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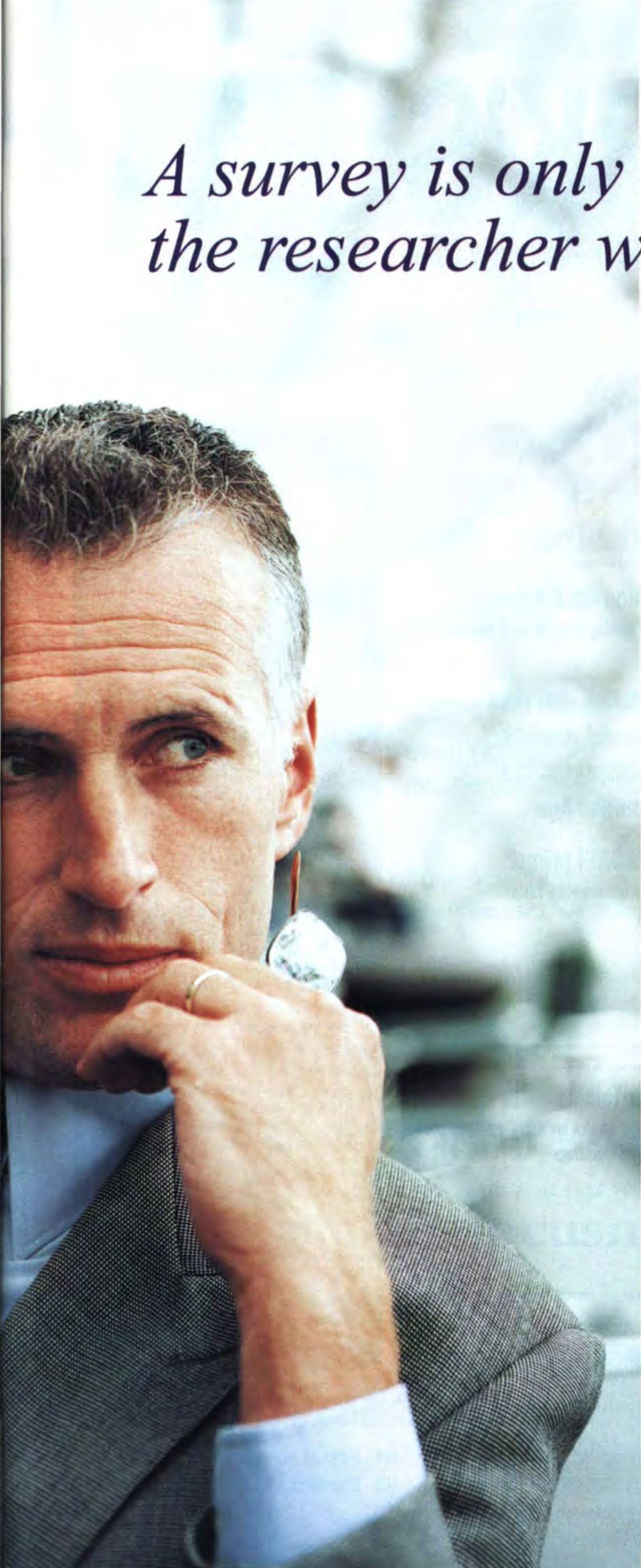

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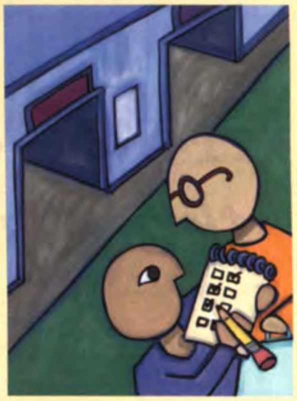

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Consumers soured by recent fast-food experiences

Could the mealtime domination of familiar fast-food restaurants be coming to an end? According to a new study by NFO WorldGroup, Greenwich, Conn., the answer is maybe — as traditional quick-service restaurants

(QSR) across the nation are failing to satisfy customers on a basic level.

NFO's research, which evaluates customer satisfaction at some of the nation's largest chain restaurants, reveals that customer expectations about the "casual dining out" experience are rising, fueled by standards set by a rapidly growing restaurant category referred to as fast-casuals, which are similar to fast-food/quick-serve outlets but offer a promise of higher quality food and atmosphere. While QSRs dominate the marketplace — 80 percent of people eat out at them regularly — one-third of QSR customers claim dissatisfaction with several aspects of their dining experience. This compares to fewer than 5 percent of customers expressing dissatisfaction with the fast-casual restaurants they frequent.

According to the study:

• Well-balanced, nutritious meal choices are not what customers are looking for when they choose a McDonald's or Taco Bell for a meal or a snack.

• Reasonable wait times are important to customers. However, they are willing to wait for freshly prepared meals at a Subway or Panera Bread.

• Promotions and rewards have a moderate impact on customer loyalty, but personalized service is far more important to regular customers. It has a much higher impact on their satisfaction and loyalty.

The study says that while 60 percent of restaurant diners are strong advocates for their favorite eateries, it isn't basic features such as menu options and price promotions that keep them coming back but rather special touches such as improved and personalized customer service. Meanwhile, consumers said that many of the largest fast-food chains struggle to deliver a basic level of service that is consistent across all locations.

"With chains providing so many of today's eating options, consumers are crying out for a generic experience to be turned into a personal one. So while each visit may be predictable and consistent, it is also friendly and familiar. Our research shows that this keeps customers coming back time and again. Fast-casuals are setting high standards in this area, but the quick-serves are failing and are likely to face a loss of market share in the long run," says Shubhra Ramchandani, North American stakeholder management practice leader, NFO WorldGroup, and the director of the study.

While consumers are linking satisfaction with personalized and pleasant service, the QSR industry clearly is not — the majority of its marketing efforts promote new menu items, special deals or rewards. Service improvements are focused on reducing wait times, providing clean facilities and food at the right temperature. Are the quick-service restaurants out of touch with the needs of their core customers?

Ramchandani recommends that QSRs reduce the high level of dissatisfaction among their core customers by delivering the following:

1. Friendly and polite service.

2. Staff that is knowledgeable and able to answer questions.

3. Staff that shows pride in their restaurant.

4. A restaurant that demonstrates it is in touch with special needs of its customers.

5. An enjoyable overall restaurant atmosphere.

"QSRs would be best served if they paid attention to their loyal customer needs. This will generate additional business through word-of-mouth recommendations — the key source of new customers in the restaurant category. For every dissatisfied customer, you lose at least 10 more through the spread of negative word of mouth, and that is a sorry price to be paid in lost revenue. With these results, and billions of dollars at stake for the QSR industry, the question is, will the fast-casual chains succeed in duplicating their winning service recipe at outlets across the country? Or can the quick-serves fix themselves before that happens?" says Ramchandani.

The study was conducted in the summer of 2003 from a nationally representative sample of consumers. Over 600 consumers were asked to rate the performance of restaurants they visited most often in the last two months. These restaurants were grouped into three categories: quick-service, fast-casual and full-service restaurants.

In measuring customer loyalty, fast-casual outperforms all others, garnering an A+ grade on overall performance. This rating is driven by consumers' perceptions of high quality food and service. In general, this group of restaurants boasts less than 5 percent of dissatisfied customers. On the contrary, the quick-service category receives an overall B grade, with specific chains receiving close to failing scores (equivalent of a D grade).

While the overall message to the restaurant industry is that an emphasis on the basics is key to maintaining cus-

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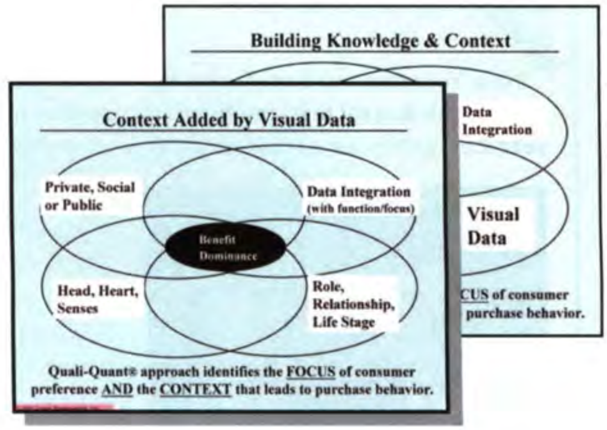

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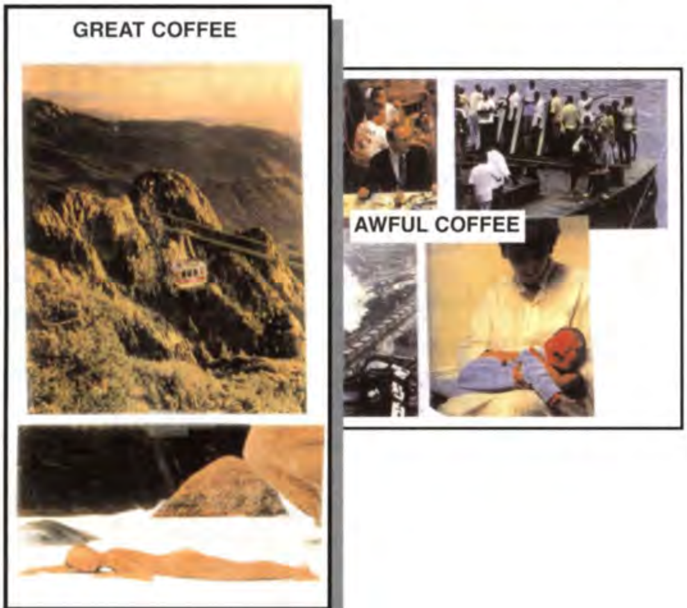

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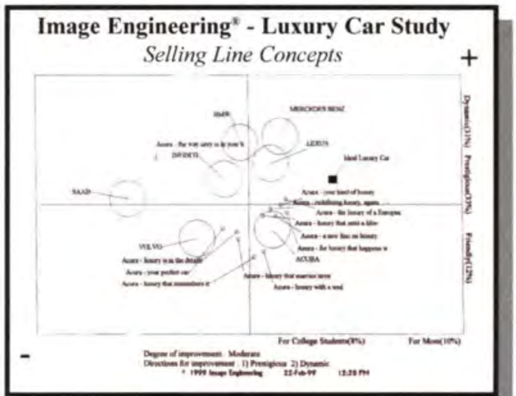

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New York research firm *Ziment* has added **Josh Rossol** to its multivariate services group as senior analyst.


Rossol Delaney

Andrea Delaney has returned to the firm as vice president, director of client service and **Art McKee** has joined Ziment as vice president, director of client service.

Dr. Paul E. Green, professor emeritus of marketing at the *Wharton School*, has been named the first recipient of the MIT Sloan School of Management Buck Weaver Award. The award was established to honor individuals who have made important contributions to the advancement of theory and practice in marketing science. The award is sponsored by General Motors Corporation in honor of Henry Grady "Buck" Weaver, who was a pioneer in marketing research and market-based decision-making in the 1930s.

Market Strategies Inc., Livonia, Mich., has named **William T. Applegate** and **Heather Alcott** vice president in the firm's telecommunications and financial services divisions, respectively.

The American Marketing Association's District of Columbia Chapter has named two researchers to its board of directors. **Pat Lovenhart**, principal of *Lovenhart Research & Consulting*, has been named co-vice president of membership. **Stacey Symonds**, manager of marketing research at *Capital One*, has been named vice president of internal communications.

Ipsos has named **Greg Mahon** senior vice president of its financial services team in New York. Separately, Ipsos has appointed **Alan Chien** as general manager of Ipsos Taiwan.

G & S Research, Carmel, Ind., has named **Melinda Spaulding** director of analytical services.


Spaulding Chon

Andre Chon has joined Moorestown, N.J.-based research and consulting firm *AUS Consultants, Inc.* as vice president in charge of corporate business development.

Synovate has announced the appointment of three senior managers in its Europe, Middle East and Africa (EMEA) region. **Carol Johnson** has joined Synovate as human resources director for EMEA. **Stéphane Courqueux** has been named managing director, France. **John Presutti**, who has been acting managing director of Synovate France, will join the regional head office team.

Leslye Geller has been named principal of San Mateo, Calif.-based *Merrill Research* and will head up the firm's new office in Dallas.

Christine Holt has joined *C&R Research* in Chicago as qualitative research director.

The Pharmaceutical Marketing Research Group (PMRG) has presented **Howard Ziment**, chief executive officer of New York research firm *The Ziment Group*, with the RR Fordyce Award. The PMRG created award to honor the memory of Richard "Dick" Fordyce, who throughout his career promoted the principles of excellence, innovation and integrity in the pharmaceutical marketing research industry.

Stephen Godwin has joined London-based *Isis Research* as research director. The firm has also added **Tim Robinson** to its Rheumatoid Arthritis Therapy Monitor team as a research executive. And **Sarah Brown** has joined the U.K. Ad Hoc Group as a senior research executive.


Robinson Brown

Albany, N.Y.-based *Colwell & Salmon Communications, Inc.*, has named **Michele Desrosiers** vice president of U.S. operations. She will be responsible for all U.S.-based operations including business-to-business, business-to-consumer and market research business segments.

U.K.-based *ORC International* has announced that **Nigel Maxfield** is stepping down as

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Major health care systems profiled in national directory

Over 11,650 affiliated provider organizations are identified in the new edition of The National Directory of Integrated Healthcare Delivery Systems Database on CD-ROM. The database profiles contain 227 fields of information and include more than 6,000 executive contact names. The directory includes full profile information on more than 830 integrated delivery systems throughout the country. The file has just undergone a reverification and updating in response to mergers and acquisitions, closures of facilities and departures from certain regions or markets.

Nineteen fields of executive contact names are provided in the database, including president/CEO, chief financial officer, chief information officer, capital equipment purchasing officer, medical supplies purchasing officer, pharmaceutical purchasing officer, network development/contracting officer, and compliance officer. Users are able to search by system affiliations, statistics and service state. For more information visit www.healthresourcesonline.com.

Total Census package available

Geolytics has created three new packages: Census 2000 — designed for the person who wants all of the current 2000 data; Census Reference — created for the researcher who wants the entire 2000 Census data and Long Form (SF3) data for 1970, 1980 and 1990; Census Time Series Research — for the researcher/analyst who needs access to as much data as possible — especially those who want to do time series analysis. It includes two products that convert data from previous censuses (1970, 1980 or 1990) to the 2000 boundaries. This allows for apples-to-apples comparison of changes to 2000. For more information visit www.geolytics.com.

Java database from Daffodil

India-based Daffodil Software has released Daffodil DB Version 2.2, a Java database which now includes database encryption based on specific algorithms, Unicode support, improved browser, B+ tree indexing, support for some of the advanced features of JDBC 3.0, byte comparison and a reduced footprint. The inherited features from the previous versions include multi-version concurrency control, concurrent access of multiple databases, enhanced error messages, a Daffodil DB shell for faster data access and performance enhancement. The product is targeted at customers who need to build business applications in Java which require an embedded database solution capable of handling complex needs. For more information visit www.daffodildb.com.

Claritas introduces new Prizm segmentation system

San Diego-based Claritas Inc. has introduced PRIZM New Evolution, a new segmentation system that incorporates both household and geographic-level data. PRIZM NE captures the essence of the existing PRIZM and MicroVision systems while using a methodology that marries demographic and lifestyle data to help companies best target their customers.

This is the fourth time in as many decades that Claritas has updated the PRIZM system. With the new system, marketers can now reach customers in many ways — by household, ZIP+4, census tract, block group, ZIP Code, media market, county, state and nation.

Reflecting America's increasing diversity over the last decade, the new system has grown from 62 to 66 segments. Some of the new segments include:

Young Digerati, No. 4 — With the boom in new computer and digital technology, this cluster represents the nation's tech-savvy singles and couples living in fashionable neighborhoods on the urban fringe.

Beltway Boomers, No. 17 — The nation's Baby Boomers are now in their 40s and 50s, and this segment reflects one group of college-educated, upper-middle-class homeowners. Like many of their peers who married late and are still raising children, these Boomers live in comfortable suburban subdivisions and are still pursuing kid-centered lifestyles.

Fast-Track Families, No. 20 — The migration of upscale city dwellers out to the countryside can be seen in the emergence of this exurban cluster. Fast-Track Families is filled with middle-aged parents who have the disposable income and educated sensibility for a granola-and-grits lifestyle: they fish, boat and shop over the Internet, all at high rates.

The Cosmopolitans, No. 26 — The continued gentrification of the nation's cities has resulted in the emergence of this segment, concentrated in America's fast-growing metros such as Las Vegas, Miami and Albuquerque. These households feature older homeowners, empty nesters and college graduates who enjoy leisure-intensive lifestyles.

Multi-Culti Mosaic, No. 54 — Capturing some of the growth of new immigrants to the U.S., this cluster is the urban home for a mixed populace of younger Hispanic, Asian and African-American singles and families. With nearly a quarter of the residents foreign born, Multi-Culti Mosaic is a mecca for first-generation Americans who are striving to improve

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News notes

The latest global market research study by the **European Society for Opinion and Marketing Research** (ESOMAR) shows that the total market for market research worldwide in 2002 was $16.6 billion.

The U.S. and the E.U. each accounted for 38 percent of the total world market in 2002. This compares to 2001's breakdown — when the U.S. accounted for 39 percent of the total world market and the E.U. 37 percent. Meanwhile, Central and South America's share of the world research market has fallen to 4 percent and the Asia-Pacific share remains 13 percent. The estimate for the Middle East and Africa market remains at 1 percent of world share.

Growth recovered to 4.5 percent and the market grew by $715 million over 2001 but this was largely an exchange rate effect and there was only minimal real growth — when measured in Euros, the year-on-year

Czech Republic research industry growing

Editor's note: In conjunction with Prague serving as the site of the annual European Society for Opinion and Marketing Research (ESOMAR) congress in September, the organization released the following profile of the market research industry in the Czech Republic.

Market and opinion research is a growth industry in the Czech Republic, with revenues of $42 million in 2002, according to ESOMAR's latest global market research study. The sector grew by 4 percent over the previous year and has nearly doubled over the last five years — despite fluctuations in the local business cycle.

Much of this growth parallels regional and global developments: the growth of multinationals and the introduction of their brands, the increasing pace of commerce, and the liberalization of trade, capital flow and investment are just a few of the global trends being felt in Czech society, industry and business.

Ordinary Czechs have also been affected, becoming more mature consumers in a rapidly developing consumer society. Evidence for this is found in heavier, more sophisticated product use, in greater involvement with brands, and in rising consumer expectations. Czech consumers have become a force that businesses shouldn't ignore, either in terms of product offerings, levels of customer satisfaction, or in advertising and promotional support.

In general, the major research companies in the Czech Republic have responded by offering internationally validated research techniques that can diagnose specific problem areas and allow for comparison from project to project. They also offer more sophisticated analysis of consumer needs and their relationship to brands and approaches that look at all aspects of a brand or company's performance.

To deliver these services, market research companies recognize the need to establish ongoing working partnerships with their clients and these frequently include an international dimension, as virtually all of the larger Czech research firms are now affiliated with multinational research companies.

The Czech research industry employs an estimated 11,200 people, of whom 10,500 are interviewers and 700 are researchers, data processors and support staff.

Who is buying the research? About 40 percent of research is commissioned by manufacturing companies. Other key sectors commissioning research are telecommunications and financial services.

The vast majority of research in the Czech Republic (77 percent) is commissioned by domestic clients — though these often include the local affiliates of multinational firms. A much smaller proportion of research — 23 percent — is commissioned from outside the country. Over two-thirds (70 percent) of the research on the Czech market is consumer research, while less than a third is non-consumer research, especially in retail and business-to-business.

Just over one-third (34 percent) of research revenues in the Czech Republic are generated by continuous research, and 66 percent of revenue comes from ad hoc projects. Of these ad hoc projects, 51 percent is quantitative and 15 percent qualitative. More than half of quantitative interviews are conducted face to face, mostly in-home, and another fifth are carried out by telephone.

The growing reliance on market research results for business decisions and concerns over privacy have underscored the need for self-regulation and quality standards, and a number of professional organizations have been formed to adopt and enforce them.

Members of SIMAR (The Association of Market Research Agencies/Sdruzení Aentur pro Vzkum Trhu), the Czech Marketing Association, and CIMA (The Czech Institute of Marketing) have undertaken to abide by the ICC/ESOMAR International Code of Marketing and Social Research Practice. This code takes into account privacy regulations and sets out the core principles governing researchers' relations with respondents, clients and other researchers. Its key principles are that respondents' cooperation is always voluntary, their confidentiality should be maintained, and that marketing research activities must be clearly differentiated from direct marketing activities. SIMAR has taken the additional step of introducing quality standards modeled on those developed by EFAMRO (the European Federation of Associations of Market Research Organizations).

World Market Research Revenue 2002, Year Growth on 2001

	Revenue 2002*		% Distribution	% Increase 2002/1	
	US$ million	EUR million		US$	EUR
World total	16,601	17,640	100	4.5	(-0.6)
Europe	6,820	7,247	41	8.0	2.7
EU 15	6,309	6,704	38	8.0	2.7
North America	6,756	7,179	41	2.7	(-2.3)
USA	6,307	6,702	38	2.4	(-2.6)
Central/S. America	661	702	4	(-11.3)	(-15.7)
Asia Pacific	2,156	2,291	13	4.8	(-0.4)
Japan	1,037	1,102	6	(-5.9)	(-10.4)
M. East & Africa	208	221	1	6.7	1.4

Source: ESOMAR

** Based on average exchange rates: 2001, 1 Euro = $0.8949; 2002, 1 Euro = $0.9411*
Source: IMF International Financial Statistics
The estimates are not adjusted for inflation.

Top Ten Largest Research Markets Worldwide 2002

Country	MR Revenue US$ million	GDP US$ billion	Population million
USA	6,037	10,082	285
UK	1,755	1,436	60
Germany	1,490	1,854	82
France	1,260	1,310	59
Japan	1,037	4,141	127
Italy	461	1,089	58
Canada	449	705	31
Spain	303	485	40
China	302	1,192	1,285
Australia	272	359	19

Source: ESOMAR

decline was EUR 115 million or 0.6 percent. In 2001, the market grew by $435 million or 2.8 percent over 2000.

Growth in the five major markets which represent 70 percent of the total was 2 percent in the U.S. and 6 percent in the U.K., 8 percent in Germany, and 10 percent in France, while the market in Japan shrank by 6 percent.

The largest market for market research worldwide is the U.S., followed by the U.K. and Germany. Together the top 10 countries account for 81 percent of the total world research market and the top 25 for 92 percent. Russia and New Zealand have moved into this group in 2002 and Finland and Argentina have dropped out.

Among the top 25 countries, most followed a similar pattern of low levels of real growth. However two countries showed spectacular growth in U.S. dollars: China was up by 54 percent after taking inflation into account and Russia by 48 percent. The biggest decline was in Argentina, where a post-inflation decline of 39 percent in local currency and 75 percent in dollars (from $72 million to $18 million) was the result of turbulent economic conditions.

Seattle research firm **NetReflector, Inc.** has been named Washington

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Are you spending too much time on your focus groups?

By Sharon Seidler

Editor's note: Sharon Seidler is senior vice president of C&R Research, Chicago. She can be reached at sharons@crresearch.com.

Wanted: Large corporation seeks bright, aggressive, analytic person, preferably with market research experience and a graduate degree, to watch group interviews from behind a mirror. Must be able to tolerate long periods of time in a dark room. A "plus" if you like M&Ms, popcorn and other assorted salty and sweet snacks.

Additionally, you will be responsible for designing studies, analyzing data, writing reports, participating in team decisions, dealing with suppliers, and training new market research people. These other duties, however, need to be worked into and around the core job of observing group interviews.

Sound bizarre? Not really. I have heard from numerous clients that they are spending enormous numbers of hours "in dark rooms, watching consumers." Certainly, we've come a long way from the days when manufacturers were not particularly in touch with their customers, when decisions got made on intuition or a little "mother-in-law" research.

But maybe we've come so far that we've overshot the target.

Do a little internal analysis of your own if you're a company that buys qualitative research. Ask your market research staff to keep careful records on how they spend their work hours, then analyze hours spent on qualitative research, generally, and specifically, hours spent observing focus groups.

One of my clients did just that and the number was staggering — way out of proportion to the dollar percentage spent on qualitative.

What is the answer? Do fewer qualitative studies? Eliminate all observation of qualitative research? Hire more market research people to handle the load?

I believe that the answer lies in better use of the time allocated to qualitative research. Here are some guidelines:

1. Make distinctions among qualitative studies; they are not all of a similar magnitude of significance.

A seminal qualitative research study that launches an investigation into unfamiliar territory, with major ramifications possible, requires that the team be present throughout the study. Conversely, a communications check to "dot the i's and cross the t's" prior to a quantitative study does not warrant full attendance.

2. Form ongoing partnerships with qualitative professionals whom you trust. Then, let them operate independently.

Are you observing qualitative research groups or one-on-ones because you need to be there to make a contribution, or are you there because you are fearful that the interviewer might not do an optimal job, or might not understand what the project requires?

If it's more of the latter, then the cure is not to attend all qualitative research, but to invest in a core group of trusted qualitative professionals:

• Take time to give the interviewer

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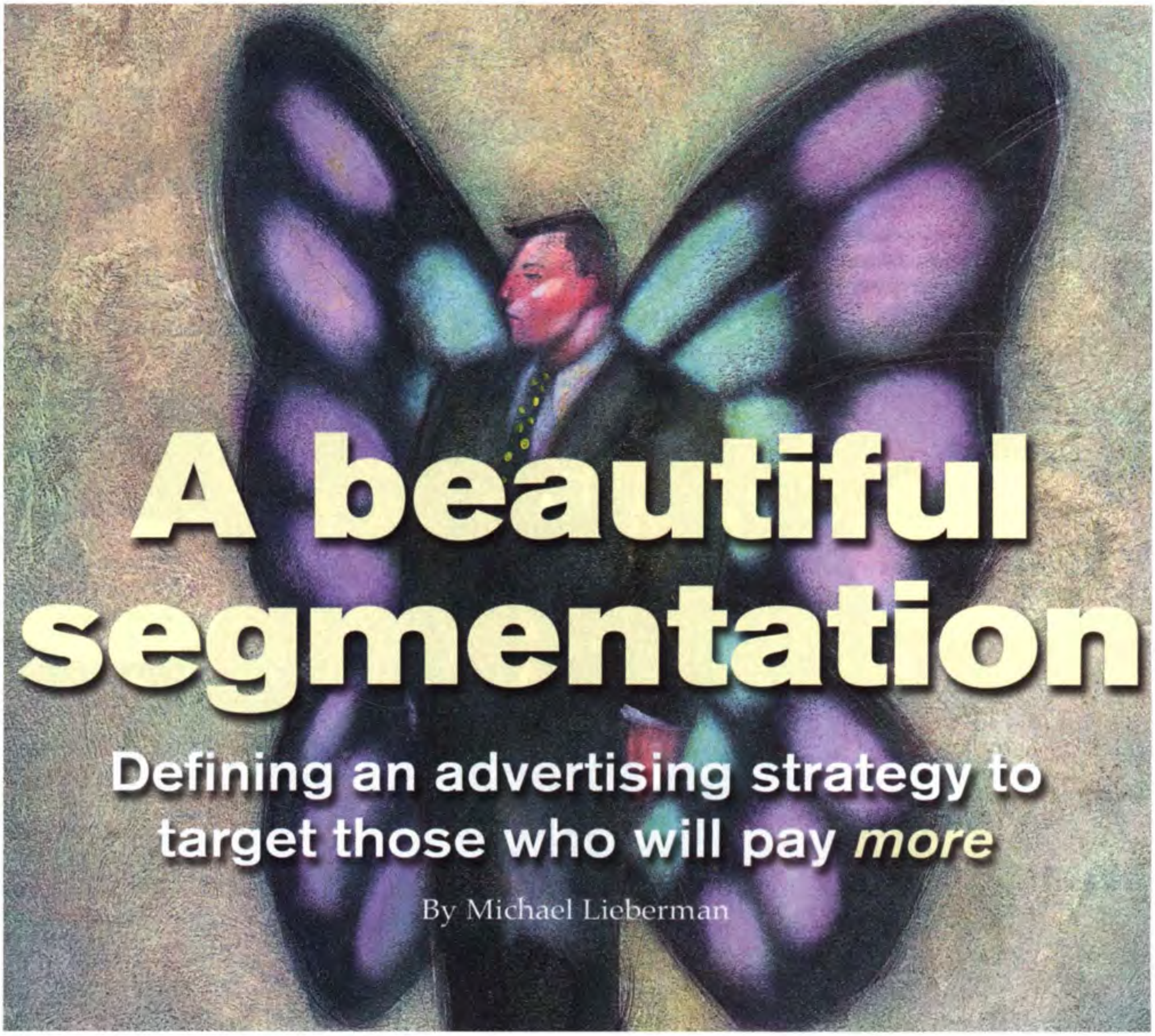

A beautiful segmentation

Defining an advertising strategy to target those who will pay *more*

By Michael Lieberman

Editor's note: Michael Lieberman is founder and president of Multivariate Solutions, a New York statistical and market research consulting firm. He can be reached at 212-656-1711 or at michael@mvsolution.com.

