method on which survey researchers might depend?

Fortunately, there is. In the notion of reproducibility. Better still, we now have the technology to cost-effectively reproduce survey research findings, thus enabling researchers to re-establish survey research's grounding in science.

Replication and reproducibility

The Internet makes it possible for survey researchers to cost-effectively and rapidly replicate their studies. Because of the speed and lower cost with which interviews can be accumulated, we can harness the Internet to reproduce study findings rapidly and repeatedly.

The point is that instead of relying on sampling to ensure the science in survey research, we can leverage our ability to rapidly replicate research findings. This ability to reproduce findings goes a long way to assuring scientific credibility.

There are things, of course, reproducibility can not do. It can not, for example, guarantee valid results. Nor can it solve the problem of self-selection. Reproducibility in and of itself can not cure all the ills of survey research. It is not a panacea. It is, however, a robust mechanism for self-correction and the enforcement of performance standards.

What reproducibility does do is assist in exposing spurious findings. It assuages our concerns about the reliability of our survey results by producing — or not producing — converging data. It facilitates decision making based on repeated trials and most importantly weans us of our reliance on the design and execution of single, one-shot, "definitive" studies.

Sampling

Today's survey researcher relies, in the main, on two methods of sampling: quota and probability sampling.

In quota sampling, samples are made representative through stratification. This stratification is typically achieved through the calibration of such control factors as: gender, age, geographic distribution, race, ethnicity, education, religion, occupation, political affiliation, income, marital status, number of children, and so on.

Despite our reliance on quota sampling, there are a number of drawbacks to its use. It presumes an accurate estimate of the incidence of the various control factors in the population from which the sample is being drawn. It assumes, as well, a robust understanding of the control factors themselves, including their relevance to the unknown characteristic being measured.

Then there are the practical difficulties associated with attempting to mesh several controls together. This is especially true when attempting to stratify within a stratum, e.g., controlling for specific age cohort distributions by gender.

Finally there is the uneasy feeling that a sample's forced similarity with a population generates undesirable byproducts of the stratification process itself. In short, we become concerned that the more we try to control a sample, the more distorted it becomes along other relevant but unseen dimensions.

By the early 1950s, therefore, survey researchers' thinking about sampling coalesced around the notion of the probability sample[2], i.e., a sample in which the selection of all respondents was by random methods such that all qualified population respondents have a known chance of being included in the sample. Or more precisely in the words of Frankel and Frankel:

"Probability sampling (is) the process of selecting elements or groups of elements from a well-defined population by a procedure which gives each element in the population a calculable non-zero probability of inclusion in the sample. (Where) the phrase 'calculable non-zero probability of inclusion' means that every element in the population has some chance of being included in the sample and that the probability of its inclusion can be determined."[3]

The problem of non-response

Much has been said about nonresponse. The purpose here is not to: belabor that literature, bemoan the causes of non-response, besmirch the tactics designed to improve response rates, nor decry compensating for nonresponse by data imputation or weighting. Nonetheless, several points about the historical treatment of and survey researchers' reactions to response rates are in order.

As exhaustively documented by Tom Smith of the NORC[4], response rates are seldom reported. Now the likelihood that the absence of published response rates is because they are uniformly robust seems slim. Instead, it is more likely that survey researchers avoid reporting response rates mostly because these are so lackluster.

In Smith's own words: "Overall, reporting of nonresponse is a rarity in the mass media and in public polls. Nonresponse is more regularly documented in academic and governmental studies, but is still sporadic at best (emphasis added).[4]Cites in books and project reports also are very uncommon (emphasis added)."[5]

We are forced to confront as well the observation of little conformity in the way response rates are calculated. Again in Smith's words: "First, response rates and other outcome rates are usually not reported. Second, when reported, they typically are not defined. Third, when their basis is documented, various meanings and definitions are employed. As Richard Lau (1995, p. 5) has noted, "Unfortunately, survey organizations do not typically publish response rates; indeed there is not even a standard way of determining them." And as James Frey (1989, p. 50) has observed, "Response rates are calculated in various ways by different research organizations. The basis on which these rates are calculated is not often reported."[6]

Instead of dwelling on the underreporting of response rates and the absence of standardization, we consider instead the importance of response rates and what might be called the Sheatsley Admonition[7]: "A probability sample in which only 60 percent of the assigned cases have been completed can be subject to severe bias, since the 40 percent who are 'hard to get' may have quite different characteristics.... Generally, (an) 80 percent (completion rate) is regarded as acceptable; anything below 75 percent may be viewed with suspicion."[8]

Or more recently, in 1979 guidelines issued by the U.S. government's Office of Management and Budget (OMB):

"It is expected that data collection based on statistical methods will have a response rate of at least 75 percent. Proposed data collections having an expected response rate of less than 75 percent require special justification. Data collection activities having a response rate of under 50 percent should be terminated. Proposed data collection activities having an expected response rate of less than 50 percent will be disapproved. As a general rule, no request for clearance of a general purpose statistical survey or report having an anticipated response rate of less than 75 percent will be approved unless the Office of Federal Statistical Policy and Standards of the Department of Commerce concurs in the request."[9]

Well, things have certainly changed. Nowadays we, and the U.S. Government, content ourselves with response rates that are well below 50 percent[10]. This, of course, is at the peril of probability sampling, which — as we noted at the start — underlies survey research's claim to a basis in science. To understand why this is true, we consider some issues of sample size.

The law of large numbers

The law of large numbers is a straightforward proposition. It is the mathematical proof of the theory that a relative frequency, mean, range, or standard deviation calculation will be more accurate with a large sample than with a small sample.

It is the law of large numbers that enables us to put our faith in survey research as sample size increases. Simply stated: the more randomly selected, independent observations we have, the more confident we are that those observations reflect reality.

O.K., you say, if the law of large numbers applies, then all we need do is make sure we complete interviews with large samples of respondents. And in fact this mistaken rationale governs the way most of today's survey research is conducted.

Whether probability sample or quota sample, the emphasis in the conduct of survey research is on the accumulation of large sample sizes; as if that alone suffices to ensure the accuracy, reliability, and (most importantly) the science behind our survey research findings.

Let's see if we can convince ourselves of this.

A common sense approach

Suppose we set out to interview people, randomly and independently selected, about their interest in the color blue. We approach 10 people, and only one or two of the 10 answer our question. That is to say, we have between a 10 percent and 20 percent response rate.

Common sense says that it's probably neither reasonable nor prudent to assume that we know the responses of the other eight or nine people who do not speak to us based on the feelings of the one or two people we do speak to.

We could, of course, drastically increase our sample size. This time we succeed in asking 1,000 people about the color blue. Does this much larger number of respondents really make us more comfortable with the notion that the answers received from those 1,000 respondents represent the views of the other 4,000 to 9,000 respondents we contacted, but who made no response?

Don't we suspect in both cases that the 10 percent to 20 percent of respondents who did answer our question(s) differed somehow from the 80 percent to 90 percent — i.e., the vast majority — of all potential, qualified respondents who did not respond?

Uncertain? Well, let's roll some dice.

An empirical approach[11]

We begin with a single six-sided die. Assuming that it is a fair die, then each of the six possible events that can take place on a given trial are equally probable. This means on each roll there is: a one in six chance of throwing a one; a one in six chance of throwing a two; a one in six chance of throwing a three; and so on.

Now consider our ability to estimate the probability of obtaining these six outcomes as the number of trials changes. The law of large numbers says that our ability to estimate the probabilities associated with each outcome should improve as the number of trials increases. So as the number of trials increases, we expect there to be equal numbers of ones, twos, threes, fours, fives, and sixes thrown. This is true because the law of large numbers says we get a truer picture of the underlying distribution of outcomes as the number of trials increases.

To complicate the game a bit, let's take two six-sided dice and toss them. We will now use the sum of the two dice as our outcome. Obviously, there is now a different number of base events that can give rise to each of the possible outcomes. The probabilities of these outcomes are shown below.

Outcomes	Events	Proportion
2	(1,1)	1/36
3	(1,2) (2,1)	2/36
4	(1,3) (2,2) (3,1)	3/36
5	(1,4) (2,3) (3,2) (4,1)	4/36
6	(1,5) (2,4) (3,3) (4,2) (5,1)	5/36
7	(1,6) (2,5) (3,4) (4,3) (5,2) (6,1)	6/36
8	(2,6) (3,5) (4,4) (5,3) (6,2)	5/36
9	(3,6) (4,5) (5,4) (6,3)	4/36
10	(4,6) (5,5) (6,4)	3/36
11	(5,6) (6,5)	2/36
12	(6,6)	1/36

The law of large numbers is still at work and our ability to estimate the probabilities associated with any of the outcomes improves as the number of trials is increased.

But what happens if for some unknown reason our view of one or more outcomes, say the (3,1) or (6,2) combinations, is intermittently obscured or (worse) occurs but is never reported at all? Well, obviously our ability to estimate population parameters is adversely affected. This remains true no matter how many times the dice are rolled. So long as some outcomes are never reported or otherwise obscured, or over-reported — no matter how many times we roll the dice our population estimates are going to be wrong.

This is the problem with non-response. No matter how large our samples, so long as 80 percent to 90 percent of all respondents contacted refuse to cooperate we can not be certain that some outcomes are obscured or go unreported altogether; and that the 10 percent to 20 percent of respondents who do cooperate are, therefore, not representative of the population from which the sample is drawn.

So if survey research as practiced for the last 20+ years is scientifically dubitable because of our problems in getting representative samples, is there some other aspect of the scientific method we can deploy to reintroduce science to the discipline of survey research?

Fortunately there is.

Reproducibility

Consider cold fusion. The central claim of cold fusion is that the fusion of deuterium can be initiated and maintained in an electrochemical apparatus not much different from that used to demonstrate the breakdown of water into its component gases in a high school chemistry class.

This claim, first reported in March of 1989, was put forward by two respectable scientists: Fleischmann of the University of Southampton in England and Pons of the University of Utah. Regrettably, this initial claim of "cold fusion" was quickly met by counterclaims from equally respectable labs and investigators to the effect that the initial findings could not be replicated.

In the midst of the ensuing controversy, the Department of Energy had its Energy Research Advisory Board (ERAB) conduct a study of the situation. But even before the ERAB panel issued its report, the consensus of mainstream researchers was that the claims of cold fusion's adherents were invalid. The ERAB report formalized and solidified that consensus — a consensus which remains unchallenged to this day.[12]

Reproducibility in survey research

Reproducibility: the replication of results, is the *sine qua non* of the scientific method. Science does not accept as "scientific" results which can not be reproduced. The notion behind reproducibility is that if the results obtained by one scientist can not be replicated by a similarly skilled scientist using similar equipment, then there is a concern of spuriousness in the original finding. Reproducibility is the check which scientists apply to ensure that science is science and not mere idiosyncrasy.

Until very recently the replication of survey research studies was impractical. This was for several reasons, but most often because of the cost involved. Few organizations could afford to launch more than one execution of a survey research study.

However, even where cost is not a constraint, the amount of elapsed time required to conduct, analyze, and report the replication of a study inevitably means that any observed differences between the original effort and its replication might equally be the results of "history" and "maturation"[13].

These three considerations — cost, history, and maturation — doomed most efforts at study replication from the start; and, ironically, have driven the need to create the "definitive" one-shot study. After all, if we have neither the time (because it takes too long) nor budget (because it costs too much) to do it more than once, then we'd best get it right the first time. Survey researchers have therefore been at pains to design research, execute the design, get an answer, and live with the results.

Not being fools, experienced survey researchers therefore rely not on any single study, but instead look for converging data. This search for converging data is a weak form of study replication. We look for confirming data from multiple, independent sources to buttress (or dispel) the findings of our survey research efforts.

Reintroducing science to the art of survey research

The advent of Internet-based market research makes it possible to introduce the key element of reproducibility to survey research. Using Internet-based techniques we can rapidly and cost-efficiently accumulate and simultaneously report results from multiple locations. By insisting on reproducibility we incorporate a key requirement of the "scientific method" in our survey research efforts.

More concretely, consider our ability to screen respondents for their use of widgets and then interview 1,000 widget users in the space of an evening by intercepting them at several of the popular search engines or widget enthusiast Web sites. Let's say we did this for five consecutive nights with detailed results for each night available the next morning.

Now imagine that the results to a question about willingness to buy a $10.95 blue widget was 20 percent on Monday, 22 percent on Tuesday, 18 percent on Wednesday, 17 percent on Thursday, and 23 percent on Friday, as shown in the table below.

Night	Sample Size	Willingness to buy $10.95 blue widget
Monday	1,000	20%
Tuesday	1,000	22%
Wednesday	1,000	18%
Thursday	1,000	17%
Friday	1,000	23%
Total/Average	5,000	20%

If we found nothing unusual about the demographic composition and several widget purchase correlates for these five samples of 1,000 respondents, we'd likely feel comfortable concluding that 20 percent of the widget-using population would buy a $10.95 blue widget. We might even feel justified in saying the estimate is 20 percent ±3 percent, though this would not be a confidence interval.

Our ±3 percent interval around the mean of 20 percent is an estimate based on empiricism. It's an observed, not a computed, range. It is based on repeated trials instead of on assertions about the random nature of our sample and the normal distribution of blue widget purchase behavior among widget users.

One can easily think of variations which would multiply our faith in these replications. We could replicate more often: in the very early morning and on weekend nights in addition to evening mealtime hours. We could, if we wanted, replicate frequently but over extended periods to check for seasonality effects.

We could replicate across a broad range of search engine or widget enthusiast sites. We also could replicate across related subject area Web sites or other Internet locations where we might expect to find widget users.

We would replicate the study as often as practicable until we obtained converging data. Depending on the importance of the decision at hand, our concerns about false acceptance versus false rejection, and the investigator's personal view of what constitutes converging data, we might standardize on more rather than fewer replications before agreeing that "convergence" had occurred.

If the data never converged we'd probably suspect something wrong with the questions being asked. We would reword the questionnaire and try again.

As likely, we would also re-examine the underlying assumptions about the sources, quality, and/or self-selected natures of our samples.

Rather than attempt to design the definitive one-shot study, executed and reported over a 14-to-30-day period (or longer), we look instead for converging data from multiple iterations of a study executed and reported in rapid fire fashion. The science underlying this approach has nothing to do with sampling theory. It depends instead on the common sense requirement that before accepting a study we insist on the reproducibility of its results.

Representativeness

Well what about representativeness? Do many, rapidly executed iterations of a study across multiple Internet contact points on a 24x7x365 basis mean we are more likely to have a representative sample?

Unlikely. Again, response rates and self selection come into play. While there is current experience with Web site intercepts yielding response rates of 40 percent to 60 percent, it is almost certain that these response rates will decay over time.

More importantly, perhaps, is the concern that the respondents who respond to Web site intercepts are strongly involved positively or negatively in the event/activity experience. Perhaps, too, they are simply people who enjoy responding to surveys, so-called professional respondents.

None of this matters. It is no different than in traditional, survey research efforts where respondent self-selection is likely for much the same reason(s). Use of the Internet to replicate a study, therefore, is neither worse nor better than current survey research techniques in terms of the reasons respondents self select to respond.

