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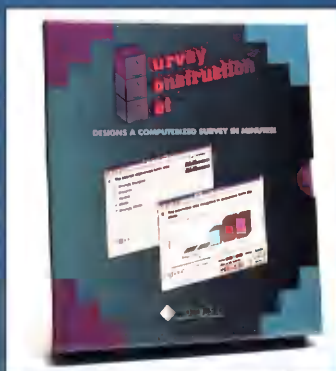
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Volume IX, Number 1

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Market research & measurement in Mexico: key guideposts

By Loretta H. Adams

Editor's note: Loretta H. Adams is president of Market Development Inc., San Diego.

Less than 10 years ago, when the market was not yet open to foreign products, Mexican grocery shelves looked desolate. Most product categories consisted of only a few brands and each brand had only a few varieties. Some major multinational U.S. firms — such as Coca-Cola, Colgate-Palmolive and Kraft — were selling in Mexico, but they took a very simple approach to marketing. They tended to use an aggregate strategy, selling products to everyone who could afford them. Segmentation strategies consisted of providing two alternatives: a low-priced, low-quality variety of the brand and a high-priced, high-quality version.

Since the election of President Carlos Salinas de Gortari in 1988, though, the marketing environment in Mexico has

changed substantially. More Mexican brands, more foreign brands and more varieties of each brand are appearing on Mexico's shelves, and more companies are advertising aggressively on Mexican TV. The surge of competition in the marketplace means companies that want to operate in the Mexican marketplace will need to deploy sophisticated brand-differentiation marketing strategies, which will increase companies' reliance on primary market research.

Market research will be used to identify new categories, brands and varieties that will appeal to Mexican consumers. Research will also tell marketers how and why various items will appeal to consumers, and it will help companies find target segments within the Mexican population.

Different approach

The design and execution of research projects conducted in Mexico tend to

differ from what companies are familiar with in the U.S. In the past, there were few brand choices and even fewer advertisers differentiating their brands, so Mexican consumers tend to be relatively unfamiliar with much of the imagery used to market goods in the United States.

Historically, market research in Mexico has been limited to primary qualitative research, concept and product tests, and awareness and usage studies, so marketers have very little secondary data to draw on. What's more, marketers have to reach consumers who are not familiar with standard U.S. research practices.

To enter the Mexican market, U.S. companies will need take a step backward when designing research projects. Companies may need to design introductory studies — perhaps focusing on market opportunities — before initiating strategic studies. And marketers may need to define their category users more broadly than they normally would. For example,



since the frozen yogurt category in Mexico is less developed than it is in the U.S., a study that focused on frozen yogurt eaters when it was conducted in the U.S. may need to include users of all desserts when undertaken in Mexico; a study of quick-service restaurant users in the U.S. might be expanded in Mexico to include all restaurant users.

While all of these issues will have large impacts on U.S. researchers in Mexico, they should not cause any grave concerns for experienced researchers, who typically go through many of the same processes when approaching any new market.

Cultural characteristics

Researchers will also need to adjust to the key demographic and geographic characteristics of Mexico and account for their effects on research design. Mexico's population is extremely young, and the country still has a very clear social class structure. Only the upper classes should be included in research studies for many mass market U.S. items, such as automobiles and microwaves. The class structure must also be accounted for when analyzing usage of and attitudes toward products used by all consumers.

Mexico City contains roughly a fifth of Mexico's population and produces nearly half of the country's GNP, so it's often suitable to conduct research studies solely in the capital. When researchers need a study representative of the whole country, it's not uncommon for them to simply add Guadalajara and Monterrey to Mexico City. But if a marketing strategy is not successful in Mexico City, it probably won't fly in Mexico.

Researchers also need to be aware of the infrastructure and lifestyle factors that will influence research in Mexico. Qualitative research, in particular, will be affected:

- There are only a few high-quality focus group facilities, so many groups, especially outside of Mexico City, are

conducted in hotels or homes.

- Groups should never be conducted between 2 and 4 p.m., which is when many Mexicans have their main meal of the day.

- Focus group respondents often view gifts as more appropriate incentives than cash.

To ensure representative studies, in-person and door-to-door interviews are the best data collection techniques. While telecommunications, including cellular service, are rapidly improving, many households lack phones. Further, the reliability of the phone system is still not up to U.S. standards. When calling members of the upper class, interviewers often must get past servants acting as a gatekeepers to talk to the target respondent.

The mail service is also getting better, but less swiftly than telecommunications. Mexico has no consumer mail panels comparable to those in the U.S.

In-person intercept studies are appropriate for concept and taste tests, but there are practically no research facilities in shopping centers, and suppliers are often prohibited by law from setting up shop in malls. For intercepts, it's more common for suppliers to establish relationships with supermarkets, or to rent trailers and park them in high-traffic areas.

Researchers should proceed deliberately through the process of choosing a research supplier. The specific qualities researchers should be most concerned with include:

- *Accountability.* Researchers should make sure that suppliers have a history of completing projects as contracted. When checking references, find out how problems were handled. Most market research projects run into obstacles along

the way. Make sure the firm you are considering resolved each difficulty to the client's satisfaction.

- *Stability.* You'll know you're in trouble if your research supplier keeps pressing for the final payment before the project is finished.

- *Emphasis on quality control.* Mexican suppliers' standards and practices are sometimes different from those maintained by U.S. firms. When doing focus groups, it's not uncommon for recruiters to invite many relatives and friends to attend a group. Quantitative research questionnaires often have unclear instructions and sloppy data layouts. The lack of reliability in multi-wave samples poses a major problem when suppliers do not use a sophisticated or matching sample design for each wave. It behooves buyers of research to demand the quality they are accustomed to in the U.S.

- *Timeliness.* While it's true that research in Mexico can take longer than comparable studies in the U.S. (often due to slower fieldwork, slower mail service and the increased time it takes to adapt instruments for Spanish), researchers should make sure that suppliers are just as responsive as the firms they use in the United States. Questionnaire development, data processing and report writing should take the same amount of time as they do in the U.S.

- *Sophisticated translators.* Research buyers truly need to do their homework when it comes to language issues. For focus groups, it's important to make sure the moderator is a native Spanish-speaker who's also an experienced moderator. It's also critical for researchers to make sure the supplier provides them with an experienced interpreter who is truly fluent in Spanish and English, and who will translate everything focus group attendees say.

Translation of questionnaires can cause an even greater problem. Suppliers must be able to understand the intent

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Three factors are successful Asian

By Grace Chin

Editor's note: Grace Chin is managing director of Asian Perspective, a New York research firm.

More and more companies are paying greater attention to the growing Asian market in the United States. As a result, many market research firms have added divisions and subsidiaries to specialize in the Asian market. The Asian-American market is unique, and researching it requires very specific sensitivity, understanding and knowledge.

There are three factors that are critical to the success or failure of research with Asian-Americans: language, cultural matching and techniques of communication.

Language

Knowing the language is more than just being able to speak Korean, Japanese, Tagalog, Mandarin, Cantonese or Vietnamese. Interviewers must use the right phrases and wordings and the right tone of voice to create the proper bond with the respondent. An

interviewer needs to give a new immigrant reason to trust him or her, so it is also important to for everyone involved in the study, from interviewer/recruiter to moderator and supervisor, to project an unthreatening, concerned and sincere image. This puts respondents at ease and makes them more willing to listen to a stranger.

A client recently told me that in a pinch he could just ask his staff, most of whom are Chinese, to sit at their desks and conduct telephone interviews with his potential Chinese customers. The problem here is not the ability to speak the language but the ability to communicate wisely. Respondents will almost always refuse when scripts are read to them in a flat and unbiased tone or if they feel information is being concealed from them. This approach makes the purpose of the call mysterious and raises suspicion.

Cultural matching

To conduct successful Asian stud-

ies, researchers should have a good sense of how research methodology can adapt to cultural differences. For example, researchers should know that Asians in general are more reserved about their feelings. This is especially true among new immigrants. It is difficult, if not impossible, for an interviewer to whom they cannot relate to ask them how they feel or think about certain issues.

Researchers must be fluent in the respondents' culture as well as their language. We feel it's best to have "real" Cantonese researchers (as opposed to Cantonese-speaking Americans) recruit Cantonese respondents, Korean researchers interview Koreans, a Japanese moderator lead Japanese group discussions, and so on. Only by being part of the culture can we effectively communicate with respondents and dispel any initial fears they might have of the interviewer/moderator as an intruder — someone dangerous, untrustworthy and trying to get something out of him or her.

Effective interpersonal skills in

critical to market research

mainstream American culture will not necessarily transfer to Asian culture. For example, it is extremely important to establish trust before the researcher ever mentions the purpose of the call or the reason for stopping a respondent in the street.

To recruit someone from Chinatown, for instance, a skilled recruiter or interviewer will know how to greet the Chinese person and project a tone of formality, politeness and sincerity. This interviewer then identifies the company he represents and points out that he is not trying to sell the respondent anything but rather is conducting a study, and that participating will not waste too much of his or her time.

The immigrant may want to participate but may not feel comfortable opening up or may feel that their response isn't important. Once a small level of trust is established (i.e., the person does not hang up or walk away) then the researcher explains the purpose of the study and how it is going to benefit Chinese people as a group.

The word "we" should be used frequently to establish bonding, and therefore it is important that the interviewer is a member of the group being researched. It should be made clear that the information taken from the study will benefit Asians as a group. This will avoid getting too personal with the respondent while at the same time giving them a sense of helping their people, making them feel important and culturally responsible.

Techniques of communication

Traditional research calls for randomness and projectability. Recruiting is thus usually done through random telephone dialing. However, since trust is such an important factor in recruiting Asian immigrants, a more effective way to increase the response rate is to utilize face-to-face recruiting or interviewing within the community. When an Asian respondent actually sees the Asian interviewer, he or she will immediately identify the interviewer as one of his or her group, and therefore will be more

receptive.

Recruiting or interviewing over the phone is not as effective with Asian immigrants because of the threat associated with a personal call from a stranger. Since market research, telemarketing and direct marketing are not common practices in Asia — with perhaps the exception of Hong Kong and Taiwan — it is therefore not easy to establish trust with the new immigrant over the phone. Respondents will feel more comfortable, relaxed and secure if they can see the person, and if the interview is conducted in their neighborhood.

Cultural differences call for a change in research methods. However, researchers must bear in mind that it is not the theory itself that has to be adapted to Asian research, but the approach and execution. Telephone interviews, focus groups, one-on-ones, street intercepts, etc., are all valid research methods, but thought and consideration must go into the choice of method and its execution to ensure success. □



Benefit impact analysis

By Ed Cohen

Editor's note: Ed Cohen is president of Survey Perspectives Inc., Baldwin, N.Y.

With the advent of conjoint analysis and other sophisticated modeling techniques, considerable progress has been made in giving management the kind of information it needs to make tactical and strategic decisions about a product or service. These decisions are based on evaluating numerous and complex marketing issues such as competitive frame, brand positioning, product design, and packaging and pricing — each with its own almost bewildering array of alternatives.

It is beyond the intent and scope of this article to discuss the many very useful techniques available today. Rather, we will outline one relatively simple technique, benefit impact analysis, for exploring a series of product elements that produces a measure analogous to conjoint's utility values in circumstances where a standard conjoint analysis may not be possible.

Application

Benefit impact analysis warrants consideration in any of the following situations:

- As a preliminary to a conjoint study to help define the range of variables, such as quantity, size, capacity, price, etc., to be included in the conjoint matrices.
- Where variables cannot be precisely quantified. For example, a discrete value can be assigned to price, quantity, certain physical attributes, interest payout levels and others. Inches, ounces, dollars, cents and primary colors are concrete and readily understood by consumers. On the other hand, many sensory variables are less clearly quantifiable in terms that respondents comprehend. These might include such elements as "degree of softness," "strength of fragrance," and "carbonation level."
- In cases where, for any reason (such as low incidence

categories or market targets), personal interviews may be prohibitively costly, BIA data may be collected by telephone.

The following case history illustrates one application of BIA in a situation involving both easily quantified and more qualitative types of variables. This particular study was done with personal (central location) interviews.

Study background

The client, a manufacturer of household paper products, was battling several strongly competitive brands, some of which were uniquely positioned and continually chipping away at the company's brand share. To thwart the erosion of brand share, management felt it necessary to modify its own brand in some way and considered four possibilities. Each of the alternatives would have some impact on the others and confusion reigned.

The attributes

Four variables relating to the category were candidates for modification: quantity per package, price per package, product absorbency, product softness.

The first two, quantity and price, are clearly definable in precise terms easily understood by consumers. Absorbency and softness are not. Think about what 10% softer means to the average respondent. We decided after discussions with the client that, although imperfect and admittedly still ambiguous, respondents would relate more easily to purely verbal descriptors, e.g., a little softer, a lot softer.

Method

The BIA technique was utilized to determine the relative appeal of hypothetical modifications in the four product benefit areas. Two levels for each benefit were considered:

Quantity

- 25 more per package
- 50 more per package

Price

- 5¢ less per package
- 10¢ less per package

Softness

- A little softer
- A lot softer

Absorbency

- A little more absorbent
- A lot more absorbent

Each benefit level or option was paired with every other in the array, except that the two options within benefits were not paired for obvious reasons, e.g., 5 cents less vs. 10 cents less. Thus, there were 24 "cross-benefit" pairs.

Note that one is limited to a relatively few variables, since the number of combinations (pairs) increases dramatically as we add benefits and/or levels. For example, the addition of a fifth benefit, maintaining two levels for each, yields a total of 40 cross-benefit pairs. Adding one level to each of the four benefits produces 54 such pairs. In both cases, respondent judgments are likely to become fuzzy long before the final few choices are made.