Not every dollar spent in advertising and sales efforts is created equal. Some of those dollars generate far more revenue than others. Indeed, it seems that if one only knew beforehand which dollars to spend, and at whom they should be directed, success would be far more certain.

My client wanted to find, define and then speak to a particular group of consumers who are willing to pay more for a commodity that is highly price elastic: gasoline. Our approach to market segmentation and customer targeting is importance-based, using a common segmentation technique called Q-factor. This uses the output of fairly straightforward factor analysis to group respondents into four distinct segments — two of which were combined to form a group of people, roughly 25 percent of the population, who were willing to pay more for gasoline.

This article follows a case study from the identification of the target segmentation, to determining sociodemographic characteristics, psychographic information, automobile self-description, client gasoline brand equity based on future behavioral intentions, and finally to developing a brand communication strategy.

Finding the payers

Cluster analysis is a term thrown around liberally in

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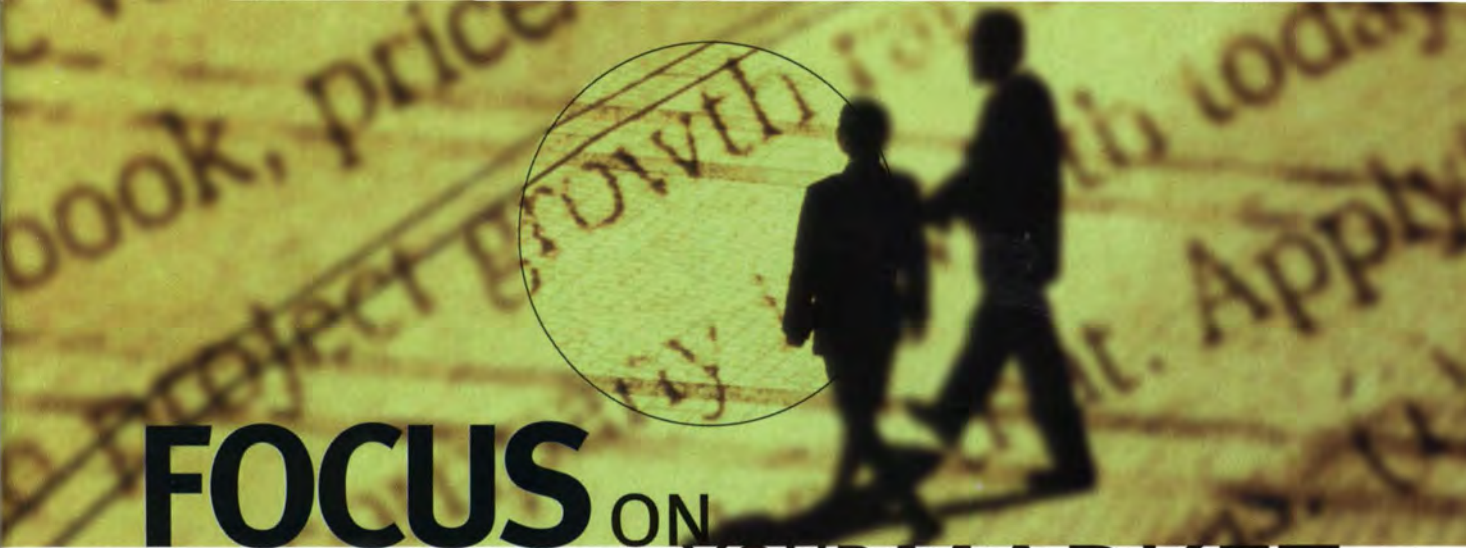
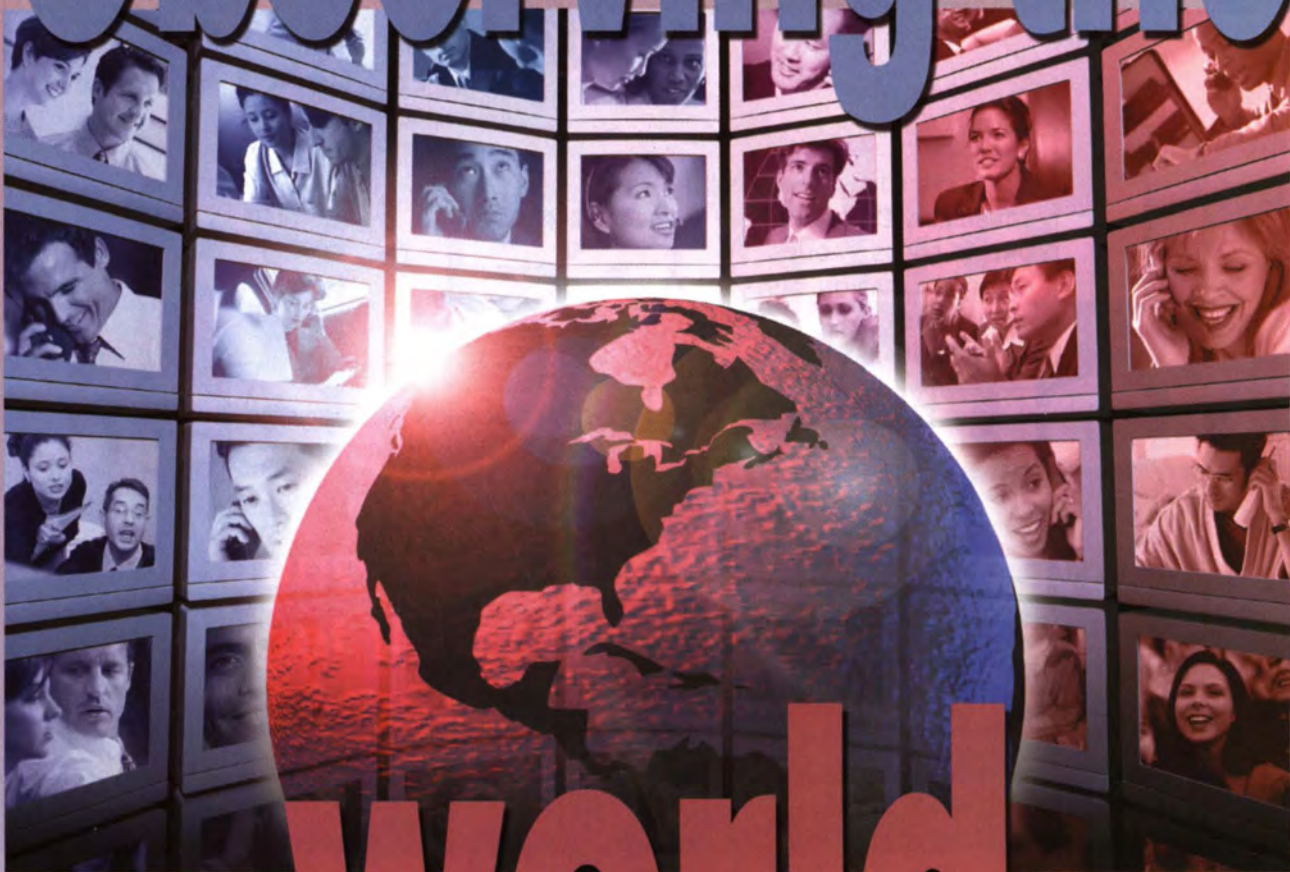


Observing the world



Using ethnography to gain perspective on international markets

By Tim Plowman, Adrien Lanusse and Astrid Cruz

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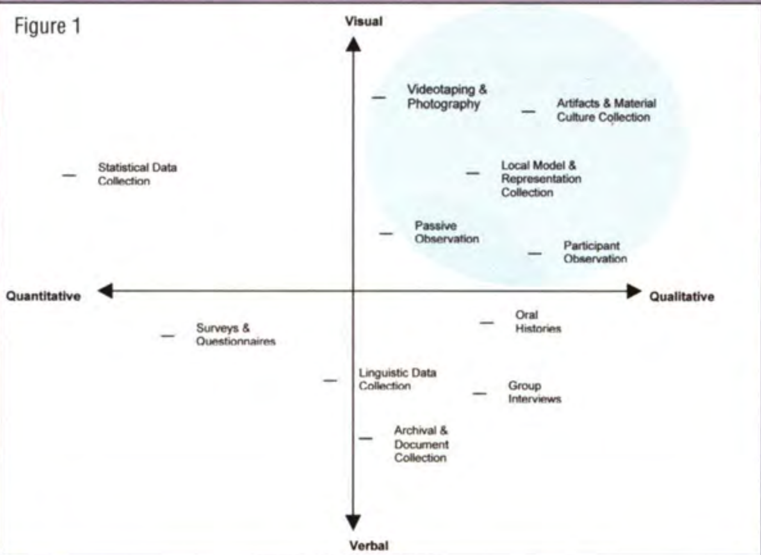
As markets become more global, companies have an increasing need to understand the often subtle nuances of customer behavior across countries and cultures. Most companies are comfortable fielding traditional forms of research in foreign environments, but more recently developed methodologies, such as commercial ethnography, can seem daunting, complex and mysterious when not done on familiar terrain. Observing a few guidelines and experimenting with some alternative options can make internationally-fielded ethnographies as powerful, insightful and easily implemented as those on home soil.

Commercial ethnographies, properly done, yield a deep, detailed understanding of the life and circumstances of individuals, effectively revealing attitudes, behaviors, preferences and style within their appropriate cultural context. The practice of commercial ethnography has evolved from its academic roots to include a range of specific techniques customized to support research objectives. Figure 1 shows many of the specific tools used when conducting academic ethnography. In contrast, the circular area indicates methods that are primarily used in commercial ethnography. It is simply not practical for business entities to engage in the same form or extent of ethnography as academics, primarily due to time and cost constraints.

Figure 1



Despite these constraints, ethnographic methods can and should be considered a viable means of learning about consumers in foreign markets. Adherence to a few key principles will ensure a successful and productive experience:

1. **Work with trained, professional ethnographers.** Graduate students or moonlighting social scientists may be less expensive to hire, but the financial savings can be diluted by a lack of rigor, lack of perspective or lack of depth. The necessity of using a trained ethnographer is even more critical when conducting research in an international context. Professional anthropologists with graduate-level training in ethnography are likely to have already conducted extensive and complex research in a foreign context. Among the benefits that come from this sort of professional experience is an acute sensitivity to working in unfamiliar cultural contexts.

2. **Partner with local ethnographers, but establish centralized control and direction.** Ethnographic training and traditions vary significantly by country. This is especially true of Asia, Latin America and Eastern Europe. Therefore, it's important to establish a clear objective, a consistent framework for fieldwork and to ensure that all ethnographers conform to this plan, regardless of their theoretical training.

3. **When possible, support a team approach.** It is difficult to get consistent execution and perspective from multiple ethnographers across diverse countries. Additionally, using only in-country ethnographers can create the potential for class, gender and ethnic tensions to emerge between the local ethnographer and the respondent. Ideally, send a domestic ethnographer to partner with a local ethnographer. The presence and leadership of an outside ethnographer can increase reporting consistency. Also, an outsider has permission to make mistakes, ask dumb questions and generally behave outside the standards of normative behavior (provided they are not offensive). Finally, this partnership arrangement brings the best of two worlds together: a professional with specifically selected expertise in ethnography and a deep understanding of the research and business issues, paired with another professional with local cultural sensitivity and native language skills.

4. **Choose locations carefully.** Picking the right market or city is always important, but it's critical when doing international ethnography. Unless the country's culture is homogenous, the choice of location can greatly skew the research. Using the U.S. as an example, imagine if an ethnographer reported back on the country's culture after conducting a dozen ethnographies in Hawaii. Locations should be decided after careful examination of the overall objectives and scope of the study, e.g., who is the target audience, what is the product,

brand awareness and usage in various areas, what is the preliminary marketing strategy, etc. Selections should be further reviewed to ensure that they don't under- or over-represent characteristics that are not common to the population being studied.

5. **Accommodate cultural details.** Once locations are selected, numerous logistical and country-specific issues need to be addressed, including work hours, observed holidays, recruiting process and travel needs. Most notably, accurate translation contributes significantly to the quality of ethnographies and shouldn't be overlooked. Find reliable translators in each country being researched. Using translation houses in the home country, while perhaps more convenient, may deliver translations that are too formal, miss colloquial and idiomatic expressions, and generally lack nuance. Back translations (retranslating the transcripts back into the native language) can improve accuracy if time and budget allows.

6. **Do your homework.** Some study of the country and its culture is mandatory prior to any international ethnography. Publications such as Culturegrams and resources on the Internet can offer guidance on aspects of communication such as appropriate levels of eye contact or whether a culture is high-context or low-context (which may affect how much conversation versus observation may be necessary).

Beyond translations, differing worldviews often require the ethnographer either to develop an incredibly flexible guide or to create different versions for each country based on a master guide. Consult reliable anthropological authorities on cultural distinctions and pay close attention to issues of social interaction, gender distinctions, religion and the role of socio-economic divisions in each country. This background information provides a lens that becomes even more useful in the analysis phase.

Finally, the flow and pacing of ethnography may vary radically from context to context. The time needed to establish rapport with respondents and get them to be open and candid varies by culture and can't easily be rushed. Knowing this ahead of time can improve scheduling and reduce anxiety and errors.

7. **Capture the visual context.** All ethnographies should be videotaped or photographed (depending on the acceptance of cameras in the locations being researched) whenever possible. In an international context, field notes alone may fail to illustrate the importance of visual cues including décor, design aesthetics, color, architecture, fashion and icons. If the cultural context is unfamiliar, even the most experienced ethnographer will miss details in the initial visit. Digital photos and videos can bring those details to light in later viewing.

8. **Encourage guided tours.** Because time is usually an issue in international research, respondents should be prompted to take the team to places and surroundings that are relevant to the research objectives (favorite hangout, store, work, their home, etc.). They should be similarly encouraged to engage in activities representing their normal routine. In this sense, the respon-

dents will be reconstructing their everyday experiences for the team. While reconstruction introduces a small element of artificiality, the benefit of rapidly accessing a range of behaviors, attitudes and contexts relevant to the research objectives far outweighs any disadvantages.

Throughout the ethnography, the team should alternately observe, ask questions, prompt respondent narration, ask for representative examples, prompt demonstrations, take notes and test hypotheses generated in the course of the ethnography. As with any properly conducted ethnography, analysis begins in the field both during the interview and during the immediate debrief and write-up later that same day. The immediate processing of data will enable hypotheses and model development to go through the iterations necessary to recognize key insights.

9. **Use pre-assignments.** The use of pre-assignments across countries can enhance ethnographies with rich detail. Although it requires more upfront planning, the use of diaries or the creation of photo albums prior to an ethnographic interview can quickly expand and accelerate the discussion. The same cross-cultural challenges cited earlier apply here: pre-assignments must be flexible enough to accommodate differences but consistent enough to add to the overall analysis.

10. **Centralize the main analysis.** Whether you are doing multiple ethnographies within one location or within multiple locations, centralizing the main analysis ensures cohesion, even data gathering and more actionable insights across countries. Current technology tools make this a relatively simple task to coordinate, particularly the use of virtual, shared collaboration spaces, mobile computing tools and digital photography. Teams operating in different countries around the globe can engage in periodic debriefs, all record their findings using a common format and submit their field notes, photos and local analyses to one central repository where all can synchronously or asynchronously view and comment.

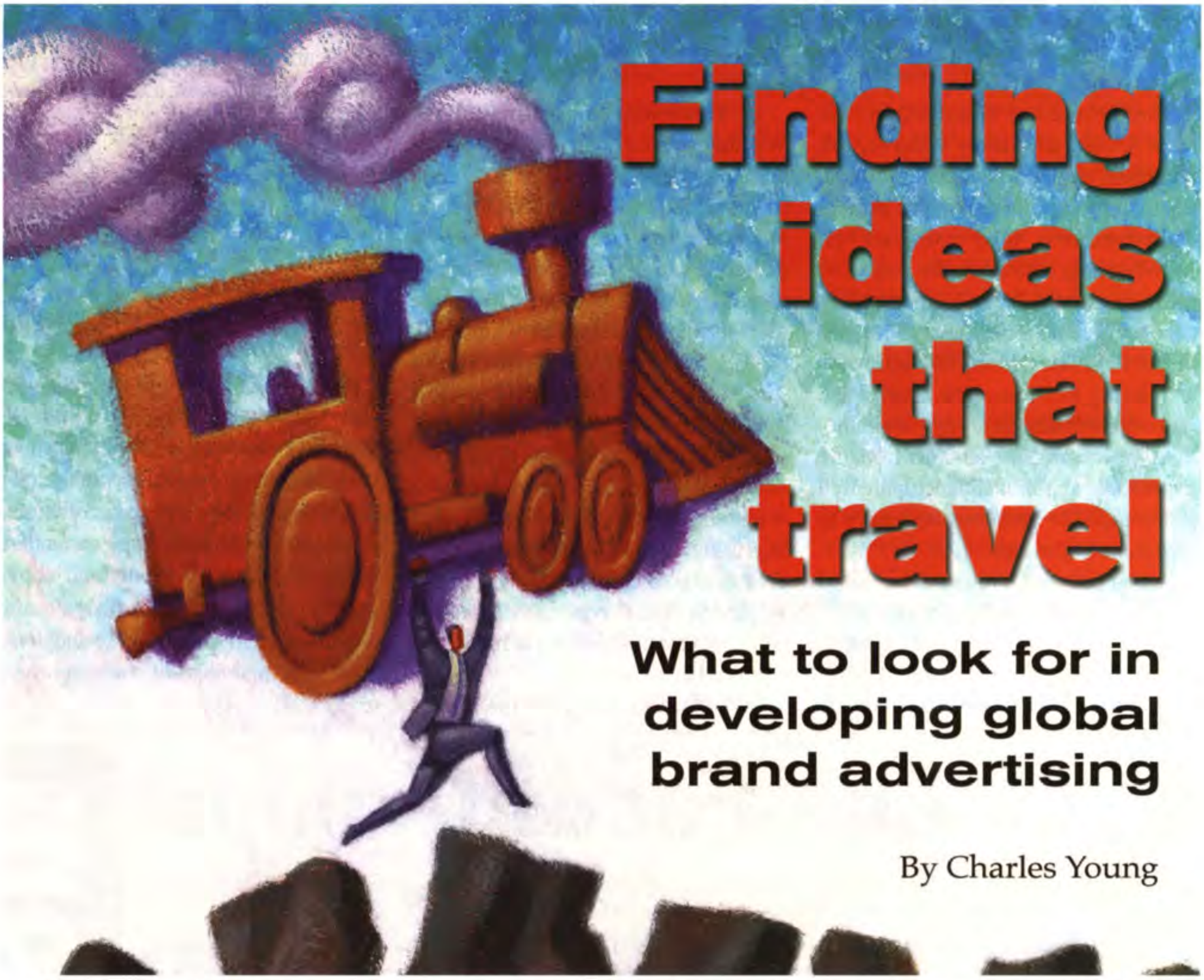
Using the raw data from the various countries (multiple readings of the interview transcripts, viewings of the photos, and review of field notes), analytic work sessions should focus on:

• identifying basic attitudes, behaviors, and practices;

• identifying larger patterns that consist of collections of attitudes behaviors and practices that appear to fit together; and

• identifying relationships among patterns that explain higher level and nuanced relationships among the phenomena documented.

Don't forget to pay special attention to the data that doesn't fit your model — it could yield insight into cultural variation across markets. The output of these work sessions will be increasingly refined categories, conceptual models demonstrating emerging relationships and preliminary frameworks that highlight both distinctions and commonalities. In the end, the insights and learning should speak clearly and convincingly, regardless of where it originated.



Finding ideas that travel

What to look for in developing global brand advertising

By Charles Young

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In broad terms, there are four potentially competing business objectives that must be kept in balance as a multinational corporation manages its international advertising.

1. Brand-building by speaking with one voice.
2. Economies of scale in creative production.
3. Maximizing local effectiveness.
4. Speed of implementation.

The main reason to do advertising at all is to build a brand. A global brand is one that stands for the same thing pretty much everywhere. While this does not necessarily require that identical advertising executions be used everywhere, it does require that the advertising communicates the same meaning, in terms of strategic messages and brand values, everywhere. In short, the brand needs to speak with one voice.

Advertising has to operate within given financial constraints. In general, money saved in the cost of producing advertising executions can be put towards media buys to ensure that target audiences actually get an opportunity to see the advertising. The second objective, therefore, is to achieve economies of scale in the cost of creative production by re-using the same executions with minimal changes from one country to another. On the surface, this objective appears to line up with the first. In reality, as we have seen in our global pre-testing business, the same execution can work differently in different countries.

The most efficient advertising is advertising that makes each member of the target audience feel like the commercial is a personalized message sent directly to them. This is advertising the target audience is most likely to pay attention to, most likely to find relevant and emotionally engaging, and most likely to act on. Advertising that is developed in-country may have a home-court advantage in terms of how it scores on measures of performance —

though we have seen that this too is not always the case. The challenge of managing international advertising is to make the correct trade-offs between in-country efficiency versus cross-country efficiency.

Finally, the world of business is increasingly moving at Internet speed. Projecting ideas around the world rapidly is one of the keys to winning in the global "street fight" for new business.

Creative options

From a creative development standpoint, there are three fundamentally different approaches to the development of advertising creative that we have seen our clients use with varying degrees of success.

• *Importing executions*

Produce commercials in one country and have other countries import them for use in their local markets. The logic of this strategy is twofold. First, economies of scale are created by only having to produce one execution that can be used in multiple markets around the world. Second, and perhaps more important, the company can speak with one voice and project a consistent brand image around the world, hopefully leading to the creation of a global brand image.

The risks associated with this command-and-control approach arise from the fact that not all advertising can be expected to work equally well from one country to another. Failure can take various forms. First, advertising imported from one country to another can backfire by running afoul of cultural sensitivities. Second, trying to develop politically correct executions that work everywhere can lead to bland advertising that does not maximize local effectiveness. Third, any approach to advertising that fails to look at the possibly unique opportunities for the brand in other markets falls short of its mission to grow that brand globally. At the very least, with this strategy a certain fair play should apply: An execution that has been found to work very well in a foreign market should be a candidate for re-execution in the U.S. market.

• *Local production*

Produce commercials that are entirely unique to the country in which they are aired. The logic of this local empowerment strategy is that the in-country manager is closest to the market and therefore is most likely to be aware of cultural nuances and market conditions. In theory this leads to advertising with maximum local effectiveness.

In reality, the risk of this strategy is that the brand identity that is created will diverge over time from the brand being created in other local markets. In other words, this strategy is fundamentally at odds with the goal of a global brand. It also fails to create an economy of scale for creative production. Lastly, an important component is the level of expertise and experience of the in-country manager in this highly creative arena.

• *Importing ideas*

It is the idea behind an execution that gives it its meaning. If the goal of building a global brand is to make the brand stand for the same thing around the world then customers and potential customers everywhere should associate the same ideas with the brand. An execution and an idea are not the same thing. *The Seven Samurai* and *The Magnificent Seven* are the same idea executed differently for a Japanese and an American moviegoing audience. In other words, there is a third strategy for managing global advertising: finding ideas that work globally.

An idea that travels may possibly be the best strategy for achieving a balance in all three business objectives. First, using the same idea globally is a way of speaking with one voice. Second, finding good ideas is a significant part of the cost of creative development and can contribute to economies of scale in the cost of finding effective advertising ideas. And third, re-executing in a local market is a way of making sure that the idea has maximum appeal to the local market.

For this last point it is important to understand that the advertising execution is a non-linear variable in the marketing mix. By that I mean small changes in executions can have large effects in terms of the overall performance of an ad. In contrast, media weight tends to be a linear variable — to increase the impact of a media buy by 10 percent you have to roughly increase the media expenditure by 10 percent. Consequently, the amount of money spent on re-executing a strong advertising idea in a local market may produce a greater return than putting the same amount of money in the media plan.

International barriers to universal executional effectiveness

A. Executional variables

These are some executional variables that can affect how well a particular execution translates from one country to another. Viewed another way, if these factors appear to be central to the execution — i.e., taking them out fundamentally changes the commercial — then chances are you do not have a big or global advertising idea.

1. *Complex language*

Ads that are heavy on copy or highly abstract verbal ideas are not likely to travel well. Ads with stand-up presenters are likely to fall into this category.

2. *Dialogue*

Does the dialogue carry the story or do the visuals? A good way to think of this issue is in silent film terms. The more the story can be conveyed visually the more likely the execution will translate. Dialogue-laden stories require a heavy use of subtitles, which can hinder viewers' speed of information processing.

3. *Ethnic characters*

There are clearly biases in many countries against members of other races or ethnic groups. Sensitivity to these issues is called for in developing global executions.

4. *Local celebrities*

For executions that use a celebrity, it's important to gauge the limits of their fame. For example, television stars are less likely than movie stars to be international celebrities.

5. *Business roles*

Different cultures conduct business in different ways and so the business roles that characters are shown filling does not always translate well. For example, showing a female manager in charge may not play as well in countries where women have not risen in management ranks as much as they have in the U.S.

6. *Culturally inappropriate cues*

Props or other objects in the execution may take on unexpected meanings in other cultures.

7. *Local settings*

Unless it is intentional, it probably does not help to have "made in the USA" stamped all over the execution.