Rapid iterations of a study across multiple Internet contact points on a day-in/day-out basis are superior, however, in other ways. There is the constant, ongoing, rapid-fire, replication of a study; the speedy development of converging data; and the ability to say: "No matter how many times I sample from within this population, the measure remains about the same."

As the frequency of these sampling iterations approaches continuous measurement, barometer-like information is obtained. In such instances the absolute value of a reading may be of less importance than its directionality: is the reading going up, going down, or is it flat, unchanged?

Continuous measurement

Continuous measurement is the logical extension of the notion of rapidly repeated trials, except that instead of sampling repeatedly, we sample continuously. *In situ* continuous measurement is everything survey research aspires to be, but can not achieve. This is because by its very nature current survey research practice is either retrospective or projective.

We can ask someone what they did and how they felt when they did it; or we can ask someone what they're likely to do and why they think they might do it. It is only with the advent of the Internet that we have the ability to intercept large numbers of respondents in the very course of their experiencing an activity or event, akin to the way an ethnographer might study a population.

The new science in survey research

Given the impacts of poor and decaying response rates on sampling, it is increasingly clear that sampling can no longer be depended upon for the science in survey research. That science must come from some other aspect of the scientific method.

Instead of "definitive" one-shot study designs with uncertain representativeness, we must broaden the search for converging data. This search is facilitated by the Internet, as its technologies enable survey researchers to generate multiple iterations of a study quickly, efficiently, and cost-effectively — across time (24x7x365) and across space; worldwide, as adoption of the Internet continues its wildfire proliferation.

Whether executed and reported in staccato-like rapid-fire fashion, or implemented as continuous measurement, the ability to amass and quickly analyze data collected from multiple iterations of a study facilitates not only the pursuit of converging data, but also the acceptance of research study findings based on their reproducibility.

The science underlying this approach has less to do with sampling theory and more to do with the fundamental requirement of the scientific method that before investigators accept a study finding, they insist on the reproducibility of its results.

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[8]Seconded by Paul Erdos, among others, who notes approvingly that "The Advertising Research Foundation recommends an 80 percent or better response on mail surveys,...." in Erdos, P., *Professional Mail Surveys*, Krieger Publishing Company, Malabar, Fla., 1983, p. 144.

[9]Quoted in Smith, Op. cit., p. 14.

[10]See for example the response rate data supplied by the Council for Marketing and Opinion Research (CMOR) initiative to collect and report survey cooperation, refusal and response rates at www.mra-net.org/docs/resources/coop_rates/coop_rates_avg.cfm. A recent visit to this site revealed a mean 12 percent response rate among RDD samples (n= 404) and a mean 28 percent response rate among telephone list samples (n=185).

[11]I found very nearly the same dice-based examples below at various places on the Internet. I am indebted to Toby Dye of the Parmly Hearing Institute at Loyola University Chicago for the version posted by him at www.parmly.luc.edu/statistics/stat6.pdf.

[12]Paul Jaffe, Introduction to the Internet Edition of: Cold Fusion Research, A Report of the Energy Research Advisory Board to the United States Department of Energy, Washington, DC DOE/S-0073 DE90 005611, November, 1989, posted at http://www.ncas.org/erab/intro.htm.

[13]"History, the specific events occurring between the first and second measurement in addition to the experimental variable. Maturation, processes within the respondents operating as a function of the passage of time per se (not specific to the particular events), including growing older, growing hungrier, growing more tired, and the like." Campbell, Donald T., and Stanley, Julian C., *Experimental and Quasi-Experimental Designs for Research*, p. 5, Rand McNally College Publishing Company, Chicago,1966.

Measuring trends: there oughta be a law

There is law, and it may help you choose the best method for the job

By Fred Phillips

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Word got out that you have a market research problem. Two vendors have appeared at your door; one sells surveys, and the other sells panels. Which should you choose? If you choose a panel, what kind of panel will cost-effectively solve your problem?

If you want to measure a trend — in purchase volume, market share, or any other behavior — you'll want to give panels a serious look. Even then, deciding among surveys and various flavors of panels is no slam dunk.

This article expands on Wansink and Sudman's excellent essay in the May, 2002 issue of *Quirk's*[1], giving trend watchers an advanced primer on panels as well as more tools (and one simple "law") for making this important decision. The tools extend those in Sudman's classic *Consumer Panels*[2], which he wrote with the support of MRCA Information Services (then called Market Research Corporation of America) while consulting for the company. Later, when I was MRCA's vice president for research, the present article's tools were devised and published in academic journals.[3]

Suppose you need to know the month-to-month trend in a company's purchases of software licenses, or a household's purchases of breakfast cereal. The January-February trend in purchase volume is simply the difference between the amount purchased in February and the amount purchased in January. Trend measurement necessarily involves a span of time — a before-and-after — and is an example of longitudinal measurement. We can contrast this kind of measurement with cross-sectional measurement, which involves only

one point in time. (Examples of cross-sectional marketing queries include, "What brand did you buy today?" or "Whom did you vote for in the last election?" and so on.)

The word "panel" refers to a research design in which respondents answer the same questions at least twice, with the reporting occasions separated by an interval of time. An ideal panel is one without attrition, i.e., one in which all respondents in the first wave of reporting also report in subsequent waves. The population of respondents in a panel with attrition can be static or dynamic. In a static panel there is no replacement of panel members who have dropped out after the first wave, whereas a dynamic panel is replenished in order to preserve the panel as a good representation of a particular population. The total replenished panel sample, including both original respondents and replacement respondents, is called the summary sample. As an alternative to panels, a trend might be measured by two or more independent, cross-sectional surveys, each with a different sample of respondents.

Operators of continuous, multi-client panels replenish their panels as a matter of course; they may then charge extra for the programming needed to "pull" a static sample. It is widely presumed that static samples are superior to summary samples for minimizing sampling error. We show below that this is not always true, and that research users (who often pay a premium to ensure a sizeable static sample) can save money by using appropriate summary samples.

To briefly review Stats 101, both surveys and panels are samples, subject to sampling errors of two kinds. Sample bias arises when we sample a group of respondents that is not really representative of the target population of buyers. Sample variation happens when we sample representative respondents but not enough of them.

The word "bias" means the same thing in statistics as in ordinary language; a biased sample statistic is "a little bit off" its true value. Momentarily ignoring sample variation, we can write the measured value of the trend like this:

Measured January-February trend in purchase volume =
(True volume in February + bias in February measurement) –
(True volume in January + bias in January measurement)

Panels have a clear advantage over repeated independent surveys, insofar as bias is concerned. In a panel that is ideal or nearly so, January bias pretty much equals February bias, and the bias terms in the above equation cancel out, leaving only the true trend. When two surveys use different sampling methodologies and/or measure completely different sets of respondents, the two bias terms differ, and the survey-measured trend is in error by an amount equal to "February bias minus January bias."

Should we measure a trend using repeated independent samples, or a panel sample? Because bias is hard to estimate (most commercial researchers provide a speculative list of possible sources of bias, without estimating their magnitude, and call it a day), we will make decision rules based on the variation of the estimate, or more precisely, the mean square error. A key element of our decision is the serial correlation (sometimes called autocorrelation) of respondents' behavior. The serial correlation reflects the tendency of individual buyers/respondents to repeat the same behavior in successive measurement periods.

If a market measure is reported in two independent surveys of size n taken in two periods, and this market measure has the same variance σ^2 in both periods, then the mean square error of an observed trend in this measure is $2\sigma^2/n$. When observations are taken on an ideal panel (i.e., no attrition) for two sufficiently short periods, and the serial correlation of individual behavior is ρ, then according to Sudman, the mean square error of the measured trend is:

$$\text{MSE (ideal panel)} = 2\sigma^2 (1-\rho)/n$$

This formula implies a well-known proposition:

For any positive ρ, the MSE is less for an ideal panel than for repeated surveys.

That is, the ideal panel is preferable. Now consider panel attrition and its effect on measuring the trend using only the static (non-dropout) portion of a panel with attrition.

$$\text{MSE (static portion)} = 2\sigma^2 (1-\rho)/Rn$$

where R = proportion of non-dropouts (the "retention rate"), and n = size of the summary sample. R, of course, is the complement of the attrition rate A. (R = 1 — A.)

This implies a second proposition, which may be called a "law" because of the simple and unexpected nature of the result:

The static panel estimate is less variable than the survey estimate whenever $\rho > A$, i.e., when the autocorrelation exceeds the attrition rate.

Because such simple relationships are rare in marketing (at least, useful ones are), my colleagues have kindly dubbed this "Phillips' Law of Longitudinal Sampling."

There are a number of simple proofs of Phillips' Law. It can be shown further that MSE (summary sample) = $2\sigma^2(1-R\rho)/n$. Simple arithmetic then shows that:

The estimates from the summary sample are less variable than those obtained from the static sample whenever $\rho < 1/(1+R)$.

This inequality holds for broad classes of consumer goods, leading to a conclusion that violates conventional wisdom: Summary samples are often preferable to static samples.

How can a market research department put these tools to use? The key is the autocorrelation statistic, and sadly, the exact value of this is not known. However, research users should ask vendors to estimate the autocorrelation of buying behavior in the market of interest. Rough estimates can be gained by looking at other studies done on the same or similar product category and the same or similar target market segment. (Salespeople for research vendors won't be accustomed to being asked this question! You will probably have to ask to talk to the vendor's research director.) Plug the estimated autocorrelation into the inequalities presented in this article; you will then be able to decide among independent surveys, static panels, and summary panels — and get the most accurate trend estimates for your budget.

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Selecting the right research vendor

By Richard Snyder

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In today's fiscal environment, selecting the right research vendor is more critical than ever. Because of the uncertain economy, there is even more pressure to reduce research budgets, as well as internal research staff resources. More and more, non-research professionals, e.g., brand managers and engineers, must select research vendors because there are no, or limited, in-house research personnel. The result has been an increased dependence on external marketing research vendors. Since this increased reliance on outside vendors is likely to continue, the following guidelines are offered to assist in the selection process:

• Determine your requirements. Prior to contacting potential vendors, it is worth the time and effort to assess your requirements. For example, are you merely looking for a vendor to supply the data collection or do you need a firm that can assist you in designing the project, writing the survey instrument, executing the data collection, analyzing the results and recommending a course of action?

Research firms can usually be classified into three broad categories: field services, consultants, and full-service.

Field services traditionally offer only data collection. They do not assist with study design, questionnaire development, tabulation or analysis. However, if your project does not require assistance with design and/or analysis, field services tend to be the most economical choice.

Consultants usually offer project design and analytical services, but normally have to subcontract the data collection and tabulation portions of the project. Although the cost for a consultant is generally more than a field service, in many cases it is less than a full service firm.

Full-service firms combine design

and analytical services with data collection and tabulation. These firms provide more services and can exert more control over the execution of the project. However, they tend to be somewhat more expensive than field services or consultants.

If there is any doubt at all about your internal resources and capabilities to tabulate and analyze the data to be collected, look for a firm that offers more than data collection. All to often, companies fall into the "do-it-yourself" trap in an attempt to save money, only to find that they are ill-equipped to derive anything meaningful from the data collected.

• Assess the areas of expertise of the potential firms. Some research vendors have a particular area of specialization. There are firms that specialize in advertising or customer satisfaction research, while there are others who are devoted to a particular technique (e.g., conjoint analysis or market segmentation) or data collection method (e.g., mall intercepts, mail surveys, Web surveys, etc.).

Beware of firms that are committed to a particular technique and/or data collection method, as they are more likely to "force" your research project into their particular model, rather than tailor the research to fit the specific needs of your project.

• Consider the size of the firms in your decision. The size of the vendor is an extremely important decision criterion. It is important not to overwhelm a small firm with an enormous project, and, conversely, a small project may not get the proper attention at a large firm.

The general rule is to favor the smallest firm consistent with the scope of the project. However, any project that is 30 percent or more of a vendor's annual revenues may be too large for them to handle effectively. It is also important to bear in mind the eventual scope of the project. If there is some likelihood of a small inquiry expanding later on, it may be better to retain a larger vendor.

• Establish, up front, the individual who will be managing your project. You should determine, in advance, who would be responsible for the day-to-day management of your project, i.e., will it be the person who "sold" the project or a project director hundreds of miles away. If your contact becomes unavailable, will competent support staff be available?

• Become acquainted with the backgrounds of the potential vendors. There are some general questions that every potential vendor should be asked to determine the stability of the company and their qualifications to complete the project in a satisfactory manner. These questions would include:

— How long has the vendor been in business?

— For what other companies has the vendor conducted research projects? Remember it is imperative to request references and check them for each firm.

— What are the academic backgrounds and experience of those persons who will be working on your project, i.e., the project director, field director, data processing manager, etc.? Does the composition of the project team strike the right balance between top-level management and technical researchers and analysts?

— Does the success of the project depend on the capabilities of a subcontractor? If your vendor will be subcontracting any elements of your project, be sure that the subcontractor and their qualifications are identified.

• Review the quality control standards of each potential vendor. The reliability of the results of any research project is dependent on the quality control measures practiced by the vendor. For example, on telephone studies, what are the procedures with respect to callbacks, monitoring and validation? It is prudent to avoid firms who do not practice generally accepted practices in their operations.

• Factor the reputations of the firms into your decision. Reputation is important, but you shouldn't pay a premium for it. However, there may be situations that require the services of a prestigious research firm because you plan to publicize the results, or use them as selling "ammunition," so having the best reputation available may actually be a good investment.

• Avoid letting price be the sole determining factor in your selection. When reviewing proposals, price should be the last item to be considered.

The margin for error in selecting research vendors has never been tighter, while the need to rely outside vendors is at an all-time high. Following the above guidelines can reduce the decision-making risk and thereby maximize the value of your research efforts.

Research Industry News

continued from p. 14

for approximately EUR 30 million. Eurazeo and Société Générale will contribute their pro-rata share.

The merger will be carried out transparently and will have no impact on the Ipsos financial statements. The number of shares of Ipsos S.A. stock under flotation will remain unchanged. Upon the merger completion, Lech and Truchot will hold approximately 21 percent of Ipsos shares and 28 percent of the voting rights. The other managers and the employees (including the recently created Ipsos Partnership Fund) will hold approximately 13 percent of the capital and 12 percent of the voting rights. Eurazeo and Société Générale, the two Ipsos historical financial shareholders, will own 7 percent respectively, close to 5 percent of Ipsos capital, and 9 percent respectively 6.5 percent of the voting rights. The free float will be approximately 50 percent.

Acquisitions

Paris-based **Ipsos** has acquired two Swedish research companies: **Eureka Marknadsfakta** and **Intervjubolaget.** These acquisitions add to the company's position in the Scandinavian market, where Ipsos has been represented by Ipsos-Imri since the beginning of the year.

Separately, Ipsos has acquired a significant equity in Japanese market research company, **Lyncs Incorporated**, and Chinese market research company, **Feng & Associates Marketing Services (FAMS)**.

London-based **Millward Brown** has acquired Paris-based **MFR**, a qualitative research consultancy founded in 1986 by Marie-Francoise Roy. It currently employs 12 consultants. Annual revenues in 2001 were over $5 million.

Separately, Millward Brown Group has acquired the remaining equity of media research firm **SMG/KRC Poland, Media.**

Portland, Ore.-based **Research Data Design, Inc.** (RDD) has acquired a telephone interviewing and multilingual focus group field facility in Santa Ana, Calif., from **Cheskin**, a Redwood Shores, Calif., research firm. The purchase increases RDD's interviewing capacity by 20 percent. The facility will operate under the RDD name.