Respondents were presented with the series of 24 benefit/level pairs on a rotated basis, and given the following instruction:

"Please read each pair of alternatives and select the one choice you would prefer over the other, according to which you personally would rather have in your (product category)."

Respondents then made their selections on a self-administered basis. Had the study been conducted by telephone, instructions would have been modified to accommodate the reading of each pair by interviewers to elicit verbal choices.

BIA analysis

A. Share of preference. The analytic model calculates a "share of preference" for each of the eight benefit levels, along with statistical significance of the differences among the respective items.

Exhibit A
Share of Preference

Benefit	Share (%)
10¢ less	15.12
50 more per package	14.70
Lot more absorbent	13.29
25 more per package	12.44
5¢ less per package	12.15
Little more absorbent	11.99
Lot softer	10.36
Little softer	9.95

Range of statistical significance

** 95% level of confidence

* 90% level of confidence

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Among the eight alternatives, the one with the greatest impact is the 10 cent reduction in price (15.12 share), while a close second position is held by 50 more per package (14.70 share). Clearly, the desire for economy is stronger than qualitative considerations, but these data suggest substantial absorbency improvements are likely to induce greater interest in the brand than more modest changes in quantity or pricing.

B. Benefit leverage. Using share of preference data we can answer the following type of question:

“What is the relative leverage value (or elasticity) of each type of benefit investigated?”

A simple calculation provides an estimate of the leverage/elasticity value for each of the benefit areas.

Exhibit B
Benefit Impact Scores

	Share of benefit preference	Difference equals impact score
<u>Price</u>		
10¢ less	15.12	
5¢ less	12.15	2.97
<u>Quantity</u>		
50 more per package	14.70	
25 more per package	12.44	2.26
<u>Absorbency</u>		
Lot more absorbent	13.29	
Little more absorbent	11.99	1.30
<u>Softness</u>		
Lot softer	10.36	
Little softer	9.95	.41

As shown in Exhibit B, leverage seems to be greatest for price, followed by quantity. This may be interpreted to mean that consumers are more sensitive to these benefits than to the others. Absorbency, while intrinsically important to the category, offers more modest leverage value, possibly because most brands in the category offer at least acceptable absorbency benefits. Softness, too, at the bottom of the benefit share hierarchy, seems to be meeting consumers' basic expectations and offers the least opportunity for marketing leverage.

Summary

BIA offers the researcher a fairly simple but useful technique which estimates the relative consumer appeal of certain changes in product attributes/benefits. It also provides a reading of the relative impact of benefit variables.

The potential applications of BIA are not limited solely to products, nor is the method limited to personal interviewing. The technique is quite versatile and warrants consideration in working towards a solution for your next configuration problem, be it for a new or established product or service.



Spend your money wisely!

Listed-surname sample suitable for most research among Hispanics

By Reger S. Sennott and David H. Taber

Editor's note: Roger S. Sennott, Ph.D., is vice president/general manager of Market Development, Inc., San Diego. David H. Taber is the company's director of business development.

Thanks to its size (22.4 million in 1990), its anticipated growth (72 percent from 1990 to 2010), and the fact that individuals can be reached cost effectively due to their dependence on Spanish-language media, the U.S. Hispanic market continues to be a key target for many consumer goods and services. U.S. Hispanics will account for 31 percent of the U.S. population growth from 1990 to 2010, compared to 36 percent for non-Hispanic whites.

Budget constraints, however, often prevent companies from conducting quantitative research among Hispanics. Many other companies limit their research to one large-scale study (which attempts to answer every question the marketing department has) every three to four years. This means that companies often throw away their opportunity to gather solid, usable information to guide their Hispanic marketing efforts.

Research personnel frequently claim

that Hispanic research tends to cost much more than comparable general market research. The reason for increased cost is their insistence that the sample source used for Hispanic studies represent as many potential respondents as possible. The increased representation, however, increases the cost of the research by lowering the overall study incidence (i.e., the proportion of potential respondents who are Hispanic decreases as the representation increases).

Market Development, Inc. (MDI), a San Diego research firm, funded research to evaluate the most common sample sources used to conduct telephone studies among Hispanics. Its purpose was to measure the differences among the various sample sources in terms of respondent profiles and dialing productivity. The results suggest that for most standard Hispanic studies, the least expensive sampling alternative is more than satisfactory.

Background on telephone sampling among Hispanics

Sampling approaches for Hispanic telephone studies range from samples representing only part of the Hispanic

telephone household population — but yielding a high incidence of Hispanics — to samples representing the entire Hispanic telephone household population and yielding a significantly lower incidence of Hispanics.

Three common methods for creating Hispanic telephone samples are:

- randomly selecting telephone numbers chosen from listed numbers of individuals with Hispanic surnames (listed-surname sample);
- randomly selecting telephone numbers that have exchanges located in high-density Hispanic population areas (high-density sample); and
- combining the methods above, developing a proportion of the sample using a high-density sample and the remainder of the sample using a listed surname sample from low-Hispanic density areas only (hybrid sample).

If cost and timing were not considerations, a fourth and optimal sample choice is the general market standard of selecting telephone numbers that are truly random within particular markets (random-digit dialing, or an RDD

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Imagery in cross-cultural research



By Felipe Korzenny, Betty Ann Korzenny and Sandra M.J. Wong

Editor's note: Felipe Korzenny, Ph.D., Betty Ann Korzenny, Ph.D., and Sandra M.J. Wong, Ph.D., are all senior research staffers at Hispanic & Asian Marketing Communication Research Inc., Belmont, Calif.

Imagery investigation — uncovering the images consumers have of products — has become an important aspect of marketing research. It's a technique that seems to work well with U.S. consumers, most of whom speak English and share social and cultural reference points. Studying product imagery across cultures, on the other hand, is complicated.

There is an unfortunate tendency to oversimplify imagery research when it is conducted with consumers who don't speak English. Simply translating a general market instrument from English into another language may not make the instrument ready to use with consumers in another culture. In addition, it is unwise to compare the data collected from an English instrument with that from a translated instrument.

For example, a product's image of health or power may have different meanings across cultures. One culture may view a car as powerful because it is associated with powerful people. Another culture may perceive it as powerful because of the engine's horsepower rating. Both cultures rate both cars high on power but for critically different reasons.

Etic vs. Emic approaches

Cross-cultural marketing research often involves a difficult, but important, choice between sacrificing cultural understanding and sacrificing comparability.

Etic¹ research strives for comparability across diverse cultures, seeking data about specific items — data that can be contrasted across cultures. Conducting etic research involves translating and adapting one culture's terminology and structures so they are understandable and useful in another culture.

For example, etic research allows the comparison of Hispanics' perceptions of artificiality with the general

public's perceptions of same, or perceptions of corporate character across sub-populations with various cultural backgrounds.

While there have been many attempts to produce cross-cultural data from an etic research perspective, the data sets such comparisons are based on are rarely equivalent.

A common assumption in the etic approach is that aside from language differences, cultures are similar and equivalent. People seem to feel that if we all spoke the same language, we would all be alike.

But the simplicity sought in the etic approach is elusive. Mostly that's because cultures and languages are responses to environment. Cultures consist of adaptive tool sets that humans create in the interest of survival. These tool sets are particular to a group, and are passed on and maintained over time as traditions.

There are three universal dimensions of meaning: power, evaluation and activity. Nevertheless, even the ways in which these universal dimensions are used vary across cultures.

For example, in the car research previously mentioned, power was important across cultures, but it was perceived as having a technological association in one culture and an interpersonal association in another. Wealth can be commonly sought across cultures, but one culture may measure wealth in terms of the number of children one has, and in terms of gold in another. Happiness can be seen as a common pursuit, but may have very different end goals.

Language and culture are intrinsically related

Language is an intrinsic part of culture. It is a tool and a means toward important ends. Language is not just a way to speak; it shapes the way we process information.

Cultures create words to reflect new experiences so those experiences can be shared. Since different cultures have different experiences, different languages are not just different sets of words, they are reflections of specific experiences.

If language influences how we think, then language also affects the imagery we associate with different products. Our language and culture affect our perceptions and abilities to generate metaphors.

Imagery and language in contrast

General market or mainstream U.S. meanings contrast with the meanings understood by many of the country's non-Western cultures, including Hispanics and several Asian groups. Figure 1 contains some examples of cultural differences in imagery gathered while doing research. The image attributes listed are instrument items that can be rated on a Likert-type scale ranging from "strongly agree" to "strongly disagree" for a particular type of product, e.g., a pizza brand or a soft drink.

The reader should keep in mind a product or service close to his or her heart while looking at these examples, and ask the following question about it: How would the disparities of inter-

continued on p. 29

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War stories:

True life tales in marketing research

By Art Shulman

Editor's note: This is the second installment of an occasional series in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. Readers are invited to call or write Shulman with stories of their own.

Market research, like any profession, has a language of its own. Sometimes, we wouldn't want the general public to know how we talk to one another. For example, how do you think someone screened at the mall would feel if she knew that just because she didn't own a dog the interviewer was instructed to terminate her?

While at a large New York research firm, Alan Fine worked with a client who hadn't quite mastered research lingo. The client, an older gentleman from the marketing department, wanted up-to-the-minute results of a project. So he called Fine daily to ask for the "hand jobs."

Sometimes, interesting things happen because of language misunderstandings. For example, one embarrassed focus group hostess reports

how she misunderstood a fatigued respondent, who kiddingly asked where he could take a nap. She directed him to the bathroom.

People also make mistakes with written words. I once gave a chicken-scrawled handwritten proposal, including a statistical plan, to my new secretary, an ambitious recent college grad with plans to really learn the market research business. A few hours later, as she handed me the typed proposal, she asked, "If you have time, could you please explain how to do the analysis of a fairy dance you recommended?"

Sometimes consumers say interesting things to us. Ellen Lady recalls a survey she conducted, a telephone callback on a toothpaste container with a cap that offered consumers the option of twisting it open or flipping it up. The respondent said that both she and her husband had tried the new toothpaste, reporting, "I guess you could just say that he screws and I flip."

A story is circulating about a British market research firm that conducted a telephone survey in the U.S. for its client, a company producing a

birth control product for dogs. To obtain qualified households, the research company, not quite versed in the American idiom, instructed interviewers to introduce themselves and then ask, "Is there a bitch in your home?" Results indicated that when a male answered the phone, 76 percent replied in the affirmative, while the percentage was only in the teens when a woman answered. (One woman responded, "Speaking.")

Speaking of misunderstanding, Richard Gentner, now at Nestlé, once worked at a bank that sent out direct mail advertising with the headline, "Now You Can Have The Best Of Both Worlds." The mailing list, containing a large number of elderly consumers, was not quite current. As a result, the bank was shortly deluged by complaints of poor taste from the spouses of some of the deceased people the advertising had been mailed to.

We conducted a study of fashion doll commercial, where, after seeing the commercial, girls were allowed to play with the doll. When asked if anything was different about the doll compared to what the commercial told

her about it, one 6-year-old responded, "The doll didn't break in the commercial!" The interviewer wrote a parenthetical note in the questionnaire indicating that the doll broke while the child was playing with it.

Most kids responding to questionnaires tend to be shy and polite. One little girl, for example, when asked how she'd play with a new doll, said, "With my little sister, and very carefully." In contrast, a perhaps more truthful girl in the same survey said, "I'd break it over my bratty little brother's head."

In future installments of this column, we'll report on more quirky, loopy and strange happenings in the world of market research. Whether you're a research provider or a client, if you'd like your story to be told — anything related to marketing research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires — please call me (818-782-4252) or, better yet, write it up and fax it to me (818-782-3014). □

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Survey Monitor

This is the modern world

The Willy Lohmans of the world may not like it, but today's purchasing managers are more likely than ever to be female or members of a minority — if not both. Based on research it recently completed, Penton Publishing, Cleveland, says that in 1993, women and minorities accounted for 41.5 percent of all managers, engineers and purchasing agents — a figure that's up dramatically from 31.4 percent in 1983. Of

the total number of people who had an influence on company purchase decisions, Penton found 30 percent were non-Hispanic white women, 4.4 percent were minority women and 7.1 percent were minority men.

Penton also discovered that in 1993, 55.2 percent of all workers were women or minorities. In 1983 the figure was 51.6 percent. Based on these findings, women, blacks, Hispanics and other minorities will make up two-thirds of the 51 million people expected to enter the workforce between 1992 and 2005. For more in-

formation, call Ken Long at 216-696-7000, ext. 2283.

What would Ned Flanders say?

Protestants — even if they're the teachers of the creed — aren't necessarily optimists. And while America's religious right garners vast quantities of media attention, the rest of the country seems to get fuzzy when it comes to defining beliefs. The Barna Research Group Ltd., Glendale, Calif., has conducted research with both Protestant pastors and lay people of various faiths, and the results provide several snapshots of America's confused religious side.

We're used to hearing about the high levels of dissatisfaction among folks in various occupations, but pastors? Barna surveyed 413 Protestant pastors, 41 percent of whom believe that if Jesus Christ returned to the world today he would say that the Christian church is "showing little positive impact on souls and society." An equal portion of the holy folk think he would describe the church as "doing a respectable, if not wholly successful job." Two percent agreed with a much more positive assessment and 3 percent felt a much more negative description would fit, while a relatively amazing 13 percent were not sure or were disinclined to make an assessment. The flip side of the finding is that Barna research with lay people shows that 67 percent have a relatively high level of confidence in the clergy and 70 percent believe the church does a good job of meeting people's spiritual needs.