8. *Humor*

Visual or slapstick humor is likely to travel better than humor based on wordplay.

9. *Music*

Music tastes vary widely and musical trends travel around the world at different rates. Therefore, music-driven executions may test differently from one country to another.

10. *Metaphors*

Advertising that relies on metaphors can fail to travel well if the metaphor is not culturally accessible or clearly executed.

B. Strategic constraints

Strategic factors, as well as executional variables, can also affect how well advertising ideas travel. Obviously, a brand's positioning is defined with reference to its competitive set. The competitive set, and the brand's position within that set, may vary as a function of geography — you might be a market leader in one country, a minor player in another. Therefore, commercials designed to communicate strategic messages that reinforce a particular positioning can be expected to vary in performance internationally as a function of the changes in the market context.

What have we learned

We have found that the Ameritest heuristic model of advertising is global. This is the model first introduced to the *Quirk's* audience in the March 2001 issue. By validating the model with international data, we have shown that we do not need to reinvent in each country the research methods we have developed for bringing discipline to the advertising process. An analysis of an extensive international pretesting database, reported at the ESOMAR conference in Rome in 2001, found that regardless of whether you are airing it in the U.S., Europe or Asia-Pacific, an effective commercial can be defined as one that gets the attention of its target audience, makes an impression of the brand, and motivates interest in doing business with the company. Moreover, regardless of which country you are talking about, the kinds of executions that we have found get the attention of the audience are those that reward the viewer for the 30 seconds of time you are asking them to give you by entertaining them, doing something they like and that is different from anything else they've seen before. And, regardless of country, the way to motivate that audience is to communicate a relevant, believable and brand-differentiating selling proposition. In other words, while it may not be possible to always create universal commercial executions for global brand building, we researchers can apply one universal standard of quality for monitoring global advertising effectiveness.

What has worked for our clients so far

Brand image is determined with reference to the self — the I of the customer. In other words, a product has truly become a brand when it becomes my product. The warmth and intimacy of the brand relationship is created in a variety of ways, from real experiences with the company to virtual experiences created by advertising. In fact, the stories that the best advertisers of global brands have been telling in their advertising have been creating those kinds of bonds. This is in striking contrast to the kind of advertising the competition has been putting on air — a lot of computer graphics, a montage, little narrative structure, emotionally bland.

Our content analysis of over 200 business-to-business commercials tested around the world suggests that the following types of executions are superior in terms of their ability to attract the attention of the target audience:

Focus on one idea...from the customer point of view...utilizing humor...or drama...with lots of structure — i.e., stories...using characters...in well-defined roles...dealing with problems of today (not the future).

This type of advertising, focusing on ideas or universal stories dealing with real human values, pays off in the long run compared to flashy video technique-oriented ads that characterize so much business-to-business advertising. The challenge, however, is to generate this kind of advertising in a form that speaks to audiences around the world. In other words, it requires genuine insight into the human character.

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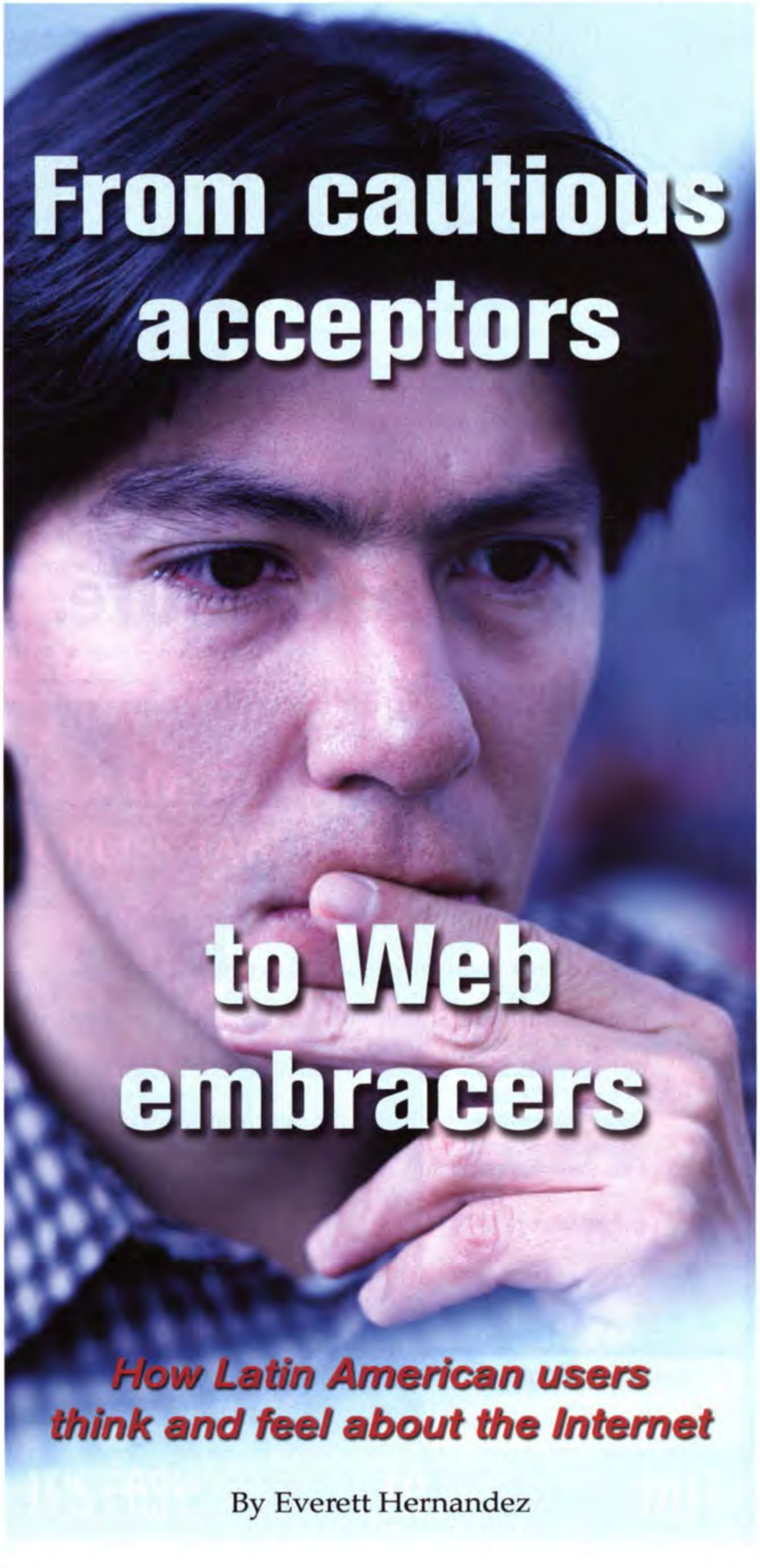

From cautious acceptors to Web embracers

How Latin American users think and feel about the Internet

By Everett Hernandez

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While still much lower than in the U.S., Internet penetration in Latin America is increasing rapidly. One forecast is for annual growth of 38 percent, which translates to millions of new Internet users each year. With a half-billion people in Latin America, global marketers are clamoring for more information on this potentially lucrative region.

Up to now, research on Latin American Internet usage has focused on measuring penetration, cataloging demographics and describing basic online behavior. But TNS Market Development recently completed a research project to discover how Latin Americans feel about using the Internet, and their hopes and concerns for this powerful technology. The study identifies common attitudes toward the Internet and how it is used, and then creates segments around groups having statistically similar attitudes. The results provide a look at these Internet user segments, profiling them on attitudes, online behavior and demographics.

Sample and methodology

An online survey methodology was used for this research, and a total of 14,162 qualifying Latin American Internet users from 19 different countries participated in the survey. Respondents were recruited online using banner and pop-up ads placed on a variety of Spanish and Portuguese-language Web sites popular in Latin America. Potential respondents were offered an incentive in the form of a chance to win a cash prize.

The sole criterion for inclusion in the study was being a Latin American Internet user. Those residing in the U.S. who completed the survey were excluded from this analysis. The ques-

tionnaire length was approximately 20 minutes, and respondents were given their choice of completing the survey in Spanish, Portuguese or English. The data was weighted by country of residence in proportion to the estimated number of Internet users in each country.

A primary component of the survey was a series of statements about the Internet that respondents rated based on their level of agreement with the statements. Factor analysis was used to group these statements into a set of six underlying attitude factors. These factors were then used as input into a cluster analysis, which grouped the respondents into six segments.

The following are the six attitude factors and the statements that define them:

Factor 1: opportunity and convenience

The Internet saves me a lot of time.

I believe that the Internet provides me with new opportunities.

It is important for children to have Internet access in order to succeed in school.

The Internet is a valuable tool for business.

The Web gives me access to information I never had before.

I would rather get news from the Internet than from newspapers or television.

Factor 2: e-commerce confidence

It is safe to purchase and pay over the Internet.

It is safe to do my banking online.

Shopping on the Internet is more convenient than going to a store.

Factor 3: global connection and change

The Internet is breaking down barriers among countries.

The Internet is uniting people from around the world who speak my language.

People should be able to publish anything they want on the Internet.

Eventually everyone will be connected to the Internet.

The Internet is my primary connection to the rest of the world.

The Internet is revolutionizing the way companies in my country do business.

The Internet is easy to use.

The Internet has the potential to drive social and economic change in my country.

Factor 4: online entertainment

I use the Internet more for fun than to learn things.

I use the Internet to relax.

People I meet on the Internet are as much my friends to me as those I meet in person.

Factor 5: information-gathering

I use the Internet to find out what is going on in my city or community.

I use the Web to get information about products and services.

The Internet teaches me about other countries and cultures around the world.

Factor 6: Internet concerns

It is dangerous for children to use the Internet unsupervised.

Most people spend too much time on the Internet when they should be doing other things.

I am concerned about objectionable content like pornography on the Internet.

I only use the Internet to obtain information on products but never to make purchases.

People who can't afford a computer should have free access to the Internet.

Segment profiles

Segment 1: Detached Transactors (20 percent)

The defining Internet attitude for this segment is no desire to connect with others online. They are trusting and confident about e-commerce transactions, but are somewhat concerned about parental supervision and objectionable online content.

They have the most experience using the Internet among all the segments. They are the most likely to perform financial transactions online and the most frequent online purchasers. They are also most likely to have investments, insurance and credit cards. They are least likely to interact with others online (e.g., chat, games, file sharing, personal ads). They have the least frequent home e-mail use, but are most likely to use e-mail at work. This segment indexes high in Brazil.

Segment 2: Practical Seekers (16 percent)

Members of this segment say they mostly go online to get information, and they believe the Internet saves them time and provides new opportunities. There are no concerns about child Internet use and objectionable content.

When online they are most likely to visit sites about business/economy, local events, and technology. They also frequently research products and download music, and are above average online purchasers (both in frequency and amount spent). They are the most frequent e-mail users from home, and they also have the highest ownership of a DVD player, digital camcorder, digital camera and cable TV. This segment is demographically close to average.

Segment 3: Personal Connectors (11 percent)

The prominent attitude for this segment is viewing the Internet as a force of global change and personal connection. They do not feel the Internet saves them time or offers them opportunities.

They are below average on accessing most types of online content, with the exception of chatting online, where they are above average. They index below average on online financial transactions, online purchasing and using online classifieds or yellow-page advertising. This segment indexes highest in Argentina and Mexico, lowest in Brazil. The segment also skews toward more male and single.

Segment 4: Young Funsters (10 percent)

This segment feels the Internet is for relaxing and having fun. They do not see the Internet as creating global change, and do not use it for information.

They are the most recent Internet users, and are below average on most types of online content visited except communities, entertainment and adult sites, where they index high. They are also above average for playing games, chat sessions and downloading videos. They are infrequent online purchasers and low spenders. This segment indexes average by country. It is by far the youngest segment, and the most likely to be single, a student and unemployed.

Segment 5: Cautious Acceptors (18 percent)

Members of this segment have the strongest concerns about parental supervision and inappropriate online content, and they do not trust online transactions. They do not use the Internet for fun, though they understand Internet's potential to connect the world and feel the Internet can be convenient.

This segment is above average for visiting education sites, and below average for shopping and finance content. They do very little online purchasing or other financial transactions and have below average e-mail use. This segment is the only segment with more females than males. This is also the oldest segment.

Segment 6: Web Embracers (25 percent)

Attitudinally, they are confident that e-commerce is secure and convenient. They find the Internet very entertaining and have some concern about children viewing objectionable content.

This segment is above average on visiting most types of Internet content, especially automotive, weather and family-oriented sites. They have the most frequent use of many online activities, especially online auctions, online dating, phone calls and watching streaming videocasts. They spend an above average amount of time online at work and are also the most frequent e-mail users from home. They are by far most likely to say they would go online to set up a digital wallet, conduct a stock trade, sign up for a credit card, and buy from an auction site. This is the largest segment of Latin American Internet users. They have an average distribution by country and are most likely to be employed.

Marketing opportunities

Each of these segments presents marketers with a range of opportunities. But it's important to know how best to reach them.

Web Embracers are the largest segment and the one with the most online activities. They respond to e-mail solicitations and are very reachable through ads on a variety of sites. However, their lower incomes make them a better target for bargain offers on everyday goods than for luxury items.

Detached Transactors are the most frequent online purchasers, and are especially interested in online finances. They are good candidates for offers for investments, insurance and credit cards, but only from a trusted name. They are best reached through finance and investment sites, especially those catering to Brazilians. You will not find them at entertainment-oriented sites.

Cautious Acceptors are probably the least attractive segment for marketers. They are unlikely to make online purchases and they visit most types of sites far below the average. One of the few opportunities for this segment could be advertising for Internet site-blocking software on education-related or women's sites.

Practical Seekers are above average on purchasing online and are the primary target for high-tech equipment like digital music and digital imaging. Advertising on sites that provide business, local entertainment and technology information will reach them best. The communications should focus on informing them rather than making an emotional appeal.

Personal Connectors are not a strong segment for online marketers, since they seldom purchase online and use the computer mostly for chatting and e-mail. They may be interested in online dating or products that promise to make them more appealing to the opposite sex.

Young Funsters do not currently have the income to command much attention from marketers but they are likely to be key consumers in the near future. Advertisements for entertainment such as music, movies and video games will be most effective now, while those for products targeting young adults will lay the groundwork for future purchases. Communications should stress fun and leverage their identification with the youth culture.

Question & Answer

Research in Italy

Editor's note: For his annual contribution to our international research issue, our West Coast ad rep/roving reporter Lane Weiss traveled to Italy to speak with Danilo De Candido, chairman of Pragma, a Rome-based research firm.

Quirk's: *What research methods are most commonly used in Italy? Face-to-face research? Focus groups? Telephone interviewing?*

Danilo De Candido: In the year 2002, the revenue of the institutes belonging to ASSIRM was about 350 million euros [ASSIRM is a trade association of Italian research agencies]. It is believed that this amount represents 70-75 percent of the total market research revenue.

Quantitative research — panels and ad-hoc research — represent three-fourths of the total revenues, out of which telephone interviews account for more than 30 percent. About 20 percent is made up by qualitative research, mainly focus groups. The remaining 5 to 6 percent represents other methods, such as desk research, etc.

Only considering those companies that have joined ASSIRM since 1996, 26 companies in total, their revenue increased from 216 to 325 million euros, with an yearly increase constantly higher than 5 percent, with the only exception of the past year. In fact, in 2002 the increase over the previous year was just 3.6 percent.

The revenue from research mainly comes from domestic projects, more than three-fourths. The remainder is made up by projects coming from abroad, and to a lower extent by Italian projects conducted abroad — 13 percent the former, 8 percent the latter, as data for 2002 shows.

Is Internet research becoming more popular and more feasible in Italy?

Internet keeps being a niche market in Italy. According to what ASSIRM data for 2002 shows, research through the Web covers about 1 percent of the total Italian market. The reasons for such a poor relevance of this tool are, on one hand, a lack of representativeness of Internet users. The youngsters and the people with a mid-higher education are those who make most use of it. On the other hand, companies feel mistrust and fear about a tool they know so little of.

The spread of the Internet in our sector is easily foreseeable if we consider, among other things, the progressively increasing costs for face-to-face interviewing and the universe representation problems of telephone directories, problems which are due to increase in the future because people who don't want to appear in the directories, and widespread of mobile phones, etc.

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

The most relevant and significant innovation brought about by the Internet is definitely the possibility of gathering data without relying on interviewers' support. The research process will benefit a lot from the spread of CAWI methodology. First of all, because accounting procedures are made a lot easier. Nowadays middle-sized companies — like Pragma, for example — have to handle around 1,000 interviewers, etc., and consequently fixed costs may decrease, for accounting department staff and fieldwork department staff.

The speed of data gathering is another important advantage offered by the Internet, not only compared to the more traditional methodology, for example, face-to-face interviewing, but also in comparison with telephone interviewing. Moreover, through the Internet it will be possible to guarantee a better data quality, since it allows you to avoid possible biases due to the interviewer's presence during the data gathering.

However, the use of the Internet implies relevant investments to purchase, manage and update the mailing list, such as costs for software and hardware, new professional figures to be included in the research process, such as mathematicians, engineers, IT professionals, etc.

What are some of the problems facing marketing research in Italy, in Europe and around the globe?

Information tends to get standardized; ongoing surveys use the same questionnaire. This is definitely a positive aspect, as it allows comparisons throughout the time that would not be possible otherwise. However, it implies the danger of relying too much on what is already tested, already known. Maybe, the search for the new, for new hypotheses has been put aside a little bit. Beside being useful for monitoring the current situation, research should also encourage innovative thought and creativity. Research plays the role of finding out the emerging trends and creating/showing the new opportunities of development, the new markets.

Are there privacy laws in Italy and/or Europe that make it difficult to conduct legitimate marketing research? Does telemarketing have a damaging effect in legitimate research, as it does in the U.S.?

Since 1996, a privacy law has been approved in Italy, too. However, the research sector hasn't been affected by it. On the other hand, telemarketing has generated and still generates negative effects on our activity, as it contributes to increasing the refusal rate and the mistrust of people towards the interview.

How has the consolidation in the market research industry — in Europe, the U.S. and around the world — affected the industry? Is consolidation helpful or harmful?

The consolidation in the sector, meant as a concentration of companies, is an inevitable process, connected to the need of rationalizing the resources, obtaining economies of scale, improving competitive market positioning, enlarging the customer base, etc. Overall, it is a positive process when the companies that join together have complementary activities or operate in different countries so that the consolidation becomes an enrichment for all. It is also a positive process in the case of a small-sized agency, maybe a specialized one, that joins a large network. However, I believe that, besides the indicated general trend, there is always room for specialized companies and/or companies that operate on niche markets, which generally present more interesting business opportunities.

Do your company's clients have reasonable expectations about what they learn by conducting marketing research? Do they make effective use of the information they obtain from research?

The company that is used to conducting research and that has a marketing and research department of its own has in general reasonable expectations and makes effective use of the market information. In the case of small-sized companies, that have just started considering market research or that don't have a long tradition, expectations may be different and partly controversial: there are those that exclusively rely on the market research company and on its capability to do a good job. Instead, in other cases and particularly when the owner or the top management intervene, expectations can exceed what the research is realistically able to provide.

What things can marketing research

companies do to help their clients use marketing research data more effectively?

I started being involved in market research over 30 years ago. We didn't have PCs then and many market research companies relied on external structures for data processing. Nowadays, for example, even a junior researcher is able to process research data. In short, there has been an exponential spread of the knowledge. During these years, marketing research has made very relevant progress from a theoretical point of view as well as in terms of methodologies. This is a process that has affected and keeps affecting not only market research agencies but also our clients, the universities, training centers, etc. Each one of these subjects may contribute, in their own sector, to improving the quality of marketing research.

But let's get back to your question. Market research companies can and should work following three guidelines:

The first aspect is represented by research with an ever-improving cost-benefits ratio for the client. That means we need to determine the most effective methodology, making constant quality controls on the data and, more generally, make the entire research process more and more reliable.

A second aspect refers to the relationship between agency and clients, a relation destined to grow and based on the actual solution of the client's problems.

Finally, a third aspect is the training, meaning that the market research company must contribute to improving the qualitative standard of the young researchers who will look after marketing research within the companies. Throughout the years, for example, Pragma has organized several courses in market research for both private and public company clients. Moreover, it usually organizes training periods of three to six months for students coming from different branches — psychology, economics, statistics, etc. All this is to say that a more effective use of market research comes from a thorough knowledge of the tools that can be easily achieved within the market research company.

What trends do you see in the use of marketing research in Italy? Are certain *kinds of companies or industries doing more research or less research, or doing research for the first time?*

Development prospects for marketing research are definitely positive for the following reasons. There is an ever-growing market complexity and a consequent growing need of data and analysis tools to help our clients to understand, keep under control and also anticipate any possible evolutions.

The importance given to research in Italy is still considerably low compared to other European "big spenders." In 2000, Italy contributed 7 percent of the total expense for European research, against 27 percent from England, 21 percent from Germany and 16 percent from France. The low Italian figure hides a surely interesting potential for at least three reasons. The inevitable process of company concentration — in Italy, we have the largest number of small-sized companies compared to other big European countries — with a consequent greater use of the research. The presence of a public sector which has been nearly absent in the past few years and which is now starting to consider the research world. And the liberalization of the market and the fall of monopoly in some sectors such as utilities and the parallel development of a research market.

Does marketing research seem to be more respected by Italian businesses? Is conducting research seen as a worthwhile expenditure?

Once again, I think I can state that there has been an overall improvement of the situation. Reluctance, if any, mainly comes from small family businesses, which are still run in a completely traditional manner. Yet, spending money for research and spending it well is more and more a top priority, given the increasing market complexity. On the other hand, the investments assigned to research every year — to the revenues indicated by the institutes belonging to ASSIRM, we must add, as I mentioned before, an additional 20-30 percent coming from other research suppliers — show real respect for and consideration of the accountability of marketing research.

What things can research companies do to help improve the reputation of marketing research among Italian businesspeople or businesspeople in general?

Basically, I believe there are two tools that could help improve the image of marketing research. On one hand, it is necessary to invest in resources in order to improve the quality of the data and the methodologies of analysis. From this point of view, the quality certification has been an important step toward a general improvement of performance. On the other hand, it is important to continue and spread more and more widely the marketing culture by organizing seminars, conferences, training courses within the corporations, etc., for the people of the sector. However, universities have significantly improved their supply in marketing and research courses, and this has contributed to further improving the image of such a subject.

Are the research departments in the client companies in Italy growing or shrinking?

Research departments have greatly increased within the companies throughout the years. There are many companies that, up to some years ago, used to take marketing research into consideration only in case of problems and that now every year plan to invest a certain amount of money in market research. Moreover, in recent years, a market parallel to that of research has been activated, whose users are represented by municipal companies that supply services to the community — transport, electricity, gas, etc. By law, they must conduct customer satisfaction surveys. An additional, although indirect, confirmation of the greater importance given to market research is showed by the number of marketing research agencies operating in Italy. When Pragma was founded in 1971, there were only some 10 institutes. Nowadays, we have more than 150.

Are Italian companies looking at research providers as consultants in information management, or still just as data-gatherers?

Customers still make both requests; in fact, there are companies that look for solutions, while others prefer to consider the two functions separately. In parallel, there are some agencies that are more oriented towards consultancy — that is, supplying high added value data — and others that are merely data gatherers. A concentration process is also taking place, which means the creation of multisector companies that are able to provide all the different services a client may need — marketing research, advertising, promotion, public relations, organizational consultancy, etc.

How has the globalization of the world economy affected marketing research?

The globalization has dramatically affected marketing research. The "global village" is no longer just a theoretical expression, it is reality. A considerable number of companies have taken root around the world. The Internet, the other side of the globalization, gains new followers every day. Although, globalization also means other things to marketing. Diesel Jeans owner, Renzo Rosso, stated: "We do not sell a product, we sell a lifestyle and a way of dressing." Phil Knight from Nike took an opportunity to say that the company's mission is not selling shoes, but validating people's life through sport and fitness. These are only two of the innumerable witnesses confirming that the core business of a successful company is no longer only the product itself but what the product represents and what can be exported. Therefore, branding policies will move more and more towards the values, which become an integral part of the marketing research objectives. The reference model of the marketing manager will include the physical, functional characteristics of the product and the advantages coming from the use of the product itself. But to these aspects, it will be necessary to increasingly add the values associated with the product.

Do you think more client companies will rely on a global marketing research approach or will they tailor their marketing efforts, and by extension their marketing research efforts, to each country?

It is necessary to make a distinction according to the type of company and the relative market of reference. Multinational companies are obviously more interested in developing a global insight into the marketing. Therefore for these companies, research will particularly focus on the international market. Given a certain degree of cultural standardization that implies some loss of information, the global marketing approach shows noticeable advantages, such as for data processing, the cost-effectiveness of the approach and better management of the different marketing mix activities. However, the bigger portion of the market is made up by firms that operate within the national territory. For example in Italy, as I've already mentioned, more than three-fourths of the research is domestic in nature. Consequently the marketing activities will necessarily be country-focused. Furthermore, in Italy there is a third typology of companies: small-sized companies focused on exporting. These companies need basic marketing information on the markets they operate in, although they don't have the resources for conducting ad-hoc surveys. They are instead interested in conducting multi-client and multi-country surveys.

Learning on the go

Tips on getting international research right

By Caterina Gerlotto

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As brand positioning becomes increasingly global, the need for accurate international market research has never been greater or played a more fundamental role. Five years ago most international research consisted of a handful of "key" markets that would represent all the potential markets involved: the U.S., a Western European country — chiefly the safe havens of the U.K. and Germany — and a token Asian market, more often than not (and budget permitting), Japan.

Times have changed dramatically. Eastern European markets appear on most multi-country research briefs. Not just the more familiar countries of Poland and Russia but ever-increasingly the Czech Republic and Hungary. The potential and preparation for growth in these markets is enormous as is the demand for quality research.

The same pattern is repeated in Asia. Gone are the days of China/Japan = Asia. Marketers realize that respondent attitudes can vary subtly or extraordinarily — united only in that they do differ.

So, faced with a potential piece of research that incorporates several multi-continent markets — some not too familiar — what are the most important considerations?

The questionnaire

It is tempting to assume that a final questionnaire will work anywhere. Sure it will need to be translated. Or will it? Many Scandinavians, for example, speak perfect English. But while B2B research has been conducted in English in various non-English-speaking countries, it should really be discouraged, even in countries with enviable levels of English fluency. The Dutch, for example, are incredibly proud people and will avoid any situation that puts their reputation into question, including making minor grammatical mistakes in a foreign language (*The Undutchables* by Colin White provides a useful insight into Dutch culture). The end result for the researcher: an almost silent respondent answering only in sentences that they are certain


Flexibility
Quality
Price
Confidentiality
Need Direction?

are correct, not what they actually think.

The Dutch pride issue is especially evident in a group/qualitative situation. One leading pharmaceutical company insisted on only recruiting English-speaking obstetricians for its focus group in Amsterdam, so that it could fly the moderator in from New York who had conducted identical groups in the States.

The respondents were conscious already of not making errors in front of *the American*, but this was relatively minor when compared to their not wanting to appear to be a fool in the presence of their peers. The group remained silent for the duration of the two hours, save a few murmurs, and had to be repeated two weeks later, in Dutch, and at the expense of the client.