London-based **Aegis Research** has acquired **INNER Strategic Research S.A.**, a Madrid-based full-service market research agency.

Alliances/strategic partnerships

Research For Action, Saratoga, Calif., has become a QualPartner with **QualTalk**, a Castle Rock, Colo., provider of online qualitative research services.

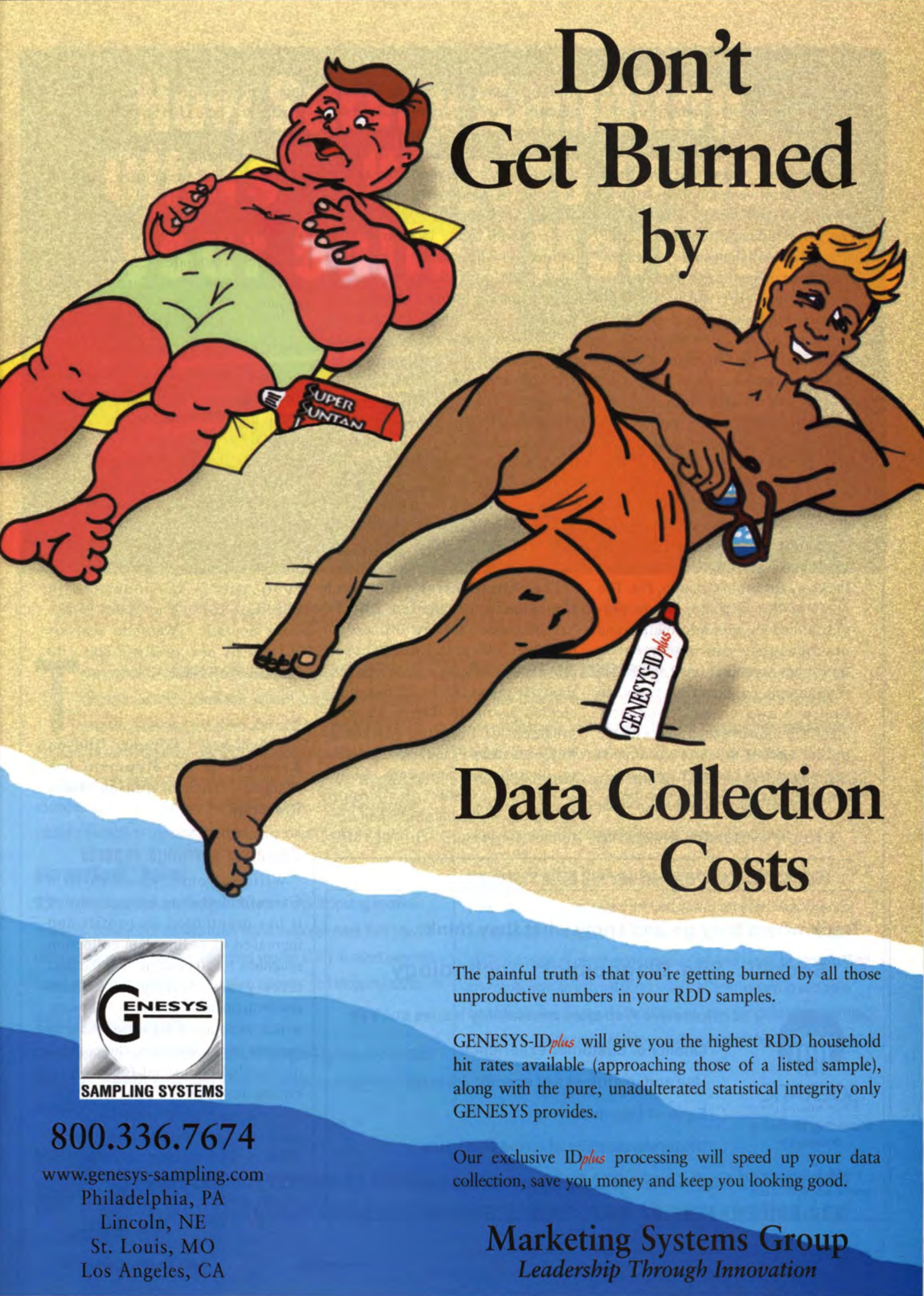
Richard Kurtz, managing director of **Richard Kurtz & Associates**, a New York research firm has established a relationship with **ifm In-depth Research + Strategies**, a research consultancy based in Cologne, Germany. Ifm is an institute for qualitative market research using descriptive depth-psychology methodology. The affiliation's objective is to offer each firm's clients a wider coverage of research services in both the European and North American markets.

Association/organization news

The Association of European Market Research Institutes (AEMRI) has changed its name to the Alliance of International Market Research Institutes (AIMRI), reflecting its broader international membership and the increasingly global nature of the research industry.

Fredrik Nauckhoff, head of market intelligence and consumer insight at Nestlé, Switzerland, has been elected the new president of **ESOMAR** (The European Society for Opinion and Marketing Research) for the 2003-2004 period. In addition, José Ignacio Wert, chairman and CEO of Spain-based Demoscopia, has been named ESOMAR's new vice president.

The proceedings from the **Council for Marketing and Opinion Research's** "Protecting Our Assets" Respondent


Don't
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by
Data Collection
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GENESYS-IDplus
GENESYS
SAMPLING SYSTEMS
800.336.7674
www.genesys-sampling.com
Philadelphia, PA
Lincoln, NE
St. Louis, MO
Los Angeles, CA
The painful truth is that you're getting burned by all those unproductive numbers in your RDD samples.
GENESYS-IDplus will give you the highest RDD household hit rates available (approaching those of a listed sample), along with the pure, unadulterated statistical integrity only GENESYS provides.
Our exclusive IDplus processing will speed up your data collection, save you money and keep you looking good.
Marketing Systems Group
Leadership Through Innovation

Cooperation Workshop are now available. In April 2002, CMOR hosted a forum for researchers to address the most common respondent-related issues facing the industry. The program showcased techniques other organizations have tried to improve respondent cooperation and new tools. The agenda included: industry trends and statistics; information on survey rates and telephone dispositions; data on consumer behavior/attitudes, and CMOR study findings; research findings; presentations from study tests and research conducted to increase cooperation, and the level of success of each approach. To obtain the best practices and insights put forth during the workshop for a nominal fee, contact CMOR at 513-985-0001 or info@cmor.org.

In addition, CMOR has also announced a second workshop, "Protecting Our Assets II," to be held February 3-4 at the Radisson Parkway Resort in Orlando, Fla. The goals of the workshop are to provide attendees with information and practices they can implement in their own organizations to increase respondent cooperation rates, to improve awareness of industry efforts to improve relations with the public and to create solutions to safeguard the research industry's important asset — the respondent.

Britain's **Market Research Society** (MRS) has announced the launch of its first Internet-based training course. Developed in partnership with specialist electronic publisher Nelson Croom, The MRS Questionnaire Design course will be delivered entirely online and is designed to improve the professionalism and skills of research practitioners, both in the U.K. and internationally. The course is aimed at those with up to 12 months experience in market research. Accessible through the MRS Web site (www.mrs.org.uk), the course has a practical focus, with registrants conducting the course entirely online. Designed to provide a thorough grounding in the theory of questionnaire writing, the course includes a range of modules, taking participants from writing the questionnaire to analyzing the results. It will also cover crucial pitfalls such as how to avoid bias and ambiguity.

The **Qualitative Research Consultants Association** (QRCA) has announced its new officers for the 2002-2003 year. Ricardo Lopez, president of Hispanic Research Inc., East Brunswick, N.J., has been elected president. Dorrie Paynter, president of Leapfrog Marketing Research, San Francisco, has been re-elected vice president. Elaine Gingold, owner of Gingold Research, Bethesda, Md., has been re-elected treasurer. Gillian Tuffin, president of Gillian Tuffin Research, Toronto, has been re-elected secretary. Other members of the board of directors are Elizabeth Berry (Strategic Focus Consulting, Summerville, S.C.), Diane Harris (D.M. Harris Associates, Butler, Pa.), George Sloan (Sloan Research and Consulting, Beverly Hills, Calif.), Susan Sweet (Doyle Research Associates, Chicago), and Jeff Walkowski (QualCore.com Inc., Minneapolis).

Awards

San Francisco-based **Socratic Technologies** was selected a winner in the Web-based Services category of the Windows & .NET Magazine Readers' Choice Awards. The award, which was given to Socratic Technologies' remote Web site usability measurement system Socratic Site Diagnostic (SSD), was announced on September 15 at the publication's headquarters in Loveland, Colo. The award recognizes Socratic's Web site analysis system as one of the "Top 100 Products" of 2002.

New companies/new locations

Denver-based **Wimmer-Hudson Research & Development** has changed its name to **Hudson Media Research.**

Company earnings reports

Wilton, Conn., research firm **Greenfield Online** announced that it has quintupled its profits and increased its online data collection revenues 1,150 percent over the past three years. Selling its custom research business this past February, which accounted for more than 60 percent of its revenues, the company decided to instead focus on its online respondent panel, survey hosting, and programming to the marketing research industry. Sales grew to $4.5 million in 2001, and the company anticipates $15 million by the end of 2002 and over $25 million in 2003.

Data Use

continued from p. 18

ence to smaller regions. The weights are derived by taking the ratio of the "target" proportion of a region and dividing it by its relative proportion in the sample.

For example, the weight for a respondent from Region #1 is calculated as 36.47/25 = 1.459. The weights in this manner are calculated and applied to each individual respondent so that one person in Region #1 is now counted as 1.459 persons; one person in Region #2 is counted as 0.779 persons, and so forth.

Many times only aggregate results are available so weighting on an individual respondent level cannot be conducted. In this case the weighting could be performed using the relative region sizes (% of total population from above table). An example of weighting the four regions together at an aggregate level is as follows:

The four-region average HH income is $50,250 (calculated by taking a simple average of the four region incomes). To allow the four regions to have influence based on population we take each regions relative proportion and multiply it by its average HH income. The sum of these four values produces the new, weighted average ($52,533), as shown in Table 2.

Table 2

	Avg HH Income From Earnings	Four-Region Average (Unweighted)	Weight	Region Contribution to Average (Weighted)	Four-Region Average (Weighted)
Region 1	$53,800		0.3647	$19,621	
Region 2	$46,500	$50,250	0.1948	$9,058	$52,533
Region 3	$41,200		0.1287	$5,302	
Region 4	$59,500		0.3118	$18,552	

Either weighting methodology (in aggregate or by individual respondent) alters the distribution of responses in total (i.e., across the four regions), but the distribution of responses in any particular region does not change. For example, weighting will not change the fact that 30 percent of respondents in Region #1 say they use Product Y. However, weighting will change the distribution of responses (the percent of all respondents that use Product Y) for the grand total across the regions.

Aligning a sub-sample to total sample

In another example, weighting is applied using a relevant variable collected within a survey. Awareness of a product was collected during the screening portion of a study; respondents were then terminated or allowed to continue based on other screening questions. After the study was completed, weighting was performed to bring the awareness level of the completed surveys in line with the awareness level derived from the total persons contacted for the study.

By making those respondents aware of the product worth 0.800 and respondents not aware worth 1.600, the total completed interviews are brought in line with the total contacts in terms of product awareness represented a weighted average based on contact awareness (Table 3).

Table 3

	# of Total Contacts	% of Total Contacts	# of Total Completes	% of Total Completes	Weight
Those Aware	1800	60.0	750	75.0	0.800
Those Not Aware	1200	40.0	250	25.0	1.600
Total	3000	100.0	1000	100.0	

Population relative strata size is unknown

Another example of weighting data can be applied when a study collects responses using specific stratum quotas but their relative size in the population is not known. For example, a study for a new drug entailed interviewing patients with a specific condition. Quotas are set for each of four groups and respondents are randomly drawn from a common sample source. Questions are asked to classify patients into one of the four groups

based on the patient's attitude toward their treatment experience. Interviewing a group is closed when its quota is reached (in this case n=50 for each group). For this study the question becomes, after all quota groups have been filled, how can we combine the four groups to obtain a look at patients as a whole when we do not know their relative stratum size in the population?

Before a quota group had been filled, we were accepting all completed interviews, regardless of which subgroup a patient belonged to (in other words, we did not reject a potential respondent because of which group they would fall in). However, after a quota group is full, we reject respondents that qualify for a completed group and only search for respondents to fill the remaining three group quotas. Therefore, before the first quota group is full, we are essentially taking a representative sample.

We can obtain a measure of the relative size of the four patient groups in the population by looking at the relative percentage of the completed group interviews at the point when the first group meets its quota (see Table 4 where Patient Group #2 has reached their quota before the others). Another option, if information is retained for all persons contacted, is to look at the distribution across the four groups after all groups meet quota, thus allowing a larger and potentially more stable number of cases on which to base the weighting.

Table 4

	Completes When One Quota Met	% of Total Interviews	# of Total Completes*	% of Total Completes	Weight
Patient Group #1	35	26.9	50	25.0	1.076
Patient Group #2 (reaches quota first)	50	38.5	50	25.0	1.540
Patient Group #3	17	13.1	50	25.0	0.524
Patient Group #4	28	21.5	50	25.0	0.860
Total	130	100%	200	100%	

*After all quota groups have been filled.

Applying the weights as calculated and combining the four patient groups can be a reasonable approach to looking at the data in total, absent other population information. However, it should be noted that weighting in this manner can be risky, given sampling error and therefore, should be used with caution.

Weighting and effective base

While weighting is an effective tool, the analyst pays a price if they decide to weight data. One way to examine the effect of weighting is by calculating the change of the base used in making statistical inferences (known as the "effective base"). The purpose of using the effective base when performing statistical calculations with weighted data is to reduce the likelihood of significant results simply because the weighting has made potentially large changes to the data.

The effective base is calculated using the following formula where n_i is the number of interviews in strata i, k_i is the weight applied to strata i, and h is the total number of stratum.

Effective base =

$$\frac{\left(\sum_{i=1}^{h} n_i k_i\right)^2}{\sum_{i=1}^{h} n_i k_i^2}$$

The effective base decreases as the relative difference of the weights applied increases. This produces a loss of efficiency compared to proportionate sampling.

Let's look at a simple example. A random sample of 100 respondents was drawn, and we receive 50 percent males and 50 percent females. However, to better fit population statistics, the sample should be more heavily female, so weighting is applied to achieve a 25/75 male/female split. The weight factors would be .50 for males and 1.50 for females. The calculations for the effective base is as follows:

$$\frac{((50 \times .50) + (50 \times 1.50))^2}{(50 \times .50^2) + (50 \times 1.50^2)} = \frac{10000}{125} = 80 \text{ (effective base)}$$

Therefore, the result of the weighting plan "effectively" reduces the sample from 100 to 80 respondents (a 20 percent reduction). Given this, the effective base is one good criterion for evaluating your weighting plan. As a rule of thumb, the greater the magnitude of the weights, the greater the penalty incurred.

Another point of examination is that the penalty of post-stratification as opposed to stratified random sampling can be reflected by an increase in variance. A formula in William Cochran's, *Sampling Techniques*[1], showing the estimated variance of a mean after post-stratification is as follows.