Of course, lay folks' answers may

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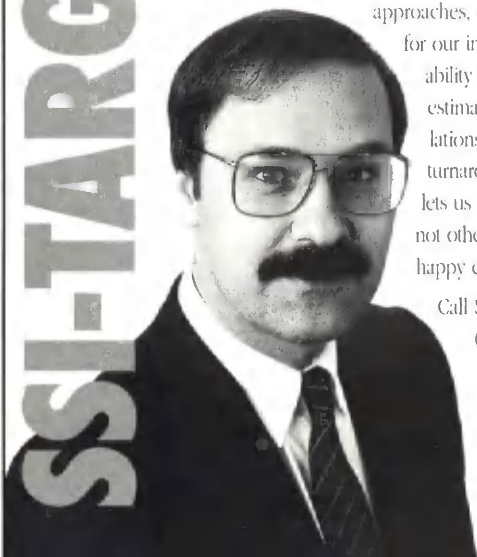
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approaches, we not only make things easier for our interviewers, but also retain our ability to generate fully projectable estimates for difficult-to-reach populations. Targeted Samples let us cut turnaround time substantially. That lets us bid on and win jobs we could not otherwise get — and makes for very happy clients."

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be attempts to balm guilty consciences: Only 42 percent of the 1,015 adults who participated in Barna's random nationwide survey said they had attended a religious service in the previous seven days — down from 49 percent just three years ago. Some 71 percent of survey participants (up from 67 percent in 1991) do not believe in absolute truth. Equal numbers believe there are no absolute moral standards that apply to everybody. Although nine out of 10 adults own a Bible, only 45 percent believe that everything in the Bible is meant to be taken literally. But Americans are willing to suspend their disbelief: 72 percent of those surveyed believe that all of the miracles described in the Bible actually took place.

Barna's research uncovered a handful of odds and ends, too: While 88 percent think Jesus Christ was a real person, 42 percent buck traditional tenets of Christian faith and say that Christ sinned. While 72 percent of respondents maintain a belief in the traditional Christian view of God as an omniscient, omnipresent being,

only 61 percent believe that his nemesis, Satan, is a living being. Still, 39 percent believe that people who do not consciously accept Jesus Christ as their savior will be condemned to hell. Three in 10 get new agey when they describe God: Among them, God ranges from being the realization of all humanity's capability to do good to a pretty flower. Finally and genuinely oddly, 10 percent of those surveyed believe that Noah was married to, yes, Joan of Arc. For more information, call Barna Research at 818-241-9300.

Stress: The battle goes on

In the not exactly earth-shattering news department: It turns out the leading cause of stress around the world is — wait for it — work. Somewhat surprisingly, though, the international survey that unmasked the culprit — 54 percent of the 5,300 adults polled cited their job as the chief cause of stress-outs — also discovered that the United States is not the world-

wide leader in that department, Hong Kong is. In the U.S., a below-average 52 percent pointed to work; in Hong Kong, the leading work-stressed nation, 67 percent feel the heat from their job. A big chunk of the folks surveyed (46 percent) add that the situation at work has worsened in the past two years. Other stress inducers included money worries (29 percent), personal relationships (20 percent) and personal/family health problems and bereavement (20 percent). The survey was conducted by Harris Research of London for the London-based Associates for Research Into the Science of Enjoyment (now there's a stress-free job).

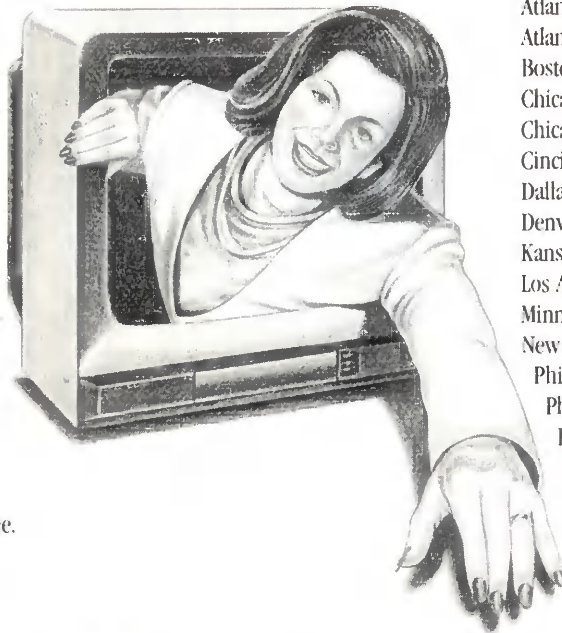
All that work-related stress — most of which, again not surprisingly, is caused by overwork — takes a toll: One in five (18 percent) office workers have taken time off because of stress (27 percent in the U.S.). What's worse, 34 percent of office workers say they wouldn't pick the same career if they had it to do all over again.

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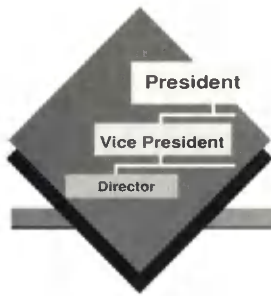
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Names of Note

Joseph Gulawsky has been named director of operations at *MascoTech Marketing Services*, Auburn Hills, Mich., a provider of customer satisfaction research. He is responsible for the planning and development of new and existing facilities, equipment, systems and staff. He also continues to manage MascoTech's marketing activities.

Having returned to the United States from the Slovak Republic, where he served as a volunteer with the International Executive Service Corps, **Richard Kurtz** has joined *CMR Market Research*, New York, as vice president and director of marketing. He will help implement business development programs for CMR. In Eastern Europe, Kurtz helped establish

entrepreneurial structures.

Joni Albrecht Muir has joined Minneapolis-based *Winona MRB Inc.* as vice president, research. She is based in the company's Phoenix office and is responsible for automotive research.

G. Jack Hauey has been named to executive vice president, sales position for *Donnelley Marketing Inc.*, Stamford, Conn. Hauey is managing Donnelley Marketing and Donnelley/FDC sales forces.

Dennis LaFave and **Daniel J. Bloom** have joined Chicago-based *CMA Marketing*. LaFave takes an account group vice president position, while Bloom serves as director

of Hispanic research. (cf. Research Company News)

Kalyna Hrushetsky has joined *In-form Marketing Research*, Chicago, as a research associate. She comes to IMR from Chicago advertising agencies Hamilton, Carver & Lee and Jordan Tamraz Caruso.

Rockwood Research, St. Paul, Minn., has added **Richard T. Scamehorn** to its analytical staff as a project director. He was formerly the head statistician at Multidata Inc. in Minnetonka, Minn.



Scamehorn

Hruby

William J. Hruby has joined *Sorensen Associates*, Troutdale, Ore., as a vice president. He is responsible for business development for the firm. His experience is in market research and consulting in the food service industry.

Susan P. Ackermann, Ph.D., has come onboard at *Response Analysis Corp.*, Princeton, N.J., as vice president, health & human services policy, research and evaluation. Ackermann will expand the company's activities

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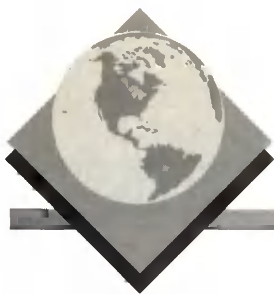
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26	70	51
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Research Company News

FocusVision Network Inc. has moved. The company's new address and phone numbers are: 1266 E. Main St., Stamford, CT 06902; 203-961-1715; 203-961-0193 (fax).

Cincinnati-based **Alliance Research** has moved its Dallas/Ft. Worth Client Service Office. The move comes in response to growth and the addition of Nancy Kennedy as vice president. The Alliance office's new address is 2000 E. Lamar Blvd., Suite 600, Arlington, TX 76006. The company's new phone numbers are 817-588-3025 and 817-265-6898 (fax).

Information Resources Inc., Chicago, and **Strategic Mapping Inc.**, Santa Clara, Calif., have joined forces to develop a family of products for sales and marketing applications. The products will combine — in single systems — micromarketing data, competitive intelligence and advanced mapping software. The first fruit of the relationship is **DataServer Targeter**, a Windows-based software application that integrates IRI's On-Line Analytical Processing software and InfoScan Census data with SMI's mapping technology. According to IRI, the partnership will build on, among other things, SMI's AtlasView SDK (software development kit), which allows data visualization and geographic analysis. In addition, certain SMI data, such as Conquest Market Data and ClusterPLUS 2000, can be embedded directly into DataServer Targeter. IRI and SMI's joint operations will extend into IRI's other applications as well.

Meanwhile, the **Campbell Soup Co.** has renewed its relationship with IRI. Campbell agreed to a multiyear, multi-million dollar plan that calls for IRI to continue to supply Campbell Soup with marketing research services and decision support software. For more information, call IRI at 312-726-1221.

International has moved to 65 E. India Row, Suite 29F, Boston, MA 02110. The company's phone numbers are 617-720-4158 and 617-723-1254 (fax).

Will Eick, David Schaefer and Dr. Celeste Gaspari have formed **MarketReach Inc.** in Burlington, Vt. The three principals intend to iden-

continued on p. 35

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Product & Service Update

Telephone tool debuts

TelePrompt, software that makes it easy to set up and conduct interviews in person or over the phone, has been introduced by 3D Software Services. The software's features include sample management, auto-dial, cross tabulation, randomization, open-ended responses, forward and backward navigation and import/export routines. TelePrompt is available for Windows, MS-DOS and Macintosh. It can run in single- or multi-user mode and costs \$299 per user. Demo diskettes can be had for no charge from the company. Call 3D Software Services at 415-574-0178.

SPSS for Mac ships

Chicago-based SPSS Inc. has shipped the Macintosh version of its SPSS 6.1 statistical software. The redesigned version of its core product has a Mac-style user interface that supports System 7 features, integrated graphics, tutorials and several features designed specifically for the Mac, including a toolbar in the graphics editor. The SPSS Base module and SPSS Professional Statistics module have been shipped already. Three other Macintosh modules — SPSS Advanced Statistics, SPSS Tables, SPSS Trends and SPSS Categories — are also in the process of shipping. The suggested retail price of the Base module is \$695 and add-on modules range from \$395 to \$495. For current SPSS users, the Base upgrade is \$199. Each additional module upgrade is \$99. For more information, call 312-329-2400.

d-Time10 update

Ballard Synergy Corp., Silverdale, Wash., has released a version 1.1 of its d-Time10 CD-ROM accelerator software. A CD-ROM accelerator makes CD-ROM applications perform as fast as they would if they were running on the computer's hard drive. Basically, on a Quad-speed CD-ROM drive, the product can do a database search that normally takes 20 minutes in one minute. Data transfers are roughly eight times faster. Slower drives are speeded up even more dramatically. The software has a Windows help program with full-motion video. For more information, call Ballard at 206-656-8070.

IRI issues IRI Publishing

IRI Software, the Waltham, Mass.-based software division of Information Resources Inc., has released IRI Publishing, a sophisticated CD-ROM database and software delivery system that provides users with access to IRI's client customized InfoScan Census scanning data. IRI Publishing's CD-ROM capabilities allows for the direct delivery of updated databases to PC platforms; the databases can then be copied to a LAN. The system allows users to access data without calling into a mainframe. IRI Publishing also allows for the customization of software and data, so clients can receive user-specific information with downloading an entire database. IRI Publishing does not require communications software, and updated CD-ROM databases are delivered each month. For more information, call IRI Software at 617-672-4562.

KidTracker moves into visual satisfactions

Theraplan Inc. and Regulus Communications Inc., Lincoln, Neb., have expanded the KidTracker Market Research program. The program now tests pre-teens' and teens' visual satisfaction with products and services. Using Internet and multimedia CD technology, the program can place full-color graphics onto any desktop computer with an e-mail address. Responses from a customized panel can be received within 24 hours. The companies say the new program eliminates the need for prototype testing with simulated products and four-color printing. The companies' new system can test new packaging designs, packaging copy, the "visual candy" that helps attract attention to a product, the influences of interactive information on marketing programs, what kids buy and why they buy it based on the visual language of media designs, and the level of "visual interactivity" required to transfer product or program information to kids. The KidTracker Market Report tracks young customers' satisfaction via products and brand interaction. For more information, call 402-421-3172.

Investext adds to MarkIntel database

The Boston-based Investext Group has added industrial market research studies from the Freedomia Group to its list of online offerings in the MarkIntel database of industry and market intelligence reports. The studies provide comprehensive analysis

of industries and products in a broad range of United States and worldwide sectors. The Freedonia Group specializes in the plastics, transportation, chemicals, communications, construction, health care, household good, industrial components and packaging industries. The online studies cover subjects such as competitive strategies, growth markets and products, industry structure and overview, market share data and opportunity and risk assessments. The reports can be used for market and corporate analysis, as well as strategic planning. Approximately 10 to 12 new studies from the Freedonia Group will be added to the MarkIntel database each month. The Freedonia Group is an international multienterprise business/research database company that does all of the writing, editing and compilation of its data in-house. For more information, call I/PLUS Direct Client Services at 800-662-7878.

NFO Multicard Survey adds households

NFO Research Inc., Greenwich, Conn., has increased the number of households that receive its Multicard shared-cost mail survey. The Multicard mailing will be sent to 250,000 homes. The company says its NFO Multicard Survey is the largest mail omnibus survey in the market research industry. The survey allows companies wanting to conduct marketing research among consumers an opportunity to share the cost of mailing questionnaires. The Multicard Survey consists of a packet of questionnaire cards that contain questions contributed by each client. The survey mailings are sent on the first and 15th day of each month to nationally representative samples of households selected from NFO's 450,000 household panel. For more information, call NFO at 419-661-8560.