Methodologies

One methodology — for example, telephone — may appear the most viable, but don't assume that it will work everywhere; it may not even be an option. In India for instance, the latest figures show that less than 10 percent of citizens have a telephone at home. The only real option therefore is face-to-face, which is time-consuming. Would it be faster if the interviewer were armed with a laptop? Experience has shown that interviewers conducting door-to-door interviews in India, with such a piece of equipment, would need to be armed with a lot more than the laptop! The only feasible methodology is pen and paper. Therefore, extra time must be included for the collation of data if India is involved in the project.

Similarly, in a more developed market, say Norway, a country with an average annual income after tax of $34,050, telephone is nearly always used, essentially for two reasons. First, the geographical distribution: a nationally representative sample from a face-to-face methodology would cost a small fortune. Second, Scandinavians in general are uncomfortable with allowing a stranger into their house.

To tip or not to tip?

As a researcher you know that the phrase "There's no such thing as a free lunch" has never been more relevant. Less than 10 years ago, it was far easier to get respondents to agree to take part in an interview of up to 40 minutes, without even mentioning any form of financial remuneration. Today's harried consumer is a lot less willing to spare their time in any capacity without an incentive.

Putting aside the financial stress on the budget, incentives should form an otherwise simple component in the "research machine," right? Unfortunately, no. Incentives, like the questionnaire and methodology, must be individually tailored to the market, not only down to the amount — which is clearly a consideration in itself — but also to the type of transaction involved.

In Sweden, respondents have to declare all earnings — including incentives — to their insatiable taxman. Swedes consequently are usually rewarded for their time in a focus group or telephone interview with a fairly expensive bottle or two of French wine. Note: they are particularly fond of 1998 Fontaine de la Tour.

The neighboring markets of Germany and the Czech Republic will require very different amounts in monetary terms. As a guide, for every $1 paid to the Czech respondent, the German will want $3.

The final point on incentives may provide some brief relief to your budget. The most hard-to-get respondents — for example, innovators of new technology or neurologists — can often be recruited with no incentive at all, subject permitting. It is becoming more and more popular, particularly on a global level, to incentivize the respondent with a copy of the final report associated with that particular study — if the subject matter interests the respondent. Unlike the questionnaire, the report can usually remain in English.

Lean on your contacts

With so much to consider, and so much that could go wrong, what steps can we researchers take to extract the most from international research? The best advice is to lean on your local contact or contacts for cultural advice.

This, however, raises one final important question: Who do you hire to do the work? It can be financially tempting to award international research to individual independent agencies. But this may lead to premature aging! In many markets language is still a barrier to communication — does the person on the other end of the phone really understand your requirements? Similarly, research involving any markets outside of the PST/EST time zones can involve 18-hour days with several nocturnal disruptions for the duration of the project. You can guarantee the sleep you do have will be peppered with blurred images of your contact in Portugal staring blankly at your last e-mail, trying to decipher its meaning.

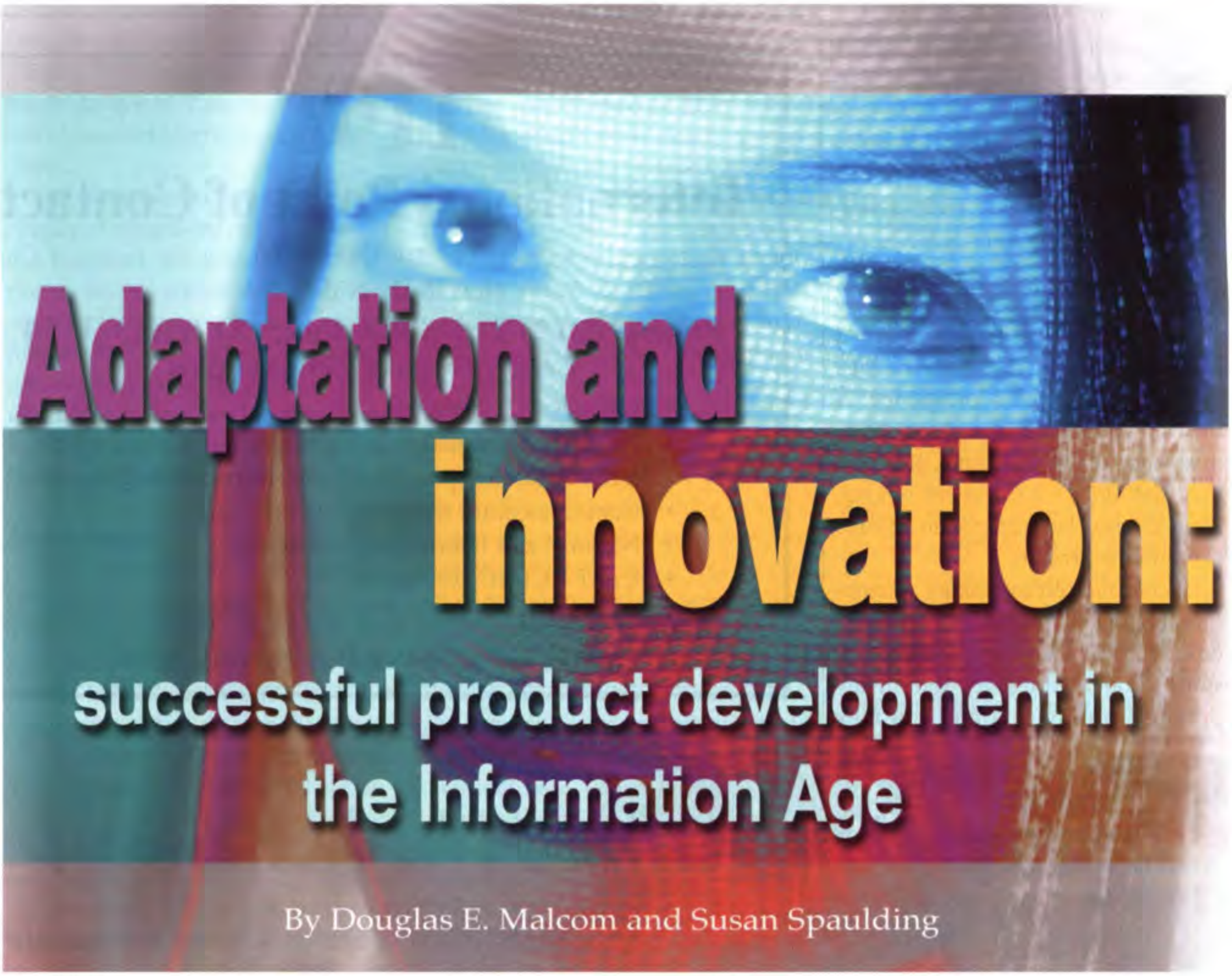
It can cost more to hand the entire coordination over to a multinational research company but the difference is fairly negligible and can actually come out in your favor when you calculate the time you have spent coordinating with the different agencies.

Take full advantage

Once you have made your choice, it is essential that you take full advantage of the local agency's knowledge. If they tell you something will not work, trust them. If you push them, of course they will do it — the client is king, after all. But be prepared to receive sub-optimum results.

Clients often err by making assumptions about a particular country based on a previous vacation experience or stories from a third party. Banish any previous misconceptions you may have. A week in Italy accounts for nothing when compared with 20 years of research experience and being an Italian, for example.

International research in any capacity can be an extremely rewarding experience, however stressful the journey! So throw yourself in and keep your eyes wide open. You just might learn a thing or two.



Adaptation and innovation:

successful product development in the Information Age

By Douglas E. Malcom and Susan Spaulding

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Hey you! Out of the GENE POOL! This slogan seen on bumper stickers and t-shirts may give us a good laugh, but increasingly it may also give us pause as an apt warning about doing business in the Information Age.

As the Industrial Age rapidly morphs into an information era, businesses must learn to operate within a new set of boundaries if they want to survive, much less prosper. No longer can businesses operate under the old rules of mass production, segmented pricing and a static organizational structure. Marketing in the third millennium requires a new perspective that emphasizes customer interactions and product innovation.

The connectivity of the information economy is rapidly changing relationships between buyer and seller, product and service, and employers and employees. As a result, doing business in the Internet economy demands even greater attention to fundamental marketing principles and strategic planning that incorporates virtual buying spaces. Companies that do not give enough credence to the new business rules or that underestimate the effects of e-commerce will likely find themselves dying a slow and painful death.

Competition in the Information Age: survival of the innovator

The lifeblood of an organization is innovation, and it must be the pervading spirit of all functional areas and levels within the organization. Those companies that make innovation a priority and operate with intimate knowledge of their customers will stand a much better chance of meeting their customers' needs in the Information Age of business.

Successful innovation needs to be the center of business strategy with marketing, capital investments, manufacturing, and research and development expenditures allocated around innovation rather than being dealt with

as an extension of any one these areas. As Kucsmarski (1999) notes, "Innovation is not one more thing to get done. Instead, it should be viewed as a way of life — a new way of thinking, managing and feeling." Companies that make innovation a component of their corporate identity and place it in the center of their overall strategy are best positioned to be leaders in product development (Barrier, 1994).

Integrating a philosophy of innovation into all facets of the company, including product development systems and processes, does not happen overnight, and equally its rewards are largely long-term. The holistic innovation perspective brings with it a kind of optimism and future-orientation that is very motivating and provides a sense of hope in down times. As such, employees are more likely to give proper attention and respect to new product development rather than view it as a stepping stone to an established brand with big advertising budgets and a high company profile. This perspective also brings into view the extent to which internal systems are in step with customers' attitudes.

Innovate for a proactive market presence

As Peppers and Rogers have pointed out, the markets of the future will be won one customer at a time. This kind of customer appreciation and knowledge will aid companies in creating new products by anticipating what their customers will want rather than reacting to a need in the market. Successful product development hinges upon both intimate customer knowledge and a real commitment to innovation.

Often companies only do enough research and development to match an important competitor. Or, they do only enough market research to tell which way the wind is blowing. Companies truly committed to advancing their ongoing product development strategy in the Information Age need to meet customer needs by anticipating them rather than reacting to an obvious market void.

Product development typically occurs through the expansion of an established line of products or through the growth of entirely novel product concepts. The first form of product development is a kind of commercial mutation where an existing product is reformed, refitted or adapted in some way to offer consumers enhanced benefits. The second, higher order type of product development is innovation resulting in benefits that are new to the market.

While continually updating products is a necessary function and often the predecessor of innovation, product adaptation will never outweigh innovation in strategic importance. Innovation, unlike adaptation, creates or protects competitive advantage for a company, thereby offering greater long-term success.

Adaptation: extending the successful line

Often, keeping pace in a market can be achieved through the continued growth and development of products related to an existing line that has a

pattern of success in a category. However, the key is not to create a "missing link" by extending the product into areas where customers do not make a connection to the brand.

In the past decade, there has been considerable impetus behind product development that stresses product platforms and families. This perspective focuses on the successive enlargement of a base product concept in order to cast a wider net for consumers. The kind of product family management that works best systematically produces new offerings based on customers' needs, and originates from a planned family of differentiated products that have a common set of design rules and brand identity. The end result is a steady flow of value-evident products from the same brand or company, carrying with each the mark of that brand and the full force of its unique equity.

This perspective also helps ensure that products possessing tenuous ties to the parent product concept die in the ideation or testing stage of development rather than in market. If customers cannot make a clear connection to the central identity of the line and understand the product's unique position in the line, they are unlikely to fully support the product.

Case study: MindStorms

MindStorms' 1998 launch of build-it-yourself robot kits in the toy market should be considered a model approach to product adaptation for the ways in which it moved beyond an original concept and captured new market segments. MindStorms, a Danish subsidiary of Lego, Inc., successfully extended the idea of the classic plastic construction sets into robot kits that appealed to both children and adults by transporting the simple idea of Legos construction into the realm of hobbyist robotics.

MindStorms released a line of design-your-own robot kits in the fall of 1998 to a great deal of acclaim and financial success in the toy and, as it turned out, hobby industry. Building from the concept of Lego's plastic building bricks, the robot kits could be quite sophisticated, appealing to kids of all ages, more specifically those aged 12 to 50.

Lego interlocking plastic building bricks are a classic toy that has remained popular in its current form for nearly 50 years. The company has made a few changes to the theme, such as complete kits for constructing miniature cars, ships, bridges and castles that lock with the building blocks. MindStorms is a high-tech version that builds on a history of product originality and moves the line into the 21st century.

The build-it-yourself robot kits, which retailed for between $100 and $200, combined Lego blocks with infrared light sensors and specialized computer software that allowed the user to control the creation from a home computer. The kit came with patterns and directions for both the blocks and the software. However, older buyers and tech-savvy kids could customize both.

During the product development

phase of MindStorms, Lego marketers felt they had a new offering with potentially broad appeal to kids, teens and adults. They set out testing all the possible markets and found that while the core customer was children 12 to 18 years of age, an adult customer base existed in the 25 to 40 range, ultimately comprising about 40 percent of MindStorms' users. Most of the adults registered on the Legomindstorms.com Web site were found to be in their 20s, but some were over 50.

The wide age range of MindStorms' enthusiastic customer base represented a marketing coup for Lego, which had revenues in 1998 of $1.2 billion, and serves as a prime example of a successful product adaptation. The robot kits showed how a company can successfully work from a base set of design rules and brand spirit and find positive revenue streams from untapped market segments

Innovation: the key for strategic growth

Industry data suggest that as many as four out of five new product offerings will fail. With those odds, a hastily conceived and poorly tested product is doomed. However, launching a new product does not have to be a roll of the dice. Whether early on in product conceptualization or later in product testing, effective research can help companies bring their strongest, most attractive offering to market.

Some degree of industry analysis or competitive intelligence should be performed to inform the initial product development planning process. Industry analysis can be used to help define product positioning, set product development parameters and confirm company or brand image prior to initiating development. Companies gain useful insights into their markets and can, for example, avoid a market scenario where competition is very strong and there are few opportunities for differentiation.

Another fundamental element of successful product development involves the proper focus on viable concepts early in the process and effective modeling and measurement prior to launch (Gruenwald, 1992). Both qualitative and quantitative research methods can be brought to bear on product development problems for companies seeking strategic direction to their product development needs.

Qualitative methods

Methods in the qualitative arena are typically used early in the research process with an in-depth exploration of topics and a relatively small number of interviews. Product development often begins with ideation and concept development.

• Ideation: When a company needs to look into the future and investigate new products, an ideation or brainstorming session is planned. The session is usually a daylong event and involves an internal group, however customers or other constituents can be integrated who have a definitive interest in the outcome. Using different ideation exercises, new products are generated. Using strategic parameters the ideas are honed to a short list and prioritize.

• Concept development: A concept is generally comprised of a key visual and a short, factual description of the product or service. The concept is presented to a group of people, usually in a focus group environment. Typically, the group is asked to identify benefits associated with the product and prioritize which are most important to them.

Quantitative methods

Quantitative techniques are commonly used to help configure and/or optimize a product according to the preferences of consumers, as well as assess product appeal or potential. Broad market measurement often is done to learn whether there is a void in the competitive space that requires a product with novel features and benefits. Product screening, product configuration and testing are some of the most widely used qualitative research methodologies.

• Product concept screening. Many companies seeking to fill an identified market need begin by sorting out the concepts that consumers believe meet their needs best. Assessing market potential at the concept stage is a critical juncture in product development. Pursue the wrong product and the financial effects can be devastating.

Best practices in concept screening utilize forms of multivariate analysis such as multiple regression or structural modeling to predict those product concepts with the most market potential. These techniques involve the prediction of preference across a number of products, typically including some volumetric-like scoring to give managers some information about revenue potential as well.

• Product configuration. Often, a company has a general idea for a new product but is unsure about what features are most important to consumers. Advanced research methods such as conjoint analysis and discrete choice modeling help companies determine the value of different product features and benefits such as color, shape, packaging and price.

Conjoint studies give the company information on the relative impact of each feature level of their potential product or service, as well as how each combines to affect purchase intent. Discrete choice studies do this as well as provide information on potential market share and any interactions between variables such as brand and price.

• Product testing. Product testing is perhaps the single most valuable market research tool because it provides direct consumer insight that helps identify product superiority and competitive advantage. Product advantage helps fortify brand share and company image, and often commands premium pricing in the category.

The most widely used techniques for product testing are monadic, sequential monadic, paired comparison and proto-monadic. In monadic tests, each consumer evaluates one and only one product. Sequential monadic designs have each respondent assess two or three products, where each is taken one at a time and evaluated before moving on to evaluate a second, and so on. Paired comparison designs have consumers use two products simultaneously and then evaluate which is superior. Proto-monadic tests are a blend of monadic testing and paired comparison testing, where the consumer begins with a monadic test after which a paired comparison test follows.

Case study: Palm, Inc.

In some cases, market research can also lead to product innovation in the form of acquiring other product benefits that give a company a competitive advantage. The success of the Palm Pilot is a prime example of innovation through product acquisition which created an entirely new category of digital handheld computing devices.

In 1996, Palm, Inc. launched a line of handheld electronic organizers, the Palm 1000 and the Palm 5000, aimed at business professionals as an alternative to spiral bound, paper organizers. The introduction of these devices pioneered the electronic organizer category and led the way toward even bigger things.

With its acquisition of Smartcode Technologie in February 1999, Palm added advanced wireless communications capabilities to the Palm OS platform to address the market for mobile information appliances, such as cellular telephones, messaging devices, data communicators and smart phones. As such, it has positioned itself to be the leader not of electronic pocket organizers but of digital handheld computing devices.

Originally established in 1992, the innovative company caught the attention of U.S. Robotics, which acquired the then-small company in 1995 and in turn became a subsidiary of 3com when that company acquired U.S. Robotics in 1997.

Palm has continued to grow with acquisitions that allow it further penetration into the emerging electronic pocket computing and communications market. According to IDC figures for 2001, Palm is the leading global provider of handheld computers, with a 42 percent share of the worldwide personal handheld device market, and a 60 percent share of the worldwide handheld operating systems market.

Nearly 200,000 registered developers and others are committed to enhancing the platform and its offerings through a community of Palm OS licensees. This community of developers has created more than 13,000 software applications and more than 100 add-on devices since 1997. At the close of 2001, Palm's annual revenue was $1.56 billion, up 47 percent from the $1.06 billion reported in 2000, and the company held nearly $514 million in cash.

Palm devices are growing increasingly pervasive as information management becomes ever more mobile and as the global workforce has an ever greater demand for portable personal computing and communications devices. Palm's innovative spirit has paved the way in a new product category, and the company is the market leader in what has proven to be a nearly ubiquitous component in modern business culture globally in less than half a decade.

More than goals

In the Information Age economy, innovation and adaptation need to be more than just goals mentioned at the annual company meeting. They need to be identity statements for those companies who seek product and brand superiority in increasingly complex and competitive markets.

Companies must acknowledge that product innovation does not occur by happenstance or by accident — it rises from internal processes operating within an evolved environment. Those companies with the best results in product development are thinking clearly and strategically about how to gain a competitive edge with their products in the marketplace.

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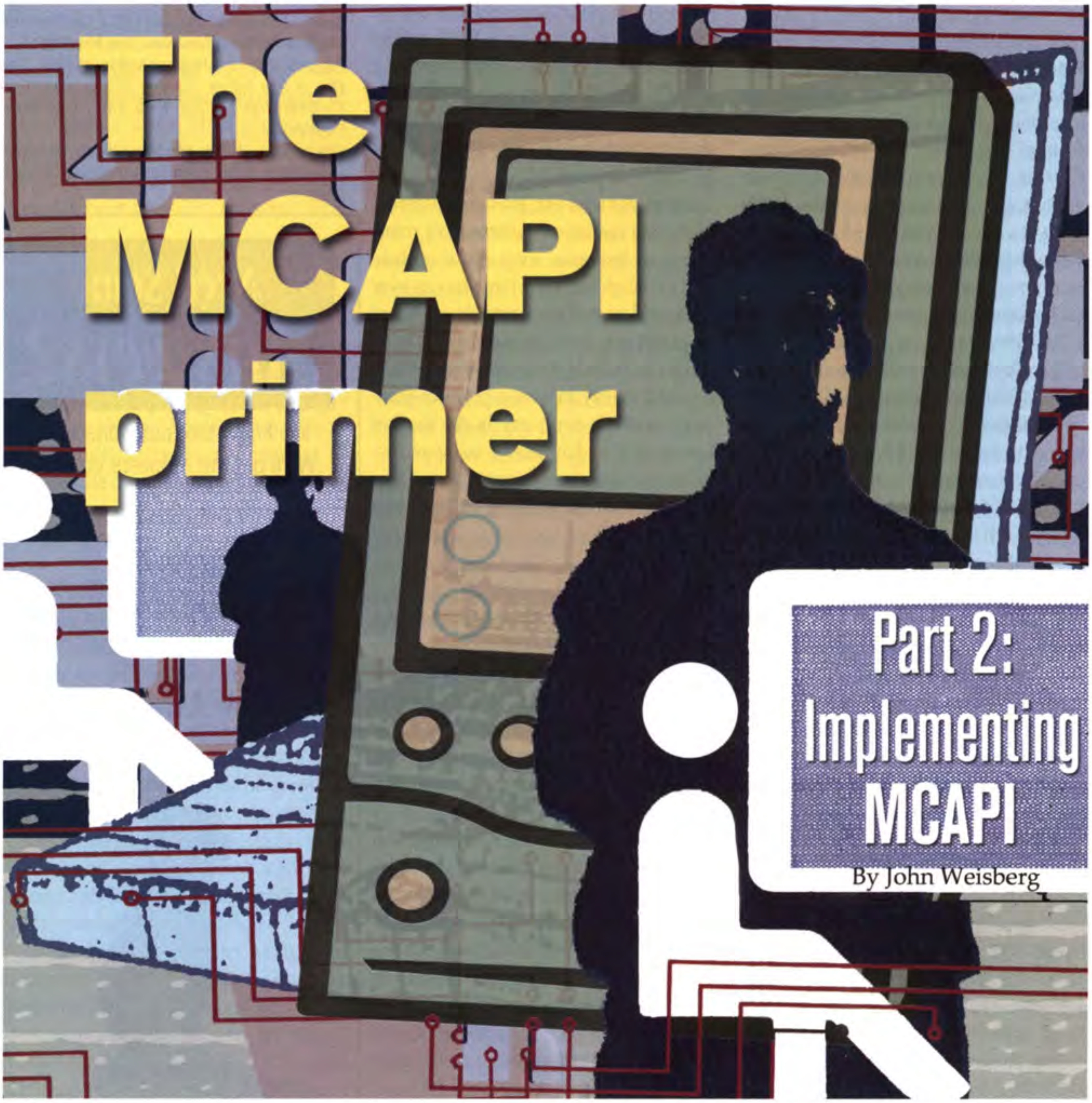

Editor's note: John Weisberg is vice president of marketing at Techneos Systems Inc., a Vancouver, B.C.-based research software firm. He can be reached at jweisberg@techneos.com. "The MCAPI Primer Part 1: Introducing MCAPI" appeared in the February 2003 issue of Quirk's. *It explained what MCAPI is and how it compares to other data collection methods. This month, Part 2 concludes the primer with advice on how to select and use an MCAPI system.*

If you've decided to add MCAPI to your marketing research toolkit, the next step is to choose a system that is suitable for your business. Start by analyzing your needs in the following areas, to generate a list of specifications the system must meet to work effectively for you.

• Project characteristics

Do projects require changes to questionnaire design over time (e.g., longitudinal studies)? Then effective modification tracking is important. What question types are used to get desired information? Must survey designs include randomized response lists, complex skip patterns, and other techniques to ensure data quality? The MCAPI software has to provide the capabilities identified. Do you frequently re-use standard questions and response sets? Software that

enables easy re-use of questionnaire elements will be more efficient for you. Will you use very long questionnaires, or require a large number of questionnaires to be on a handheld all at once? The software and hardware must have the necessary capacity.

• Interviewer and respondent needs

What control would you like the software to have over the interview process? The ability to modify the software user interface can accommodate inexperienced or veteran interviewers, or adapt the system for self-completion. Hiding the software's menus, modifying "quit" and "save" behavior at the end of an interview, and preventing users from switching to another application on the handheld are some of the key things you may want to control. What unique respondent needs must be addressed? If respondents come from different ethnic groups, support for multi-language questionnaires may be essential.

• Physical setting

Are interviewers or respondents located at distant or dispersed locations? You will want a system that is easy to support and has reliable data communications. Will the mobile computers be used in extreme environments (hot, cold, dusty, dark)? Hardware suited to these situations is available, but may only work with certain MCAPI software.

These are just examples of the questions to ask. By doing an initial analysis and creating a list of required specifications, you can eliminate any unsuitable software and hardware. Compare additional features of the remaining products to determine which is best for you. The next two sections will help you to evaluate specific software packages and hardware devices.

Software

The advantages of MCAPI over paper — speed, quality, economy and power — were covered in Part 1 of this primer. Compare the extent to which these advantages are provided by competing packages. Check for the key features expected in any computer-assisted interviewing program: branching/skips, range/logic checks, activity logging, etc. Is the system scalable so it can grow with your business?

A system that integrates with other tools simplifies multimodal interviewing. Direct export to your analysis and reporting tools saves time and eliminates errors. Open standards such as the SPSS MR Data Model and Triple-S provide compatibility with the widest range of products.

Mobile computing is attracting developers who know little about survey research or mobile systems. Check the developer's background, reputation and focus. How available and competent is technical support? Are testimonials and an opportunity to talk to existing users provided? What training, customization and other services are available? Does the developer stand behind its products by offering a free evaluation copy and a satisfaction guarantee?

Popularity of a software package is important. More field houses and MR firms know how to use a popular package, and there is a larger pool of skilled staff to do the work.

The differences between systems must be weighed against their relative price. Total system cost will include software, training, ongoing support and the necessary hardware. A variety of licensing and leasing options may be available. The vendor should help you determine the best return on investment for your particular situation.

Check the CAPI/CASI section of *Quirk's* online software directory to find MCAPI vendors, and watch for reviews in future issues of the magazine.

Hardware

The options for MCAPI are primarily the Palm OS and Microsoft Pocket PC. Since its debut in 1996 the Palm OS has consistently outsold all other mobile platforms combined. As a result, Palm OS devices are readily found, at competitive prices, and work with a wide range of available hardware accessories.

The attributes that make a computer truly mobile were covered in Part 1. Generally, Palm OS devices meet the criteria better than Pocket PC devices, especially when it comes to battery life.

Differences between operating systems mean hardware specifications cannot be directly compared across platforms. Palm OS devices with 2MB of memory and a 20MHZ processor can run sophisticated MCAPI software; Pocket PC cannot run on a device with such modest specifications. Try software for both platforms on the type of device you would buy for interviewers to determine what real-life performance is like.

The ability to use less powerful hardware gives the Palm OS a cost advantage. Palm OS devices have the inexpensive segment of the market to themselves with prices less than half that of entry-level Pocket PC models. The savings add up quickly when equipping a field force.

The simplicity of the Palm OS has two added benefits. Its interface requires less training to learn and is less confusing for users. It also tends to be more reliable — system problems are rare on a Palm OS device, and are usually due to poorly written software.