Estimated post-stratified mean variance =

$$\left(\frac{1-f}{n}\right)\sum_{i=1}^{h} w_i s_i^2 + \frac{1}{n^2}\sum_{i=1}^{h}(1-w_i)s_i^2$$

Where $W_i = N_i/N$ (N_i=population stratum size and N=total across all stratum)

The first portion of the formula is similar to the variance formula below used under stratified random sampling (incorporating a finite population correction).

$$\sum_{i=1}^{k} w_i^2(1-f_i)\frac{s_i^2}{n_i}$$

The second portion of the post-stratification variance formula is greater than or equal to zero and represents the "penalty" paid in terms of the increase in the variance. However, this increase could be small for large n_i sizes.

Useful and necessary

Weighting is a useful and many times necessary tool. Many common statistical packages like SPSS and SAS offer weighting options that are easy to apply to data. However, use of this convenience should be tempered with experience and knowledge of any potential risks. For statistical testing, there may a penalty for using that may or may not be accounted for in the analysis in terms of an increase in variance.

In addition, weighting plans used to adjust the sample on a single variable will have much less potential to change results than a complex multi-variable weighting plan. Such severe weighting can alter data in ways that may be invisible to the researcher and may even change the conclusions that are drawn. Therefore, one should always balance the need to weight data with the knowledge of the potential effects.

References

[1]Cochran, William, *Sampling Techniques*, John Wiley and Sons, 1977, p. 135.

Survey Monitor

continued from p. 8

where alcohol is part of everyday life, the presence of children in the household does not affect beer-drinking or alcohol consumption in general. Children are used to seeing their parents drink and are themselves given small amounts to taste as they get older. Around 70 percent of Italians under 20 years old drink alcohol, compared to some 78 percent of Britain's youth," says Anne Bourgeois, European consumer goods consultant.

Over 64 percent of the British are wine drinkers. This is virtually equal to France, where 65 percent enjoy a glass of wine. Just under half of Americans are wine consumers. Of the 89 percent of British adults who drink alcohol, wine is drunk by 73 percent of them. In terms of the amount of wine drunk per drinker, the British are still the lightest users, with French wine drinkers consuming the greatest number of glasses. Nevertheless, the French are drinking less wine than ever and their drinking habits have changed. From a rate of 120 liters per adult per annum in the 1960s, consumption slid to an estimated 55 liters in 2001. Changing eating habits and lifestyles have led the French to broaden the range of beverages they drink. "This shift in consumption trends and lifestyles in France is reflected in the growth of the soft drinks and bottled water markets. Expenditure in these markets has developed more swiftly than for wine," says Bourgeois.

With the exception of the U.S. and their love of dark spirits (at just about half of respondents), the British show the greatest tendency towards drinking any spirit. The proportion of adults drinking white spirits in the U.K. (43 percent) is higher than France (22 percent) and Spain (15 percent) combined and one-quarter of Americans. The Spanish (15 percent) and Germans (13 percent) are the least likely to favor this drink option (the figure for France does not include the popular anise aperitif which is drunk by some 38 percent of French). Across Western Europe, the French are the most likely to opt for dark spirits, in particular whiskey (37 percent), this is followed by the British at 33 percent. Looking at white spirits, the proportion of U.K. adults drinking these in the U.K. (42.4 percent) is higher than the U.S. (25 percent), France (21.9 percent), Spain (14.9 percent) and Germany (13.3 percent). For more information visit www.mintel.com.

International study finds wide differences in online usage by businesses

Nearly nine out of 10 companies in the U.S. (93 percent) and the U.K. (86 percent) are now using the Internet for activities such as CRM, marketing, order fulfillment, and sales, according to research by Taylor Nelson Sofres Information Technology, Horsham, Pa.

In contrast, 60 percent of organizations in Japan and fewer than four out of 10 (36 percent) organizations in France are using the Internet as a marketing channel or customer service mechanism.

Similar results are found for Internet usage across key internal business functions such as employee schedule management, knowledge management, supply chain management and training, with companies in Denmark, France, Japan and Singapore reporting fewer internal uses of Internet applications than their U.K. and U.S. counterparts.

Overall, U.S. and U.K. companies claim to use an average of five different Internet applications out of the 10 for which they were surveyed — CRM, e-mail, employee schedule management, knowledge management, marketing, order fulfillment, selling, supply chain management, training and wireless access to the Internet. In comparison, the average is between two and three different applications in the other countries surveyed.

These findings suggest that the U.S. and U.K. have developed a more comprehensive use of the Internet for a wider range of applications by investing more heavily in e-solutions in recent years. In contrast, companies in countries like Japan and France have typically focused on more traditional methods of marketing and selling products and have been slower to adopt wider Internet applications beyond e-mail.

While companies within the U.S. and U.K. markets are likely to have invested more in e-solutions in recent years than their Japanese and French counterparts, the research indicates that around two thirds of companies in both the U.S. (63 percent) and U.K. (66 percent) intended to decrease their Internet-related expenditure over the next year. In contrast, similar proportions in France (56 percent) and Japan (61 percent) expected to increase Internet-related expenditure over the same period of time. This could be explained by the fact that markets such as the U.S. and U.K. have already made significant levels of investment in e-solutions and are now starting to realize the benefits of this investment, which is not the case in other markets.

"Our findings show that some markets have clearly been much faster than others in realizing the potential of the Internet for business applications other than e-mail," says Chandra S. Chaterji, senior vice president, Taylor Nelson Sofres Information Technology. "In many ways this is a reflection of the cultural differences towards doing business in different countries. In Japan, and to some extent in France too, face-to-face contact continues to be extremely important and the more impersonal approach of an online transaction may still not be considered a satisfactory way of conducting business."

This study was undertaken using online interviews conducted with 555 IT decision makers in six countries (Denmark, France, Japan, Singapore, U.K. and U.S.). For more information visit www.tnsofres.com.

Are Americans working less?

Each year, The Harris Poll asks people how much time they spend working, including at school and keeping house, how much time they have for leisure and what their favorite pastimes are. In most years, the numbers do not change very much. This year's survey, however, shows a sharp drop in the average number of hours spent working (including housekeeping, studying and commuting). Interestingly, this is the only time since Harris Interactive first asked this question almost 30 years ago that the number of working hours has dropped significantly.

From 1973 to 1980, the number of hours spent working, as broadly defined, rose from 41 to 47 hours. It then rose slowly to 51 hours in 1994, dropped back to 50 in 1998 and had remained unchanged through 2001. This year the median number of hours worked has fallen sharply to 47. "This surely reflects the weakening of the economy and the end of the boom years of the 1990s which saw a record number of hours worked," says Humphrey Taylor, chairman of The Harris Poll, Harris Interactive.

While the number of hours spent working has dropped, there has been no change in people's estimates of how many leisure hours they have available for relaxation, watching television, taking part in sports or hobbies, and so on. The median estimate of 20 hours this year is the same as it has been every year since 1999. Indeed, it has not been higher than 20 or lower than 19 since 1989.

Reading, watching TV, spending time with the family, fishing and gardening are America's most popular pastimes. When this nationwide cross section of American adults was asked to name their two or three favorite leisure time activities, the largest number mentioned reading (26 percent) and watching television (15 percent). These two activities have topped the list every year Harris has asked this question, although the numbers have fluctuated a bit. Indeed, it is striking that those who say that watching television is one of their favorite activities has fallen from 23 percent in 2000 to 20 percent last year and is now down sharply to 15 percent.

Most of the other numbers in reply to this question have not changed greatly. However, the rank order has changed a little, with team sports moving up on the list (from 5 percent to 7 percent) while swimming (from 8 percent to 5 percent), computer activities (from 7 percent to 4 percent) and walking (from 6 percent to 4 percent) have all slipped a little. For more information visit www.harrisinteractive.com.

Europe – oases of affluence and pockets of poverty

A survey by Germany-based research firm GfK-Regionalforschung (regional research) found that Switzerland is an oasis of affluence: seven out of eight of the richest European regions are in the Swiss Confederation. Geneva leads the way with disposable income per capita of around EUR 36,000 per year. The inhabitants of Eastern Europe, on the other hand, have to live far more modestly, the countries with the least disposable income being Albania (EUR 563), the Ukraine (EUR 379) and Moldavia (EUR 223). In a country-by-country comparison of income in euro, the Swiss edged ahead in 2001 with an average of EUR 25,603 per inhabitant, while the Luxembourgers had just under EUR 25,000 per capita and the Norwegians approximately EUR 19,000. The Swiss have their strong currency to thank for this result. At No. 6 in the ranking is the U.K. which, with EUR 16,451, has overtaken Germany for the first time in a long while (Germany: EUR 16,171 per capita). This development is also attributable to the strong pound compared with the euro during the survey period. As in previous years, it is noticeable that while the list of affluent countries is headed exclusively by EU states and countries in Central and

Northern Europe, the last 20 places are occupied by countries in Southern and especially Eastern Europe. However, there are also significant differences between these countries. With income per capita of EUR 6,436, Slovenia has slid below Portugal, the poorest EU country with an average annual income of EUR 7,466 per capita. In Moldavia, Europe's poorest region, people have an average of EUR 223 at their disposal, less than 1 percent of the purchasing power of their Swiss counterparts. In order to take account of the price discrepancies in individual countries, these should be compared on the basis of purchasing power parities. Since the price level is considerably higher in affluent countries than in countries with lower purchasing power, Luxembourg is actually ahead of Switzerland. Luxembourgers have a 53 percent higher purchasing power than the Germans, while the Swiss are only 28 percent above the German level. Moldavia also comes off worst in a country comparison of parity, but the gap between this country and the affluent countries is not as wide as that of the comparison of disposable income. The purchasing power of people from Moldavia currently amounts to approximately 5 percent of the purchasing power of people from Luxembourg.

The purchasing power of inhabitants in individual regions within the European countries was measured using the purchasing power index and taking the German average of 100 points as a basis. In Western Europe, Geneva leads the way with a purchasing power index of 180.4, while Paris follows with 159 points. The Hochtaunus district north of Frankfurt is ranked seventh with 139.8 points, closely followed by Bologna, Italy with an index of 138.5. In a separate comparison of the 300 areas in Eastern Europe, four regions in Western Slovenia come out on top with an index of between 69.9 and 76.4. With 67.9 points, Prague is in fifth place. Compared with the areas of affluence in Western Europe, the richest regions in Eastern Europe still have considerable ground to make up, as they only have around half of the purchasing power of areas in Western Europe. There is substantial regional variation within the 38 European countries. A survey of the purchasing power in the 103 Italian provinces confirmed a marked North-South discrepancy. Whereas some of the regions in Northern Italy are among the wealthiest areas in Europe, the purchasing power south of Rome in what is known as the Mezzogiorno drops significantly. The purchasing power in the Northern provinces of Milan, Parma, Modena and Bologna is around 30 percent above the average for Italy as a whole, while in some of the Southern regions it is 40 percent below the Italian average.

The findings are taken from the "GfK Eastern Europe Basic Market Data 2001" survey and the "Europe Basic Market Data 2001" survey of 1,500 regions in 38 European countries. For more information visit www.gfk.com.

CNH Global

continued from p. 21

marketing research design that would be effective in their respective countries. To reach this agreement, careful attention was paid to differences among countries with respect to language, loader backhoe usage, cultural variations, psychological differences related to using rating scales, and numerous other nuances that could potentially affect the outcome of marketing research.

Grueling field tests

The first step was qualitative research, but traditional interviews or focus groups would not suffice. Because of the major financial investment resting on the results of this research, we did not want comments about brands which were based on an operator's memory alone or on perceptions that may have been formed without any hands-on experience with each of the brands. Since a loader backhoe can cost at much as $100,000 it is unlikely that operators would have owned, or even operated, all the leading brands of loader backhoes. For this reason, operators could not realistically compare the brands in consumer-style interviews or focus groups.

Qualitative research was needed which obtained the same type of information as consumer-style focus groups or in-home product tests, but which also addressed the problem of operators not having experience with each brand. We chose field tests with each of five leading brands as the best way to level the playing field for brand experience. And we made the field tests grueling so that any real performance differences could be detected by operators.

The field tests were a week of 12-hour days in a remote location. Up at first light each day, operators tested all five leading brands in common but demanding loader backhoe jobs, such as digging trenches and backfilling, lifting 2,000-pound weights, maneuvering in tight spaces, and loading a dump truck with soil.

Operators were carefully recruited from all over the U.S. to provide a balance of: brands of loader backhoes owned, geographical location, small and large companies, range of ages, and varied primary use of the loader backhoe. The purpose of this was to give no brand an advantage in the field tests. And the field tests were conducted by Chicago-based Strategic Business Research, which implemented a large number of security precautions so that no operator could determine the sponsoring company.

Operators put each loader backhoe brand through the field test for a long enough period of time to effectively evaluate the actual operating performance of each brand. Following each test, operators rated the brand on an extensive list of performance attributes, and then took notes on the reasons for their ratings. Operators used their notes later in the day during in-depth discussions led by a moderator from Strategic Business Research.

During these talks, operators detailed the reasoning behind each brand's ratings. Strategic Business Research further explored additional areas that were experienced but not part of any field test such as: cab and seat comfort, loader backhoe lighting on the job area, gauges, dealer service, and reasons for brand selected in the most recently purchased loader backhoe.

Scale surprises

The field tests also were used to customize and pre-test scales for later use in the quantitative stage of the marketing research. The intent was to develop scales that reflect the way operators think about loader backhoe performance. Researchers who routinely use symmetrical 7- or 9-point scales in their research may be surprised by our findings.

Operators clearly discerned four levels of satisfaction with loader backhoe performance attributes. They did not discern four levels of dissatisfaction. So the symmetrical satisfaction scale commonly used in marketing research was inappropriate for subsequent quantitative research.

We also found that use of the word extremely, as in "extremely satisfied," was inappropriate. While operators frequently said that more than one brand would be very effective for their job needs, they did not perceive anything "extremely" and never used a scale point with that adjective. So if we had presented a 7-point scale with the anchor points "extremely satisfied" and "extremely dissatisfied," as is common in marketing research, we really would have been presenting a 5-point scale from the operator's perspective.

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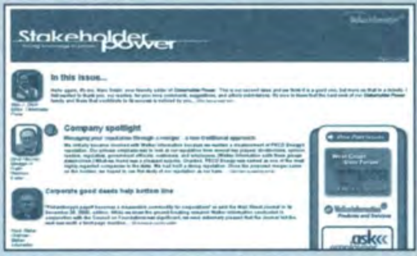

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We eventually determined that the scale which most effectively reflects the way operators think about their loader backhoes has four levels of satisfaction, a neutral point, and one level of dissatisfaction — a 6-point asymmetrical scale. (Subsequently, we learned that this applies to other construction equipment also.)

A larger scale would have introduced "noise" into the responses. Similarly, insisting that there be an equal number of levels of both satisfaction and dissatisfaction points would have clouded over subtle differences in operator responses.

Worldwide brand comparisons

Following the field tests and in-depth discussions, quantitative surveys were developed for the countries with the highest-volume loader backhoe markets. A number of procedural safeguards were used to assure dependable data in each country.