NCS beefs up offerings with Viewpoint, scanner software

National Computer Systems, Minneapolis, has developed the NCS Viewpoint satisfaction measurement

system to simply, and reduce the cost of, evaluating patient satisfaction. Data garnered from the surveys can be used by hospitals, group practices, care facilities and others to evaluate patient care, monitor marketing efforts and meet quality measurement standards set by the Joint Commission on Accreditation of Healthcare Organizations and National Committee for Quality Assurance. The system creates survey forms that are attractive and simple for patients to fill out and return. Information on the completed survey forms can be tabulated quickly and accurately. The system includes an OpScan 3 scanner that reads patient survey responses quickly and easily, the NCS Viewpoint software and customizable starter survey forms. With the software, users can customize forms, print the forms on a laser printer, scan the returned forms, download patient information, tabulate survey responses and prepare graphs and charts to summarize the survey results. The NCS Viewpoint system, with 400 starter survey forms, has a base price of \$5,995. Organizations that already have an OpScan scanner for processing other data can purchase the Viewpoint software and starter forms at a one-time price of \$695.

Meanwhile, NCS is also offering a series of Windows-based software products that allow users to input information from a form automatically, without key entry. The products work with NCS optical mark read scanners and scannable forms. NCS' Windows-based forms-processing software, ScanTools, makes it easy to use a data-entry scanner. Menu-driven screens and point-and-click commands make forms scanning simple to incorporate into and use with most PC applications programs. NCS also has introduced DesignExpert software, for designing scannable forms, and NCS Survey, a statistical reporting software package. In addition to the software, NCS provides related services tailored to the new ScanTools software, including training, custom programming, software consulting, scannable forms design and printing and support service. For information

on NCS products, call 800-347-7226.

Fry launches vinyl survey

Fry Consultants Inc., Atlanta, has started a comprehensive multienterprise study of the North American vinyl window and door industry. The projects will examine all aspects of the vinyl window and door industry, projecting trends through the year 2000. The study will have an emphasis on production, marketing, construction materials, distribution and competition with wood, aluminum, FRP, steel and other materials. The study will include comprehensive secondary research, plus telephone and personal interviews with 200 builders, building supply organizations, contractors, dealers and distributors, home centers, jobbers, lumberyards, resin manufacturers, window and door manufacturers, profile extruders and other key respondent organizations. The pre-publication subscription price of the study is \$4,500; after-publication price will be \$5,400. Copies of the Offering Prospectus can be had from Fry, 1900 Emery St. N.W., One Park Place, Suite 450, Atlanta, GA 30318. Call the company at 404-352-2293.

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Spatial Insights, Vienna, Va., offers geographically referenced demographic data, market potential data, lifestyle segmentation data, business locations, road networks and traffic counts — all based on spatially modeled, site-specific trade areas. The company maintains that the incorporation of sophisticated gravity-based models into the definition of trade areas provides more accurate representations and leads to better, more reliable siting decisions than those based on simple radial distances. Spatial Insights uses spatial interaction and patronage probability models to define and delineate trade areas, and provides the geographically referenced data to end users in GIS-ready formats. For more information, call 703-827-7031.

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Mexico

continued from p. 7

of each English-language question and translate its concept into the most appropriate Spanish for Mexican consumers.

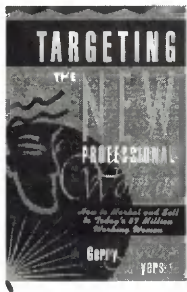
No tricks to it

There really is nothing magical about conducting primary research in Mexico. While there are some lifestyle and attitudinal issues that can affect the way research is executed, buyers of research are advised not to focus on cultural issues in trying to understand the market. Instead, researchers should attempt to fully understand four factors that come into play:

- the past and present marketing environment in Mexico;
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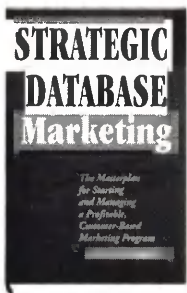
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Research among Hispanics

continued from p. 13

sample).

Listed-surname samples are based on a list of over 12,000 Hispanic surnames supplied by the Bureau of Census. Listed-surname samples have the advantage of a very high incidence of Hispanics, typically 70 percent and higher. Errors of commission, i.e., respondents who have Hispanic surnames and do not consider themselves Hispanic, are eliminated by screening for Hispanic self-identification.

Listed-surname samples, however, represent only part of the Hispanic telephone household population. The two sources of omission errors, i.e., households with telephones who would classify themselves as Hispanic but do not appear on listed surname samples, are Hispanics:

- with unlisted telephone numbers. These could account for anywhere from 30 percent to 55 percent of Hispanic telephone households depending on the market; and

- without Hispanic surnames. According to the Census, this could include up to 18 percent of the Hispanic population, half of whom would have listed phone numbers, thereby omitting an additional 9 percent of the Hispanic telephone household population.

The purpose of the high-density samples is to include unlisted numbers within the sampling frame and, at the same time, maintain a reasonably high incidence of Hispanics. Telephone exchanges can be drawn from high-density census tracts or high-density ZIP codes. Telephone numbers are then typically created by randomly generating the last four digits. Many of the resulting phone numbers may be from households outside of high density areas. This occurs for two reasons. One, telephone numbers with the same exchange are not necessarily located in the same area. Two, ZIP codes and census tracts based on the 1990 census may be somewhat inaccurate in terms of today's Hispanic population.

The most common type of high-density sample is based on census tracts or

exchanges that have a Hispanic population density of at least 30 percent. This type of sample can yield a Hispanic incidence of anywhere from 40 percent to 60 percent, depending on the market. High-density random samples also omit part of the Hispanic telephone population, namely those Hispanics who live in low-density areas. The number of households excluded can vary substantially (from 10 percent to 80 percent) depending on the market.

The hybrid sample offers a compromise. Its Hispanic incidence efficiency is greater than that of the high-density sample and less than that of the listed surname sample. It also includes a greater proportion of the Hispanic telephone population than the other sample types.

Key questions when using the hybrid sample are: What proportion of the numbers should be derived from a high-density sample? What proportion from a listed-surname sample in low-density areas? And, what should be the cut-off for determining whether a density level is high or low? A typical approach is to use 30 percent as the cut-off density level and to administer one-half of the completed interviews using each of the two sample source components.

Study findings

In terms of past four-week household usage for the 13 different products or foods asked about, there was only one product from one sample source which was significantly different from the RDD sample. The usage of bottled salad dressing was higher using the high-density sample. (See Table 1.)

Table 1: Past 4 Week Usage of Household Products/Foods

Base Total Sample	RDD (180) %	Listed-Surname (320) %	High Density (189) %	Hybrid (271) %
Paper towels	97	94	95	96
Bleach	94	95	93	94
Cold cereal	94	95	94	93
Mayonnaise	91	91	89	89
Carbonated soft drinks	87	88	86	86
Liquid laundry detergent	83	89	87	86
Coffee	84	85	86	83
Salty snacks	61	77	80	79
Syrup for pancakes/waffles	79	74 ^A	62 ^A	76
Non-Prescription pain relievers	74	75	74	75
Fruit drinks	62	59 ^A	70 ^A	66
Bottled salad dressing	57 ^A	60	67 ^A	66
Boxed cake mix	52	56	56	55

A - matched columns are significantly different at the 95% level of confidence.
Source: Market Development, Inc., San Diego, CA

In terms of household ownership of the 10 high-ticket products and/or services asked about, incidence figures for two products deviated from those for

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the RDD sample. When using the listed-surname sample, the incidence of having an answering machine was lower and the incidence of having a washing machine was higher. (See Table 2.)

Table 2: Household Ownership of Appliances/High-Ticket Items

Base: Total Sample	RDD (180) %	Listed-Surname (320) %	High-Density (189) %	Hybrid (271) %
Car or truck	81	85	79	83
VCR	79	82	80	82
Microwave oven	74	69 ^A	77	77 ^A
Washing machine	48 ^A	58 ^A	52	55
TV video game unit	42	46	42	42
Dryer	41	38	39	42
Answering machine	38 ^A	28 ^{AB}	31	35 ^B
Dishwasher	27	23	23	25
Savings account	41	43 ^A	34 ^A	39
Checking account	41	41	34	38

A, B - matched columns are significantly different at the 95% level of confidence
Source: Market Development, Inc., San Diego, CA

Respondents were asked about 13 different classification variables and significant differences appeared on two of them relative to the RDD sample. All three samples reported a higher incidence of Spanish-television viewing than did the RDD sample, and the listed surname sample resulted in a higher proportion of the respondents reporting they were of Mexican origin. (See Table 3.)

Table 3: Classification Data by Sample Source

Base: Total Sample	RDD (180) %/#	Listed-Surname (320) %/#	High-Density (189) %/#	Hybrid (271) %/#
Spanish dominant	65	73	74	71
Watch Spanish TV	74 ^{ABC}	88 ^A	84 ^B	85 ^C
Listen to Spanish radio	65	68	68	66
Have cable TV	28	26	22	28
Age (mean)	35.1	35.6	35.4	35.9
Income (mean in 000's)	20.4	19.5	17.3	19.1
High-school graduate	39	35	37	38
Household size (mean)	4.7	4.7	4.7	4.6
Children at home (mean)	2.0	2.1	2.0	2.0
Have child under 3	32	34	27	27
Have child 3 - 5	39	36	36	36
Have child 6 - 12	48	50	50	48
Have child 13 - 17	27	29	35	32
Born in U.S.	24	17	21	22
Of Mexican origin	75 ^A	85 ^{ABC}	73 ^B	76 ^C
Own home	29	36 ^A	27 ^A	31

A, B, C - matched columns are significantly different at the 95% level of confidence
Source: Market Development, Inc., San Diego, CA

As for productivity issues, there were, as expected, dramatic differences between the samples. For the listed surname sample, 13 percent of all dials resulted in contacts (i.e., getting the opportunity to ask the correct respondent the first screener question), and 74 percent of the households claimed to have a member who was of Hispanic origin. Using the

high-density sample resulted in an 8 percent contact rate and a Hispanic incidence of 45 percent. The productivity of the hybrid sample was between that of the other two.

All of the results were also analyzed by looking only at respondents who speak Spanish more than English at home (a very common screening requirement for Hispanic studies). Of all 36 variables asked about, only the results for three were significantly different than those for the RDD sample. In two cases, the listed-surname sample was different, in one case the high-density sample was different, and none of the variables was significantly different using the hybrid sample.

And the winner is . . .

If a winner needed to be selected from the sample test study, it would be the hybrid sample. When compared to the RDD sample among Spanish-speaking respondents it was not significantly different on any of the 36 variables. Both the high-density and listed-surname samples, however, also provided results that were very similar to those of the RDD sample. By chance alone, one would expect each sample to produce results different from those of the RDD sample on one or two variables.

If all samples are satisfactory for representing the Hispanic consumer, the sample selection criteria should focus on productivity, or cost, issues. The listed-surname sample clearly is most productive and is less costly because it:

- has fewer non-working numbers, since all numbers are from listed households;
- has a Hispanic incidence much higher than for the others; and
- has lower sample costs, since fewer telephone numbers need to be purchased.

Using a high-density sample as the baseline, a hybrid sample could reduce the total study cost by 10 per-

cent to 20 percent, and using a listed-surname sample could reduce the total study cost by 20 to 40 percent. Hopefully, the listed-surname approach would free up enough dollars to conduct at least one quantitative study instead of relying on information from a Hispanic expert. It also might allow the company to divide a large "one size fits all" questionnaire into two or more focused questionnaires.

The results of the study show that when a proportion of the population is excluded from a sample, the resulting sample is only inferior if the excluded individuals are significantly different on key variables than those who are included. This principle also applies to sampling targets other than Hispanics.

Often, sampling issues gain exaggerated importance since this is one of the few areas in which error can be measured scientifically. When conducting research among Hispanics, researchers would probably best be served by improving other study considerations which typically have a much greater impact on the results. Their attention should be focused on eliminating the possible biases caused by:

- interviewers who speak Spanish poorly;
- use of English-speaking supervisors for Spanish-language studies;
- asking questions that are inappropriate for the Hispanic market;
- excluding questions that are critical for Hispanic studies;
- questionnaires that are too long; and
- questionnaires that are poorly adapted into Spanish.

In summary, MDI's study shows that, at least for the Los Angeles ADI (the largest U.S. Hispanic market), it is possible for companies to gain quantitative insights into the Hispanic market without paying research prices that are higher than those for comparable general market studies. Given the size and potential of this lucrative market, that's good news indeed. □

Imagery

continued from p. 15

pretation shown affect research conclusions?

Image attributes	Perception of U.S. mainstream	Perception of other cultures in the U.S.
Preservatives	Negative, not natural	Positive, keeps things fresh
Traditional	Negative, old fashioned, passé	Positive, worthy of respect, stability
Innovative	Positive, up-to-date, creative	Negative, disruptive of tradition, threatening, challenging
Party goer	Negative, bum, lazy	Positive, integrated in society, fulfill social obligations
Frozen	Convenient, easy, modern, practical	Not natural, not fresh, questionable, for lazy people not interested in their family

These examples suggest how an etic approach to cross-cultural research may backfire. It becomes evident: making comparisons while working across cultures can be complicated and results obtained are often misleading. This is particularly true when words and their translations are taken literally.

Some readers may argue that it is naive to deal with concepts the way we have. Some people believe that it is possible to adapt a concept in a way that allows for culturally relevant conclusions. But attempting to do so consistently gives rise to a specific problem — the so-called the paradox of equivalence — that is not easily resolved.

The paradox of equivalence

When conducting multicultural research, one can nobly attempt to make various translations of a concept as equivalent as possible. For example, a researcher could culturally adapt and translate the connotation of "tradition" in English as "the glory of your ancestors" so it made sense to a certain cultural group.

The more culturally equivalent a concept is, the more relevant the translations will be to their respective cultures. But the translations will likely fail to uncover cultural differences precisely because they were well adapted to each culture. What a headache!

On the other hand, a more literal and unadapted translation will be less relevant to a second culture. This approach will tend to uncover cultural differences, but these cultural differences may be complicated and have implications that render the translation worthless.

Forexample, a product may be judged to be quite natural by the U.S. mainstream, while Hispanics may feel it is

not natural. But mainstream U.S. consumers may think the product is natural because it does not have preservatives, while Hispanics may feel it is not natural because it is not fresh from the farm.