Obsolescence is a concern when buying hardware. So far, Palm's record of providing upgrade options and backwards compatibility is good, while Microsoft's is poor. Buying the least expensive hardware that meets your anticipated needs for a year or so avoids the issue — it can pay for itself before it is outdated.

People may share responsibility for the hardware platform decision. Be aware that people may lean towards a platform or model that they would like for personal use or another business application. The requirements analysis outlined earlier helps ensure that the choice will meet your needs, so do not skip it.

The platform decision should include determining that models with the capabilities you need are available. Key items to look for are screen type and resolution; backup and expansion capability; availability of modems, keyboards, and other accessories; and features such as bar code scanning, wireless connectivity, and voice recording. Special features are often model-specific, so check that they are supported by the software you plan to use.

Implementation issues

Anybody who has gone through the introduction of a new data collection method will appreciate that regardless of potential benefits, success is not a foregone conclusion. Pay attention to the following areas when introducing MCAPI.

• Interviewer training and buy-in

Many interviewers are keen to switch from paper to handhelds and do so quickly, but the ones who don't can derail implementation. Take the introduction of MCAPI as seriously as you would the introduction of a CATI system. Ensure interviewers receive complete training and good support during the roll-out. Some may not see the benefits that MCAPI provides throughout the survey process, only the disruption it causes in their job, so explain why the change is a positive one for the company and its clients, and how that is good for them.

• Under- and over-design

Experienced questionnaire designers and scriptwriters may underestimate what an MCAPI system can do and not fully utilize it. Those new to computer-assisted interviewing (CAI) may not even be aware of what could be possible. At the other extreme, watch out for new users of CAI who get caught up in what is possible, and spend time on design that does not result in benefits during the rest of the project.

• Unrealistic expectations of technology

MCAPI brings the power of CAI right to the field. That is a huge improvement, but don't expect miracles. Use of a computer does not make open-ended text responses as easy to handle as categorical responses, anymore than it did with CATI. Similarly though, MCAPI offers some advantages over recording them on paper. Be pragmatic and focus on what is possible — you can make substantial improvements with current technology.

• High rate of mobile hardware technology change

Every technology purchaser faces the dilemma of whether to buy now or wait. If the expected payback period will probably be less than the time until a much better technology is available, then it is worth buying now. Also, it does not matter when a new technology will come out if it cannot generate more revenue or further reduce costs. In most cases, the added benefits of new technology in the near future are small compared to the immediate difference in moving from paper or laptops to handhelds.

Designing for MCAPI

We have covered what MCAPI is, when to use it, how to select a system, and implementation issues. This final section provides tips on how to design questionnaires that deliver the benefits of MCAPI.

Everything you know about good questionnaire design applies when creating MCAPI surveys. However, any notions about design for paper must be put aside. The goal is to get better data — more quickly and with less effort for interviewers and respondents — than is possible with paper. The first rule of good MCAPI design is therefore not to automatically take the same approach you would with paper.

• Put more time into design. Proper MCAPI design can make interviews faster and easier, reduce errors and data cleaning work and simplify analysis. Achieving these results takes more time at the design stage than when using paper. The effort will pay off in every remaining step in the survey process.

• Design and present the questionnaire to optimize the interview. Paper questionnaire design optimizes page layout to reduce the number of pages, and make it easy to follow for interviewers, respondents and data entry staff. With MCAPI, the number of "pages" has no effect on cost, navigation is handled by the software, and responses do not need to be re-keyed. Design can focus on making it easy to understand questions and enter responses.

Instead of saving space and simplifying data entry by using a response set with only the most common answers and an "other" category, as you would with paper, use all the items you want to have available for analysis. Capture exact numbers instead of ranges where appropriate. Specific answers are useful for skip patterns and calculations, and can be piped or filtered later in the interview to make it clearer. Break complicated questions down into parts that are easier to display on a handheld-size screen, and are easier for the respondents to understand.

• Use more complex designs. It may seem counterintuitive to people unfamiliar with computer-assisted interviewing, but complex designs can make the interview easier and faster. Use conditional questions to ensure respondents are asked only those that apply. Complex designs can also reduce errors and obtain more precise answers. Calculations, error checks and recoding can be included without interrupting the interview flow, unless a problem is detected.

• Take advantage of automated collection. Most MCAPI software will automatically record date, time and duration of interview, respondent number, and language used. Other questions you might ask on paper can be eliminated — for example, expenditures can be automatically totaled. Inferences that would normally be made during data processing to fill in missing responses can be used in real-time to shorten the interview.

Some hardware supports additional types of automated data collection, including bar codes and magnetic stripe readers. Packaged goods product codes, ticket purchase information, coupon codes and more can be accurately and quickly recorded.

Finally, bear in mind two important points about MCAPI design. The length and difficulty of the interview for a particular respondent is the issue, not the total number of questions (screens) in the questionnaire. And good design should free the interviewer to focus complete attention on interaction with the respondent, which is the whole point of face-to-face interviews.

Unique benefits

Research buyers and providers need to be knowledgeable about a wide range of methods in order to do their jobs effectively. MCAPI is an approach with unique benefits. If it suits your work, use this primer to guide you as you give it a try.

Additional resources

PalmSource - Palm OS compatible software and hardware: www.palmsource.com.

Microsoft Pocket PC site: www.microsoft.com/mobile/pocketpc/default.asp.

Pen Computing magazine - cross-platform mobile computing news and reviews: www.pen-computing.com.

SPSS MR Data Model: www.spss.com/spssmr/dimensions/datamodel.htm.

Triple-s: www.triple-s.org.

Check out the sources listed at the end of Part 1 as well.

Survey Monitor

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tomer satisfaction and loyalty, the exact prescription varies by category. The best course of action is for each category to review its weaknesses and build on its strengths. These include:

• QSRs must improve basic staff service skills and wait times.

• Fast-casuals would do well to add locations, with a continued emphasis on maintaining quality of service staff. Increasing price-value of their offerings would strengthen their position.

• Full service restaurants must excel in service and restaurant atmosphere to justify price levels. For more information visit www.nfow.com.

Europe, U.S. largest private label markets

Sales of private label consumer packaged goods are a large and growing global phenomenon, according to a study by ACNielsen. In the 36 countries and 80 categories studied, consumers spent 15 percent of total value of sales on private label consumer packaged goods, but with widespread diversity across both markets and product types.

Europe remains the region with the largest private label share of total retail sales, at 22 percent, with North America second at 16 percent. Even excluding Wal-Mart's private label sales, the United States remains the largest single market for private label sales in absolute dollars, while Switzerland has the highest private label share at 38 percent. More than 95 percent of private label sales are found in Europe and North America.

In terms of the rate of growth for private label products, however, the study revealed a decidedly different picture. Latin America, Asia-Pacific and the emerging markets all have very small private label markets in terms of overall retail sales, but are experiencing much more rapid sales growth. For example, the emerging markets of the Czech Republic, Hungary, Poland and South Africa saw a collective growth rate of 48 percent compared to 2002, while Latin America and Asia-Pacific saw year over year growth rates of 16 percent and 14 percent respectively. European growth was 6 percent, while North America, excluding Wal-Mart in the U.S., remained unchanged from 2002. Overall, growth rates for private label products outpaced those of manufacturers in nearly two-thirds of the countries studied (22 of 36).

"The high growth rates for private label in the developing markets are directly related to the expansion of global retailers beyond their traditional geographic borders. As they build infrastructure, they build their private label brands," says Jane Perrin, ACNielsen managing director of global services.

The study's findings are based on ACNielsen sales data from 36 countries in North America, Western Europe, emerging markets, Asia-Pacific and Latin America, representing 65 percent of the world's gross domestic product. A representative sample of 80 product categories was selected for review, chosen to provide a cross-section of private label activity across product types. Data was collected for the 12-month periods ending in April 2001, 2002 and 2003. For the purposes of this study, any consumer packaged goods brand that is sold exclusively by a specific retailer or chain is defined as private label.

As expected, some of the largest private label categories were within traditional strongholds that are often viewed as commodities, like the paper products, plastic bags and wraps area. For instance, nearly half (46 percent) of aluminum foil sales were private label products, while plastic wrap/rolls and kitchen paper/towels attributed 33 percent and 32 percent respectively of their sales to private label. In the food area, complete ready meals (often offered in a special section of a store) had a 51 percent private label share, while private label milk represented 44 percent of the total market and more than $11 billion in actual value sales.

Looking beyond traditional categories, some distinct trends begin to emerge. In today's private label market, a different level of products has come to the fore: the premium "branded" private label product. These products offer consumers a quality private label choice as well as providing retailers an additional selling point for their stores. Some of these quality products may be branded with the retailer's name or even have a brand image all of their own (e.g. President's Choice).

Due to this "premium" phenomenon, some categories once deemed unreachable by private label are starting to see significant growth rates. Non-traditional categories such as lipstick/gloss, facial cleansing, eye shadow, baby food, drinking yogurt and sports ener-

Top Ten Fastest Growing Private Label Categories

Category	Private Label Share	Private Label Growth	Manufacturer Growth
1. Drinking Yogurt	8%	38%	17%
2. Sports Energy Drinks	6%	33%	9%
3. Lipstick/Gloss	2%	26%	2%
4. Facial Cleansing	6%	21%	6%
5. Baby Food	1%	20%	2%
6. Face Moisturizers	2%	20%	10%
7. Complete Ready Meals	51%	20%	13%
8. Eye Shadow	3%	19%	2%
9. Cooking Oil	21%	16%	7%
10. Flavored Milk Drinks	14%	13%	4%

gy drinks represent very small actual private label sales, but are all experiencing rapid growth rates versus comparable manufacturer brands (see chart).

"In areas like beauty products and baby food, trust is a vital element to success," says Perrin. "Private labels' growth in these areas shows that retailers are marketing effectively to consumers beyond the simple 'low-cost, high-volume' approach of the past."

In its analysis, ACNielsen found that in the 36 countries and 80 categories studied, private label products were on average 31 percent cheaper than their manufacturer counterparts. This differential has remained fairly consistent since ACNielsen's previous global study in 1998. Within the countries and categories studied, however, important variances exist. For instance, in Poland the differential was 50 percent, where in Hong Kong it was only 10 percent. Europe, with its private label market share dominance, was home to seven of the top 10 countries with the biggest differential between private label and manufacturer brands. The United States had the average differential of 31 percent.

At the category level, the product categories found in personal care and health care often had the largest price differential (greater than 40 percent). Private label pain relief products, for example, were found to be 55 percent cheaper than manufacturer brands. At the other end of the spectrum, categories found within many food areas had the lowest differential, with a category like frozen fish (including shellfish and seafood) offered at less than a 10 percent difference.

One interesting finding uncovered by ACNielsen is that in some categories private label prices were found, on average, to be equal to or even higher than manufacturer-branded products. One of the many drivers behind this trend is the previously mentioned retailer strategy of offering consumers premium branded private label products as a high-quality option and a unique selling point for the store. Other factors include the presence of private label products sourced from imports (which are thus more expensive than domestic manufacturer brands), differences in product package sizing, and manufacturer brands being more often found on promotion than private labels, thus bringing their average price down. For more information visit www.acnielsen.com.

European economies show dramatic differences in innovativeness

A study of 137 new product launches in 16 European countries shows the persistence of major regional disparities in the era of the European Union, according to an article in a journal of the Institute for Operations Research and the Management Sciences (INFORMS). "While we expected some differences, we were surprised by the size of the differences," the authors write. "We were also surprised by the fact that Scandinavian countries tend to have the shortest 'time-to-takeoff' of all European countries. In contrast, the large economies of Europe — France, Germany, Italy, Spain, and the United Kingdom — turned out to be less innovative than the Scandinavian countries."

Based on their research, the authors recommend that European marketers introduce new products first in a few countries, employing what is called a waterfall strategy, rather than in many countries at once, what marketing literature calls a sprinkler strategy.

"The International Takeoff of New Products: The Role of Economics, Culture and Country Innovativeness" appeared in the spring 2003 issue of the INFORMS journal *Marketing Science*. The authors are Gerard J. Tellis of the University of Southern California, Stefan Stremersch of Erasmus University, Rotterdam, and Eden Yin of Cambridge University. A summary of the study can be found at www.informs.org/Press/newproductsinternational.pdf.

Normally, a new product is marked by a long introductory period when sales linger at low levels. At a certain point in time — the takeoff — a successful new product breaks into rapid growth and a large jump in sales. Time-to-takeoff is the duration of the introductory stage from product introduction to takeoff.

The authors' conclusions include:

• "Time-to-takeoff" for new products differs dramatically between countries (for example, 3.3 years for Denmark and 9.3 years for Portugal). On average, time-to-takeoff takes about half the time in Scandinavian countries (four years) as it does in Mediterranean countries (7.4 years).

• Cultural factors partly explain these differences. In particular, the probability of takeoff increases in countries that place high in an index of achievement and industriousness and low in uncertainty avoidance.

• Sales of most new products display a distinct takeoff in various European countries, at an average of six years after introduction.

• Time-to-takeoff differs dramatically across product classes. The mean time-to-takeoff is eight years for what are described as "white" goods (kitchen and laundry appliances) and two years for "brown" goods (entertainment and information products).

• The probability of a new product's takeoff in one country increases with prior takeoffs in other countries.

Because managers are under great pressure to pull the plug on a product that has not taken off, the authors suggest that introducing a product in a few countries that are expected to show early takeoff can win internal corporate support. The strategy lets marketers use sales data in one country to forecast sales in other countries where they plan to launch the product. Unfortunately, the authors observe, most European marketers do not introduce new products gradually and pay a penalty in failure.

The authors analyzed the takeoff of 10 consumer durable categories across 16 Western European countries: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, and the United Kingdom. The products are refrigerators, washing machines, freezers, dishwashers, color televisions, dryers, VCRs, computers, CD players and microwave ovens.

The authors used data on product sales made available by Euromonitor, GfK, The Economist Intelligence Unit (EIU), TableBase of Responsive Database Services, the archives of appliance manufacturers in various European countries, and a private observer. For more information visit www.informs.org.

Do Not Call is more like Do Not Know

Provo, Utah-based data collection firm Western Wats announced the results of a nationwide survey conducted among a sample of Americans concerning the National Do Not Call (DNC) registry. The study was conducted via telephone among 300 households selected at random using RDD sampling methodology, with a 95 percent confidence level and a 5.7 percent confidence interval. The survey took place during the week following the Federal Government's open registration of the DNC list that prohibits telemarketers from dialing registered numbers.

After only one week following open registration, 28 percent of respondent households had placed their phone numbers on the DNC list. Another 46 percent said they intended to register at some point in the future. That left 12 percent who said they did not intend to sign up and 14 percent still undecided.

Most (95 percent) survey respondents had heard of the National DNC list without being prompted by an explanation, but many were unsure as to exactly what types of calls will be blocked. Only 80 percent said they

thought telemarketing calls would be blocked as a result of registering. Sixty percent said they thought market research calls would be blocked, 52 percent thought telemarketing calls from companies they currently do business with would be blocked, 47 percent thought calls for donations to charitable organizations would be blocked, 41 percent thought political polling calls would be blocked, and 21 percent thought customer service calls would be blocked.

Though enthusiasm for the National DNC list is great, Americans are still generally willing to receive certain types of calls. When given a list of various types of phone calls, 65 percent said they would be willing to receive a reminder call for something like a doctors appointment or oil change, 35 percent would be willing to talk to someone asking for their opinions about products or political issues, and 19 percent said they would be willing to speak with someone about contributing to a charitable organization. Only 7 percent said they would be willing to talk to someone selling something, but 17 percent said they would be willing to speak to someone about additional products or features related to something they already own.

Survey participants were skeptical about the effectiveness of the National DNC list. When asked how likely telemarketers would be to call even though their number was on the DNC registry, 43 percent of respondents said they believed telemarketers would call them anyway. For more information visit www.westernwats.com.

Get in the car, turn on the radio

In-car radio listening has increased over the past five years, gaining 34 percent of total listening, according to The National In-Car Study: Can Radio Defend Its Turf?, a study by Arbitron Inc. and Edison Media Research. However, among persons age 12-24, CD players and cell phones minimize radio's stronghold as "one essential" in-car companion.

Over a third of Americans are spending more time in their cars than in 2002. On average, people are spending more than 15 hours per week on the road and surprisingly equal time is spent in the car on weekend days as weekdays. While both sexes report equal time in the car on weekends, men report more time in the car than women during weekdays and overall, men use in-car radio more frequently than women.

The study reveals that workers make many stops on the commute home. Seventy-seven percent stop by the grocery store, and more than half go to convenience stores or large retail stores. Since two out of five consumers decide at the last minute to make many of these stops, it is an advantage to target them close to the purchase.

Advertisers can benefit from later-day advertisements, as 48 percent of listeners have heard advertisements for sales while listening in a car and visited that store later that day.

Consumers with household incomes over $100,000 are 42 percent more likely to make choices based on radio advertisements while they commute. Forty-five percent of men make last-minute decisions to shop at a store on the way home from work. Men are also 31 percent more likely to hear an advertisement and be motivated to visit that store.

Radio is used by 96 percent of Americans who drove or rode in a car in the last month. In addition, CD players and cell phones are used by more than half of in-car consumers. Of all devices currently used in-car, 75 percent of Americans who drove or rode in a car within the last month used the radio almost all or most of the time. When asked to choose only one device for their primary car, consumers chose radio by 69 percent above CD players at 16 percent and cell phones at 8 percent.

However, radio is less essential for 12-to-24-year olds. Only 49 percent chose radio as the most essential device in the car, while the CD player was chosen by 34 percent. Comparing time spent with radio, 78 percent of persons 25+ spend most of their time in the car with radio, while only 61 percent of persons age 12 to 24 spent most time with radio in the car.

Telephone interviews were conducted in July with 1,505 of a random sample of Arbitron Spring 2003 diarykeepers age 12+. Ninety-eight percent of the sample had driven or ridden as a passenger in non-public transportation vehicles (car/truck/van, etc.) in the last month. For the full study go to www.arbitron.com/home/incar_study.asp.

Research Industry News

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State's 16th fastest-growing technology company as part of Deloitte & Touche's Technology Fast 50 Program. Rankings are based on the percentage of growth in fiscal year revenues over five years, from 1998 to 2002. NetReflector increased its revenues by 1,087 percent from $123,000 in 1998 to $1,460,000 in 2002.

Perseus Development Corporation, a Braintree, Mass., research firm ranks #318 on *Inc.* magazine's annual Inc. 500 ranking of the fastest-growing private companies in the country the list. With five-year sales growth of 559 percent, Perseus is the 21st fastest-growing, privately-held software company in America, according to the list.

Acquisitions

Synovate has acquired **Censydiam** NV, a Belgium research firm employing 170 worldwide. Censydiam will rebrand as Synovate Censydiam, a specialist research division.

Separately, Synovate announced its full acquisition of **Blackstone Market Facts** in India. Synovate had previously held 25 percent ownership of the company. Headquartered in Mumbai, Blackstone Market Facts has 12 offices around the sub-continent.

Paris-based **Ipsos** has acquired **Marketing Metrics** (MMI), a Paramus, N.J., research company specializing in customer relationship and customer satisfaction management (CRM/CSM). CRM/CSM, which will be offered globally under the Ipsos Loyalty brand name in 2004, currently accounts for 8 percent of total Ipsos revenues and is one of the company's five research specializations. The Ipsos Loyalty research division will be headed by Henri Wallard, Paris-based CEO of Ipsos. MMI, which generated close to $10 million in revenues last year, was founded in 1984 by Terry Vavra.

Separately, Ipsos has acquired **Partner Market Research** of Taipei, Taiwan. Partner Market Research, to be named Ipsos Taiwan, will generate revenues of $1 million this year. To reinforce the management team, Ipsos has appointed Alan Chien as general manager of Ipsos Taiwan.

Alliances/strategic partnerships

Techneos Systems Inc., a Vancouver, Canada-based supplier of mobile data collection solutions, has announced that **Trevenque Sistemas de Información** has launched a localized Spanish version of Techneos's Entryware Professional software.

Millward Brown has signed a worldwide licensing agreement with French market modeling agency **Interstat** to use its SAPIENS market mix model. Designed for sales volume forecasting across both packaged goods and business-to-business product categories, the Sapiens model measures sales for an entire product category. It will be marketed by Millward Brown under the CategoryDynamics name.

Association/organization news

Robert L. Barocci has been elected president/CEO of the **Advertising Research Foundation.** Barocci is former president of Leo Burnett International and founder/CEO of McConnaughy Barocci Brown advertising in Chicago.

A new group representing organizations serving the mystery shopping industry has been formed. **The International Mystery Shopping Alliance** (IMSA) will initially offer mystery shopping and related services in 15 European countries, and plans to expand to offer worldwide coverage. The member firms have 33,000 mystery shoppers carrying out more than 300,000 mystery shopping visits annually. The organization's members also offer other services such as customer satisfaction and service auditing systems, incentive loyalty and staff training programs, and

Research Calendar

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on qualitative research on November 5-7 in Venice. For more information visit www.esomar.org.

The Marketing Research Association (MRA) will hold its annual fall education conference and technology forum on November 12-14 at the Wyndham Palace, Orlando, Fla. For more information visit www.mra-net.org.

The Society of Insurance Research will hold its annual conference on November 16-19 at the Don Cesar Hotel, St. Pete Beach, Fla. For more information visit www.sirnet.org.

The Advertising Research Foundation Business Intelligence Forum, in association with the American Association of Advertising Agencies, will take an in-depth look at "Building Brands During Challenging Times" on November 18 at the Marriott Marquis in New York. For more information visit www.thearf.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its Global Cross-Industry Forum, subtitled "Globalization and Concentration — International Research at the Cross Road," on December 3-5 at the Eden Roc Resort & Spa in Miami. For more information visit www.esomar.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold Technovate 2, its worldwide market research technology and innovation conference, on February 1-3 in Barcelona, Spain. For more information visit www.esomar.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its Global Healthcare 4 conference on February 22-24 in Paris. For more information visit www.esomar.org.

consulting. The seven founder members have elected Alex Mahave of ThinkSmart, Spain, as the first president and Harvey Gilbert of ESA in the U.K., as vice president. For more information visit www.theimsa.com.

Awards

Datascension, a Brea, Calif.-based data processing and research firm, has been named Supplier of the Year for Telephone Research Data Collection by Ipsos-Vantis, a division of the Ipsos Group. The award recognizes consistently superior performance in the supply of services to Ipsos-Vantis.

New accounts/projects

Major League Baseball Properties (MLBP) has selected **Scarborough Sports Marketing**, Chicago, for consumer and fan research services. Through the contract, MLBP will utilize Scarborough's Multi-Market database and have access to the sports consumer information that Scarborough measures.

New companies/new divisions/relocations/expansions

San Mateo, Calif.-based **Merrill Research, LLC** has opened an office in Dallas. The new location will be headed by Leslye Geller.

New York-based e-mail list management and brokerage firm **NetCreations** has created a new marketing research division called SurveyDirect.

Product & Service Update

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their lower-middle-class status.

Old Milltowns, No. 57 — With the shrinking of the nation's manufacturing sector, America's once-thriving factory towns have aged, as have their residents. Old Milltowns reflects the decline of these small industrial communities, now filled with retired singles and couples living quietly on fixed incomes. These home-centered residents make up one of the top segments for daytime television.

Claritas segmentation is available on nearly all marketing databases from such providers as ACNielsen, Arbitron, Gallup, IRI, J.D. Power, Mediamark Research Inc., Nielsen Media Research, NFO, NPD, Polk Automotive, Scarborough Research and Simmons Market Research Bureau, plus nearly all major direct mail list providers. For more information visit www.claritas.com.

New scanner from Pearson NCS

Minneapolis-based Pearson NCS has released the OpScan iNSIGHT desktop forms processing scanner. The new scanner combines optical mark recognition (OMR) data collection with the ability to capture images for hand-print and machine-print recognition, as well as the ability to clip and store entire forms or portions of forms, such as demographic information or comments on market research or customer satisfaction surveys.

It can do OMR processing using Pearson NCS' ScanTools II software and is plug-and-play compatible with applications designed for the OpScan scanners.

The addition of Pearson NCS' Image ScanTools software adds new capabilities. The scanner can capture pencil or ink bubble responses plus image clips for items, such as comments, write-ins, signatures and demographic information. Text can be keyed from the images or the images can be assigned a name or code and stored electronically with the OMR data for retrieval. Users also have the option to automatically index and store the entire document electronically. The collection of hand print and machine print data can also be simplified with the addition of the character recognition module. For more information visit www.pearson-ncs.com/scanners/feature.htm.

SPSS updates three products

Chicago-based SPSS Inc. has released new versions of its products mrInterview, mrStudio and mrTables. The products are part of the SPSS Dimensions platform, which offers market researchers an integrated suite of tools for survey design, data collection, data management, analysis and publishing of results. MrInterview 2.0, which features end-to-end online research tools, now features an integrated Web environment for setting up and running projects — from designing and writing the questionnaire, through activation and testing, to analyzing and exporting data. MrStudio 2.0 offers enhanced data processing and project management capabilities. MrTables 2.0 moves its operation from the desktop to a Web browser and adds new features that enable users to create many new variables, run more statistical tests, easily apply global options and sort rows and columns. A new interface, DimensionNet, which underpins mrInterview and mrTables, enables users to manage the Web survey environment by controlling who has access to which projects and their level of interaction. For more information visit www.spss.com.

Software suite for Palm devices

Techneos Systems Inc., a Vancouver, Canada supplier of mobile data collection solutions, has released Techneos Enterprise Solution for Palm Powered handhelds and smartphones. The Techneos Enterprise Solution is a scalable, integrated software suite that allows organizations to design, deploy and manage mobile data collection projects. It supports every current model of Palm Powered handheld or smartphone, and works with a wide range of connectivity methods — including Bluetooth, Wi-Fi (802.11b) and Wide-Area wireless networks. Working in conjunction with Techneos' Entryware Pro software suite, the Techneos Enterprise Solution adds a Web-based project management interface and scalable software components for communication and database management. For more information visit www.techneos.com.

Customer feedback program for snow sports industry

Customers First, a Bethel, Me., information management firm, and Leisure Trends Group, a Boulder, Colo., research firm, have combined two products to create a marketing tool for resorts and retailers in the snow sports industry. The end result is a program that helps both groups find out who their customers are and gathers customer experience feedback. Data Stream, a program of Customers First, captures contact and demographic information from large volumes of customers for follow-up via direct mail and e-mail. Leisure Trends Group provides marketing research services including customer satisfaction surveys so snow sports companies can monitor their products and gather more comprehensive background on customer groups. Data Stream and the customer satisfaction survey have been combined on one form, which is administered throughout the property. Customers can win trips and prizes by completing the form. For more information visit www.leisuretrends.com.

New e-panel data analysis product from Pulse Train

Pulse Train Software Ltd. has debuted iMercury, a new Web-based consumer panel data analysis system, designed for consumer panel service providers and their customers.

IMercury is designed to increase the efficiency of consumer panel service providers' operations and provide service customers with insights into consumer purchase behavior and shopping patterns of selected demographic segments across retail outlet types and competitive brands, varying over time.

In addition to respondent-level purchase case data, iMercury uses the standard demographic attributes of the panel members, plus market-specific information including product groups, product and brand hierarchy, retail outlet information and measurement systems.