Three translators were used in each country to assure the questionnaire was effectively worded, meant the same thing in each country, and reflected the way operators actually talk about equipment. Researchers who use one translator when doing international research might be surprised to learn how long and difficult it is to get three bilingual people to agree on translations of simple questions and scales.

Both CNH Global and Strategic Business Research personally participated in the instruction sessions for the international interviewers. Although we are not bilingual ourselves, it was very clear from observing interviews and from interviewer feedback that taking an active role in the instruction sessions resulted in better-informed interviewers and higher-quality interviews. And we gained a stronger appreciation of the cultural and linguistic differences among countries that can impact responses to seemingly simple questions.

Of course, we pre-tested the questionnaires in each language. More importantly we statistically examined the distribution of responses to questions in each country. That the distributions (but not necessarily the scale results) were similar reinforced our confidence that the translated questionnaires were working effectively.

Global implications

The results are having a huge impact on advancing the engineering design of CNH loader backhoes. This was expected. Operators indicated clear differences in performance among the five brands. These findings are being used not only to better differentiate CNH brands from competitors but also to differentiate among the CNH brands.

Not expected, however, was the finding that non-performance attributes play a much bigger role in brand selection than was widely believed. There was a time when the loader backhoe brand with the best engineering and job performance would garner brand share. The market is more complicated and operators are more demanding now. In many ways operators now mirror the demanding purchasing behaviors of consumer product customers.

Today's loader backhoe market has evolved to the point where operators now expect excellent engineering and high performance from all brands. They then make purchase decisions in part on non-engineering factors such as after-purchase service, loyalty to a dealer, convenience features like easy-to-use controls, and in some countries, in response to aggressive marketing campaigns.

As the loader backhoe market has taken on some of the dynamics of a consumer product, many more teams within CNH Global beyond engineering have been impacted by the research results. Marketing and sales, after-purchase parts support and service, financing and credit, strategic planning, marketing research, and other areas are digesting results and planning for the future. Increases in market share will result from integrated product development programs involving all these areas of CNH Global in many varied countries.

The other broad implication of this research to CNH Global is for planning future marketing research. Immense benefit was gained from designing research that fit the way operators think — customized scale questions, use of three translators to capture language nuances, field tests conducted by someone outside of CNH Global, etc. Using standard off-the-shelf questions and procedures would not have revealed the subtleties and richness of detail in this market. One size clearly does not fit all when unearthing construction equipment advancements through marketing research.

Product & Service Update

continued from p. 12

received, and net price paid per unit purchased. All data received was weighted and projected for the entire U.S. as well as for high corn acreage states. For more information contact Dave Tugend at 216-491-9515, ext. 211.

Asia panel from TNS and Intage

Tokyo-based research firm Intage Inc. and London-based Taylor Nelson Sofres (TNS) Plc. have launched the Asiapanel 2001 Annual Report, a pan-regional continuous consumer panel offering. The report will enable companies to benchmark household and grocery purchasing across eight of Asia's economies — Japan, Korea, China, Hong Kong, Taiwan, Thailand, Malaysia and the Philippines. The Asiapanel 2001 Annual Report provides a multi-comparative annual report of the markets, broken down into five sectors (beverages, packaged groceries, dairy products, household products, personal care), 65 product categories, 11 measures (including value, penetration, etc.) in both annual and quarterly format, as well as demographics and channel breakdowns. Both companies are working closely to offer custom consumer panel data services that allow clients to drill down to manufacturer- and brand-level data and understand consumer habits through various special analysis. For more information visit www.asiapanel.com/annualreport.

Book offers Web site design guidance

Design of Sites - Patterns, principles, and processes for crafting a customer-centered Web experience, a new book by Douglas van Duyne, James Landay, and Jason Hong, is now available from Addison-Wesley. Based on investigation and analysis of more than 100 Web sites, the book distills the principles and best practices that make sites enjoyable to visit and an asset to the organizations they serve. It features numerous design patterns that offer solutions to common Web design problems. For more information visit www.designofsites.com.

Decision Analyst beefs up its panels

Arlington, Texas-based Decision Analyst Inc. now has 50,000 Spanish-language households participating in its international Internet-based consumer panels in Spain, Mexico, Central America, and South America. Panel membership is highest in Spain with 15,000 households, followed by Mexico with 10,000 households.

The firm also announced that its Internet-based consumer panels in Europe now number more than 100,000 households. France is the largest panel with 36,000 households, followed by Italy with 20,000 households and Spain with 15,000. The U.K. and German panels include 10,000 households each. For more information contact Cristi Allen 800-262-5974 or visit www.decisionanalyst.com.

Track survey data over the Web

Indianapolis-based Answers & Insights Market Research is now offering MyDataFast.com, which allows researchers to access their survey data over the Internet as it is fielded. Surveys using phone/CATI, Internet, IVR and mail can be tracked by accessing the data through user accounts on MyDataFast.com. Suppliers can update the system as quickly as every two minutes. Users can track, view and archive quantitative surveys for analysis. For more information call 866-900-0088 or visit www.mydatafast.com.

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Measure attendee attitudes before and after programs

New York-based brand communication firm Jack Morton Worldwide and NFO WorldGroup have launched E-Metric, a new measurement tool. The Web-based product features a "before and after" survey designed to qualitatively determine the impact of programs and meetings on the attitudes of attendees. E-Metric uses the Web to pose 25 closed-ended questions and three open-ended questions to a defined audience both before and three days after the event. NFO will collect the findings and deliver baseline survey results to the client's project team via e-mail. Jack Morton Worldwide will then use the results to develop and deliver programs for meeting their client's business objectives.

Briefly...

Minneapolis-based Northstar Interviewing Service is offering a **10 percent discount** on all new projects through the end of the year. For more information call 952-897-3700.

NOP World Health, East Hanover, N.J., has formed a new **Corporate Image and Public Information Management Division** focusing on helping pharmaceutical companies respond to public relations crises and develop integrated communication strategies.

Millward Brown has launched Millward Brown Automotive, a new initiative which will use Kantar's **automotive research capabilities**, including those of Goldfarb Consultants, which recently merged with Millward Brown. Automotive marketers will have a single source for research throughout the product life cycle, from strategy, early ideation and new product development, to product launch and in-market performance. For more information visit www.millwardbrown.com.

Herndon, Va.-based WebSurveyor Corporation has released **WebSurveyor 4.0**, a survey tool including features like true multi-page, advanced skip logic, data piping, XML support, improved reporting and exporting features, and multi-language capability. For more information visit www.websurveyor.com.

Maritz Inc., St. Louis, has created Maritz Brand Alignment, a service designed to help companies deliver a **consistent brand management strategy**. Services offered include research and assessment, consultation and facilitation, learning systems, communications and events, measurement and feedback, project management and rewards and recognition programs. For more information visit www.maritz.com.

Minneapolis-based data processing firm Adapt, Inc. has implemented Adapt-Key, a **new data entry technology**, offering flexible outputs (Quantum ASCII, column binary, fixed-field and delimited ASCII file formats), efficient handling of out-of-order columning, on-screen keying masters for data entry operators, and simplified use of look-up tables and logic patterns. For more information call Dave Koch at 888-522-3278 or visit www.adaptdata.com.

Information Resources, Inc., Chicago, is now offering **InfoScan Convenience Store Account Level service**, providing weekly scanner-based sales data and causal (promotional) information for all products and categories sold in convenience stores, including salty snacks, candy, general merchandise, beer, non-alcoholic beverages, and cigarettes. For more information visit www.infores.com.

Qualitatively Speaking

continued from p. 16

If a facility is really uncomfortable recruiting from the general public, it's not a facility I'll be using. Their discomfort shows they've become so fat and happy recruiting from an overused database of professional respondents that the thought of having to leave that comfort zone scares them.

Now, I fully expect higher costs and a slightly longer recruiting time when not using a database, if only due to the fact that initial refusals will be higher when dialing the general public than when dialing into a database. And it's fair to expect the need to over-recruit by an even greater number, because virgin respondents will be more likely to get cold feet at the last minute or decide it's not worth their time and not show up. But the cost-per-recruit shouldn't go from $75 to $130 because the database can't be used. It shouldn't take an extra week to recruit two groups. And we shouldn't have to recruit 16 for 10 to show.

Another tip-off is when a facility director will ask something like, "If we don't use our database, what can we possibly use to get names?" Facilities that have never heard of random-digit-dial sample, or that insist the sample quality is so poor that they'll never be able to get the project recruited, also generally will not get my business.

Still another hint there may be trouble afoot comes when the facility will ask us to reduce our past participation screening question from a time frame of 12 months to six months. This, too, suggests an overused database.

Certainly, there are times a database is the best way to go. If we have a ridiculously short period for recruiting, or the incidence is painfully low, a database definitely helps mitigate those problems. Some facilities maintain information on their database that will really help the recruit, such as what vehicle the individual owns or what her profession is.

There are also times when the budget is tight, and the client won't spring for an increased cost of even $10 per recruit, because it's "unnecessary." (I've found clients too often have the perspective of "I'm not worried where they come from — I just want to hear what they have to say.")

But in a normal-incidence recruit where we have sufficient time, I'll frequently insist on recruiting from the general public to get some fresh voices in the group. I'm tired of sitting down at the table, asking "How many of you have participated in focus groups before?" and having all 10 respondents raise their hands.

And every time that happens, I'm hoping the client behind the mirror is thinking, "Next time, we'll spend a little more to recruit virgin respondents rather than working off that database."

Costa Rica

continued from p. 23

information and the short timeline involved in marketing the Interfin pension program, management and the research team decided that it was not possible to convert Banco Interfin into a household name and to successfully build trust in the brand among the population as a whole. Instead, it was decided that the best target for the program would be those workers with a banking relationship and earning over the minimum wage.

Informally it was decided that private enterprise workers were preferable, because of their higher wages as compared to those working in government, and, of course, no applicant would be turned down regardless of salary (in fact the law did not permit refusing anyone).

For the second wave of research a survey of 400 workers, 18 to 45 years of age and residents of the San Jose metro area, was conducted to determine what could motivate them to select one institution over another to manage their pensions.

The sample was designed to be upscale and results revealed that, in fact, only 22 percent reported monthly incomes at or around the minimum wage. Half of the sample was surveyed over the telephone, thus ensuring middle-class or better respondents (lower socioeconomic households in Costa Rica generally do not have telephones, although this is now rapidly changing). The other half of the sample was selected using quotas in demographic segments which had been pre-classified as at least middle-class. In these households, interviews took place face-to-face.

When respondents at this socioeconomic level were asked to name pension program operators, about 7 percent mentioned Banco Interfin top of mind, but 40 percent were able to remember the name of this institution spontaneously.

Nonetheless, two of the government-owned banks enjoyed recall by workers of 72 percent, in the case of the Banco Nacional, and 53 percent in the case of the Banco Popular. When respondents were asked why

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workers would be likely to select a government-owned bank to handle their pension, the majority cited the security that these institutions provide. Under Costa Rican law all deposits in the state-owned banks, regardless of their size, are guaranteed by the government. This is not the case for private banks like Banco Interfin.

Unlike the FDIC in the United States, which places a limit of $100,000 per depositor, in Costa Rica a client with $10 million in Banco Nacional has the guarantee of the government for the full amount if the bank were to fail.

When asked what were the most attractive characteristics of the private banks as operators of the pension programs, the largest group of respondents (44 percent) stated that they provided a better quality of service. Quality of service was determined by short lines (state-owned banks were cited by respondents as working at a slow pace), personal service and for not making mistakes on statements, in transactions, and in decisions involving customers.

Three-part strategy

Based on these and other findings, Banco Interfin developed a three-part strategy for attracting clients to the pension program. First, all mass media advertising was to focus on the excellent service a client receives at Banco Interfin, coupled with information about its financial stability. Some of the advertising was testimonial and other focused on specific services provided to clients.

Next, the bank approached its corporate and other private sector clients and asked permission to visit them during working hours, and to make presentations to their employees, both collectively and individually. The premise was that if the corporations were using the bank, they must be satisfied with the service and that a personal contact might make the difference when making a decision.

Finally, a direct mail campaign was developed, based on a variety of databases. (Only Costa Ricans in the middle or upper socioeconomic levels can receive mail; household delivery is virtually non-existent). Personalized letters were sent to workplaces and to post office boxes.

Largest percentage

Banco Interfin is now an important operator in the national pension program. In fact, it is the private bank which obtained the largest percentage (11 percent) of the total pension market. The funds captured through this program by law cannot be invested outside of Costa Rica and Interfin has now established a special analytical-operational unit to handle workers' savings.

All of this serves to show that the strategy developed by Interfin was a success and the research program was a major underpinning for all management decisions. Modern thinking based on market research drove the process — the payoff for the bank was satisfactory beyond expectations.

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2002 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 level, 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

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www.grahammktres.com
Shelley McRee, Supervisor
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Stations: 6 C K P O

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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 or 800-677-5883
Fax 559-298-5226
E-mail: bartels1@compuserve.com
www.bartelsresearch.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
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

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. 386-677-5644
Fax 386-677-5534
E-mail: losn@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-30% L-30%
Stations: 5 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
Gail Stutz, Manager
Income: H-40% M-40% L-20%
Stations: 12 C K P O

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
Teri Carver, 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

Field Management Associates-Los Angeles
10800 W. Pico Blvd., #207
Los Angeles, CA 90064
Ph. 310-234-3410
Fax 310-234-3480
E-mail: lpernick@aol.com
www.fmaresearch.com
Income: NA
Stations: NA

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Ruth Grigaras
Income: H-40% M-40% L-20%
Stations: 6 C K P O

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

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Mid-America Research
Santa Monica Place
301 Santa Monica Pl.
Santa Monica, CA 90401
Ph. 310-260-3237 or 847-392-0800
Fax 310-260-3241
E-mail: santamonica@midamr.com
www.midamr.com
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

North American Insights - Los Angeles
Palm Desert Town Center
72840 Hwy 111, Suite D165
Palm Desert, CA 92260
Ph. 708-747-1100 ext. 11
Fax 708-747-4883
E-mail: sandyl@nainsights.com
Income: H-32% M-38% L-30%
Stations: 11 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
Patricia Koerner, President
Income: H-20% M-45% L-35%
Stations: 6 C P O

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

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

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

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

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

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
Peter Schachter, Manager
Income: H-24% M-46% L-30%
Stations: 10 C K P O

San Diego

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

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
Marilyn Adesanwo
Income: H-30% M-50% L-20%
Stations: 9 C K P O

Quick Test/Heakin
Parkway Plaza
304 Parkway Plaza, Suite 304
El Cajon, CA 92020
Ph. 619-444-7700
Fax 619-444-4157
E-mail: info@quicktest.com
www.quicktest.com
Harriet Roth, Manager
Income: NA
Stations: 6 C K P O

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
Fidencio Olquin, Mall Manager
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

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

Cunningham Field & Research Service
New Park Mall
1129 New Park Mall
Newark, CA 94560
Ph. 386-677-5644
Fax 386-677-5534
E-mail: SANN@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-20%
Stations: 5 C K P O

Cunningham Field & Research Service
Santa Rosa Plaza
2047A Santa Rosa Plaza
Santa Rosa, CA 95401
Ph. 386-677-5644
Fax 386-677-5534
E-mail: sanf@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 5 C K P O