Going native: the emic approach

Multicultural research can also be undertaken from an emic² perspective, wherein concepts are examined from the perspective of the culture being studied. This approach can lead to a deeper understanding of the culture, but may preclude comparisons between cultures.

Still the emic perspective can be quite useful. After all, cross-cultural comparisons can be used to generate global approaches to selling products or services, but they may not do much to ensure the success of a specific product.

To best position a product or service, one should be most interested in knowing how a particular culture perceives the product or service. For example, brands that have positioned themselves uniquely within the Hispanic or Asian markets have claimed more loyalty and market share than others. To assess imagery correctly across cultures, researchers must take emic approach.

It's best to start by conducting qualitative research within each of the target cultures to gain an understanding of the particular meanings associated with a brand or product. The specific meanings uncovered at the qualitative stage can then be used in a second quantitative step.

In the quantitative phase, the attributes uncovered are checked for prevalence and importance with a representative sample. The results of the quantitative phase must be tempered by the meanings discovered at the qualitative phase.

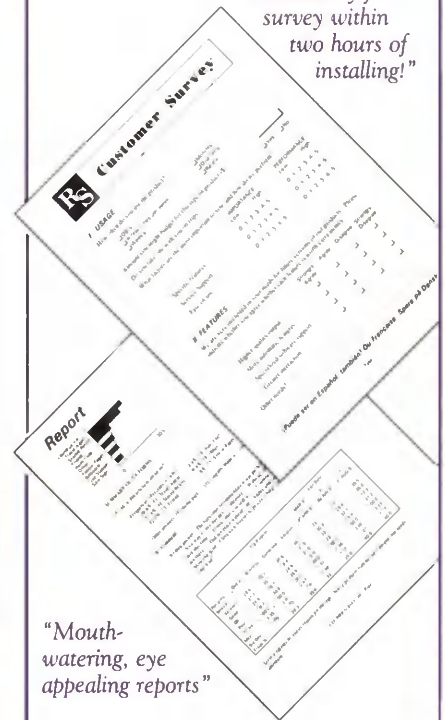
Neither phase would produce results that are necessarily equivalent across cultural groups. Qualitative procedures may differ, and the quantitative imagery attributes can differ even more. Different instrument scales and structures

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would have to be used to accommodate cultural differences.

Imagery in qualitative research across cultures

Product sorts and personifications are techniques routinely used in the general market for understanding product imagery, but these approaches may not make sense to some cultural groups.

Sometimes it's not just cultural differences that restrict consumers' ability to participate in such qualitative approaches. Many times it is a lack of knowledge of products in a category that precludes the generation of imagery.

Think of yourself — assuming you are not completely familiar with the Japanese culture and its products — in a focus group in Japan. Imagine a set of products placed in front of you with Japanese labels. How would you sort these products?

Logically enough, consumers from other cultures tend to classify products by size, color, shape and familiarity. But researchers often expect consumers from other cultures to have an image of all products normally found on the shelves of supermarkets. To the surprise of many marketers, products that have not been directly advertised to culturally different consumers have almost no imagery among those consumers.

When asked to sort products, consumers typically cluster familiar products together simply because they know and trust those products. Likewise, they will group other products together "because we don't know them. They are not advertised enough in our language."

Personification exercises and other projective approaches that ask respondents to attach attributes normally associated with people, animals or objects to products tend to flop if not planned with the culture in mind. A researcher might ask a question such as, "What type of animal does each of these cans of beans remind you of? And respondents could respond with total silence.

In other categories, such as deodorants or dairy products, respondents may only know one or two brands. They would likely say they like the smell or taste of their favorite brand,

and would not know how else to differentiate the products.

In such a situation, a qualitative researcher who is well anchored in his or her culture can get consumers in the same culture to discuss attributes, perceptions and associations relevant to the culture. Avoid preconceptions about approaches that may have worked in the general U.S. market. Such approaches can perplex respondents and fail to elicit important findings.

Quantitative research variants

Once the researcher has successfully identified themes and attributes in qualitative research, the project can proceed to a usage and attitude study. There are several issues to consider when striving to make the research approach culturally sensitive.

- Allow for ignorance. In imagery research, typical quantitative approaches to asking questions do not allow the respondent to say "I don't know." The researcher usually says, "Please tell me how much you agree or disagree with each of the following statements. Please tell me if you strongly agree, agree, disagree or strongly disagree, or if you neither agree nor disagree."

Soda X is natural.

Soda X is good for you, etc.

The respondent has not been given the option to say that he or she does not know if the soda is natural or good for you. A "neither agree nor disagree" answer does not indicate that the respondent doesn't know.

Semantically, "neither agree nor disagree" could indicate indifference or simply the belief that the product has an intermediate rating on an attribute. The respondent should be given the option to say that she or he does not know if the attribute applies to the product.

- Make scales culturally compatible. Some cultures find scales easier to use than others. Mexicans, for example, are quite familiar with the notion that children in school are graded on a 0 to 10 scale. We have found out that 0-to-10 scales are easier for Mexican respondents to understand and use because of this familiarity.

- Pre-coded open-ended questions. The use of a long battery of items to detect perceptions and opinions may not be as useful in some cultures as they are in the general market. When a long list of attributes is read to respondents who share a specific cultural background, many respondents are likely to give the same kind of answer.

Hispanic respondents, for example, are known for using extremes of scales. After a few attributes are rated, they tend to settle on a high or low value and continue that way. In contrast, Asian respondents tend to avoid the extremes. They tend to settle on the more moderate value or to seek a yes/no or agree/disagree type of response.

When researchers need to present a battery of items, it best to break the items into small subsets to avoid getting the same answer to each question from respondents.

A better approach is to have pre-coded categories of responses. The attributes discovered in the qualitative phase are listed and pre-coded, but the respondent is asked to freely talk about a brand or product. Other response options are allowed.

Each mention that matches a pre-coded category is coded. This approach is more likely to validly reflect the way in which respondents look at the brand or product. But again, the results are not easily comparable across cultures.

Conclusion

An emic approach to research across cultures is recommended when product and brand imagery are important. Sensitivity in both qualitative and quantitative phases of research is fundamental to identifying valid cultural trends.

Looking at a culture from the inside is more likely to produce information that can be used for effective positioning. Imagery is strongly tied to culture, and language and culture cannot be separated. □

¹From *phonetics* or vocal utterances that are universal, as opposed to *phonemics* or vocal utterances that are specific to a culture. A discussion of this topic can be found in Kenneth Pike's "Etic and Emic Standpoints for the Description of Behavior" in the book *Communication and Culture*, edited by Alfred Smith, published by Holt, Rinehart, and Winston, 1966.

²*ibid.*

Survey Monitor

continued from p. 21

Even 27 percent of the CEOs queried said they'd go a different route if given another chance.

Workers relieve stress in a variety of ways, most (81 percent) cool out by chatting and joking with colleagues. People also relieve stress by taking a coffee or tea break (68 percent — the news about caffeine apparently travels slowly), performing a different mix of jobs each day (59 percent), having a soft drink (50 percent), taking a walk at lunchtime (44 percent), varying work hours (41 percent) and of course that old favorite, smoking (27 percent). After work, another cluster of activities relaxes folks worldwide: Talking to friends and listening to music (both 76 percent), reading (74 percent) and watching TV (70 percent) all sound like relatively healthy ways to unwind, and they lead more indulgent routines such as dinner at a restaurant (58

percent), drinking coffee (37 percent), drinking tea (30 percent), smoking (28 percent) and drinking alcohol (25 percent). Boozing's low rank at the end of the day was outstripped by its unpopularity during the work day. Where Western work culture especially once gladly included lunchtime cocktails, now only 5 percent of those surveyed have a mid-day bump to relax. For more information, call Epley Associates at 704-522-1220.

Rubber duckie's been bumped

More than half of the women surveyed by Bruskin/Goldring Research, Edison, N.J., said the star of their bathtime playmate fantasies was their husband or boyfriend. Fill the tub and toss them in, gals — realize a dream and get your man clean all in one fell swoop. Women who were a little more creative, fantasy-wise, favored the "Diet Coke guy" (no wonder his first name is Lucky) when presented with

a list of potential celebrity bathing partners. Diet Coke man pulled 59 percent of the vote, followed by Denzel Washington (27 percent), David Letterman (12 percent) and John Tesh (2 percent). (Apparently the mentions of trade publication editors were statistically insignificant.)

Lack of creativity was not just a female thing: 53 percent of the dudes surveyed picked their wives/girlfriends as their first choice for bath/shower activities (they did if they know what's good for them). Among those who mentally searched outside the home for sudsy recreation, many (42 percent) wanted Heather Locklear to come over to their place for a cleansing. The list was completed by Janet Jackson (37 percent), Kathie Lee Gifford (18 percent) and Christy Turlington (4 percent). Both men and women (61 percent) deemed Madonna "most in need of a cold shower." A fifth of the survey participants thought Demi Moore and husband Bruce "What you talkin' 'bout" Willis were

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likely to have fun mutual baths, while folks thought Rush Limbaugh (30 percent) and Barney the Annoyasaurus Max (23 percent) were most in need of a dunking.

On the side: *People* (35 percent) is the most popular bathroom magazine for women. It was followed by *Good Housekeeping* (32 percent), *Vogue* (21 percent), *USA Today* (8 percent) and *Weight Watchers* (5 percent). Men like *Sports Illustrated* (42 percent), *Playboy* (18 percent), *Consumer Reports* (15 percent), *USA Today* (13 percent) and *People* (11 percent). For more information, call 800-444-9910.

Population check

Hang onto your chairs, folks, plenty of people are scheduled to arrive on the planet before the millennium's over. Strategic Mapping Inc., Santa Clara, Calif., has released American Profile, its 1994/1999 demographic estimates and projects, which are based on the 1990 census. According to SMI, the United States will gain 13 million people by 1999 — a 5 percent increase over the 1994 population — to hit 273.8 million. The regions expected to grow most rapidly are the West (8.5 percent) and the South (6.2 percent). Nevada is projected as the fastest growing state at 19.6 percent, though California will gain more than 2 million souls and Florida and Texas will add 1 million each. Rhode Island, Connecticut and Massachusetts are expected to lose, but under 1 percent each. The District of Columbia will lose the most — 7.1 percent.

SMI thinks Asians, with a growth rate of 22.5 percent, will outpace Hispanics as the fastest-growing ethnic population. By 1999, there will be 10.8 million ethnic Asians in the United States, 3.9 percent of the total population. Real increases in Asian populations should be found throughout the country as all states except Hawaii and D.C. should see double-digit growth. SMI sees the Hispanic population growing by 16.6 percent. By 1999, one in eight Californians will be Asian and one in three will be Hispanic.

Baby boomers will move firmly into middle age, making that group the bulkiest in the next five years. The number of folks 35 to 64 will increase by 10.8 percent. The only group losing members will be young adults (20 to 34), the number of which should decline by 2.1 million (3.5 percent). Some 2.7 million additional folks 65 and older and 2.4 million more kids under 20 will be counted in the next half-decade. The median age of the U.S. population is projected to reach 35.6, but it will range from 26.6 in Utah to 39.1 in Florida. The 1999 average is almost three years older than the 1990 average of 32.6. For more information, call 408-970-9600.

The casual trend

If suits and ties are de rigeur everyday around your office, perhaps it's time to show the boss some numbers from Waldbillig & Besteman Inc., Madison, Wis. The firm queried 1,100 marketing professionals in the Upper Midwest and found that 56 percent get to wear casual clothes at least one day a week. Most of the time, Friday's the day for easygoing styles (75 percent). Of course, the other 44 percent of firms have no casual day, but only 20 percent have a strict dress code.

On the other hand, casual day may be more of a headache than a break — sometimes it's tough to negotiate the line between too tight and too casual — so you may want to blow by that bit of news and casually let the chief know that W&B also found that 25 percent of the firms it surveyed have "summer hours" policies that let employees restructure their schedules so they can enjoy the sunshine (let's face it — that means "play golf"). That ought to appeal to the old warhorse. For more information, call 608-238-4767.

Retailers catering to 50-plus shoppers

As usual, the rules you thought were set in stone have been proven malleable. The Washington-based International Mass Retail Association sur-

veyed a selection of mass retailers and suppliers, as well as 500 consumers 50 and older in five major cities around the country, in an effort to gear up for an expected jump in the number of shoppers in that age range. The survey results give the IMRA ground to stand on as it clears up some misconceptions about older consumers:

- The 50-plus shopper is not strictly a bargain shopper. Some 60 percent of consumers surveyed feel strongly that consumers over 50 believe that paying more for quality is the best value.

- Older consumers do indulge themselves. Three-quarters of those surveyed will not hesitate to spend money on themselves whenever they want to.

- Over-50s impulse buy. Almost half of those surveyed said they often come home with a spontaneous purchase.

- Older shoppers do read, even study, labels.

- Nearly half of those surveyed do not care that much about age-based discounts and special shopping days.

- Brand equity is important to older shoppers — nearly half have a strong preference for established brands.

In response to older consumers' needs retailers are making a number of moves:

- 54 percent of retailers have scattered chairs throughout their stores to give folks places to rest while shopping.

- 75 percent have made restrooms more accessible and have added quick check-outs to their services.

- 48 percent are making employees more available to help shoppers.

- 75 percent have made in-store signs easier to read.

- A third of suppliers are reconfiguring or reformulating products to better meet the needs of people over 50.

- Almost a third of the suppliers surveyed have redesigned packaging and labels to make them easier to read.

- 58 percent of retailers and 19

percent of suppliers tailor their print ads to older consumers.

For more information, call 202-861-0774.