IMercury provides information about category and brand penetration, brand loyalty and switching, place of purchase preference, heavy buyer significance and structure, frequency of purchase, purchase volume and expenditure by category and brand, brand share, average expenditure and volume per purchase, etc. For more information visit www.pulsetrain.com.

Briefly...

Norway-based ObjectPlanet has released version 4.1.1 of its **Opinio survey application**. Opinio is platform-independent. It runs on Windows (all versions) and Linux. Mac OS, Solaris and other Unix variants will be supported soon. This upgrade adds improvements to report-filtering capabilities. For more information visit www.objectplanet.com/opinio/.

The Media Network, Inc. has opened a **new focus group facility** in Silver Spring, Md. The TMN Market Research Center will specialize in market research for multicultural populations, particularly Hispanics. For more information visit www.themedianetwork.com.

Reposition Inc., an Old Lyme, Conn., marketing firm, has launched **yourfocusgroup.com**, an online application that allows companies to perform customer feedback evaluations on their marketing efforts as well as their competitors. For more information visit www.yourfocusgroup.com.

Provo, Utah-based data collection company Western Wats has selected SPSS Inc.'s CATI and Telephony System. This will allow Western Wats to **offer Quancept CATI powered by a QTS dialer** to a broader range of clients who use SPSS to program their surveys. As part of the 50-seat installment in its Lethbridge, Alberta interviewing facility, Western Wats can now offer CATI services to SPSS' customer base on an outsource basis.

Cincinnati-based Burke Inc. has introduced SEGUE, a new **proprietary market segmentation method**. With SEGUE, Burke combines information from both customer attitudes and demographic profiles to more accurately predict how potential buyers will respond to marketing efforts. For more information visit www.burke.com.

Sawtooth Software has added a **new look and new features to its Web site** at www.sawtoothsoftware.com. Visitors can download and read technical/white papers; read about new product updates; search a list of firms and consultants offering services using Sawtooth software; install demo software; and use training materials (.PPT and .PDF files) for teaching conjoint analysis.

Bacon's Information, a provider of media research, distribution, monitoring and evaluation services, has opened a new **broadcast monitoring service for the Chicago market**.

Chapel Hill, N.C.-based FGI Research has **expanded its online research panel** to over four million individuals in 1.5 million households. The online panel, marketed under the SmartPanel brand, includes U.S. and international consumers, and an array of demographic, lifestyle and consumer preferences.

Separately, FGI announced the **availability of Yankelovich MONITOR MindBase** as an extension of its custom research and omnibus solutions. FGI Research will offer MONITOR MindBase, an attitudinal and lifestyle segmentation developed by Yankelovich, to its online research panel clients. For more information visit www.fgiresearch.com.

Qualitatively Speaking

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background on the study: secondary research findings, why the company is interested in this business, its position in the market, current hypotheses and goals.

• Build continuity with your qualitative suppliers. Make them part of your team. Subsequent segments of a continuing investigation should proceed smoothly as a result of initial investments.

3. Manage the study, don't shadow it. Consider this scenario for basic, bread-and-butter qualitative studies:

— Day 1 of interviewing: brief the interviewer thoroughly before the interviews and stay for the first group or for the first few individual interviews. Then go back to the office for the rest of the day and address other tasks.

— Alternatively, check in by telephone to make sure the process is going well. Ask specific questions that go to both content and form. Perhaps convene at the end of the interviews for a debriefing.

— Subscribe to a service that allows you to watch interviews online. Periodically monitor the process.

In a quantitative project you wouldn't parallel the person conducting the study, watching his/her every move. Qualitative research that involves a moderator who has truly internalized the issues will thrive even without hands-on management.

Note that some of the foregoing assumes that you are doing research locally, which you should probably be doing anyway since the right respondents can be recruited in most major cities. That is, a champion, or a user, of your products is a user if she/he lives in Chicago or Atlanta or Denver. Save geographical dispersion for a later quantitative study.

4. Make the most of a qualitative study in which you do actively participate. For those critical, high-profile "launching" studies, make sure that key people are there, in the back room. Engage observers so tat they are active participants via back room active listening techniques.

But also make sure everyone is not simply "bearing witness," but also participating in team discussions. Schedule debrief meeting times between groups for the team to discuss learning, and also to make changes to the stimulus or interviewing flow, as needed. In other words, make the day one that meaningfully advances the study and the goals of the corporation. That is ultimately the best way to be respectful of team members' time.

Make distinctions

In sum, qualitative research studies should not, like Pac Man of years ago, have to gobble your time in order to produce useful outcomes. Because not all qualitative studies are created equal, it is smart to make distinctions and be judicious with your time. Don't micro-manage your study. Instead, form a bond with a group of qualitative professionals and be confident that they can act independently as your agents.

Data Use

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the market research world. In fact, it encompasses any number of techniques — formal and otherwise — that can be used to cluster respondents or consumers into marketable groups.

I prefer to apply a Q-factor. This technique uses a principal components analysis — more commonly known as a factor analysis — to determine underlying behavioral structures in those attributes included in the analysis. In simpler terms, factor analysis creates "families" of attributes that tend to be rated near the same level.

Figure 1

	Dependability/Protection	Price	Environment	Performance
That the fuel protects your engine	0.84	0.07	0.13	0.16
That the fuel has a consistent and reliable quality	0.82	0.13	0.18	0.22
That the fuel prolongs the engine life of your car	0.76	0.15	0.19	0.13
That the fuel adds power to the engine	0.66	0.08	0.02	0.37
That the fuel has a higher octane level	0.63	0.25	0.16	0.06
That the fuel has a competitive price	0.23	0.76	0.13	-0.01
That the fuel has a low price	0.01	0.74	0.08	0.11
That the fuel gives the best mileage	0.19	0.52	0.06	0.33
That the fuel reduces other costs in the operation of your car	0.43	0.52	0.08	0.35
That the fuel does not pollute the air	0.20	0.10	0.92	0.10
That the use of the fuel does not damage the environment	0.22	0.17	0.89	0.16
That the fuel helps your car to accelerate better	0.35	0.08	0.02	0.75
That the fuel helps your car run more smoothly	0.10	0.17	0.27	0.71

Figure 2

	Respondents in Category	Percentage of Sample
Dependability/Protection	77	12.8
Price	407	67.8
Environment	55	9.2
Performance	61	10.2
Total	600	100

Our survey contained a section in which respondents are asked to rate the importance of 13 gasoline attributes. The factor analysis (Figure 1) grouped those 13 attributes into the families mentioned above.

After the factor analysis, SPSS software creates four new variables. Each respondent receives a factor score for each of the variables. He is then assigned to the one where his score is the highest. The segments are named according to the importance ratings contained in the division (Figure 2).

Not surprisingly, more than two-thirds of respondents clustered into the Price segment. Gasoline is a highly price elastic business and the biggest issue on people's mind when they pull up to the station is price.

The Q-factor segmentation was only the first step in the search to find our payers. Now that we have the respondents in four groups, we want to know what they will spend for gasoline.

In the next section of the survey, respondents were asked, "How much more are you willing to pay?" across a series of gasoline attributes. It is by comparing each of the four segments above that we will be able to find our target audience.

Naturally, the largest group, the Price segment, were not amongst the biggest payers.

Though our cluster analysis yielded four segments, our target group consists of two of those segments combined — Dependability/Protection and Environment (Figure 3). These two groups are willing to consistently pay more for gasoline. Together they

Figure 3: How Much More Are You Willing to Pay Per Liter?

	Dependability/Protection	Price	Environment	Performance
A fuel that prolongs the life of your car	4.44	3.05	4.37	3.66
A fuel that provides added power to the engine	4.35	3.09	4.2	3.43
A fuel that has consistent and reliable quality	4.27	2.97	4.06	3.30
A high technology fuel engineered to perfectly meet the requirements of today's car engines	4.23	2.91	3.91	3.40
A cleaner burning fuel that ensures maximum performance from my car	4.14	3.03	4.31	3.44
A fuel that gives better fuel economy	4.10	2.91	3.83	3.39
A cleaner and purer fuel reducing exhaust emissions (pollution) into the environment	3.96	2.85	3.91	3.29
A fuel that gives my engine extra pick-up/acceleration	3.51	2.72	3.44	3.40
A gentle fuel that better protects my car's engine	3.29	2.71	3.73	3.21
A fuel that enables my engine to run more smoothly	2.96	2.59	3.27	3.40
Average Pay More Per Liter	**3.93**	**2.88**	**3.90**	**3.39**

Figure 4: Sociodemographic Characteristics

	Payers	Price/Performance
Average Age	38	38
Median Annual Income	$32,000	$28,600
Percent Attended College	54%	46 %
Percent Married	63%	62%
Percent Prefer to Pay Cash	86%	88%
Male	67%	65%
Female	33%	35%
Percent Premium Gas	56%	39%
Percentage Use Client Company	54%	47%

Figure 5: Psychographic Information
Top Box (4 5) Percentages

	Payers	Price/ Performance
I am a responsible person	98	98
I have a very busy lifestyle	93	87
I am prepared to pay more for services and products of high quality	**82**	58
I like to buy well known brands	75	77
I like to try new things	**74**	56
I like exciting things	**63**	56
I have a varied lifestyle	57	63
I enjoy relaxing without doing anything	55	57
Material possessions make me feel good	50	60
I am a person that sticks to what I know	47	58
I do not like to go shopping	39	33
I am always looking for the least expensive products	28	45

Figure 6: Key Automobile Self-Description
Top Box (4 5) Percentages

	Payers	Price/ Performance
I always have confidence in my own ability to drive	97	97
I rely very much on my vehicle to help me look after my family	92	92
Life without a car is inconceivable	89	87
I give my car maintenance regularly	**87**	82
I am willing to pay more for a fuel that provides better car performance	**86**	74
There are certain brands of fuel that are more reliable than others	82	75
I do not mind paying a bit more for a brand of fuel I trust	**80**	65
Some brands of fuel are better for my vehicle than others	79	82

make up 22 percent of the total sample.

When combined and tallied, our group is willing to pay, on average, 1¢ per liter, or 4¢ more per gallon. Given the size of the gasoline market, that is a sizable chunk and a target for aggressive communication. We will call these people the Payers.

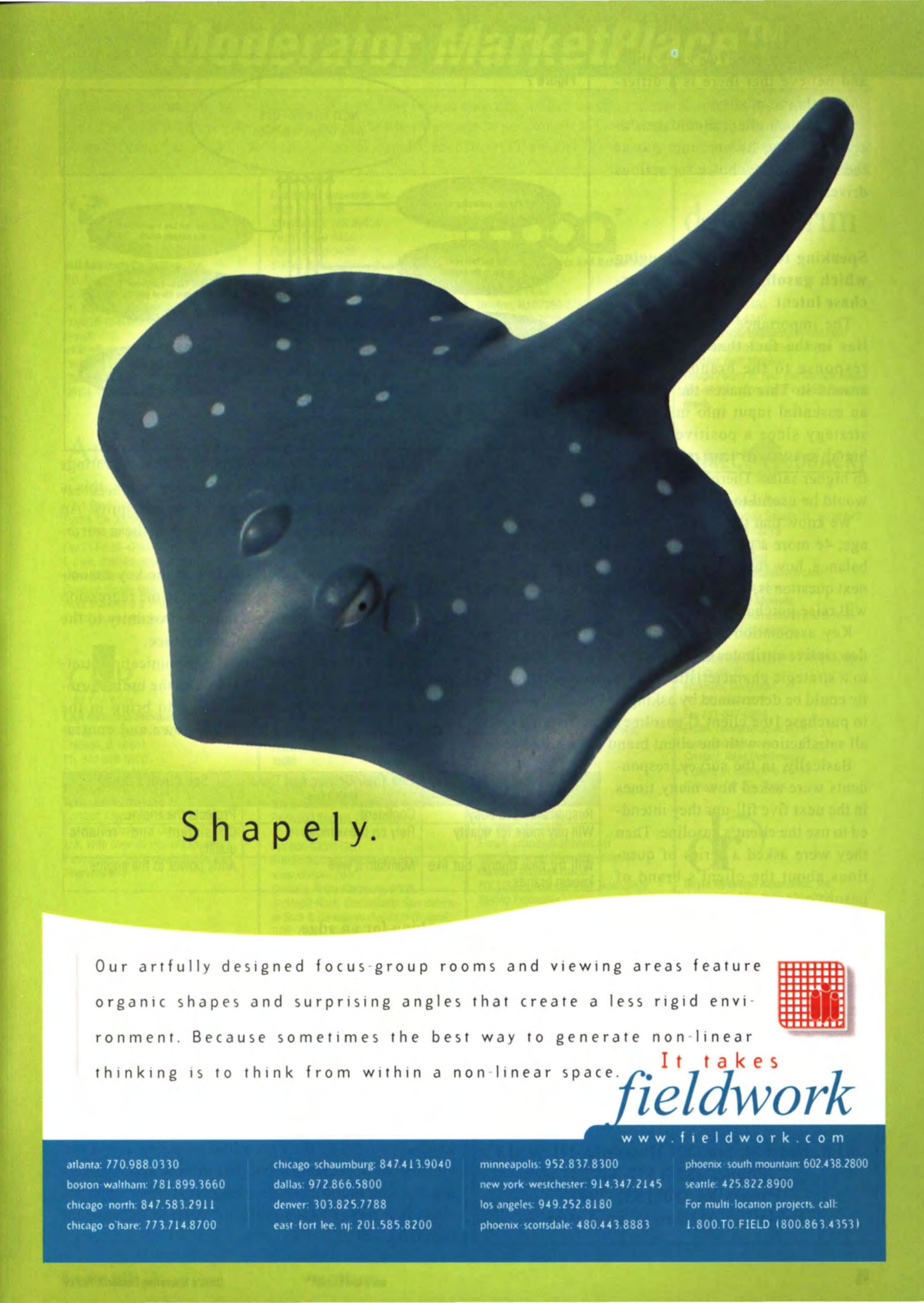
Who are the Payers?

A run across demographics gives us an idea of who these people are. The target group is better educated, has higher income, and not surprisingly, has a significantly higher usage of premium gasoline. This bodes well for the communication effort, as many of these Payers will not have to be persuaded to move to a higher priced gasoline. Also, more than half (54 percent) already use the client's gasoline. Again, it is easier to retain a customer than to attract a new one.

Most importantly, the investigation into what they want from a gasoline yields the clues on how to speak to these people.

The Payers are for the most part responsible, busy people, who buy well-known brands. What most distinguishes them from the rest of the pack is that they will pay more for quality and are willing to try exciting, new things.

Payers are confident drivers who cannot live without their cars. They maintain their automobiles well, are


Shapely.
Our artfully designed focus-group rooms and viewing areas feature organic shapes and surprising angles that create a less rigid environment. Because sometimes the best way to generate non-linear thinking is to think from within a non-linear space.
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willing to pay more (we know this), and believe that there is a difference in brand quality.

Perhaps our client should consider positioning its premium gas as the quality, new choice for serious drivers.

Speaking to the Payers: gauging which gasoline uses drive purchase intent

The importance of brand image lies in the fact that consumers' response to the brand revolves around it. This makes the concept an essential input into marketing strategy since a positive, strong brand image will lead presumably to higher sales. There are a number of approaches that would be useful to the client's brand managers.

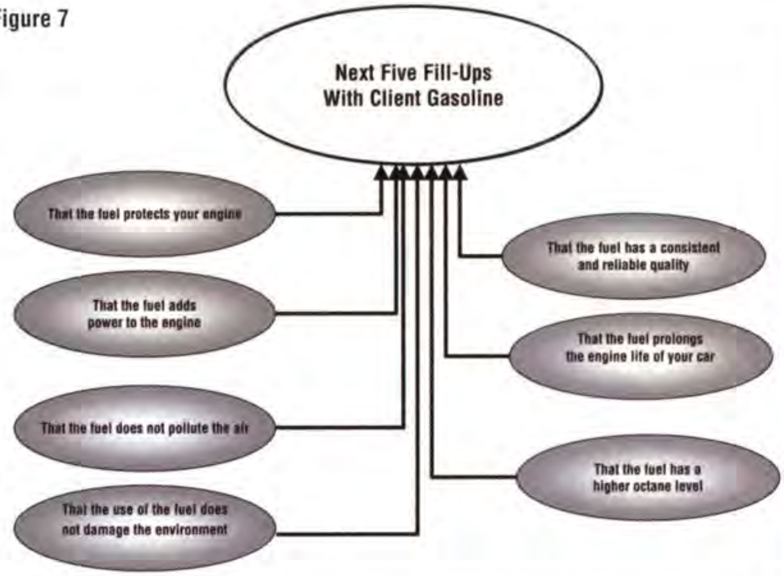
We know that the Payers are willing to pay, on average, 4¢ more a gallon. We know who they are and, on balance, how they view themselves and their cars. The next question is, what characteristics of a gasoline brand will raise purchase intent?

Key association analysis measures the strength of descriptive attributes or performance ratings in relation to a strategic characteristic. The strategic characteristic could be determined by asking, "How likely are you to purchase [the client's] gasoline?," or gauging overall satisfaction with the client brand of gasoline.

Basically, in the survey, respondents were asked how many times in the next five fill-ups they intended to use the client's gasoline. Then they were asked a series of questions about the client's brand of gasoline (as well as performance ratings of key competitors).

Using the "next five purchases" as the dependent variable, and the client's brand performance ratings as the independent variables, we run a key association regression (Figure 7) to see which performance ratings are driving purchase intent. In marketing terms, this is brand image and is also known as brand equity. An effective communication effort is based on these attributes.

Figure 7



The client brand attributes shown in the key association map are those that are significant in the regression (i.e., they influence purchase intent). Proximity to the top bubble gives their order of importance.

When designing the final brand communication strategy, all of the above come into play. In the brainstorming sessions to design the campaign to bring in the Payers, the chart below should be shown and considered.

See Themselves	See Their Driving and Their Vehicles	See Client's Brand
Responsible and busy	Confident	Protects the engine
Will pay more for quality	Rely on the vehicle	Consistent and reliable quality
Will try new things, but like known brands	Maintain it well	Adds power to the engine

Looking for an edge

These days brand managers are looking for an edge. They are turning more and more to the marriage of good research and advertising know-how to get there.

The above mix of methods — cluster analysis, simple top box rankings, and regression — is the process by which value is added to the client/agency relationship, one that fuses solid research with advertising savvy. The strategic focus of any advertiser's effort on behalf of a client is to intensify the relationship of its loyal customers to their premium products. However, the process of segmentation, data mining and uncovering existing brand equities may reveal other opportunities that represent a significant volume increase for the client.

Moderator MarketPlace™

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

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C&R Research Services, Inc.
Insight Research Associates
Primary Insights, Inc.

SMALL BUSINESS/ ENTREPRENEURS
FOCUSED Marketing Research, Inc.

SOFT DRINKS, BEER, WINE
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Focus Latino
FOCUSED Marketing Research, Inc.
Jay L. Roth & Associates, Inc.

SPORTS
FOCUSED Marketing Research, Inc.
Pamela Rogers Research, LLC

STRATEGY DEVELOPMENT
Primary Insights, Inc.

TEACHERS
Market Navigation, Inc.
PRYBYL Group, Inc.

TEENAGERS
C&R Research Services, Inc.
Doyle Research Associates, Inc.
Fader & Associates
Focus Latino
Insight Research Associates

TELECOMMUNICATIONS
Daniel Associates
In-Depth: Technology Market Rsch.
Insight Research Associates
Knowledge Systems & Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
MCC Qualitative Consulting
The Research Department
Jay L. Roth & Associates, Inc.
Synovate

TELECONFERENCING
Cambridge Research, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.

TELEPHONE FOCUS GROUPS
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Doyle Research Associates, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.
MedProbe, Inc.
Millennium Research, Inc.

TOURISM/HOSPITALITY
Fine Research & Marketing, Inc.

TOYS/GAMES
C&R Research Services, Inc.
Fader & Associates
PRYBYL Group, Inc.

TRAVEL
Cambridge Associates, Ltd.
Fine Research & Marketing, Inc.
FOCUSED Marketing Research, Inc.
PRYBYL Group, Inc.

UTILITIES
Cambridge Associates, Ltd.
Knowledge Systems & Research, Inc.
Jay L. Roth & Associates, Inc.

VETERINARY MEDICINE
FOCUSED Marketing Research, Inc.

WEALTHY
Leichliter Ascts. Mkt. Rsch/Idea Dev.

YOUTH
C&R Research Services, Inc.
Zebra Strategies

QUIRK'S Marketing Research Review

2003 Mall Research Facilities Directory

This directory was developed by mailing forms to firms that we identified as operating permanent mall interviewing facilities. For your convenience, 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. For more contact information on these firms please visit the online version of the Mall Research Facilities Directory at www.quirks.com.

CODES

Income levels of mall customers
H - high-income (+$60,000/yr.)
M - middle-income ($30,000-$60,000/yr.)
L - low-income (under $30,000/yr.)

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

For more contact information on these firms consult the online version of this directory at www.quirks.com.

Alabama

Birmingham

Graham & Associates, Inc.
Century Plaza
Ph. 205-443-5399
Income: H-20% M-50% L-30%
Stations: 6 Features: C K P O

Gadsden

Graham & Associates, Inc.
Gadsden Mall
Ph. 205-443-5399
Income: H-25% M-50% L-25%
Stations: 5 Features: C K

Huntsville

Graham & Associates, Inc.
Madison Square Mall
Ph. 205-443-5399
Income: H-50% M-30% L-20%
Stations: 5 Features: C K P O

Mobile

Graham & Associates, Inc.
Bel Air Mall
Ph. 334-251-0059
Income: H-30% M-35% L-35%
Stations: 6 Features: C K P O

Montgomery

Nolan Research
Eastdale Mall
Ph. 334-284-4164
Income: H-30% M-60% L-10%
Stations: 5 Features: C P

Arizona

Phoenix

C & C Market Research, Inc.
Arrowhead Towne Center
Ph. 479-785-5637
Income: H-45% M-30% L-25%
Stations: 7 Features: C K P O

Car-Lene Research, Inc.
Arizona Mills Mall
Ph. 480-839-4606
Income: H-20% M-50% L-30%
Stations: 6 Features: C K P O

Creative Consumer Research
Fiesta Mall
Ph. 480-649-3747
Income: H-20% M-60% L-20%
Stations: 4 Features: C K P O

Cunningham Field & Research Service
Metro Center Mall
Ph. 386-677-5644
Income: H-10% M-70% L-20%
Stations: 8 Features: C K P O

Friedman Marketing Services
Desert Sky Mall
Ph. 623-849-8080
Income: H-25% M-50% L-25%
Stations: 14 Features: C K P O

Friedman Marketing Services
Paradise Valley Mall
Ph. 602-494-7813
Income: H-50% M-25% L-25%
Stations: 10 Features: C K P O

Friedman Marketing Services
Spectrum Mall
Ph. 602-242-4868
Income: H-30% M-50% L-20%
Stations: 11 Features: C K P O

Quick Test/Heakin
Superstition Springs Center
Ph. 480-985-2866
Income: H-3% M-37% L-60%
Stations: 7 Features: C K P O

Tucson

Car-Lene Research, Inc.
Tucson Mall
Ph. 520-292-0966
Income: H-24% M-40% L-36%
Stations: 8 Features: C K P O

Arkansas

Fort Smith

C & C Market Research, Inc.
Central Mall
Ph. 479-785-5637
Income: H-40% M-50% L-10%
Stations: 8 Features: C K P O

California

Bakersfield

Reyes Research
East Hills Mall
Ph. 661-872-4433
Income: H-30% M-40% L-30%
Stations: 6 Features: C K P O

Fresno

Bartels Research Corp.
Ph. 559-298-7557
Income: H-10% M-75% L-15%
Stations: 6 Features: C K P O

Los Angeles

(See also Orange County)

Adept Research, Inc.
Sherman Oaks Fashion Square
Ph. 818-727-7494
Income: H-60% M-35% L-5%
Stations: 6 Features: C K

Car-Lene Research, Inc.
Puente Hills Mall
Ph. 626-964-4589
Income: H-20% M-50% L-30%
Stations: 6 Features: C K P O

Consumer Pulse of Los Angeles
Galleria at South Bay
Ph. 310-371-5578
Income: H-25% M-50% L-25%
Stations: 9 Features: C K P O

Cunningham Field & Research Service
Northridge Fashion Center
Ph. 386-677-5644
Income: H-40% M-30% L-30%
Stations: 5 Features: C K P O

Facts 'n Figures
Antelope Valley Mall
Ph. 661-272-4888
Income: H-20% M-70% L-10%
Stations: 8 Features: C K P O

Facts 'n Figures
Panorama Mall
Ph. 818-891-6779
Income: H-30% M-50% L-20%
Stations: 12 Features: C K P O

Facts 'n Figures
Valencia Town Center Mall
Ph. 661-222-2278
Income: H-40% M-40% L-20%
Stations: 12 Features: C K P O

Friedman Marketing Services
Stonewood Center Mall
Ph. 562-861-9392
Income: H-40% M-40% L-20%
Stations: 6 Features: C K P O

L.A. Research, Inc.
Ph. 818-993-5500
Income: H-30% M-50% L-20%
Stations: 7 Features: C P O

Los Angeles Marketing Research Associates
Victory Plaza Mall
Ph. 818-506-5544
Income: H-40% M-40% L-20%
Stations: 6 Features: K P

Mid-America Research
Santa Monica Place
Ph. 310-260-3237
Income: H-25% M-70% L-5%
Stations: 25 Features: C K P O

Barbara Nolan Market Research
Montclair Plaza
Ph. 800-240-6119
Income: H-25% M-50% L-25%
Stations: 8 Features: C K P O

PKM Research Services, Inc.
The Plaza at West Covina Mall
Ph. 626-856-3883
Income: H-20% M-45% L-35%
Stations: 6 Features: C P O

Suburban Associates
Media City Center Mall
Ph. 818-563-5360
Income: H-20% M-60% L-20%
Stations: 10 Features: C P

Orange County

Quick Test/Heakin
Santa Ana/Mainplace
Ph. 714-547-8300
Income: H-33% M-34% L-33%
Stations: 10 Features: C K P O

Palm Springs

North American Insights - Los Angeles
Palm Desert Town Center
Ph. 708-747-1100 ext. 11
Income: H-32% M-38% L-30%
Stations: 11 Features: C K P O

San Bernardino/ Riverside

Car-Lene Research, Inc.
Ontario Mills Mall
Ph. 909-481-7666
Income: H-35% M-45% L-20%
Stations: 4 Features: C K P O

Car-Lene Research, Inc.
The Promenade Mall
Ph. 909-296-0606
Income: H-35% M-45% L-20%
Stations: 5 Features: C K P O

Quick Test/Heakin
Galleria at Tyler
Ph. 909-637-1100
Income: H-25% M-55% L-20%
Stations: 12 Features: C K P O

Quick Test/Heakin
Moreno Valley Mall
Ph. 909-653-3200
Income: H-24% M-46% L-30%
Stations: 10 Features: C K P O

San Diego

Friedman Marketing Services
Plaza Camino-Real
Ph. 760-730-4577
Income: H-60% M-30% L-10%
Stations: 6 Features: C K P O

Jagorda Interviewing Services
Plaza Bonita Mall
Ph. 858-573-0330
Income: H-23% M-33% L-44%
Stations: 8 Features: C K P

Luth Research
Mission Valley Center Mall
Ph. 619-299-7487
Income: H-30% M-50% L-20%
Stations: 9 Features: C K P O

Quick Test/Heakin
Parkway Plaza
Ph. 619-444-7700
Income: NA
Stations: 6 Features: C K P O

San Francisco Bay/ San Jose Area

Car-Lene Research, Inc.
Stonestown Galleria
Ph. 415-566-9925
Income: H-44% M-36% L-20%
Stations: 6 Features: C K P O

Cunningham Field & Research Service
New Park Mall
Ph. 386-677-5644
Income: H-30% M-50% L-20%
Stations: 5 Features: C K P O

Cunningham Field & Research Service
Santa Rosa Plaza
Ph. 386-677-5644
Income: H-40% M-40% L-20%
Stations: 5 Features: C K P O

Field Management Associates-San Francisco
Great Mall
Ph. 408-719-9800
Income: H-30% M-50% L-20%
Stations: 7 Features: C K P O

Friedman Marketing Services
Northgate Mall
Ph. 415-472-5394
Income: H-50% M-40% L-10%
Stations: 13 Features: C K P O

North American Insights - San Francisco
Solano Mall
Ph. 708-747-1100 ext. 11
Income: H-35% M-40% L-25%
Stations: 10 Features: C K P O

Quick Test/Heakin
Southland Mall
Ph. 510-785-4650
Income: H-5% M-20% L-75%
Stations: 9 Features: C K P O

Quick Test/Heakin
West Valley Mall
Ph. 209-839-0532
Income: H-20% M-75% L-5%
Stations: 11 Features: C K P O

Ventura/Santa Barbara

Reyes Research
Ph. 805-278-1444
Income: H-25% M-40% L-35%
Stations: 10 Features: C K P O

Colorado

Boulder

Car-Lene Research, Inc.
Twin Peaks Mall
Ph. 303-682-0131
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P O

CODES

Income levels of mall customers
H - high-income (+$60,000/yr.)
M - middle-income ($30,000-$60,000/yr.)
L - low-income (under $30,000/yr.)