Field Management Associates-San Francisco
308 Great Mall Dr.
Milpitas, CA 95035
Ph. 408-719-9800
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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Kathe Holt
Income: H-50% M-40% L-10%
Stations: 13 C K P O

North American Insights - San Francisco
Solano Mall
1350 Travis Blvd., Suite 1352B
Fairfield, CA 94533
Ph. 708-747-1100 ext. 11
Fax 708-747-4883
E-mail: sandyl@nainsights.com
Income: H-35% M-40% L-25%
Stations: 10 C K P O

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

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

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
E-mail: yarbroughm@msn.com
www.myarbrough.com
Diane Kientz, President
Income: H-30% M-50% L-20%
Stations: 7 C K P

Ventura

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.
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

Colorado Springs

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

Barbara Nolan Market Research
Chapel Hill Mall
1710 Briargate Blvd., 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

C & C Market Research, Inc.
Westminster Mall
5433 W. 88th Ave., #70
Westminster, CO 80031
Ph. 479-785-5637
Fax 479-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Income: NA
Stations: NA

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 soon)
Colorado Mills Mall
Lakewod, CO 80401
Ph. 847-940-2000
E-mail: info@carleneresearch.com
www.carleneresearch.com
Income: NA
Stations: NA

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

Cunningham Field & Research Service
Aurora Mall
14200 E. Alameda, Suite 1041
Aurora, CO 80012
Ph. 386-677-5644
Fax 386-677-5534
E-mail: DENV@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-40% L-40%
Stations: 4 C K P O

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Ed Mitchell
Income: H-40% M-40% L-20%
Stations: 10 C K P O

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

Connecticut

Hartford

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
Riverview Plaza Mall
Norwalk, CT 06850
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
Matt Williams, Manager
Income: H-20% M-60% L-20%
Stations: 4 C K P O

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

Waterbury

Cunningham Field & Research Service
Brass Mill Center
495 Union St., Suite 1102
Waterbury, CT 06706
Ph. 386-677-5644
Fax 386-677-5534
E-mail: WATE@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-30% L-50%
Stations: 5 C K P O

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

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
Dana Ganey, Manager
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. 386-677-5644
Fax 386-677-5534
E-mail: WASH@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-70% L-10%
Stations: 4 C K P O

Barbara Nolan Market Research
Ballston Common Mall
4238 Wilson Blvd., L2-K
Arlington, VA 22203
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR149@attglobal.net
Income: NA
Stations: NA

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. 386-677-5644
Fax 386-677-5534
E-mail: DAYT@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-10% M-70% L-20%
Stations: 6 C K P O

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

Car-Lene Research, Inc.
Sawgrass Mills Mall
12801 W. Sunrise Blvd.
Sunrise, FL 33323
Ph. 847-940-2000
E-mail: info@carleneresearch.com
www.carleneresearch.com
Income: H-15% M-60% L-25%
Stations: NA C K P O

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
Joyce Gutfreund, Director of Operations
Income: H-60% M-30% L-10%
Stations: 8 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

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

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
Wendy Comer, Manager
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. 386-677-5644
Fax 386-677-5534
E-mail: JACK@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-70% L-10%
Stations: 8 C K P O

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

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

Miami

Cunningham Field & Research Service
Pembroke Lakes Mall
11401 Pines Blvd., Suite 702
Pembroke Pines, FL 33026
Ph. 386-677-5644
Fax 386-677-5534
E-mail: MIAM@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-20%
Stations: 6 C K P O

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

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Cunningham Field & Research Service
Florida Mall
8001 S. Orange Blossom Trail, Suite 824
Orlando, FL 32809
Ph. 386-677-5644
Fax 386-677-5534
E-mail: orlf@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 5 C K P O

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

Sarasota/Bradenton

Mid-America Research
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
E-mail: desoto@midamr.com
www.midamr.com
Camille Moore, 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: jim@starrresearch.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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Liz Cox
Income: H-25% M-50% L-25%
Stations: 7 C K P O

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. 479-785-5637
Fax 479-785-5645
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

Cunningham Field & Research Service
Brandon Towne Center
334 Brandon Town Center
Brandon, FL 33511
Ph. 386-677-5644
Fax 386-677-5534
E-mail: TAMB@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-10% M-80% L-10%
Stations: 5 C K P O

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

North American Insights - Tampa Bay
1441 Tamiami Trail, Suite 505
Port Charlotte, FL 33948
Ph. 708-747-1100 ext. 11
Fax 708-747-4883
E-mail: sandyl@nainsights.com
Income: H-25% M-49% L-26%
Stations: 12 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
Michael Borges, Manager
Income: H-30% M-60% L-10%
Stations: 7 C K P O

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
Lori Hulett-Knapp, Manager
Income: H-10% M-30% L-60%
Stations: 6 P

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
Barbara Talbott, Manager
Income: H-10% M-70% L-20%
Stations: 10 C K P

West Palm Beach

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

Georgia

Athens

C & C Market Research, Inc.
Georgia Square Mall
3700 Atlanta Hwy., #109
Athens, GA 30606
Ph. 479-785-5637
Fax 479-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Income: NA
Stations: 5 C K P O

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

Car-Lene Research, Inc.
Discover Mills
5900 Sugarloaf Pkwy., Space #216
Lawrenceville, GA 30043
Ph. 678-847-5737
Fax 678-847-5738
E-mail: atlantad@carleneresearch.com
www.carleneresearch.com
Income: H-37% M-46% L-17%
Stations: NA C K P O

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

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

Cunningham Field & Research Service
North Point Mall
1002 N. Point Cir.
Alpharetta, GA 30022
Ph. 386-677-5644
Fax 386-677-5534
E-mail: ATLA@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-35% M-55% L-10%
Stations: 7 C K P O

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: ATLS@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-40% L-30%
Stations: 4 C K P O

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 Research
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: lenox@midamr.com
www.midamr.com
Carrie Skinner, Manager
Income: H-26% M-60% L-14%
Stations: 24 C K P O

Mid-America Research
Northlake Mall
4800 Briarcliff Rd.
Atlanta, GA 30345
Ph. 770-493-1403 or 847-392-0800
Fax 770-493-9050
E-mail: northlake@midamr.com
www.midamr.com
Carrie Skinner, 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

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

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
JEff Skelton, Manager
Income: H-25% M-46% L-29%
Stations: 10 C K P O

CODES

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

Stations - number of interviewing stations

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

NA - information not available

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: boise@cosvc.com
www.cosvc.com
Robert Corbin, Manager
Income: H-15% M-60% L-25%
Stations: 9 C K P
(See advertisement on p. 121)

Illinois

Chicago

Bryles Research, Inc.
9405 Enterprise Drive
Mokena, IL 60448
Ph. 708-478-3333
Fax 708-478-1850
E-mail: bids@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: bids@brylesresearch.com
www.brylesresearch.com
Laura Brady, 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

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

Car-Lene Research, Inc.
Westfield Shoppingtown Hawthorn
429 Hawthorn Center
Vernon Hills, IL 60061
Ph. 847-816-1237
Fax 847-816-3117
E-mail: chicagoh@carleneresearch.com
www.carleneresearch.com
Robin Rome, Manager
Income: H-60% M-30% L-10%
Stations: 6 C K P O

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

Consumer Opinion Services, Inc.
Harlem-Irving Plaza
4192 N. Harlem Ave., Space #67
Norridge, IL 60706
Ph. 708-452-7665 or 206-241-6050 for bids
Fax 708-452-7936
E-mail: chicago@cosvc.com
www.cosvc.com
Susan Piacenza
Income: H-23% M-50% L-27%
Stations: 6 C K P O
(See advertisement on p. 121)

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

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. 105)

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. 105)

Cunningham Field & Research Service
Gurnee Mills Mall
6170 W. Grand Ave., Suite 588
Gurnee, IL 60031-4548
Ph. 386-677-5644
Fax 386-677-5534
E-mail: CHIG@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-25% M-50% L-25%
Stations: 6 C K P O

Cunningham Field & Research Service
Lincoln Mall
146B Lincoln Mall
Matteson, IL 60443
Ph. 386-677-5644
Fax 386-677-5534
E-mail: CHIL@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-80% L-0%
Stations: 6 C K P O

Mid-America Research
Orland Square Mall
2800 Orlando Square
Orland Park, IL 60462
Ph. 708-349-0888 or 847-392-0800
Fax 708-349-9407
E-mail: orland@midamr.com
www.midamr.com
Joan Rogers, Manager
Income: H-24% M-63% L-14%
Stations: 12 C K P O

Mid-America Research
Randhurst Center
999 N. Elmhurst Rd., Suite 210
Mt. Prospect, IL 60056
Ph. 847-392-9770 or 847-392-0800
Fax 847-392-9891
E-mail: randhurst@midamr.com
www.midamr.com
Lori Tomeleoni
Income: H-33% M-52% L-15%
Stations: 20 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

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

Quick Test/Heakin
Louis Joliet Mall
1166 Louis Joliet Mall
Joliet, IL 60431
Ph. 815-439-2053
Fax 815-439-2162
E-mail: info@quicktest.com
www.quicktest.com
Molly Vaught, Manager
Income: H-34% M-39% L-27%
Stations: 8 C K P O

Quick Test/Heakin
Spring Hill Mall
1298 Spring Hill Mall
West Dundee, IL 60118
Ph. 847-426-8099
Fax 847-426-8245
E-mail: info@quicktest.com
www.quicktest.com
Kelly Parsons, Manager
Income: H-18% M-50% L-32%
Stations: 8 C K P O

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@a5.com
Nancy Matheis, President
Income: H-25% M-50% L-25%
Stations: 6 C K P

Indiana

Evansville

LK Research LLC
Eastland Mall
Evansville, IN 47715
Ph. 812-485-2160
Fax 812-485-2164
E-mail: rbienhaus@lkresearch.net
www.lkresearch.net
Jim Knauff, Owner
Income: H-25% M-50% L-25%
Stations: 8 C K P O

Indianapolis

Herron Associates, Inc.
Greenwood Park, #C-26
1251 U.S. 31 N.
Greenwood, IN 46142
Ph. 317-882-3800
Fax 317-882-4716
E-mail: paul@herron-research.com
www.herron-research.com
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

North American Insights - Indianapolis
Castleton Square
6020 E. 82nd St., Suite 304
Indianapolis, IN 46236
Ph. 708-747-1100 ext. 11
Fax 708-747-4883
E-mail: sandyl@nainsights.com
Sandy Lewis
Income: H-11% M-60% L-29%
Stations: 11 C K P O

Iowa

Davenport

PMR-Personal Marketing Research, Inc.
NorthPark Mall
320 W. Kimberly Rd./P.O. Box 404
Davenport, IA 52806
Ph. 563-388-4759
Fax 563-388-4796
E-mail: info@e-pmr.com
www.e-pmr.com
Bonnie Howard, Vice President
Income: H-20% M-70% L-10%
Stations: 6 C K P

Des Moines

Car-Lene Research, Inc.
Merle Hay Mall
3800 Merle Hay Rd., 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

T.L. Grantham & Associates, Inc.
Park Fair Mall
100 E. Euclid Ave., Suite 17
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
Dolly Brown, Owner
Income: H-30% M-40% L-30%
Stations: 6 C K P O

Kansas

Kansas City

(See Kansas City, MO)

Wichita

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

Kentucky

Louisville

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

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

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

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Connie Baldassaro
Income: H-25% M-50% L-25%
Stations: 5 C K P O

Gulf State Research Center
Clearview Mall
4426 Veterans Blvd.
New Orleans, LA 70006
Ph. 800-357-8842 or 863-676-3676
Fax 863-676-0471
E-mail: gulfstatefla@aol.com
Susan Brehm, Manager
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
Tracie Luc, Manager
Income: H-21% M-45% L-34%
Stations: 12 C K P O

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

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

Consumer Pulse of Baltimore
The Mall in Columbia
10300 Little Patuxent Pkwy.
Columbia, MD 21044
Ph. 410-772-1440 or 800-336-0159
Fax 410-772-1443
E-mail: baltimore.columbia@consumerpulse.com
www.consumerpulse.com
JoAnna Rogers, Manager
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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Tara Jones
Income: H-30% M-50% L-20%
Stations: 18 C K P O

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
Judy Ernig, Manager
Income: H-46% M-41% L-13%
Stations: 10 C K P O

CODES

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

Stations - number of interviewing stations

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

NA - information not available

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
Randi Stone, Manager
Income: H-37% M-45% L-18%
Stations: 10 C K P O

Massachusetts

Boston

Car-Lene Research, Inc.
Silver City Galleria
2 Galleria Mall Dr.
Taunton, MA 02780
Ph. 508-880-0087
Fax 508-880-8715
E-mail: boston@careneresearch.com
www.carleneresearch.com
Steve Martin, Manager
Income: H-34% M-24% L-42%
Stations: 5 C K P O

Cunningham Field & Research Service
Natick Mall
1245 Worchester St., Suite 1004
Natick, MA 01760-1553
Ph. 386-677-5644
Fax 386-677-5534
E-mail: BOST@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 5 C K P O

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

Performance Plus
2 Faneuil Hall Marketplace
4th fl., 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

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Joan Gevry
Income: H-30% M-50% L-20%
Stations: 6 C K P O

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

Crimmins & Forman Market Research
Consumer Research Center
Westland Mall, #210
35000 W. Warren Rd.
Westland, MI 48185
Ph. 734-513-5040
Fax 734-513-8966
www.crimminsandforman.com
Sue Ketchum, Manager
Income: H-35% M-45% L-20%
Stations: 10 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. 386-677-5644
Fax 386-677-5534
E-mail: detr@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-25% M-50% L-25%
Stations: 6 C K P O

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Jason Rodgers
Income: H-30% M-50% L-20%
Stations: 15 C K P O

Quick Test/Heakin
Macomb Mall
32441 Gratiot, Suite 440
Roseville, MI 48066
Ph. 586-294-3232
Fax 586-294-3759
E-mail: info@quicktest.com
www.quicktest.com
Diana Chalou, Manager
Income: H-31% M-41% L-28%
Stations: 8 C K P O

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

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: bids@brylesresearch.com
www.brylesresearch.com
Denise Jerome
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

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

Cunningham Field & Research Service
Maplewood Mall
3001 White Bear Ave N., Suite 2013
Maplewood, MN 55109
Ph. 386-677-5644
Fax 386-677-5534
E-mail: MINM@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 4 C K P O

Cunningham Field & Research Service
Northtown Mall
310 Northtown Dr.
Blaine, MN 55434
Ph. 386-677-5644
Fax 386-677-5534
E-mail: minn@cunninghamresearch.com
www.cunninghamresearch.com
Susan Hoffman, Manager
Income: H-20% M-80% L-0%
Stations: 4 C K P O

Friedman Marketing Services
Consumer Opinion Center
Burnsville Center Mall
1178 Burnsville Center, Suite 25
Burnsville, MN 55306
Ph. 952-892-5383 or 914-698-9591
Fax 612-898-2940
E-mail: gvigeant@friedmanmktg.nopworld.com
www.friedmanmktg.com
Michelle Jenkins
Income: H-50% M-40% L-10%
Stations: 8 C K P O