1-800-Results

Still making your customers call you on their dime? Cincinnati-based MATRIXX Marketing Inc.'s 1994 National 800-Number Image Research Summary indicates that the savings probably aren't worth it. The random telephone survey of 300 people found that a whopping 91 percent think all companies should have a toll-free number. And 85 percent think highly of companies that provide an 800 number. The survey's slightly ironic finding is that only three-fourths of those polled said they had ever used an 800 number — go figure.

Not surprisingly, folks (especially older ones) like to get a real human being on the line when they call, and they like to be able to reach them around the clock — 68 percent feel 24-hour access is key to making the services convenient. The survey also shows that those with incomes of \$40,000 and more use toll-free numbers most frequently and are more likely to order products rather than request information than people with incomes below \$40,000. Almost three-quarters of those surveyed rely on toll-free numbers to obtain information about products, services and bills. They also use them to order catalogs and locate dealers. Some 55 percent use them to order products, make reservations and subscribe to magazines. The use of toll-free numbers for checking/authorizing credit cards rose from 2 percent in 1992 (the last time the survey was conducted) to 9 percent. Calls for repair work (13 percent) and complaint calls (11 percent) held steady from 1992. For more information, call 513-397-6488.

Info superhighway runs over print

Perhaps the beloved Christmas Wishbook was just the first to fall.

The advance of the information superhighway will result in diminished use of conventional means of communication, such as catalogs and print ads. The prognostication is based on the results of a survey of 2,000 U.S. executives commissioned by USA Chicago Inc., a marketing and communications agency, and Crain Communications' *Advertising Age* and *Business Marketing*. The survey involved qualitative and quantitative analysis of the opinions of executives in information-intensive industries such as publishing, health care, banking, retailing and broadcasting.

Many of those surveyed expected the growth in overall communications spending to occur in the interactive and online media. Of those who expect spending to increase, 50 percent see a rise in the use of online newsletters, 49 percent predict an increase in online sales brochures, and 46 percent predict that faxed communications will increase. Nearly 70 percent of those surveyed are using the info superhighway now or expect to within the next four years.

Of the executives who expect an increase in communications use and spending, only 15 percent thought they'd see an increase in print advertising. A third of the respondents believe that the traditional ad agency is ill-equipped to handle the needs of technologically advanced clients.

The study was conducted under the auspices of the Small Business Institute of Northern Illinois University. For more information, call 312-444-9570.

Frozen foods continue to fly

New York-based FIND/SVP predicts that by 1997, the total supermarket dollar volume for all prepared frozen foods will hit \$9.9 billion. That's a dollar-based annual growth rate of 1.9 percent from 1993 to '97. Who is going to be buying all those ready-to-thaw foods? Of all American women who are the head of a household, 26.5

percent buy frozen stuff. Nearly 24 percent of the households that currently shop for frozen entrees will use between four and six packages in a given 30-day period. The profile of the frozen food fan looks like a 35- to 44-year-old college graduate, part-time employee who is white and lives in the Northeast or South. He or she earns \$30,000 or more and lives in a household of less than five people with no children or children between ages 1 and 6. For more information, call 212-645-4500.

These boots are made for hiking

Mark Trail isn't the only one who enjoys the outdoors. Almost 19 million Americans like to hike, making the pastime more popular than cross-country and downhill skiing, mountain biking, mountain and rock climbing, saltwater fishing, fly fishing, water skiing and sport shooting. The minimal amount of equipment required no doubt contributes to the activity's popularity. While 381,000 spent at least 52 days a year hiking and backpacking in 1987, 799,000 fit that bill in 1993. In 1993, nearly 6 million people went hiking or backpacking at least once. Utah and Idaho have the highest rate of participation — though the Portland/Vancouver, Denver/Boulder and Seattle/Tacoma areas are the metro hiking hotbeds — while California and Washington have the largest numbers of outdoorsy types. In 1993, 51 percent of all hikers and backpackers said they would increase their participation; only 6 percent said they planned to go less often.

The figures come from the North Palm Beach, Fla.-based Sporting Goods Manufacturers Association's 1994 *National Hiking/Backpacking Participation Survey* — which is based on American Sports Data Inc.'s syndicated tracking study of 15,000 people. For more information, call 407-842-4100.

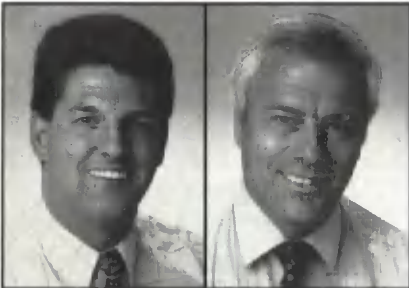
Names of Note

continued from p. 22

in health program evaluation research.

Michael Gray has joined *Socratic Technologies*, San Francisco, as vice president of analytical services. Formerly with MACRO Consulting, Gray has expertise in interactive and computer-based research techniques.

Todd Frost and **Thomas Tew** have joined the *Paria Group Inc.*,



Frost

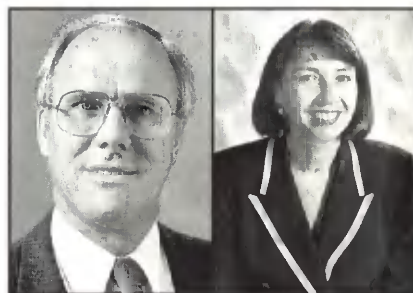
Tew

Orem, Utah. Frost is a research analyst who will coordinate projects, design questionnaires and analyze data for the company. Tew will serve as the quality assurance supervisor, responsible for hiring research associates and ensuring that interviews are of high quality.

Response Analysis, Princeton, N.J., has been the site of a number of staff moves. **Lee Robeson, Ph.D.**, has joined the company as a senior research director in the Social and Policy Research Group. He assumes the role of project director on the contract to collect data for the evaluation of the JOBS Program funded by the Manpower Demonstration Research Corp. **James R. Kenyon, Ph.D.**, has been named senior statistician and as such is responsible for survey design and analysis for national probability sample surveys, customer satisfaction studies and continuous improvement programs. **Susan P. Ackerman** is *Response Analysis'* new vice president in the Social and Policy Research Group. She is responsible for expanding the company's work in the health pro-

gram evaluation area. **Paul Braun** is the company's new telephone center manager and **Lauren Burnbauer, Ph.D.**, is research director for the company. Burnbauer is responsible for questionnaire design, survey direction and analysis and proposal writing.

Bart D. Zehren and **Pedro Geraldino** have been added to the staff at *Chilton Research Services*, Radnor, Penn. Zehren serves as the research consultant for the company's Financial Services Group. He is responsible for the direction and supervision of all Chilton client studies in the financial services industry. Geraldino is the new senior vice president, sales and marketing at Chilton. He manages and supervises the sales and marketing functions of the firm's four specialty groups: The TEC Group, the Healthcare and Pharmaceuticals Group, Consumer Products and the Business and Industry Research Division. He will also assume P&L accountability for each of the specialty groups and will have overall responsibility for implementing and monitoring the group's strategic paths.



Zehren

Kennedy

Nancy Kennedy has moved into the Dallas office of *Alliance Research*, which is based in the Cincinnati area, as a vice president. Kennedy will be responsible for study design, client services, consulting and overall management of research projects. At the same time, Ken Glaser has joined Alliance at its corporate headquarters as associate program manager. He writes interview scripts and has responsi-

bility for data tabulation for the company. (cf. Research Company News)

Jim Steber has joined *Quality Controlled Services*, St. Louis, as



Steber

account manager. His job is to provide service to clients in the Midwestern region and coordinate projects from his office in Carmel, Ind.

Kathy Wurth has been tabbed as market research manager at *Blattner/Brunner*, Pittsburgh. Wurth is working on the company's Daily Juice Products, Pittsburgh Corning Corp., Chamber of Commerce Service Cooperative, Devilbliss Health Care Inc. and Phipps Conservatory accounts

Graham B. Cooper has been named president of *ICT Europe*, the recently formed sales and marketing division of the Langhorne, Penn.-based ICT Group Inc. He is responsible for the expansion and development of the company's business in Europe.

Four employees of Minnetonka, Minn.-based *Satisfaction Management Systems Inc.* have received 1994 Minnesota Council for Quality Individual Service awards. The four are **Lisa Lentem-Heredia**, publishing specialist; **Melisa Linder**, project manager; **Bill Miller**, analyst; and **Julie Tibbles**, publishing specialist. The awards recognize individuals who provide exceptional service to their customers.

Research Company News

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tify and analyze emerging telecommunications, health care and education markets, among others, and keep clients abreast of changes taking place in the workforce. The company will do both qualitative and quantitative analysis and develop programs and information products that help clients reach new markets. Eick, the president of the new firm, says MarketReach's early projects include evaluating a new consumer telecommunications service and conducting a study for a major health care provider in northern Vermont. Eick and Gaspari come to the new enterprise from Macro International's Burlington branch; Schaefer has operated a public relations and video production firm in Burlington for 10 years. For more information, call 802-985-8679.

BRX/Global Inc., Rochester, N.Y., has added **Research Pacific Singapore** and **Research Pacific Malaysia** to its worldwide network of Brand Equity Systems licensees. According to BRX, each of the firms is the leading independent producer of customer research in its market. BRX's Brand Equity Systems monitors and predicts the value of a brand name in dollar terms using a measuring process that is open to client view. BRX/Global is negotiating further licensing agreements with firms in Asia, Latin America and Europe, and the company anticipates finalizing two more agreements before the end of January 1995. For more information, call 716-442-0590.

TMR Inc., has opened a new 40-station CATI facility at 12250 E. 111st Ave., Suite 122, Aurora, CO 80014. The phone numbers are 303-751-5300 and 303-751-5550 (fax).

Conway/Milliken & Associates has created CMA Latina, its Hispanic research group. CMA Latina was founded to deploy CMA's idea generation, qualitative research and quan-

titative techniques into the Hispanic market. For more information, call 312-787-4060.

Microsoft Corp., Redmond, Wash., and **MapInfo Corp.**, Troy, N.Y., have agreed to share a subset of MapInfo's visual analysis technology for use in future versions of Microsoft's Office and Excel software packages. Microsoft is counting on MapInfo's desktop mapping technology and data products to make its business products more flexible and capable. The agreement with the software giant gives MapInfo a significant opportunity to broaden its market.

At the same time, MapInfo reports that its revenues for the fiscal quarter ending in September rose 60 percent from the same period last year to \$9.2 million. Net income increased 150 percent to a high of \$1.2 million. The company chalked up the increases to steadily rising demand for its desktop mapping products, particularly MapInfo 3.0, the latest version of the

company's flagship product. For more information, call 518-285-6000.

The Arbitron Co. will obtain an interest in **Scarborough Research Corp.** as a result of an agreement signed by the two firms' respective parent companies, Ceridian Corp. and VNU Business Information Services. Both Arbitron and Scarborough have headquarters in New York City. In exchange for the interest in Scarborough, VNU will receive Ceridian's interest in Competitive Media Reporting, a joint venture launched by Ceridian and VNU in 1992. The pact marries Scarborough's local market newspaper, consumer and retail information services with Arbitron's experience in measuring local market media. Competitive Media Reporting, a provider of national and local competitive advertising information, will be fully owned by VNU upon completion of the terms of agreement. The companies expected the transaction to be completed by the end of 1994.

SSI-ETHNIC

OBJECTIVE:

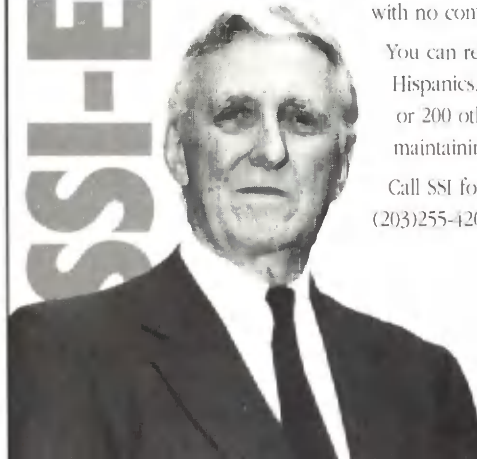
Survey Hispanic males, ages 18 to 49, in states where only 11% of the households have Hispanics.

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Ph. 203-688-8821
Contact: Gerald M. O'Connor

Asian Marketing Communication Research/Division of HMCR
1301 Shoreway Rd., Ste. 100
Belmont, CA 94002
Ph. 415-595-5028
Contact: Dr. Sandra M.J. Wong
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Auto Pacific Group, Inc.
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Ph. 412-471-8484
Contact: R. Yvonne Campos
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Ph. 305-475-7181
Contact: Susan Carlson
Fortune 500 Clients/Consumer/Business-To-Business.

Michael Carraher Discovery Research
204 Dupont St.
Philadelphia, PA 19127
Ph. 215-487-2061
Contact: M. Carraher
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The Clowes Partnership
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Ph. 203-855-8751
Contact: Rusty Clowes
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Communications Workshop, Inc.
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Ph. 312-263-7551
Contact: Lisa J. Hougsted
Consumer, Executive, Technical & Children Grps.

Consumer/Industrial Research Service (CIR)
P.O. Box 206
Chadds Ford, PA 19317
Ph. 610-565-6222
Contact: Gene Rullo
Agriculture, Business-To-Business, Health Care.

Consumer Opinion Services
12825-1st Ave. South
Seattle, WA 98168
Ph. 206-241-6050
Contact: Jerry Carter
Consumer, Business Groups and One-On-Ones.

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Contact: Sanford Adams
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Specialty: Children/Teenagers
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First Market Research Corp.
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Contact: Linda M. Lynch
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Contact: Jack Reynolds
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One Gorham Island, 3rd Floor
Westport, CT 06880
Ph. 203-226-5844
Contact: Mindy Rudick
10+ yrs. Experience Utilizing Innovative Techniques.