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

For more contact information on these firms consult the online version of this directory at www.quirks.com.

Colorado Springs

Consumer Pulse of Colorado Springs
The Citadel Mall
Ph. 719-596-6933
Income: H-25% M-55% L-20%
Stations: 8 Features: C K P

Barbara Nolan Market Research
Chapel Hill Mall
Ph. 800-240-6119
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P O

The Springs Research
Ph. 719-597-9869
Income: H-26% M-40% L-34%
Stations: 8 Features: C K P O

Denver

C & C Market Research, Inc.
Westminster Mall
Ph. 479-785-5637
Income: NA
Stations: NA

Car-Lene Research, Inc.
Colorado Mills Mall
Ph. 303-279-2199
Income: H-23% M-65% L-12%
Stations: 7 Features: C K P O

Cunningham Field & Research Service
Flat Iron Crossing
Ph. 386-677-5644
Income: H-20% M-40% L-40%
Stations: 4 Features: C K P O

Friedman Marketing Services
Southwest Plaza Mall
Ph. 303-972-8734
Income: H-40% M-40% L-20%
Stations: 10 Features: C K P O

Connecticut

Hartford

Firm Facts Interviewing
Bristol Center Mall
Ph. 203-375-4666
Income: H-25% M-55% L-20%
Stations: 4 Features: C K P

Performance Plus
Westfield Shopping Town Enfield
Ph. 508-872-1287
Income: H-40% M-40% L-20%
Stations: 8 Features: C K P O

New Haven

Quick Test/Heakin
Westfield Shopping Town
Ph. 203-639-8100
Income: H-20% M-60% L-20%
Stations: 4 Features: C K P O

Shapiro Research Services, Inc.
Trumbull Shopping Park
Ph. 203-373-9391
Income: H-20% M-60% L-20%
Stations: 6 Features: C K P O

Waterbury

Cunningham Field & Research Service
Brass Mill Center
Ph. 386-677-5644
Income: H-20% M-30% L-50%
Stations: 5 Features: C K P O

District of Columbia

C & C Market Research, Inc.
Spotsylvania Mall, Bellvue Center
Ph. 479-785-5637
Income: NA
Stations: 5 Features: C K P O

Car-Lene Research, Inc.
Potomac Mills Mall
Ph. 703-497-4444
Income: H-25% M-45% L-30%
Stations: 4 Features: C K P O

Cunningham Field & Research Service
Springfield Mall
Ph. 386-677-5644
Income: H-20% M-70% L-10%
Stations: 4 Features: C K P O

Barbara Nolan Market Research
Ballston Common Mall
Ph. 800-240-6119
Income: H-45% M-40% L-15%
Stations: 6 Features: C K P O

Florida

Daytona Beach

Cunningham Field & Research Service
Volusia Mall
Ph. 386-677-5644
Income: H-10% M-70% L-20%
Stations: 6 Features: C K P O

Fort Lauderdale

Car-Lene Research, Inc.
Broward Mall
Ph. 954-476-6840
Income: H-25% M-35% L-40%
Stations: 6 Features: C K P O

Car-Lene Research, Inc.
Sawgrass Mills Mall
Ph. 954-838-7172
Income: H-15% M-60% L-25%
Stations: NA Features: C K P O

Carolana Research
Oakbrook Mall
Ph. 954-741-2234
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P O

Mars Research
Fashion Mall at Plantation
Ph. 954-755-2805
Income: H-60% M-30% L-10%
Stations: 8 Features: C P

Jacksonville

Consumer Pulse of Jacksonville
Regency Square Mall
Ph. 904-723-3322
Income: H-20% M-60% L-20%
Stations: 8 Features: C K P

Cunningham Field & Research Service
Orange Park Mall
Ph. 386-677-5644
Income: H-20% M-70% L-10%
Stations: 8 Features: C K P O

Quick Test/Heakin
The Avenues Mall
Ph. 904-363-1480
Income: H-20% M-43% L-37%
Stations: 12 Features: C K P

Melbourne

Quick Test/Heakin
Melbourne Square Mall
Ph. 321-729-9809
Income: H-30% M-50% L-20%
Stations: 10 Features: C K P O

Miami

Cunningham Field & Research Service
Pembroke Lakes Mall
Ph. 386-677-5644
Income: H-30% M-50% L-20%
Stations: 6 Features: C K P O

Miami Market Research, Inc.
Ph. 305-666-7010
Income: H-30% M-50% L-20%
Stations: 10 Features: C K

Quick Test/Heakin
Miami International Mall
Ph. 305-591-1388
Income: H-30% M-60% L-10%
Stations: 11 Features: C K P O

Orlando

Car-Lene Research, Inc.
West Oaks Mall
Ph. 407-298-6668
Income: H-36% M-25% L-39%
Stations: 6 Features: C K P O

Cunningham Field & Research Service
Florida Mall
Ph. 386-677-5644
Income: H-30% M-60% L-10%
Stations: 5 Features: C K P O

Barbara Nolan Market Research
Altamonte Mall
Ph. 800-240-6119
Income: H-60% M-30% L-10%
Stations: 10 Features: C K P O

Barbara Nolan Market Research
Oviedo Marketplace
Ph. 800-240-6119
Income: H-50% M-40% L-10%
Stations: 8 Features: C K P O

Barbara Nolan Market Research
Seminole Town Center
Ph. 800-240-6119
Income: H-50% M-40% L-10%
Stations: 8 Features: C K P O

Quick Test/Heakin
Lake Square Mall
Ph. 352-365-0505
Income: H-9% M-28% L-63%
Stations: 6 Features: C K O

Sarasota

Mid-America Research
De Soto Square
Ph. 941-746-1849
Income: H-12% M-78% L-10%
Stations: 12 Features: C K P O

Tallahassee

Friedman Marketing Services
Tallahassee Mall
Ph. 850-385-4399
Income: H-25% M-50% L-25%
Stations: 7 Features: C K P O

Tampa/St. Petersburg

Adam Market Research, Inc.
University Mall
Ph. 813-875-4005
Income: H-25% M-40% L-35%
Stations: 7 Features: K P

C & C Market Research, Inc.
Lakeshore Mall
Ph. 479-785-5637
Income: H-45% M-45% L-10%
Stations: 8 Features: C K P O

Cunningham Field & Research Service
Brandon Towne Center
Ph. 386-677-5644
Income: H-10% M-80% L-10%
Stations: 5 Features: C K P O

Gulf View Research, LLC
Eagle Ridge Mall
Ph. 800-357-8842
Income: H-34% M-49% L-17%
Stations: 6 Features: C K P O

North American Insights - Tampa Bay
Ph. 708-747-1100 ext. 11
Income: H-25% M-49% L-26%
Stations: 12 Features: C K P O

Quick Test/Heakin
Citrus Park Town Center Mall
Ph. 813-926-3222
Income: H-30% M-60% L-10%
Stations: 7 Features: C K P O

Quick Test/Heakin
Gulf View Square Mall
Ph. 727-847-2222
Income: H-10% M-30% L-60%
Stations: 6 Features: P

Suburban Associates
Lakeland Square Mall
Ph. 863-858-9639
Income: H-10% M-70% L-20%
Stations: 10 Features: C K P

West Palm Beach

Quick Test/Heakin
Boynton Beach Mall
Ph. 561-733-8998
Income: H-34% M-56% L-10%
Stations: 10 Features: C K P O

Georgia

Athens

C & C Market Research, Inc.
Georgia Square Mall
Ph. 479-785-5637
Income: NA
Stations: 5 Features: C K P O

Atlanta

Car-Lene Research, Inc.
Arbor Place Mall
Ph. 770-577-5414
Income: H-43% M-32% L-25%
Stations: 4 Features: C K P O

Car-Lene Research, Inc.
Discover Mills
Ph. 678-847-5737
Income: H-37% M-46% L-17%
Stations: NA Features: C K P O

Car-Lene Research, Inc.
Perimeter Mall
Ph. 770-730-0622
Income: H-75% M-20% L-5%
Stations: 6 Features: C K P O

Cunningham Field & Research Service
North Point Mall
Ph. 386-677-5644
Income: H-35% M-55% L-10%
Stations: 7 Features: C K P O

Cunningham Field & Research Service
The Malls at Stonecrest
Ph. 386-677-5644
Income: H-30% M-40% L-30%
Stations: 6 Features: C K P O

Mid-America Research
Lenox Square Mall
Ph. 404-261-8011
Income: H-32% M-58% L-10%
Stations: 24 Features: C K P O

Mid-America Research
Northlake Mall
Ph. 770-493-1403
Income: H-25% M-60% L-5%
Stations: 12 Features: C K P O

Barbara Nolan Market Research
Town Center at Cobb
Ph. 678-581-1393
Income: H-55% M-45% L-15%
Stations: 15 Features: K P O

Quick Test/Heakin
Gwinnett Place Mall
Ph. 770-476-0714
Income: H-34% M-37% L-29%
Stations: 10 Features: C K P O

CODES

Income levels of mall customers
H - high-income (+$60,000/yr.)
M - middle-income ($30,000-$60,000/yr.)
L - low-income (under $30,000/yr.)

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

For more contact information on these firms consult the online version of this directory at www.quirks.com.

Gainesville

Quick Test/Heakin
Mall of Georgia
Ph. 770-831-5099
Income: H-25% M-46% L-29%
Stations: 10 Features: C K P O

Idaho

Boise

Consumer Opinion Services
We answer to you

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: 10 Features: C K P
(See advertisement on p. 97)

Illinois

Chicago

Bryles Research, Inc.
Ph. 708-478-3333
Income: H-30% M-60% L-10%
Stations: 12 Features: C K P O

Bryles Research, Inc.
Northfield Square Mall
Ph. 815-937-8822
Income: H-10% M-70% L-20%
Stations: 10 Features: C K P O

Car-Lene Research, Inc.
Lincolnwood Town Center
Ph. 847-679-4470
Income: H-37% M-17% L-46%
Stations: 6 Features: C K P O

Consumer Opinion Services
We answer to you

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 Features: C K P O
(See advertisement on p. 97)

Consumer Pulse of Chicago
Stratford Square Mall
Ph. 630-894-9103
Income: H-30% M-50% L-20%
Stations: 10 Features: 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 Features: C K P O
(See advertisement on p. 91)

Consumer Surveys Co.
730 Chicago Ridge Mall
Chicago Ridge, IL 60415
Ph. 847-394-9411
Fax 847-394-0001
E-mail: consumersurveys1@aol.com
Deanna Kohn, Nat'l. Field Director
Income: H-32% M-48% L-32%
Stations: 5 Features: C K P O
(See advertisement on p. 91)

Cunningham Field & Research Service
Gurnee Mills Mall
Ph. 386-677-5644
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P O

Cunningham Field & Research Service
Lincoln Mall
Ph. 386-677-5644
Income: H-20% M-80% L-0%
Stations: 6 Features: C K P O

Mid-America Research
Orland Square Mall
Ph. 708-349-0888
Income: H-27% M-60% L-13%
Stations: 12 Features: C K P O

Mid-America Research
Randhurst Center
Ph. 847-392-9770
Income: H-33% M-52% L-15%
Stations: 20 Features: C K P O

Mid-America Research
Yorktown Shopping Center
Ph. 630-827-1516
Income: H-65% M-35% L-0%
Stations: NA Features: C K P O

Barbara Nolan Market Research
Charlestowne Mall
Ph. 800-240-6119
Income: H-25% M-60% L-15%
Stations: 6 Features: C K P O

Quick Test/Heakin
Golf Mill Center
Ph. 847-824-6550
Income: H-22% M-65% L-13%
Stations: 10 Features: C K P O

Quick Test/Heakin
Louis Joliet Mall
Ph. 815-439-2053
Income: H-34% M-39% L-27%
Stations: 8 Features: C K P O

Quick Test/Heakin
Spring Hill Mall
Ph. 847-426-8099
Income: H-18% M-50% L-32%
Stations: 8 Features: C K P O

The Research Group, Inc.
Oak Mill Mall
Ph. 847-966-8900
Income: H-30% M-50% L-20%
Stations: 5 Features: K P O

Peoria

Scotti Research, Inc.
Northwoods Mall
Ph. 309-682-4254
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P

Indiana

Indianapolis

Herron Associates, Inc.
Greenwood Park
Ph. 317-882-3800
Income: H-35% M-48% L-17%
Stations: 10 Features: C K P O

CODES

Income levels of mall customers
H - high-income (+$60,000/yr.)
M - middle-income ($30,000-$60,000/yr.)
L - low-income (under $30,000/yr.)

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

For more contact information on these firms consult the online version of this directory at www.quirks.com.

North American Insights - Indianapolis
Castleton Square
Ph. 708-747-1100 ext. 11
Income: H-11% M-60% L-29%
Stations: 11 Features: C K P O

Iowa

Davenport

PMR-Personal Marketing Research, Inc.
NorthPark Mall
Ph. 563-388-4759
Income: H-20% M-70% L-10%
Stations: 6 Features: C K P

Des Moines

Car-Lene Research, Inc.
Merle Hay Mall
Ph. 515-270-6555
Income: H-30% M-45% L-25%
Stations: 3 Features: C K P O

T.L. Grantham & Associates, Inc.
Park Fair Mall
Ph. 515-288-7156
Income: H-15% M-65% L-20%
Stations: 7 Features: C K P O

Kansas

Kansas City

(See Kansas City, MO)

Salina

C & C Market Research, Inc.
Central Mall
Ph. 479-785-5637
Income: H-40% M-35% L-25%
Stations: 8 Features: C K P O

Wichita

Barbara Nolan Market Research
Towne West Square
Ph. 800-240-6119
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P O

Kentucky

Louisville

Car-Lene Research, Inc.
Green Tree Mall
Ph. 812-284-1770
Income: H-31% M-34% L-35%
Stations: 5 Features: C K P O

MRK, Inc.
Mid City Mall
Ph. 502-458-4159
Income: H-40% M-50% L-10%
Stations: 7 Features: C K P O

Louisiana

New Orleans

Car-Lene Research, Inc.
North Shore Square Mall
Ph. 985-847-0405
Income: H-40% M-45% L-15%
Stations: 6 Features: C K P O

Friedman Marketing Services
Oakwood Shopping Center
Ph. 504-367-5808
Income: H-25% M-50% L-25%
Stations: 5 Features: C K P O

Gulf View Research, LLC
Clearview Mall
Ph. 800-357-8842
Income: H-38% M-48% L-14%
Stations: 6 Features: C K P O

Quick Test/Heakin
Esplanade Mall
Ph. 504-464-9188
Income: H-21% M-45% L-34%
Stations: 12 Features: C K P O

Maryland

Baltimore

Car-Lene Research, Inc.
Arundel Mills
Ph. 443-755-8880
Income: H-30% M-55% L-15%
Stations: 5 Features: C K P O

Car-Lene Research, Inc.
Towson Town Center
Ph. 410-823-7900
Income: H-45% M-35% L-20%
Stations: 4 Features: C K P O

Consumer Pulse of Baltimore
The Mall in Columbia
Ph. 410-772-1440
Income: H-30% M-50% L-20%
Stations: 10 Features: C K P

Friedman Marketing Services
Eastpoint Mall
Ph. 410-284-7900
Income: H-30% M-50% L-20%
Stations: 18 Features: C K P O

Quick Test/Heakin
Owings Mills Town Center
Ph. 410-998-3939
Income: H-46% M-41% L-13%
Stations: 10 Features: C K P O

Quick Test/Heakin
White Marsh Mall
Ph. 410-933-9400
Income: H-37% M-45% L-18%
Stations: 10 Features: C K P O

Massachusetts

Boston

Car-Lene Research, Inc.
Silver City Galleria
Ph. 508-880-0087
Income: H-34% M-24% L-42%
Stations: 5 Features: C K P O

Cunningham Field & Research Service
Natick Mall
Ph. 386-677-5644
Income: H-40% M-40% L-20%
Stations: 5 Features: C K P O

Barbara Nolan Market Research
Independence Mall Way
Ph. 800-240-6119
Income: H-25% M-50% L-25%
Stations: 5 Features: C K P O

Performance Plus
2 Faneuil Hall Marketplace
Ph. 508-872-1287
Income: H-60% M-30% L-10%
Stations: 10 Features: C K P

Performance Plus
Meadow Glen Mall
Ph. 508-872-1287
Income: H-30% M-60% L-10%
Stations: 10 Features: C K P

Performance Plus
Westgate Mall
Ph. 508-872-1287
Income: H-10% M-70% L-20%
Stations: 10 Features: C K P

Quick Test/Heakin
Watertown Mall
Ph. 617-924-8486
Income: H-20% M-50% L-30%
Stations: 9 Features: C K P O

Springfield

Friedman Marketing Services
Eastfield Mall
Ph. 413-543-8515
Income: H-30% M-50% L-20%
Stations: 6 Features: C K P O

Michigan

Ann Arbor

(See Detroit)

Detroit

Car-Lene Research, Inc.
Frenchtown Square Mall
Ph. 734-241-0489
Income: H-34% M-55% L-11%
Stations: 6 Features: C K P O

Crimmins & Forman Market Research
Consumer Research Center
Westland Mall
Ph. 734-513-5040
Income: H-35% M-45% L-20%
Stations: 10 Features: C K P O

Cunningham Field & Research Service
Great Lakes Crossing
Ph. 386-677-5644
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P O

Friedman Marketing Services
Oakland Mall
Ph. 248-589-0950
Income: H-30% M-50% L-20%
Stations: 15 Features: C K P O

Quick Test/Heakin
Macomb Mall
Ph. 586-294-3232
Income: H-31% M-41% L-28%
Stations: 8 Features: C K P O

Quick Test/Heakin
Southland Center Mall
Ph. 734-287-3600
Income: H-25% M-50% L-25%
Stations: 11 Features: C K P O

Minnesota

Duluth

Bryles Research, Inc.
Miller Hill Mall
Ph. 218-722-9274
Income: H-10% M-70% L-20%
Stations: 12 Features: C K P O

Minneapolis/St. Paul

Car-Lene Research, Inc.
Southdale Mall
Ph. 952-922-1444
Income: H-35% M-25% L-40%
Stations: 6 Features: C K P O

Cunningham Field & Research Service
Maplewood Mall
Ph. 386-677-5644
Income: H-40% M-40% L-20%
Stations: 4 Features: C K P O

Cunningham Field & Research Service
Northtown Mall
Ph. 386-677-5644
Income: H-20% M-80% L-0%
Stations: 5 Features: C K P O

Friedman Marketing Services
Burnsville Center Mall
Ph. 952-892-5383
Income: H-50% M-40% L-10%
Stations: 8 Features: C K P O

Quick Test/Heakin
Mall of America
Ph. 952-854-3535
Income: H-25% M-50% L-25%
Stations: 14 Features: C K P O

Quick Test/Heakin
Ridgedale Mall
Ph. 952-512-3838
Income: H-30% M-40% L-30%
Stations: 10 Features: C K P O

Mississippi

Jackson

Friedman Marketing Services
Metrocenter Mall
Ph. 601-352-9340
Income: H-20% M-60% L-20%
Stations: 13 Features: C K P O

Missouri

Kansas City

C & C Market Research, Inc.
Metro North Mall
Ph. 479-785-5637
Income: H-35% M-55% L-10%
Stations: 5 Features: C K P O

Car-Lene Research, Inc.
Bannister Mall
Ph. 816-767-8300
Income: H-25% M-40% L-35%
Stations: 4 Features: C K P O

Quick Test/Heakin
Independence Center
Ph. 816-795-0706
Income: H-23% M-48% L-29%
Stations: 10 Features: C K P O

St. Louis

C & C Market Research, Inc.
Jamestown Mall
Ph. 479-785-5637
Income: H-40% M-35% L-25%
Stations: 8 Features: C K P O

Car-Lene Research, Inc.
South County Mall
Ph. 314-845-2002
Income: H-30% M-30% L-40%
Stations: 4 Features: C K P O

Cunningham Field & Research Service
St. Claire Square Mall
Ph. 386-677-5644
Income: H-30% M-40% L-30%
Stations: 5 Features: C K P O

Friedman Marketing Services
Mid River Mall
Ph. 636-278-3821
Income: H-25% M-50% L-25%
Stations: 10 Features: C K P

Barbara Nolan Market Research
Jamestown Mall
Ph. 800-240-6119
Income: H-20% M-55% L-25%
Stations: 6 Features: C K P O

CODES

Income levels of mall customers
H - high-income (+$60,000/yr.)
M - middle-income ($30,000-$60,000/yr.)
L - low-income (under $30,000/yr.)

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

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Superior Surveys of St. Louis, Inc.
Crestwood Plaza
Ph. 314-918-7460
Income: H-60% M-30% L-10%
Stations: 10 Features: C K P O

Springfield

Bryles Research, Inc.
Battlefield Mall
Ph. 417-887-1035
Income: H-10% M-80% L-10%
Stations: 12 Features: C K P O

Nebraska

Omaha

C & C Market Research, Inc.
Westroads Shopping Mall
Ph. 479-785-5637
Income: NA
Stations: 6 Features: C K P O

Cunningham Field & Research Service
Crossroads Mall
Ph. 386-677-5644
Income: H-30% M-45% L-25%
Stations: 6 Features: C K P O

The MSR Group
Mall of the Bluffs
Ph. 712-323-1438
Income: H-25% M-30% L-45%
Stations: 9 Features: C K P O

Nevada

Las Vegas

Cunningham Field & Research Service
The Galleria at Sunset
Ph. 386-677-5644
Income: H-30% M-60% L-10%
Stations: 5 Features: C K P O

New Hampshire

Concord

Cunningham Field & Research Service
Steeplegate Mall
Ph. 386-677-5644
Income: H-20% M-60% L-20%
Stations: 5 Features: C K P O

New Jersey

Northern New Jersey

Car-Lene Research, Inc.
Bergen Mall
Ph. 201-845-5600
Income: H-20% M-45% L-35%
Stations: 5 Features: C K P O

Car-Lene Research, Inc.
Moorestown Mall
Ph. 856-231-0600
Income: H-35% M-31% L-34%
Stations: 4 Features: C K P O

Consumer Pulse of New York
One Garden State Plaza
Ph. 201-909-0144
Income: H-40% M-45% L-15%
Stations: 13 Features: C K P O

Consumer Reaction Research
Focus World International, Inc.
Brunswick Square Mall
Ph. 732-946-0100
Income: H-40% M-50% L-10%
Stations: 8 Features: C K P

Cunningham Field & Research Service
Raceway Mall
Ph. 386-677-5644
Income: H-50% M-40% L-10%
Stations: 6 Features: C K P O

Ebony Marketing Research, Inc.
Newport Shopping Mall
Ph. 718-217-0842
Income: H-10% M-90% L-0%
Stations: 8 Features: C P O

Mid-America Research
Livingston Mall
Ph. 973-740-1566
Income: H-15% M-80% L-5%
Stations: 12 Features: C K P O

Barbara Nolan Market Research
Menlo Park Mall
Ph. 800-240-6119
Income: H-60% M-30% L-10%
Stations: 5 Features: C K P O

Northeast Data
High Income Mall Testing & Group Focus Facility
Wayne Towne Center
Ph. 973-785-4449
Income: H-70% M-25% L-5%
Stations: 8 Features: C K P O

Quick Test/Heakin
Woodbridge Center
Ph. 732-326-9779
Income: H-45% M-35% L-20%
Stations: 12 Features: C K P O

Suburban Associates
Monmouth Mall
Ph. 732-542-5554
Income: H-10% M-60% L-30%
Stations: 8 Features: C K P O

Suburban Associates
Willowbrook Mall
Ph. 973-785-0770
Income: H-25% M-55% L-20%
Stations: 10 Features: C K P O

Southern New Jersey

(See Philadelphia, PA)

New Mexico

Albuquerque

Car-Lene Research, Inc.
Coronado Center
Ph. 505-889-3070
Income: H-34% M-36% L-30%
Stations: 6 Features: C K P O

Barbara Nolan Market Research
Cottonwood Mall
Ph. 800-240-6119
Income: H-25% M-50% L-25%
Stations: 8 Features: C K P O

New York

Albany

Barbara Nolan Market Research
Rotterdam Square Mall
Ph. 800-240-6119
Income: H-25% M-50% L-25%
Stations: 5 Features: C K P O

Barbara Nolan Market Research
Wilton Mall
Ph. 800-240-6119
Income: H-20% M-46% L-34%
Stations: 6 Features: C K P O

Quick Test/Heakin
Crossgates Mall
Ph. 518-456-8641
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P O

Buffalo

Buffalo Survey & Research, Inc.
McKinley Mall
Ph. 716-822-3250
Income: H-15% M-75% L-10%
Stations: 8 Features: C K P O

Ruth Diamond Market Research Services
Boulevard Mall
Ph. 716-836-1110
Income: H-24% M-45% L-31%
Stations: 6 Features: C K P O

Opinions, Ltd.
Chautauqua Mall
Ph. 716-763-6380
Income: H-25% M-50% L-25%
Stations: 7 Features: C K