Quick Test/Heakin
Mall of America
300 E. Broadway
Bloomington, MN 55425
Ph. 952-854-3535
Fax 952-854-4375
E-mail: info@quicktest.com
www.quicktest.com
Elena Johnson, Manager
Income: H-25% M-50% L-25%
Stations: 14 C K P O

Quick Test/Heakin
Ridgedale Mall
12745 Wayzata Blvd.
Minnetonka, MN 55305
Ph. 952-512-3838
Fax 952-512-0011
E-mail: info@quicktest.com
www.quicktest.com
Ersula Myers-Jeff, Manager
Income: H-30% M-40% L-30%
Stations: 10 C K P O

Mississippi

Jackson

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

Missouri

Kansas City

C & C Market Research, Inc.
Metro North Mall
400 N.W. Barry Rd., Suite 143
Kansas City, MO 64155
Ph. 479-785-5637 or 816-436-9545
Fax 479-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-35% M-55% L-10%
Stations: 5 C K P O

Car-Lene Research, Inc.
Bannister Mall
5600 E. Bannister Mall, Store #34
Kansas City, MO 64137
Ph. 816-767-8300
Fax 816-761-0100
E-mail: kansascity@carleneresearch.com
www.carleneresearch.com
Income: H-25% M-40% L-35%
Stations: 4 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

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
Debbie Culver, Manager
Income: H-30% M-40% L-30%
Stations: 9 C K O

CODES

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

Stations - number of interviewing stations

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

NA - information not available

St. Louis

C & C Market Research, Inc.
Alton Square Mall
203 B Alton Square
Alton, IL 62002
Ph. 479-785-5637
Fax 479-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Income: NA
Stations: 5 C K P O

Car-Lene Research, Inc.
South County Mall
Hwy. 55 & Lindbergh Blvd.
St. Louis, MO 63129
Ph. 314-845-2002
Fax 314-845-6254
E-mail: stlouissc@carleneresearch.com
www.carleneresearch.com
Marie Sykes, Manager
Income: H-30% M-30% L-40%
Stations: 4 C K P O

Cunningham Field & Research Service
St. Claire Square Mall
134 St. Claire Square, #125
Fairview Heights, IL 62208
Ph. 386-677-5644
Fax 386-677-5534
E-mail: STLO@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-40% L-30%
Stations: 5 C K P O

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Angie Maxey
Income: H-25% M-50% L-25%
Stations: 10 C K P

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

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

Superior Surveys of St. Louis, Inc.
208 Crestwood Plaza
St. Louis, MO 63126
Ph. 314-918-7460
Fax 314-692-2427
E-mail: SURVEYS4U@aol.com
Carol McGill, 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: bids@brylesresearch.com
www.brylesresearch.com
Jay Gillispie, Supervisor
Income: H-10% M-80% L-10%
Stations: 12 C K P O

Nebraska

Omaha

C & C Market Research, Inc.
Westroads Shopping Mall
10000 California St., #2100
Omaha, NE 68114
Ph. 479-785-5637
Fax 479-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Income: NA
Stations: 6 C K P O

Cunningham Field & Research Service
Crossroads Mall
7400 Dodge St., Suite B-2
Omaha, NE 68114
Ph. 386-677-5644
Fax 386-677-5534
E-mail: omah@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-45% L-25%
Stations: 6 C K P O

Midwest Survey & Research
Mall of the Bluffs
1751 Madison Ave., Suite 708
Council Bluffs, IA 51503
Ph. 712-323-1438
Fax 712-323-1438
E-mail: mall@mwsurvey.com
www.mwsurvey.com
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. 386-677-5644
Fax 386-677-5534
E-mail: LASV@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 7 C K P O

New Hampshire

Concord

Cunningham Field & Research Service
Steeplegate Mall
270 Loudon Rd., Suite 1164
Concord, NH 03301
Ph. 386-677-5644
Fax 386-677-5534
E-mail: CONC@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-60% L-20%
Stations: 5 C K P O

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

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

Consumer Pulse of New York
One Garden State Plaza, #1170
Paramus, NJ 07652
Ph. 201-909-0144 or 800-336-0159
Fax 201-909-9877
E-mail: newyork@consumerpulse.com
www.consumerpulse.com
Liz Ellingsen, Director
Income: H-40% M-45% 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

Cunningham Field & Research Service
Raceway Mall
3710 Rte. 9, Suite 238A
Freehold, NJ 07728
Ph. 386-677-5644
Fax 386-677-5534
E-mail: FREE@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-50% M-40% L-10%
Stations: 6 C K P O

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 Research
Livingston Mall
131 Livingston Mall
Livingston, NJ 07039
Ph. 973-740-1566 or 847-392-0800
Fax 973-740-0569
E-mail: livingston@midamr.com
www.midamr.com
Marc Brandon, Manager
Income: H-15% M-80% L-5%
Stations: 12 C K P O

Barbara Nolan Market Research
Menlo Park Mall
55 Parsonage Rd., Space 2310
Edison, NJ 08837
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR138@attglobal.net
Income: H-60% M-30% L-10%
Stations: 5 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

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

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
Brenda Davis, Manager
Income: H-10% M-60% L-30%
Stations: 8 C K P O

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

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

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

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

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Quick Test/Heakin
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

Buffalo

Buffalo Survey & Research, Inc.
McKinley Mall
3701 McKinley Pkwy., Unit 124
Blasdell, NY 14219-2684
Ph. 716-822-3250
Fax 716-822-9691
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-24% M-45% L-31%
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

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
www.atoq.com
Mary Garofaldo, Managing Director
Income: H-20% M-60% L-20%
Stations: 7 C K P O

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Josh Malone
Income: H-40% M-40% L-20%
Stations: 6 C K O

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Jon Erickson
Income: H-25% M-50% L-25%
Stations: 6 C K P O

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

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

Audrey Schiller Market Research
385 Spruce Lane
East Meadow, NY 11554
Ph. 516-489-7431
Fax 516-489-7842
E-mail: aschiller1@aol.com
Audrey Schiller, President
Income: H-35% M-50% L-15%
Stations: 8 C K P O

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

Poughkeepsie

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

Rochester

Car-Lene Research, Inc.
Greece Ridge Center Mall
150 Greece Ridge Center Dr.
Rochester, NY 14626
Ph. 716-225-3100
Fax 716-225-2834
E-mail: rochgreece@carleneresearch.com
www.carleneresearch.com
Barry Rudner, Manager
Income: H-19% M-39% L-42%
Stations: 6 C K P O

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

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

Syracuse

Cunningham Field & Research Service
Eastview Mall
602 Eastview Mall
Victor, NY 14564
Ph. 386-677-5644
Fax 386-677-5534
E-mail: ROCH@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-35% M-45% L-20%
Stations: 5 C K P O

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
Asheville, NC 28805
Ph. 386-677-5644
Fax 386-677-5534
E-mail: ASHE@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-50% L-30%
Stations: 6 C K P O

South East Market Research
800 Brevard Rd., Suite 516
Asheville, NC 28806
Ph. 865-546-7678
Fax 865-546-7684
E-mail: vphilips@bellsouth.net
Vicki Phillips, Dir. Marketing Research
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

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. 386-677-5644
Fax 386-677-5534
E-mail: chap@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-45% M-35% L-20%
Stations: 5 C K P O

Cunningham Field & Research Service
Eastridge Mall
246 N. New Hope Rd., Suite E-120
Gastonia, NC 28054
Ph. 386-677-5644
Fax 386-677-5534
E-mail: CHAR@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-50% L-10%
Stations: 6 C K P O

Greensboro/ Winston-Salem

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

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

W.H. Long Marketing, Inc.
Golden Gate Shopping Center
2250 Golden Gate Dr.
Greensboro, NC 27408
Ph. 336-292-4146
Fax 336-299-6165
Ruth Long, President
Income: H-33% M-34% L-33%
Stations: 8 C K P O

Quick Test/Heakin
Oak Hollow Mall
921 Eastchester Dr., Suite 1130
High Point, NC 27262
Ph. 336-882-1176
Fax 336-882-1664
E-mail: info@quicktest.com
www.quicktest.com
Lisa Haggett, Manager
Income: H-20% M-40% L-20%
Stations: 4 C K O

Raleigh/Durham

Cunningham Field & Research Service
Cary Towne Center
1105 Walnut St., Suite E103A
Cary, NC 27511
Ph. 386-677-5644
Fax 386-677-5534
E-mail: RALE@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 6 C K P O

North American Insights - Raleigh/Durham
The Streets at Southpoint
6910 Fayetteville Rd., Suite 101
Durham, NC 27713
Ph. 708-747-1100 ext. 11
Fax 708-747-4883
E-mail: sandyl@nainsights.com
Income: H-31% M-45% L-24%
Stations: 12 C K P O

Ohio

Akron

Cunningham Field & Research Service
Chapel Hill Mall
2000 Brittain Rd., Suite 465
Akron, OH 44310
Ph. 386-677-5644
Fax 386-677-5534
E-mail: AKRO@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-70% L-10%
Stations: 6 C K P O

Opinions, Ltd.
Summit Mall
3265 W. Market St., #402
Fairlawn, OH 44333
Ph. 440-893-0300
Fax 330-864-8929
E-mail: info@whereopinionscount.com
www.whereopinionscount.com
Mike Kikel
Income: H-45% M-40% L-15%
Stations: 9 C K P

Quick Test/Heakin
Rolling Acres Mall
2400 Romig Rd.
Akron, OH 44320
Ph. 330-745-8883
Fax 330-745-7881
E-mail: info@quicktest.com
www.quicktest.com
Debbie Moore, Manager
Income: H-10% M-70% L-20%
Stations: 6 C K

Cincinnati

B & B Research Services, Inc.
Eastgate Mall
4601 Eastgate Ave.
Cincinnati, OH 45245
Ph. 513-753-4111
Fax 513-753-6194
E-mail: bbresearchserv@aol.com
Bonnie Fumarola, 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: cincinnati@carleneresearch.com
www.carleneresearch.com
Kelly Scharding, Manager
Income: H-36% M-48% L-16%
Stations: 5 C K P O

Consumer Pulse of Cincinnati
Northgate Mall
9663A Colerain Ave.
Cincinnati, OH 45251
Ph. 513-385-8228 or 800-336-0159
Fax 513-385-2140
E-mail: cincinnati@consumerpulse.com
www.consumerpulse.com
Phil Brantley, Manager
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. 386-677-5644
Fax 386-677-5534
E-mail: CINC@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 5 C K P O

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

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

Cunningham Field & Research Service
The Avenue @ Tower City
230 W. Huron Rd., Suite 72-92
Cleveland, OH 44113
Ph. 386-677-5644
Fax 386-677-5534
E-mail: clev@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-35% M-30% L-35%
Stations: 6

OPINIONation
4301 Ridge Rd.
Cleveland, OH 44144
Ph. 216-351-4644
Fax 216-351-7876
E-mail: ron@opinionation.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: questionsinc@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

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
5555 Rte. #422
Niles, OH 44446
Ph. 315-431-0660
Fax 315-431-0672
E-mail: mccarthyfield@cs.com
John McCarthy, President
Income: H-30% 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. 479-785-5637
Fax 479-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-35% M-55% L-10%
Stations: 7 C K P O

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

Tulsa

C & C Market Research, Inc.
Arrowhead Mall
501 N. Main St., Suite 75
Muskogee, OK 74401
Ph. 479-785-5637
Fax 479-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-40% M-45% L-15%
Stations: 6 C K P O

Car-Lene Research, Inc.
Tulsa Promenade Mall
4107 S. Yale Ave.
Tulsa, OK 74135
Ph. 918-663-4410
Fax 918-663-4413
E-mail: tulsa@carleneresearch.com
www.carleneresearch.com
Lee Pietryk, Manager
Income: H-25% M-50% L-25%
Stations: 4 C K P O

Cunningham Field & Research Service
Woodland Hills Mall
7021 S. Memorial, Suite 148
Tulsa, OK 74133
Ph. 386-677-5644
Fax 386-677-5534
E-mail: tulw@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-50% M-35% L-15%
Stations: NA C

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
Laurie Kempton, Manager
Income: NA
Stations: NA

Portland

Consumer Opinion Services, Inc.
1206 Jantzen Beach Center
Portland, OR 97217
Ph. 503-240-8159 or 206-241-6050 for bids
Fax 503-240-8161
E-mail: jantzen@cosvc.com
www.cosvc.com
Kelly Ross, Manager
Income: H-5% M-50% L-45%
Stations: 8 C K P
(See advertisement on p. 121)

Consumer Opinion Services, Inc.
991 Lloyd Center
Portland, OR 97232
Ph. 503-493-2870 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. 121)

Consumer Pulse of Portland
Clackamas Town Center, #2121
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
906 Lloyd Center, Suite B1108
Portland, OR 97232
Ph. 386-677-5644
Fax 386-677-5534
E-mail: port@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-30% L-40%
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

Pennsylvania

Erie

Moore Research Services, Inc.
Millcreek Mall
340 Mill Creek Mall
Erie, PA 16565
Ph. 814-868-0873
Fax 814-864-7012
E-mail: colleen@moore-research.com
www.moore-research.com
Colleen Moore Mezler, President
Income: H-28% M-48% L-24%
Stations: 8 C K

Philadelphia

Car-Lene Research, Inc.
Echelon Mall
2070 Echelon Mall, 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

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

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

Consumer Pulse of Philadelphia
One Plymouth Meeting Office Center & Plymouth Meeting Mall
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. 386-677-5644
Fax 386-677-5534
E-mail: PHIL@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-35% M-40% L-25%
Stations: 6 C K P O

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. 11)

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
Income: H-30% M-40% L-30%
Stations: 10 C K P O
(See advertisement on p. 51)

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., Suite 917
Cherry Hill, NJ 08002
Ph. 856-910-1000
Fax 856-910-1010
E-mail: info@quicktest.com
www.quicktest.com
Lorraine Jones, Manager
Income: H-35% M-39% L-26%
Stations: 10 C K P O

Quick Test/Heakin
Neshaminy Mall
109 Neshaminy Mall
Bensalem, PA 19020
Ph. 215-322-0400
Fax 215-322-5412
E-mail: info@quicktest.com
www.quicktest.com
Charna Mandell, Manager
Income: H-5% M-80% L-15%
Stations: 11 C K P O

Pittsburgh

Car-Lene Research, Inc.
Monroeville Mall, Rm. 144
Monroeville, PA 15146
Ph. 412-373-3670
Fax 412-373-5076
E-mail: pittsburg@carleneresearch.com
www.carleneresearch.com
Kathleen Hanlin, Manager
Income: H-15% M-45% L-40%
Stations: 7 C K P O

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

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
Alma Noble, President
Income: H-30% M-40% L-30%
Stations: 6 K P O

Quick Test/Heakin
Ross Park Mall
1000 Ross Park Mall Rd., Suite A01
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

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

Spartanburg

C & C Market Research, Inc.
205 W. Blackstock Rd., #290
Spartanburg, SC 29301
Ph. 479-785-5637
Fax 479-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
Income: H-50% M-40% L-10%
Stations: 8 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: vphilips@bellsouth.net
Vicki Phillips, Dir. Marketing Research
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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Rosemarie O'Sullivam
Income: H-25% M-50% L-25%
Stations: 6 C K P O

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Angel Powell
Income: H-40% M-40% L-20%
Stations: 10 C K O