Rhoda Schild Focus Group Recruiting/Marketing

330 Third Ave.
New York, NY 10010
Ph. 212-505-5123
Contact: Rhoda Schild
Excellent Medical, Consumer, Business Recruiting.

James Spanier Associates

120 East 75th St.
New York, NY 10021
Ph. 212-472-3766
Contact: Julie Horner
Focus Groups And One-On-Ones In Broad Range Of Categories.

Dwight Spencer & Associates

1290 Grandview Avenue
Columbus, OH 43212
Ph. 614-488-3123
Contact: Betty Spencer
4'x16' Mirror Viewing Rm. Seats 8-12. In House Audio/Vid. Equip.

Spier Research Group

1 Lookout Circle
Larchmont, NY 10538
Ph. 914-834-3749
Contact: Daisy Spier
Advtg./Dir. Mktg./Prod. Dev./Cons./Business/FGI's/1 on 1's.

Jane L. Stegner, Inc.
2215 Penn Ave. So.
Minneapolis, MN 55405
Ph. 612-377-2490
Contact: Jane Stegner
Bus.-To-Bus./Medical/Fncl. Svcs./Agric.,
Groups:1:1's.

Strategic Directions Group, Inc.
119 N. 4th St., Ste. 311
Minneapolis, MN 55401
Ph. 612-341-4244
Contact: Doran J. Levy, Ph.D.
Nationally Published Authority on Ma-
ture Market.

Strategic Research
4600 Devonshire Common
Fremont, CA 94536
Ph. 510-797-5561
Contact: Sylvia Wessel
400 Groups, Hi-Tech/Medical/ Finan-
cial/Transportation Svcs.

Strategy Research Corporation
100 N.W. 37 Avenue
Miami, FL 33125
Ph. 305-649-5400
Contact: Jim Loretta
Serving All U.S. Hispanic Mkts. & Latin
America.

Sweeney International, Ltd.
221 Main St.
Danbury, CT 06810
Ph. 203-748-1638
Contact: Timm Sweeney
Qualitative Research. Member:
QRCA/AMA/Adv. Club.

Technometrica
85 Kinderkamack Rd.
Emerson, NJ 07630
Ph. 201-986-1288
Contact: James M. Sears
Specializing In Med., Bus.-To-Bus. &
Other Hard To Arrange Groups.

Thorne Creative Rsch. Svces.
65 Pondfield Rd., Ste. 3
Bronxville, NY 10708
Ph. 914-337-1364
Contact: Gina Thorne
Ideation, Teens, New Product
Ad Concepts, Package Goods.

Three Cedars Research
533 N. 86th Street
Omaha, NE 68114
Ph. 402-393-0959
Contact: Sara Hemenway
Executive Appointed Facility, Qualita-
tive and Quantitative Research.

Dan Wiese Marketing Research
2108 Greenwood Dr., S.E.
Cedar Rapids, IA 52403
Ph. 319-364-2866
Contact: Dan Wiese
Highly Experienced: Farmers, Consum-
ers, Business.

Wolf/Altschul/Callahan, Inc.
60 Madison Avenue, 5th fl.
New York, NY 10010-1600
Ph. 212-725-8840
Contact: Judi Lippert
Business-To-Business, Consumers, All
Specialties.

Yarnell Inc.
147 Columbia Tpke., #302
Florham Park, NJ 07932
Ph. 201-593-0050
Contact: Steven M. Yarnell
New Product Development & Position-
ing. HW/SW Cos.

STATE CROSS INDEX OF MODERATORS

Refer to Preceding Pages For Address, Phone Number and Contact Name

California

Asian Marketing
Auto Pacific Group, Inc.
Erich Transcultural Consultants
Freeman, Sullivan & Co.
Grieco Research Group, Inc.
Hispanic Market Connections
Hispanic Marketing
Infotech Research Studies
Lachman Research & Marketing Svces.
Market Development, Inc.
Strategic Research, Inc.

Connecticut

Access Research, Inc.
The Clowes Partnership
Groups Plus
Rudick Research
Sweeney International, Ltd.

Florida

Carlson Marketing Consultants
Cunninghis Associates
Kerr & Downs Research
Strategy Research Corporation

Georgia

Elrick and Lavidge
James A. Lumpp
Michelson & Associates, Inc.

Illinois

George I. Balch

Communications Workshop, Inc.
Creative & Response Rsch. Svces.
Doyle Research Associates
Anne Flanz Custom Marketing Research
Irvine Consulting, Inc.
Kehr Research, Inc.
Leichliter Associates
Marketing Advantage Research

Indiana

Focused Resources

Iowa

Dan Wiese Marketing Research

Maryland

Hammer Marketing Resources
Nancy Low & Associates, Inc.

Massachusetts

Dolobowsky Qual. Svcs., Inc.
First Market Rsch. (L. Lynch)
First Market Rsch. (J. Reynolds)
The Marketing Partnership
The Marketing Partnership/Milestone™

Michigan

Brand Consulting Group
KidFacts Research
PACE, Inc.

Minnesota

Cambridge Research, Inc.

MedProbe Medical Mktg. Rsch.
Jane L. Stegner, Inc.
Strategic Directions Group, Inc.

Missouri

12

Nebraska

Three Cedars Research

New Jersey

Jack Paxton & Associates
Technometrica
Yarnell Inc.

New York

BAI
Fader, William & Associates
Find/SVP
Focus On Hudson
Focus Plus
Horowitz Associates Inc.
KS & R Consumer Testing Center
Leichliter Ascts.
Market Navigation, Inc.
Rhoda Schild Focus Group Recruiting/
Mktg. James Spanier Associates
Spier Research Group
Thorne Creative Research
Wolf/Altschul/Callahan, Inc.

North Carolina

Catherine Bryant & Associates
D/R/S HealthCare Consultants
Medical Marketing Research, Inc.

Ohio

The Davon Group
Pat Henry Market Research, Inc.
Matrixx Marketing
Rodgers Marketing Research
Dwight Spencer & Associates

Pennsylvania

Intersearch Corp.
Campos Market Research
Michael Carraher Discovery Rsch.
Consumer/Industrial Research (C/IR)
Data & Management Counsel, Inc.
Direct Feedback

Texas

First Market Rsch. (J. Heiman)

Utah

Focused Solutions

Washington

Consumer Opinion Services

Wisconsin

Gene Kroupa & Associates

SPECIALTY CROSS INDEX OF MODERATORS

Refer to Preceding Pages For Address, Phone Number and Contact Name

ADVERTISING

Brand Consulting Group
Cambridge Research, Inc.
The Clowes Partnership
Creative & Response Rsch. Svcs.

Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
Erich Transcultural Consultants
Fader, William & Associates
First Market Research (L. Lynch)

Kehr Research, Inc.
Gene Kroupa & Associates
James A. Lumpp
PACE, Inc.
Spier Research Group

Strategy Research Corporation
Sweeney International, Ltd.
Thorne Creative Research
Dan Wiese Marketing Research

AGRICULTURE

Cambridge Research, Inc.
Consumer/Industrial Research (C/IR)
Gene Kroupa & Associates
James A. Lumpp
Market Navigation, Inc.
Dan Wiese Marketing Research

ALCOHOLIC BEV.

George I. Balch
Creative & Response Rsch. Svcs.
Strategy Research Corporation

APPAREL/FOOTWEAR

Brand Consulting Group

ASIAN

Asian Marketing
Communication Research
Data & Management Counsel, Inc.
Erich Transcultural Consultants
Fader, William & Associates

AUTOMOTIVE

Auto Pacific Group, Inc.
Creative & Response Rsch. Svcs.
Erich Transcultural Consultants
Matrixx Marketing-Research Div.
PACE, Inc.

BIO-TECH

Focus On Hudson
Intersearch Corporation
Irvine Consulting, Inc.
Market Navigation, Inc.
MedProbe Medical Mktg. Rsch.
Medical Marketing Research, Inc.

BUS.-TO-BUS.

Access Research, Inc.
BAI
Cambridge Research, Inc.
Michael Carraher Discovery Rsch.
Consumer/Industrial Research (C/IR)
Consumer Opinion Services
Creative & Response Rsch. Svcs.
Data & Management Counsel, Inc.
The Davon Group
Direct Feedback
Fader, William & Associates
First Market Research (J. Heiman)
First Market Research (J. Reynolds)
Pat Henry Market Research, Inc.
Intersearch Corporation
Gene Kroupa & Associates
James A. Lumpp
James Spanier Associates
Spier Research Group
Sweeney International, Ltd.
Wolf/Altschul/Callahan, Inc.
Yarnell Inc.

CHILDREN

Carlson Marketing Consultants
Creative & Response Rsch. Svcs.
Doyle Research Associates
Fader, William & Associates
KidFacts Research
Matrixx Marketing-Research Div.

COMMUNICATIONS RESEARCH

Access Research, Inc.

COMPUTERS/MIS

Michael Carraher Discovery Rsch.
Creative & Response Rsch. Svcs.
Fader, William & Associates
Find/SVP
First Market Research (J. Heiman)
Leichliter Associates
Market Navigation, Inc.
Marketing Advantage Research
The Marketing Partnership
James Spanier Associates
Strategic Research, Inc.
Sweeney International, Ltd.
Yarnell Inc.

CONSUMERS

Consumer Opinion Services
Creative & Response Rsch. Svcs.
Doyle Research Associates
Pat Henry Market Research, Inc.
Intersearch Corporation
Kehr Research, Inc.
Gene Kroupa & Associates
James A. Lumpp
Marketing Advantage Research
The Marketing Partnership
Rodgers Marketing Research
Thorne Creative Research
Dan Wiese Marketing Research
Wolf/Altschul/Callahan, Inc.

CUSTOMER SATISFACTION

BAI
Michael Carraher Discovery Rsch.
Elrick and Lavidge
Fader, William & Associates
James A. Lumpp
Strategic Research, Inc.

DIRECT MARKETING

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Spier Research Group

EDUCATION

Marketing Advantage Research

ENTERTAINMENT

Sweeney International, Ltd.

EXECUTIVES

BAI
Creative & Response Rsch. Svcs.
Dolobowsky Qual. Svcs., Inc.
Fader, William & Associates
First Market Research (J. Heiman)
First Market Research (J. Reynolds)
Intersearch Corporation
Marketing Advantage Research
PACE, Inc.
James Spanier Associates
Strategy Research Corporation
Sweeney International, Ltd.

FINANCIAL SERVICES

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Michael Carraher Discovery Rsch.
Creative & Response Rsch. Svcs.
The Davon Group
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Fader, William & Associates
Intersearch Corporation
Matrixx Marketing-Research Div.
The Research Center
James Spanier Associates
Sweeney Int'l. Ltd.

FOODS/NUTRITION

Leichliter Associates

FOOD PRODUCTS

BAI
Creative & Response Rsch. Svcs.
Doyle Research Associates
Kehr Research, Inc.
KidFacts Research
James Spanier Associates
Thorne Creative Research

HEALTH & BEAUTY PRODUCTS

BAI
Thorne Creative Research

HEALTH CARE

Access Research, Inc.
George I. Balch
Consumer/Industrial Research (C/IR)
Dolobowsky Qual. Svcs., Inc.
D/R/S HealthCare Consultants
Elrick and Lavidge
Erich Transcultural Consultants
Find/SVP
First Market Research (L. Lynch)
First Market Research (J. Reynolds)
Freeman, Sullivan & Co.
Infotech Research Studies
Intersearch Corporation
Irvine Consulting, Inc.
Kehr Research, Inc.
Market Navigation, Inc.
Matrixx Marketing-Research Div.
MedProbe Medical Mktg. Rsch.
Medical Marketing Research, Inc.
James Spanier Associates
Strategy Research Corporation

HISPANIC

Data & Management Counsel, Inc.
Erich Transcultural Consultants
Hispanic Marketing
Communication Research
Market Development, Inc.
Strategy Research Corporation

IDEA GENERATION

Analysis Research Ltd.
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George I. Balch
Brand Consulting Group
Creative & Response Rsch. Svcs.

Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Kehr Research, Inc.
Leichliter Associates
The Marketing Partnership
Matrixx Marketing-Research Div.
Sweeney International, Ltd.
Thorne Creative Research

INDUSTRIAL

First Market Research (J. Heiman)
Intersearch Corporation
Market Navigation, Inc.
Strategic Research, Inc.
Sweeney International, Ltd.
Dan Wiese Marketing Research

INSURANCE

Marketing Advantage Research

INTERACTIVE PROD./SERVICES/RETAILING

Leichliter Associates

MANAGEMENT

James A. Lumpp

MEDICAL PROFESSION

D/R/S HealthCare Consultants
Focus On Hudson
Pat Henry Market Research, Inc.
Intersearch Corporation
Kehr Research, Inc.
Nancy Low & Associates, Inc.
Matrixx Marketing-Research Div.
MedProbe Medical Mktg. Rsch.
Medical Marketing Research, Inc.
Rhoda Schild Focus Group Recruiting/Mktg.

MODERATOR TRAINING

Cunninghis Associates

MULTIMEDIA

Marketing Advantage Research

NEW PRODUCT DEV.

BAI
Brand Consulting Group
Carlson Marketing Consultants
The Clowes Partnership
Creative & Response Rsch. Svcs.
Data & Management Counsel, Inc.
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
Fader, William & Associates
First Market Research (J. Heiman)
First Market Research (L. Lynch)
Intersearch Corporation
Kehr Research, Inc.
KidFacts Research
Leichliter Associates
Marketing Advantage Research
The Marketing Partnership
James Spanier Associates

PACKAGED GOODS

BAI
Creative & Response Rsch. Svcs.
Doyle Research Associates

Kehr Research, Inc.
Thorne Creative Research

PARENTS

Doyle Research Associates
Fader, William & Associates
Marketing Advantage Research

PET PRODUCTS

Cambridge Research, Inc.
Kehr Research, Inc.
Marketing Advantage Research
Thorne Creative Research

PHARMACEUTICALS

BAI
Creative & Response Rsch. Svcs.
D/R/S HealthCare Consultants
Focus On Hudson
Infotech Research Studies
Intersearch Corporation
Irvine Consulting, Inc.
Kehr Research, Inc.
Market Navigation, Inc.
MedProbe Medical Mktg. Rsch.
Medical Marketing Research, Inc.