Marion Simon Research Service, Inc.
Walden Galleria
Ph. 716-684-8025
Income: H-35% M-35% L-30%
Stations: 3 Features: C K P O

New York City

(See also Northern New Jersey)

Answers to Questions, Inc.
South Shore Mall
Ph. 631-666-9705
Income: H-20% M-60% L-20%
Stations: 7 Features: C K P O

Ebony Marketing Research, Inc.
Ph. 718-320-3220
Income: H-5% M-95% L-0%
Stations: 8 Features: C K P O

Ebony Marketing Research, Inc.
Ph. 718-526-3204
Income: H-0% M-55% L-45%
Stations: 6 Features: C K

Friedman Marketing Services
Smith Haven Mall
Ph. 631-366-6325
Income: H-40% M-40% L-20%
Stations: 6 Features: C K O

Friedman Marketing Services
The Galleria at White Plains
Ph. 914-328-2447
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P O

J & R Field Services, Inc.
Attias Mart
Ph. 631-244-0475
Income: H-15% M-65% L-20%
Stations: 4 Features: C P

J & R Field Services, Inc.
East Meadow Mall
Ph. 516-542-0081
Income: H-10% M-55% L-35%
Stations: 6 Features: C P

Primary Data Collection Services
Green Acres Mall
Ph. 516-561-1723
Income: H-20% M-65% L-15%
Stations: 8 Features: C P O

Quick Test/Heakin
Kings Plaza Mall
Ph. 718-338-3388
Income: H-20% M-45% L-35%
Stations: 15 Features: C K P

Quick Test/Heakin
Sunrise Mall
Ph. 516-541-5100
Income: H-15% M-80% L-5%
Stations: 12 Features: C K P O

Audrey Schiller Market Research
Ph. 516-489-7431
Income: H-35% M-50% L-15%
Stations: 8 Features: C K P O

Seaport Surveys
Financial Focus, Inc.
Ph. 212-608-3100
Income: H-40% M-40% L-20%
Stations: 10 Features: C K P O

Poughkeepsie

Barbara Nolan Market Research
Poughkeepsie Galleria
Ph. 800-240-6119
Income: H-50% M-30% L-20%
Stations: 6 Features: C K P O

Rochester

Car-Lene Research, Inc.
Greece Ridge Center Mall
Ph. 716-225-3100
Income: H-19% M-39% L-42%
Stations: 6 Features: C K P O

Car-Lene Research, Inc.
Market Place Mall
Ph. 585-424-3203
Income: H-32% M-37% L-31%
Stations: 6 Features: C K P O

Cunningham Field & Research Service
Eastview Mall
Ph. 386-677-5644
Income: H-35% M-45% L-20%
Stations: 5 Features: C K P O

Syracuse

Lavalle Research
Carousel Center Mall
Ph. 315-466-1609
Income: H-20% M-65% L-15%
Stations: 8 Features: C K P O

McCarthy Associates
Great Northern Mall
Ph. 315-431-0660
Income: H-33% M-34% L-33%
Stations: 7 Features: C K P O

North Carolina

Asheville

Cunningham Field & Research Service
Ashville Mall
Ph. 386-677-5644
Income: H-20% M-50% L-30%
Stations: 6 Features: C K P O

South East Market Research
Ph. 865-546-7678
Income: H-40% M-30% L-30%
Stations: 6 Features: C K P

Charlotte

Car-Lene Research, Inc.
Concord Mills Mall
Ph. 704-979-1660
Income: H-38% M-48% L-14%
Stations: 6 Features: C K P O

Consumer Pulse of Charlotte
Eastland Mall
Ph. 704-536-6067
Income: H-20% M-60% L-20%
Stations: 7 Features: C K P O

Cunningham Field & Research Service
Carolina Place
Ph. 386-677-5644
Income: H-45% M-35% L-20%
Stations: 5 Features: C K P O

Greensboro/ Winston-Salem

Homer Market Research Associates, Inc.
Four Seasons Town Centre
Ph. 336-294-9415
Income: H-25% M-45% L-30%
Stations: 10 Features: C K P O

Quick Test/Heakin
Oak Hollow Mall
Ph. 336-882-1176
Income: H-20% M-40% L-20%
Stations: 4 Features: C K O

CODES

Income levels of mall customers
H - high-income (+$60,000/yr.)
M - middle-income ($30,000-$60,000/yr.)
L - low-income (under $30,000/yr.)

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

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Raleigh/Durham

Cunningham Field & Research Service
Cary Towne Center
Ph. 386-677-5644
Income: H-30% M-60% L-10%
Stations: 6 Features: C K P O

North American Insights - Raleigh/Durham
The Streets at Southpoint
Ph. 708-747-1100 ext. 11
Income: H-31% M-45% L-24%
Stations: 12 Features: C K P O

Ohio

Akron

Cunningham Field & Research Service
Chapel Hill Mall
Ph. 386-677-5644
Income: H-20% M-70% L-10%
Stations: 6 Features: C K P O

Opinions, Ltd.
Summit Mall
Ph. 330-864-8909
Income: H-45% M-40% L-15%
Stations: 9 Features: C K P

Quick Test/Heakin
Rolling Acres Mall
Ph. 330-745-8883
Income: H-10% M-70% L-20%
Stations: 6 Features: C K

Cincinnati

B & B Research Services, Inc.
Eastgate Mall
Ph. 513-753-4111
Income: H-20% M-60% L-20%
Stations: 8 Features: C K P O

Car-Lene Research, Inc.
Forest Fair Mall
Ph. 513-671-0696
Income: H-36% M-48% L-16%
Stations: 5 Features: C K P O

Cunningham Field & Research Service
Tri County Mall
Ph. 386-677-5644
Income: H-40% M-40% L-20%
Stations: 5 Features: C K P O

Quick Test/Heakin
Florence Mall
Ph. 859-282-1333
Income: H-30% M-40% L-30%
Stations: NA Features: K P O

Cleveland

Car-Lene Research, Inc.
Great Northern Mall
Ph. 440-979-0200
Income: H-32% M-31% L-37%
Stations: 5 Features: C K P O

Cunningham Field & Research Service
The Avenue @ Tower City
Ph. 386-677-5644
Income: H-35% M-30% L-35%
Stations: 6

OPINIONation
Ph. 216-351-4644
Income: H-20% M-70% L-10%
Stations: 8 Features: C K P

Opinions, Ltd.
Sandusky Mall
Ph. 419-626-8944
Income: H-17% M-62% L-21%
Stations: 7 Features: C

Questions, Inc.
Great Lakes Mall
Ph. 216-464-0087
Income: H-20% M-60% L-20%
Stations: 7 Features: C K

Quick Test/Heakin
Richmond Town Square
Ph. 440-473-1000
Income: H-28% M-52% L-20%
Stations: 10 Features: C K P O

Toledo

Barbara Nolan Market Research
Franklin Park Mall
Ph. 800-240-6119
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P O

Youngstown

Opinions, Ltd.
Southern Park Mall
Ph. 330-965-1190
Income: H-24% M-57% L-19%
Stations: 10 Features: C K P

Oklahoma

Oklahoma City

C & C Market Research, Inc.
Central Mall
Ph. 479-785-5637
Income: H-35% M-55% L-10%
Stations: 7 Features: C K P O

Quick Test/Heakin
Cross Roads Mall
Ph. 405-631-9738
Income: H-4% M-25% L-61%
Stations: 6 Features: C K P O

Tulsa

C & C Market Research, Inc.
Arrowhead Mall
Ph. 479-785-5637
Income: H-40% M-45% L-15%
Stations: 6 Features: C K P O

Car-Lene Research, Inc.
Tulsa Promenade Mall
Ph. 918-663-4410
Income: H-25% M-50% L-25%
Stations: 4 Features: C K P O

Cunningham Field & Research Service
Woodland Hills Mall
Ph. 386-677-5644
Income: H-50% M-35% L-15%
Stations: NA Features: C

Oregon

Eugene

Quick Test/Heakin
Gateway Mall
Ph. 541-747-1333
Income: NA
Stations: NA

Portland

Consumer Opinion Services
We answer to you

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: kelly@portlandopinion.com
www.cosvc.com
Kelly Ross, Manager
Income: H-15% M-55% L-30%
Stations: 9 Features: C K P O
(See advertisement on p. 97)

Consumer Pulse of Portland
Clackamas Town Center
Ph. 503-654-1390
Income: H-25% M-55% L-20%
Stations: 8 Features: C K P

Cunningham Field & Research Service
Lloyd Center
Ph. 386-677-5644
Income: H-30% M-30% L-40%
Stations: 5 Features: C K P O

Pennsylvania

Erie

Moore Research Services, Inc.
Millcreek Mall
Ph. 814-868-0873
Income: H-28% M-48% L-24%
Stations: 8 Features: C K P O

Philadelphia

Car-Lene Research, Inc.
Echelon Mall
Ph. 856-772-2411
Income: H-40% M-50% L-10%
Stations: 6 Features: C K P O

Car-Lene Research, Inc.
Franklin Mills Mall
Ph. 215-612-8005
Income: H-25% M-65% L-10%
Stations: 5 Features: C K P O

Consumer Pulse of Philadelphia
Plymouth Meeting Office Center & Mall
Ph. 610-825-6636
Income: H-20% M-60% L-20%
Stations: 15 Features: C K P O

Cunningham Field & Research Service
Deptford Mall
Ph. 386-677-5644
Income: H-35% M-40% L-25%
Stations: 6 Features: C K P O

JRA
J. RECKNER ASSOCIATES, INC
Marketing & Sensory Research

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 Features: C K P O
(See advertisement on p. 37)

JRP
MARKETING RESEARCH SERVICES INC

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 Features: C K P O
(See advertisement on p. 29)

Quality in Field
Leo Mall
Ph. 215-698-0606
Income: H-20% M-70% L-10%
Stations: 4 Features: K

Quick Test/Heakin
Cherry Hill Mall
Ph. 856-910-1000
Income: H-35% M-39% L-26%
Stations: 10 Features: C K P O

Quick Test/Heakin
Neshaminy Mall
Ph. 215-322-0400
Income: H-5% M-80% L-15%
Stations: 11 Features: C K P O

Pittsburgh

Car-Lene Research, Inc.
Monroeville Mall
Ph. 412-373-3670
Income: H-15% M-45% L-40%
Stations: 7 Features: C K P O

Car-Lene Research, Inc.
South Hills Village
Ph. 412-854-0622
Income: H-60% M-30% L-10%
Stations: 6 Features: C K P O

CODES

Income levels of mall customers
H - high-income (+$60,000/yr.)
M - middle-income ($30,000-$60,000/yr.)
L - low-income (under $30,000/yr.)

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

For more contact information on these firms consult the online version of this directory at www.quirks.com.

Quick Test/Heakin
Ross Park Mall
Ph. 412-369-4545
Income: H-40% M-48% L-12%
Stations: 13 Features: C K P O

Rhode Island

Providence

Performance Plus
Providence Place Mall
Ph. 508-872-1287
Income: H-40% M-40% L-20%
Stations: 8 Features: C K P O

South Carolina

Charleston

Quick Test/Heakin
Northwoods Mall
Ph. 843-553-0030
Income: H-5% M-80% L-15%
Stations: 7 Features: C K P O

Greenville/Spartanburg

C & C Market Research, Inc.
Ph. 479-785-5637
Income: H-50% M-40% L-10%
Stations: 8 Features: C K P O

Tennessee

Knoxville

South East Market Research
Ph. 865-546-7678
Income: H-30% M-40% L-30%
Stations: 6 Features: C K P O

Memphis

Friedman Marketing Services
Raleigh Springs Mall
Ph. 901-382-9970
Income: H-40% M-40% L-20%
Stations: 10 Features: C K O

Quick Test/Heakin
Wolfchase Galleria
Ph. 901-381-4811
Income: H-61% M-30% L-9%
Stations: 8 Features: C K P O

Nashville

Car-Lene Research, Inc.
Stones River Mall
Ph. 615-907-0037
Income: H-30% M-45% L-25%
Stations: 5 Features: C K P O

Cunningham Field & Research Service
Cool Springs Galleria
Ph. 386-677-5644
Income: H-20% M-80% L-0%
Stations: 5 Features: C K P O

Quick Test/Heakin
Hickory Hollow Mall
Ph. 615-731-0900
Income: H-25% M-60% L-15%
Stations: 7 Features: C K P O

Quick Test/Heakin
Rivergate Mall
Ph. 615-859-4484
Income: H-20% M-50% L-30%
Stations: 7 Features: C K P O

Texas

Austin

Barbara Nolan Market Research
Lakeline Mall
Ph. 800-240-6119
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P O

Quick Test/Heakin
Barton Creek Square
Ph. 512-327-8787
Income: H-20% M-40% L-40%
Stations: 10 Features: C K P O

Corpus Christi

Quick Test/Heakin
Sunrise Mall
Ph. 361-993-6200
Income: H-20% M-50% L-30%
Stations: 6 Features: C K P O

Dallas/Fort Worth

C & C Market Research, Inc.
Valley View Mall
Ph. 479-785-5637
Income: H-50% M-40% L-10%
Stations: 6 Features: C K P O

Car-Lene Research, Inc.
Collin Creek Mall
Ph. 972-424-8587
Income: H-60% M-30% L-10%
Stations: 6 Features: C K P O

Car-Lene Research, Inc.
Grapevine Mills Mall
Ph. 972-724-6816
Income: H-53% M-35% L-12%
Stations: 6 Features: C K P O

Car-Lene Research, Inc.
North Hills Mall
Ph. 817-595-3737
Income: H-57% M-31% L-12%
Stations: 6 Features: C K P O

Car-Lene Research, Inc.
Richardson Square Mall
Ph. 972-783-1935
Income: H-50% M-35% L-15%
Stations: 5 Features: C K P O

Car-Lene Research, Inc.
Six Flags Mall
Ph. 817-633-6020
Income: H-25% M-55% L-20%
Stations: 6 Features: C K P O

Cunningham Field & Research Service
Stonebriar Center
Ph. 386-677-5644
Income: H-40% M-40% L-20%
Stations: 6 Features: C K P O

Quick Test/Heakin
Hulen Mall
Ph. 817-263-2900
Income: H-30% M-45% L-25%
Stations: 12 Features: C

Quick Test/Heakin
Northeast Mall
Ph. 817-595-4195
Income: H-55% M-25% L-20%
Stations: 12 Features: C K P O

Quick Test/Heakin
Vista Ridge Mall
Ph. 972-315-3555
Income: H-46% M-41% L-13%
Stations: 10 Features: C K P O

Savitz Field and Focus
The Parks at Arlington Mall
Ph. 817-467-6437
Income: H-35% M-45% L-20%
Stations: 14 Features: C K P O

Houston

C & C Market Research, Inc.
Central Mall
Ph. 479-785-5637
Income: H-40% M-50% L-10%
Stations: 7 Features: C K P O

Car-Lene Research, Inc.
Katy Mills Mall
Ph. 281-644-6100
Income: H-49% M-28% L-23%
Stations: 6 Features: C K P O

Creative Consumer Research
Deerbrook Mall
Ph. 281-446-9730
Income: H-30% M-39% L-31%
Stations: 10 Features: C K P O

Creative Consumer Research
First Colony Mall
Ph. 281-277-7778
Income: H-50% M-38% L-12%
Stations: 8 Features: C K P O

Creative Consumer Research
Northline Mall
Ph. 713-699-2990
Income: H-10% M-31% L-59%
Stations: 6 Features: C P

Cunningham Field & Research Service
The Woodlands Mall
Ph. 386-677-5644
Income: H-30% M-60% L-10%
Stations: 5 Features: C K P O

Market Research & Analysis Field Staff, Inc.
Galleria Mall Financial Center
Ph. 713-271-5624
Income: H-50% M-30% L-20%
Stations: 5 Features: C K P O

Quick Test/Heakin
Greenspoint Shopping Mall
Ph. 281-872-4165
Income: H-27% M-50% L-23%
Stations: 12 Features: C K P O

Quick Test/Heakin
West Oaks Mall
Ph. 281-531-5959
Income: H-40% M-35% L-25%
Stations: 12 Features: C K P O

San Antonio

C & C Market Research, Inc.
South Park Mall
Ph. 479-785-5637
Income: H-20% M-80% L-20%
Stations: 6 Features: C K P

Car-Lene Research, Inc.
North Star Mall
Ph. 210-340-3595
Income: H-40% M-41% L-19%
Stations: 8 Features: C K P O

Creative Consumer Research
McCreless Mall
Ph. 210-531-9345
Income: H-10% M-65% L-25%
Stations: 7 Features: C P

Cunningham Field & Research Service
Rivercenter Mall
Ph. 386-677-5644
Income: H-20% M-65% L-15%
Stations: 4 Features: C K

Friedman Marketing Services
Rolling Oaks Mall
Ph. 210-651-6971
Income: H-25% M-50% L-25%
Stations: 7 Features: C K

Galloway Research Services
Crossroads Mall
Ph. 210-734-4346
Income: H-5% M-80% L-15%
Stations: 9 Features: C K P

Galloway Research Services
Ingram Park
Ph. 210-734-4346
Income: H-10% M-80% L-10%
Stations: 8 Features: C K P

Utah

Salt Lake City

Consumer Opinion Services
We answer to you

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 Features: C K P
(See advertisement on p. 97)

Cunningham Field & Research Service
South Towne Center
Ph. 386-677-5644
Income: H-10% M-80% L-10%
Stations: 4 Features: C K P O

CODES

Income levels of mall customers
H - high-income (+$60,000/yr.)
M - middle-income ($30,000-$60,000/yr.)
L - low-income (under $30,000/yr.)

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

For more contact information on these firms consult the online version of this directory at www.quirks.com.

Vermont

Burlington

Opinions, Ltd.
Burlington Town Center
Ph. 802-652-0088
Income: H-38% M-48% L-14%
Stations: 7 Features: C P

Washington

Everett

Consumer Opinion Services We answer to you

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 Features: C K P
(See advertisement on p. 97)

Kelso

Consumer Opinion Services We answer to you

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 Features: C K P O
(See advertisement on p. 97)

Olympia

Consumer Opinion Services We answer to you

Consumer Opinion Services, Inc. (Br.)
Westfield Shoppingtown
625 Blake Lake Blvd., 375
Olympia, WA 98502
Ph. 360-570-0804 or 206-241-6050 for bids
Fax 360-570-1028
E-mail: olympia@cosvc.com
www.cosvc.com
Christy Moore, Manager
Income: H-5% M-50% L-45%
Stations: 8 Features: C K P
(See advertisement on p. 97)

Seattle/Tacoma

Car-Lene Research, Inc.
Alderwood Mall
Ph. 425-744-8047
Income: H-44% M-27% L-29%
Stations: 6 Features: C K P O

Cunningham Field & Research Service
Super Mall of the Great N.W.
Ph. 386-677-5644
Income: H-0% M-80% L-20%
Stations: 5 Features: C K P O

Friedman Marketing Services
South Hill Mall
Ph. 253-840-0112
Income: H-30% M-50% L-20%
Stations: 6 Features: C K P O

Barbara Nolan Market Research
Northgate Mall
Ph. 800-240-6119
Income: H-25% M-50% L-25%
Stations: 6 Features: C K P O

North American Insights - Seattle
Kitsap Mall
Ph. 708-747-1100 ext. 11
Income: H-22% M-53% L-25%
Stations: 8 Features: C K P O

Quick Test/Heakin
Tacoma Mall Shopping Center
Ph. 253-474-9980
Income: H-10% M-40% L-50%
Stations: 7 Features: C K P O

Spokane

Consumer Opinion Services We answer to you

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
Carl Biotti, Manager
Income: H-9% M-61% L-30%
Stations: 8 Features: C K P O
(See advertisement on p. 97)

Vancouver

Consumer Opinion Services We answer to you

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 Features: C K P
(See advertisement on p. 97)

West Virginia

Wheeling

C & C Market Research, Inc.
Ohio Valley Mally
Ph. 479-785-5637
Income: H-45% M-30% L-25%
Stations: 7 Features: C K P O

Wisconsin

Eau Claire

Friedman Marketing Services
Oakwood Mall
Ph. 715-836-6580
Income: H-25% M-55% L-20%
Stations: 8 Features: C K P O

Green Bay/Appleton

Friedman Marketing Services
Fox River Mall
Ph. 920-730-2240
Income: H-30% M-55% L-15%
Stations: 11 Features: C K P O

Milwaukee

Car-Lene Research, Inc.
Bayshore Mall
Ph. 414-962-9926
Income: H-52% M-30% L-18%
Stations: 6 Features: C K P O

Car-Lene Research, Inc.
Southridge Mall
Ph. 414-421-2865
Income: H-31% M-31% L-38%
Stations: 4 Features: C K P O

Consumer Pulse of Milwaukee
The Grand Avenue Mall
Ph. 414-274-6060
Income: H-20% M-60% L-20%
Stations: 8 Features: C K P O

Quick Test/Heakin
Brookfield Square Mall
Ph. 262-787-1727
Income: H-20% M-60% L-20%
Stations: 9 Features: C K O

Canada

British Columbia

Vancouver

Canadian Viewpoint, Inc.
Surrey Place Mall
Ph. 604-583-3355
Income: H-20% M-65% L-15%
Stations: 4 Features: C K P O

Ontario

Hamilton

Canadian Viewpoint, Inc.
Eastgate Mall
Ph. 905-560-0854
Income: H-20% M-70% L-10%
Stations: 4 Features: C K P O

Toronto

Canadian Viewpoint, Inc.
Hillcrest Mall
Ph. 905-770-1770
Income: H-25% M-50% L-25%
Stations: 4 Features: C K P O

Canadian Viewpoint, Inc.
Centerpoint Mall
Ph. 416-229-1221
Income: H-30% M-60% L-10%
Stations: 3 Features: C K P O

Car-Lene Research, Inc.
(Opening Fall 2003)
Vaughan Mills
Ph. 847-940-2000
Income: H-27% M-32% L-41%
Stations: 4 Features: C K P O

Research House, Inc.
Don Mills Centre
Ph. 416-488-2333
Income: H-40% M-50% L-10%
Stations: 5 Features: C K P O

Research House, Inc.
Portage Place
Ph. 416-488-2328
Income: H-35% M-50% L-15%
Stations: 3 Features: C K P O

Research House, Inc.
Square One Mall
Ph. 416-488-2333
Income: H-20% M-55% L-25%
Stations: 4 Features: C K

Quebec

Montreal

Quebec Recherches
Les Promenades St. Bruno
Ph. 514-725-0306
Income: H-55% M-30% L-15%
Stations: 3 Features: C K P O

Mexico

EPI Marketing, SA de CV
Plaza Polanco
Ph. 52-5-395-3237
Income: H-5% M-80% L-15%
Stations: 15 Features: K P O

Names of Note

continued from p. <None>

managing director. He will remain on the company's board and continue to work with the directors from his Manchester, England base. His successor is **Richard Cornelius**, who has been with the organization since 1983. Separately, **Mark Beauchamp** has joined the firm as an associate director.

Boston-based communications and networking research and consulting firm *The Yankee Group* has named **Michael G. Mahan** as senior regional vice president of sales.

New York-based television ad measurement firm *Intermedia Advertising Group* has named **Mark Cooper** director of marketing.

Braintree, Mass.-based research firm *Perseus Development Corporation* has named **Alan J. Farias** vice president of professional services.

Andersen Corporation, Bayport, Minn., has named **J Glasnapp** vice president of marketing, effective January 1, 2004. In this new role, Glasnapp will be responsible for product marketing, channel marketing, marketing research, brand communications/marketing services and pricing.

Thomas Fusso has rejoined *Market Probe*, Milwaukee, as a senior vice president. He will be based in Vancouver, Wash.

Index of Advertisers

Trade Talk

continued from p. 106

Harris, managing partner of Mature Marketing & Research in Boston, has assembled 10 chapters from various authors on Baby Boomers and their needs, wants and consumption habits.

The chapters, written by marketers and researchers who specialize in all things Boomer-related, cover specific topics such as fast-food, technology, health, travel, apparel and financial services. There are also helpful and thorough overview sections that put this vast group's size and opinions into perspective. Taken as a whole, they give the reader a complete picture of this challenging and multifaceted market.

How Customers Think (324 pages, $29.95), by Gerald Zaltman, is published by Harvard Business School Press, Boston (www.hbspress.org).

Moderating to the Max (144 pages, $34.95), by Jean Bystedt, Siri Lynn, and Deborah Potts, is published by Paramount Market Publishing, Ithaca, N.Y. (www.paramountbooks.com).

After Fifty – How the Baby Boom Will Redefine the Mature Market (182 pages, $39.95), edited by Leslie Harris, is published by Paramount Market Publishing, Ithaca, N.Y. (www.paramountbooks.com).

Trade Talk

By Joseph Rydholm, *Quirk's* editor

Two new books on mind-mining; plus a look at Boomers

I sometimes wonder if it would be helpful to add a minor in psychology to the standard marketing research curriculum. Though nothing new — people like Vance Packard and Ernest Dichter brought it to the fore decades ago — the study of the role our unconscious mind plays in our buying habits is a hot topic now, as marketers seek new and different ways to communicate with consumers.

In his dense and scholarly book *How Customers Think*, author Gerald Zaltman argues that traditional marketing (and by extension, marketing research) falls short because it attempts to communicate with consumers at the conscious level, rather than the all-important subconscious level, where 95 percent of all thinking is done, he maintains.

While Zaltman, a professor of marketing at Harvard Business School, describes himself as a fan of "research that requires thoughtful statistical analysis," in arguing that metaphor is key, he seems to be tipping the scale toward qualitative research, which is ideally suited to the brain-plumbing that metaphor hunting requires. A favored approach is the consensus map, which displays how the shared thoughts and feelings of a group of consumers about a topic are connected in similar ways. Zaltman shows how the development of consensus maps and other schemata can help marketers construct the metaphors that resonate with consumers.

Though different in overall approach, *Moderating to the Max* makes a nice companion to Zaltman's effort. Authors/moderators Jean Bystedt, Siri Lynn and Deborah Potts reinforce the power of our subconscious, positing that thoughts and emotions and unconscious elements are key to consumers' relationships with brands. Respondents need some help bringing these things to the surface, however, and qualitative research is here to help.

Getting at those motivations, which aren't easily uncovered, requires a range of methods. And methods, both usual and unusual — such as metaphorical tools, storytelling, "draw the user," picture decks, collage — are the focus of the book.

It's a fun read, obviously a labor of love, which by no means lessens its considerable instructional value. Each focus group is different, and there is no single way to approach the discussions, but in reading the book I imagined it could serve as a handy guide to developing action plans for upcoming focus groups.

As long as the moderator knows who he or she will be talking to, what the client's informational goals are, and the nature of the product or service or advertising to be discussed, *Moderating to the Max* can help determine the mix of techniques — from laddering to word bubbles — that will elicit those invaluable nuggets from the folks around the conference table.

* * *

I also wanted to mention *After Fifty – How the Baby Boom Will Redefine the Mature Market*, in which Leslie

You'll notice that smart people have one thing in common: they are curious, always on the search for questions and their answers.
Synovate is the world's newest global market intelligence and research company. We've decided to put more curious people in the frontlines than any other research company in the world.
But don't take our word for this. Come see the difference for yourself...
www.synovate.com
synovate
Research reinvented