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

Nashville

C & C Market Research, Inc.
Bellvue Center
7620 Hwy. 70 S.
Nashville, TN 37221
Ph. 479-785-5637
Fax 479-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Income: NA
Stations: 5 C K P O

Car-Lene Research, Inc.
Stones River Mall
1720 Old Fort Parkway
Murfreesboro, TN 37129
Ph. 615-907-0037
Fax 615-907-0039
E-mail: nashville@carleneresearch.com
www.carleneresearch.com
Toni White, Manager
Income: H-30% M-45% L-25%
Stations: 5 C K P O

Cunningham Field & Research Service
Cool Springs Galleria
1800 Galleria Blvd., Suite 1320
Franklin, TN 37064
Ph. 386-677-5644
Fax 386-677-5534
E-mail: NASH@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-80% L-0%
Stations: 5 C K P O

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

Quick Test/Heakin
Rivergate Mall
1000 Rivergate Pkwy., Suite 2005
Goodlettsville, TN 37072
Ph. 615-859-4484
Fax 615-851-0717
E-mail: info@quicktest.com
www.quicktest.com
Marilyn Ledbetter, Manager
Income: H-20% M-50% L-30%
Stations: 7 C K P O

Texas

Austin

Barbara Nolan Market Research
Lakeline Mall
11200 Lakeline Mall Dr., Space J-1
Cedar Park, TX 78613
Ph. 800-240-6119
Fax 407-629-7633
E-mail: BNMR151@attglobal.net
Income: H-25% M-50% L-25%
Stations: 6 C K P O

CODES

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

Stations - number of interviewing stations

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

NA - information not available

Quick Test/Heakin
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

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

Dallas/Ft. Worth

C & C Market Research, Inc.
Valley View Mall
13331 Preston Rd., #1073
Dallas, TX 75240
Ph. 479-785-5637
Fax 479-785-5645
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

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

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

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

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

Cunningham Field & Research Service
Stonebriar Center
2601 Preston Rd., Suite 2112
Frisco, TX 75034
Ph. 386-677-5644
Fax 386-677-5534
E-mail: DALL@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-40% M-40% L-20%
Stations: 6 C K P O

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
Erika Hough, Manager
Income: H-55% M-25% L-20%
Stations: 12 C K P O

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
Susan Patey, Manager
Income: H-30% M-45% L-25%
Stations: 12 C

Quick Test/Heakin
Irving Mall
3680 Irving Mall
Irving, TX 75062
Ph. 972-594-8573
Fax 972-257-0487
E-mail: info@quicktest.com
www.quicktest.com
Helen Alnezirawy, Manager
Income: NA
Stations: NA

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
Marsha Fugitt, Manager
Income: H-46% M-41% L-13%
Stations: 10 C K P O

Savitz Field and Focus
The Parks at Arlington Mall
3811 S. Cooper, 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. 479-785-5637
Fax 479-785-5645
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

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

Creative Consumer Research
Deerbrook Mall, #1122
20131 Hwy. 59
Humble, TX 77338
Ph. 281-446-9730
Fax 281-446-6649
E-mail: ccrhouston@ccrsurveys.com
www.ccrsurveys.com
Patricia Pratt, Field Director
Income: H-30% M-39% L-31%
Stations: 10 C K P O

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: ccrhouston@ccrsurveys.com
www.ccrsurveys.com
Patricia Pratt, Field Director
Income: H-50% M-38% L-12%
Stations: 8 C K P O

Creative Consumer Research
Northline Mall
113 Northline Mall
Houston, TX 77022
Ph. 281-240-9646
Fax 281-240-3497
E-mail: ccrhouston@ccrsurveys.com
www.ccrsurveys.com
Patricia Pratt, Field Director
Income: H-10% M-31% L-59%
Stations: 6 C P

Cunningham Field & Research Service
The Woodlands Mall
1201 Lake Woodlands Dr., Suite 1104
The Woodlands, TX 77380
Ph. 386-677-5644
Fax 386-677-5534
E-mail: HOUS@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-30% M-60% L-10%
Stations: 4 C K P O

Gulf State Research Center
1670 San Jacinto Mall
Baytown, TX 77521-8361
Ph. 800-357-8842 or 863-676-3676
Fax 863-676-0471
E-mail: gulfstatefla@aol.com
Robert Landsberger, President
Income: H-36% M-47% L-17%
Stations: 6 C K P O

Market Research & Analysis Field Staff, Inc.
The Research Center
5075 Westheimer Rd.
Houston, TX 77056
Ph. 713-271-5624
Fax 713-840-0699
E-mail: mrafs@swbell.net
Fay Parker, President
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

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

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
Kurt Smith, Manager
Income: H-40% M-35% L-25%
Stations: 12 C K P O

San Antonio

C & C Market Research, Inc.
South Park Mall
2310 S.W. Military Dr., #438
San Antonio, TX 78224
Ph. 479-785-5637
Fax 479-785-5645
E-mail: craig@ccmarketresearch.com
www.ccmarketresearch.com
Income: NA
Stations: NA

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

Creative Consumer Research
McCreless Mall
South Cross & I-37
San Antonio, TX 78223
Ph. 210-531-9345
Fax 210-673-0094
E-mail: ccrsanantonio@ccrsurveys.com
www.ccrsurveys.com
Amalia Pena, Project Supervisor
Income: H-10% M-65% L-25%
Stations: 7 C P

Creative Consumer Research
Westlakes Mercado Mall
1401 S.W. Loop 410
San Antonio, TX 78227
Ph. 210-654-1900
E-mail: ccrsanantonio@ccrsurveys.com
Claudia De Hoyos
Income: H-10% M-65% L-25%
Stations: 4 C K P

Creative Consumer Research
Windsor Park Mall
7900 IH 35
San Antonio, TX 78218
Ph. 210-654-1900
Fax 210-653-3884
E-mail: ccrsanantonio@ccrsurveys.com
Claudia De Hoyos
Income: H-20% M-50% L-30%
Stations: 5 C P

Cunningham Field & Research Service
Rivercenter Mall
849 E. Commerce St., #403
San Antonio, TX 78205
Ph. 386-677-5644
Fax 386-677-5534
E-mail: sant@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-65% L-15%
Stations: 4 C K

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Lisa Garbett
Income: H-25% M-50% L-25%
Stations: 7 C K

Galloway Research Services
Crossroads Mall
4522 Fredricksburg Rd., #A3
San Antonio, TX 78201
Ph. 210-734-4346
Fax 210-732-4500
E-mail: grs@gallowayresearch.com
www.gallowayresearch.com
Betty Rose, Department Director
Income: H-5% M-80% L-15%
Stations: 9 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

Galloway Research Services
Ingram Park
6301 N.W. Loop 410
San Antonio, TX 78238
Ph. 210-734-4346
Fax 210-732-4500
E-mail: grs@gallowayresearch.com
www.gallowayresearch.com
Betty Rose, Department Director
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: newgate@cosvc.com
www.cosvc.com
Willard Hill, Manager
Income: H-10% M-65% L-25%
Stations: 9 C K P
(See advertisement on p. 121)

Cunningham Field & Research Service
South Towne Center
10450 S. State St., Suite 1331
Sandy, UT 84070
Ph. 386-677-5644
Fax 386-677-5534
E-mail: SALT@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-10% M-80% L-10%
Stations: 4 C K P O

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

Vermont

Burlington

Opinions, Ltd.
Burlington Town Center
101 Cherry St.
Burlington, VT 05402
Ph. 440-893-0300
E-mail: mark@whereopinionscount.com
www.whereopinionscount.com
Mark Kikel, Owner
Income: H-38% M-48% L-14%
Stations: 7 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: everett@cosvc.com
www.cosvc.com
Maureen Barbee, Manager
Income: H-10% M-65% L-25%
Stations: 10 C K P
(See advertisement on p. 121)

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: threerivers@cosvc.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. 121)

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

Cunningham Field & Research Service
Super Mall of the Great N.W.
1101 Super Mall Way., Suite 1239
Auburn, WA 98001
Ph. 386-677-5644
Fax 386-677-5534
E-mail: SEAT@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-0% M-80% L-20%
Stations: 5 C K P O

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Ted Hubbard
Income: H-30% M-50% L-20%
Stations: 6 C K P O

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

North American Insights - Seattle
Kitsap Mall
10315 Silverdale Way N.W., Suite E20
Silverdale, WA 98383
Ph. 708-747-1100 ext. 11
Fax 708-747-4883
E-mail: sandyl@nainsights.com
Income: H-22% M-53% L-25%
Stations: 8 C K P O

Quick Test/Heakin
Tacoma Mall Shopping Center
4502 S. Steele St., Suite 935
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

Spokane

Consumer Opinion Services, Inc.
Northtown Mall
4750 N. Division St.
Spokane, WA 99207
Ph. 509-487-6173 or 206-241-6050 for bids
Fax 509-482-7205
E-mail: northtown@cosvc.com
www.cosvc.com
Linda Levely, Manager
Income: H-9% M-61% L-30%
Stations: 8 C K P O
(See advertisement on p. 121)

Cunningham Field & Research Service
Spokane Valley Mall
14700 E. Indiana, #1188
Spokane, WA 99216
Ph. 386-677-5644
Fax 386-677-5534
E-mail: spok@cunninghamresearch.com
www.cunninghamresearch.com
Income: H-20% M-50% L-30%
Stations: 6 C K O

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: vancouver@cosvc.com
www.cosvc.com
Alice Hilby, Manager
Income: H-15% M-45% L-40%
Stations: 7 C K P
(See advertisement on p. 121)

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: 9 C K P O
(See advertisement on p. 83)

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: tada@1st.net
Tim Aspenwall, Manager
Income: H-10% M-65% L-25%
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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Tammy Tomaloff
Income: H-25% M-55% L-20%
Stations: 8 C K P O

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@friedmanmktg.nopworld.com
www.friedmanmktg.com
Dawn Marhefke
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Stations: 11 C K P O

Milwaukee

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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

Car-Lene Research, Inc.
Southridge Mall
5300 S. 76th St., Suite 1325
Greendale, WI 53129
Ph. 414-421-2865
Fax 414-421-2990
E-mail: milwaukee@carleneresearch.com
www.carleneresearch.com
Christine Malone, Manager
Income: H-31% M-31% L-38%
Stations: 4 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

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
Daina Veidemanis, Director
Income: H-20% M-60% L-20%
Stations: 8 C K P O

Quick Test/Heakin
Brookfield Square Mall
95 N. Moorland Rd., Space PC-13
Brookfield, WI 53005
Ph. 262-787-1727
Fax 262-787-0052
E-mail: info@quicktest.com
www.quicktest.com
Linda Kelly, Manager
Income: H-20% M-60% L-20%
Stations: 9 C K O

Canada

British Columbia

Vancouver

Canadian Viewpoint, Inc.
Surrey Place Mall
400B - 2562 Surrey Place Mall
Surrey, BC V3T 2W1
Canada
Ph. 604-583-3355
Fax 604-583-3733
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Alan Boucquey, V.P. Operations
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Canada
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Fax 604-832-0342
www.nfocfgroup.com
Income: NA
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Research House, Inc.
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Burnaby, BC V5H 4J2
Canada
Ph. 416-488-2333
Fax 416-488-2391
E-mail: info@research-house.ca
www.research-house.ca
Kate Crowley, Project Director
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Stations: 4 C K P O

Manitoba

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Canada
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Fax 204-224-5004
www.nfocfgroup.com
Income: NA
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Fax 905-770-1692
E-mail: info@canview.com
www.canview.com
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Stations: 4 C K P O

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Fax 905-770-1692
E-mail: info@canview.com
www.canview.com
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Stations: 3 C K P O

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Graham Loughton, V.P. & General Manager
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Stations: 3 C K P O

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Bramalea, ON
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(See advertisement on p. 55)

Quebec

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Index of Advertisers

Trade Talk

continued from p. 126

pleted analyzing a survey of over 450 market research and intelligence functions at companies around the world and he found a noticeable uptick in the portion of budgets committed to primary research. "Custom market research firms are part of this trend I call moving content up the value chain," he says. "They are responding to their internal clients' demands, the demands of the ultimate information or intelligence end user, who is oftentimes a senior decision maker in the organization. They may be getting their information synthesized or analyzed through a market research or intelligence function but the bottom line is, they are the ultimate consumer of what the custom market research firm is providing. And that end consumer is asking more high-risk, what-if questions. They have really raised the bar in terms of their expectations for the kind of content they need to make decisions. A bad decision in today's economy is much more costly than that same bad decision 12 months ago, and it could break the back of an organization depending on where that company is at."

So maybe the message is finally getting through. Maybe businesses are starting to realize that informed decisions are better than uninformed ones. We can only hope.

Classified Ads

Trade Talk

By Joseph Rydholm, QMRR editor

Analyst sees more growth for MR industry

Earlier this summer Outsell, Inc., a Burlingame, Calif., research and advisory firm, released findings from its 2001 study of what it calls the information content industry. Part of that industry is the "market research, reports, and services" market, or MRRS, which includes custom market research firms, providers of syndicated research and providers of databases.

According to Outsell figures, the \$14.1 billion dollar market consists of the database segment at \$6.2 billion, custom research at \$5.5 billion, and syndicated research at \$2.4 billion.

Though overall MRRS segment growth was 2.7 percent in 2001, compared to a 5.7 percent adjusted growth rate in 2000, sales at custom research firms grew 7.9 percent in 2001 while growth in the syndicated and database segments was flat.

"The custom research providers have been carrying the MRRS market," says Joel Block, vice president and lead analyst, Outsell, Inc. "When we take a look at the three segments and what's driving business in them, without a doubt, the custom segment has served as a buoy for the broader research reports and services market. One of the primary reasons for that is the demand from research buyers' internal corporate clients. We believe that the custom segment grew well beyond its peer segments in 2001 in large part because corporate decision makers want hard facts on which to base their strategic decisions. They want the research to be customized to suit their needs."

Closer look

Block says that corporate clients are taking a closer look at their in-house market research capabilities and how they fit in with their companies' core competencies. Research may be a critical part of the firm's marketing and strategic planning, but some feel that it's better to outsource those efforts, at least in part, and focus in-house talent on doing what the company does best.

And in tough economic times like these, outsourcing offers another tangible appeal: it may be more economical than hiring and maintaining an in-house staff. So some firms, faced with a decision between hiring new in-house primary research capacity and outsourcing, will choose the latter. "It is fundamentally easier in down economies to control those variable dollars than it is to manage head count," Block says.

An argument against relying on outsourcing is that a company loses historical perspective, both of its past business experiences and its past research efforts. Sure it may be cheaper in the short term to partner with a research vendor, but unless the two parties develop a long-term relationship through which both build an awareness of past research successes and failures, they risk duplicating those failures and missing out on the benefits of already-accumulated knowledge.

Granted, in-house research departments can become hidebound but they can also be rich storehouses of knowledge and, depending on the experience level of the workers, can provide valuable, industry-specific insights unavailable from an outside research firm.

While many client firms pay lip service to the value of building partnerships with their research providers — which in theory would avoid the loss of intellectual capital — we all know that a years-long relationship could disappear in an instant if another research firm submits a lowball bid for the same services.

Noticeable uptick

Despite my cynicism, there is cause for some optimism. Block just com-

continued on p. 125