PUBLIC POLICY RSCH.

George I. Balch
The Davon Group

PUBLISHING

First Market Research (J. Heiman)
Marketing Advantage Research
Thorne Creative Research
Dan Wiese Marketing Research

RETAIL

Brand Consulting Group
First Market Research (L. Lynch)
Pat Henry Market Research, Inc.

SENIORS

Erich Transcultural Consultants
Marketing Advantage Research
Strategic Directions Group, Inc.

SMALL BUSINESS/ ENTREPRENEURS

Leichliter Associates
Strategy Research Corporation
Yarnell Inc.

SOFT DRINKS, BEER, WINE

Carlson Marketing Consultants
Creative & Response Rsch. Svcs.
Grieco Research Group, Inc.
Strategy Research Corporation
Thorne Creative Research

TEACHERS

Marketing Advantage Research

TEENAGERS

Creative & Response Rsch. Svcs.
Doyle Research Associates
Fader, William & Associates
KidFacts Research
Matrixx Marketing-Research Div.
Thorne Creative Research

TELECOMMUNICATIONS

BAI
Cunninghis Associates
Erick and Lavidge
Find/SVP
First Market Research (J. Heiman)
Horowitz Associates Inc.
Intersearch Corporation
Marketing Advantage Research
Strategy Research Corporation

TELECONFERENCING

Cambridge Research, Inc.

TELEPHONE FOCUS GROUPS

Consumer/Industrial Research (C/IR)
Creative & Response Rsch. Svcs.
Intersearch Corporation
Market Navigation, Inc.
Medical Marketing Research, Inc.

TOYS/GAMES

Carlson Marketing Consultants
Fader, William & Associates
KidFacts Research

TRANSPORTATION SVCS.

Sweeney International, Ltd.

TRAVEL

Michael Carraher Discovery Rsch.
James A. Lumpp
James Spanier Associates
Spier Research Group
Sweeney International, Ltd.

UTILITIES

Fader, William & Associates
Freeman, Sullivan & Co.

WEALTHY

Strategy Research Corporation

YOUTH

Doyle Research Associates
Fader, William & Associates

**Look for the Directory of Qualitative
Research/Focus Group Moderators in every
issue of *Quirk's Marketing Research Review*.**

**If you are a moderator and would like
information on how to be listed in the
section, call Steve Quirk at 612-861-8051.**

Quirk's
MARKETING RESEARCH
Review

1995

Ethnic Research Directory

Editor's note: This directory was compiled by sending listing forms to companies that had advertised a specialization in some aspect of ethnic research. As an added feature, we have placed an asterisk next to firms that indicated they are owned by a member of an ethnic minority, in response to reader requests for lists of such firms. We hope you find this directory useful. Please let us know how we can improve next year's edition.


Codes 1-4 show the types of research the firm provides.

1. Full service
2. Data collection
3. Data processing/software
4. Field service
5. Other (specified)

Next are the general ethnic groups the firm specializes in researching.

*In response to reader requests for lists of firms owned by ethnic minorities, we have placed an asterisk next to firms that indicated they are owned by a member of an ethnic minority.

AHF Marketing Research, Inc.
100 Avenue of the Americas
New York, NY 10013
Ph. 800-825-3243
Fax 212-941-7031
Mindy Rhindress, Sr. Vice President
1 - Hispanic



FOCUS ON EL PASO HOT MARKET OF THE 90'S

Specially designed 3,200 square feet, free standing focus group facility. Large 20' X 20' conference room, two level viewing room (seats 15), full kitchen, audio, video, expert recruiting. One on ones, executive, professional, medical, Hispanic recruiting a specialty. "Se habla Español".

Twenty-five line phone center, National Hispanic market coverage, bilingual interviewers and computer assisted interviewing.

Permanent mall facility also available in the regions largest mall.

Call Linda Adams
Owner and Director
(915) 591-4777
FAX (915) 595-6305

AIM RESEARCH

10456 Brian Mooney Avenue
El Paso, Texas 79935
(Twenty-five Years in El Paso)

Aim Research

10456 Brian Mooney Ave.
El Paso, TX 79935
Ph. 915-591-4777
Fax 915-595-6305
Linda Adams, Project Director
2 - Hispanic

AIM Research has 25 years experience conducting bilingual studies, both qualitative and quantitative among Hispanics. Focus Groups, Bilingual moderator, consumer surveys, telephone, pre-recruited. Studies are all conducted and supervised by an experienced, fully bilingual staff.

(See advertisement on p. 42)

***Asian Marketing Communication Research Div. of H&MCR, Inc.**

1301 Shoreway Rd., Ste. 100
Belmont, CA 94002
Ph. 415-595-5028
Fax 415-595-5407
Sandra M.J. Wong, Ph.D., Research Director
1 - Asian

Full-service qualitative and quantitative research in most Asian languages. Copy testing, motivational discovery, product design and evaluation, and cultural analysis for the positioning of products and services among Asians in the U.S. and abroad. Focus groups, in-depth interviews, surveys and tracking studies. Psycho-socio-cultural Asian research© is our unique approach. Our own facilities in the multicultural San Francisco Bay area available.

(See advertisement on p. 3)

*Asian Perspective, Inc.
386 Broadway, 5th fl.
New York, NY 10013
Ph. 212-431-9366
Fax 212-431-1282
Grace Chin, Research Director
1 - Asian

Behavior Research Center
1101 N. Third St.
Phoenix, AZ 85002-3178
Ph. 602-258-4554
Fax 602-252-2729
Earl de Berge, Research Director
1, 2 - Hispanic

*Castillo & Associates
3604 Fourth Ave., Ste. 1
San Diego, CA 92103
Ph. 619-683-3898
Fax 619-683-3820
Enrique F. Castillo, Principal
1 - Hispanic

Creative & Response Research Services, Inc.
500 N. Michigan Ave., Ste. 1200
Chicago, IL 60611
Ph. 312-828-9200
Fax 312-527-3113
Sanford C. Adams, COO/ Exec. V.P.
1 - African-American, Hispanic

Creative Consumer Research
3945 Greenbriar
Stafford, TX 77477
Ph. 713-240-9646
Fax 713-240-3497
Patricia Pratt, Field Director
2, 3 - African-American, Asian, Hispanic, Middle Eastern

DataSource
3939 Priority Way S. Drive
P.O. Box 80432
Indianapolis, IN 46280-0432
Ph. 800-800-8370
Fax 317-843-8638
Teresa Young, Director-Business Development
2, 3 - Hispanic

Directions In Research
5353 Mission Center Rd., Ste. 310
San Diego, CA 92108
Ph. 619-299-5883 or 800-676-5883
Fax 619-299-5888
Pat Funes, Account Executive
1, 2, 3 - Hispanic

Eagle Research
12157 W. Cedar Dr.
Denver, CO 80228
Ph. 303-980-1909
Fax 303-980-2270
Freddi Wayne, Dir. Field Operations
2 - African-American, Hispanic

*Ebony Marketing Research, Inc.
2100 Bartow Ave.
Baychester, NY 10475
Ph. 718-217-0842
Fax 718-320-3996
Bruce Kirkland, Vice President
1 - African-American, Hispanic

Ebony Marketing Research, Inc. is a full field service firm with permanent mall facilities located in Queens, the Bronx and New Jersey. In addition, EMR has a state-of-the-art focus facility with full test kitchen, two conference room, client lounge and central phone bank (WATS) with bilingual capabilities.
(See advertisement on p. 43)

Erich Transcultural Consultants

21241 Ventura Blvd., #193
Woodland Hills, CA 91364
Ph. 818-226-1333
Fax 818-226-1338
Andrew Erlich, Ph.D., President
1 - African-American, Asian, Hispanic, Middle Eastern

Erich Transcultural Consultants provides full service Latino and Asian qualitative and quantitative research. This includes focus groups, in-depth individual interviews and the complete spectrum of quantitative studies conducted and supervised by bilingual, bicultural marketing professionals. We also conduct cultural awareness training.
(See advertisement on p. 43)

*Ethnic Marketing Research
 5714 Lankershim Blvd.
 Encino, CA 91601
 Ph. 818-762-8081
 Fax 818-762-5144
 Karen Espanol, President
 2 - African-American, Asian, Hispanic, Middle Eastern

Field Dynamics Marketing Research
 17547 Ventura Blvd., Ste. 308
 Encino, CA 91316
 Ph. 800-4-FIELDS
 Fax 818-905-3216
 Tony Blass, President
 2 - African-American, Asian, Hispanic
 (See advertisement on p. 44)

Field Dynamics of Ohio
 929 Eastwind Dr., Ste. 211
 Westerville, OH 43081
 Ph. 800-4-FIELDS
 Fax 818-905-3216
 Tony Blass, President
 2 - African American, Asian, Hispanic

Field Dynamics Marketing Research, one of Los Angeles' leading providers of ethnic focus groups and field services, is proud to announce the opening of Field Dynamics of Ohio, a brand new state-of-the-art facility located in Columbus, Ohio. Field Dynamics recruits in Spanish, Chinese, Korean, Vietnamese and other Asian languages. Our facilities are equipped with translating equipment and interpreters are available. 26 regional staff supervisors provide nationwide field management. Video conferencing available to your own office. Call 1-800-4-FIELDS for more information.
 (See advertisement on p. 44)



**Erlich
 Transcultural
 Consultants**

**Latino & Asian
 Qualitative & Quantitative
 Research**

- Focus Group Moderating and Reporting Services
- Simultaneous Translation
- In-depth Individual Interviews
- Quantitative Studies
- Computer Tabulations
- Instrument Translation into Familiar, Readily Understandable Language
- Careful and Insightful Analysis and Interpretation
- Highly Experienced Research Staff

Transcultural Consultants

Contact: Andrew Erlich, Ph.D.

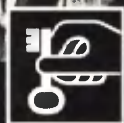
Phone (818) 228-1333

FAX: (818) 228-1338

Circle No. 118 on Reader Card

Triangulate the most comprehensive market in America

FROM OUR THREE PRIME LOCATIONS



Your Key to Ethnic Marketing

*D*ense, diverse and enormously rich, **metropolitan New York** is like no other market in America. But, to penetrate it, you've got to know the angles. And how to make them work for you.

That's where EMK can help

*F*rom our three full-service mall facilities in **Jersey City, Queens, the Bronx**, we can help you evaluate virtually any ethnic, specialized or mainstream market segment.

*W*hether your focus is inward toward the city or outward toward the suburbs, call EMR. We've got the reach, the range and the rapport to give you **fresh new perspectives** on this vital region.

From any angle you could ask for.

Ebony Marketing Research, Inc.
 2100 Bartow Avenue
 Baychester, NY 10475

Phone: 718-217-0842 Fnx: 718-320-3996

Circle No. 119 on Reader Card

Codes 1-4 show the types of research the firm provides.

1. Full service
2. Data collection
3. Data processing/software
4. Field service
5. Other (specified)

Next are the general ethnic groups the firm specializes in researching.

*In response to reader requests for lists of firms owned by ethnic minorities, we have placed an asterisk next to firms that indicated they are owned by a member of an ethnic minority

Fieldwork Atlanta, Inc.
200 Galleria Pkwy., Ste. 1850
Atlanta, GA 30339
Ph. 404-988-0330
Fax 404-955-1555
Carolyn Lee, President
4 - African-American, Hispanic

Fieldwork Boston, Inc.
800 South St.
Waltham, MA 02154
Ph. 617-899-3660
Fax 617-893-5574
Vincent A. Stolo, President
4 - African-American, Native American

Fieldwork Boston-Downtown, Inc.
The Prudential Twr./Prudential Ctr., Ste. 1490
Boston, MA 02199
Ph. 617-351-2856
Fax 617-351-2865
Vincent A. Stolo, President
4 - African-American, Hispanic

Fieldwork Chicago, Inc.
6200 N. Hiawatha, Ste. 720
Chicago, IL 60646
Ph. 312-282-2911
Fax 312-282-8971
Alice White, President
4 - African-American, Hispanic, Native American

Fieldwork Chicago-O'Hare, Inc.
8420 W. Bryn Mawr Ave., Ste. 650
Chicago, IL 60631
Ph. 312-714-8700
Fax 312-714-0737
Susan Brody, President
4 - African-American, Hispanic

Fieldwork Chicago-West, Inc.
1450 E. American Ln., Ste. 1880
Schaumburg, IL 60173
Ph. 708-413-9040
Fax 708-413-9064
Pam White, President
4 - African-American, Hispanic

Fieldwork Denver, Inc.
At The Tivoli/900 Auraria Pkwy., Ste. 601
Denver, CO 80204
Ph. 303-825-7788
Fax 303-623-8006
Anne McIntyre, President
4 - African-American, Hispanic, Native American

Fieldwork East, Inc.
2 Executive Dr.
Fort Lee, NJ 07024
Ph. 201-585-8200
Fax 201-585-0096
Carol Tauben, President
4 - African-American, Asian, Hispanic, Middle Eastern

Fieldwork East at Westchester, Inc.
555 Taxter Rd.
Elmsford, NY 10523
Ph. 914-347-2145
Fax 914-347-2298
Maria Garcia, President
4 - African-American, Hispanic

Fieldwork Los Angeles, Inc. in Orange County
Lakeshore Towers
18101 Karmen Ave.
Irvine, CA 92715
Ph. 714-252-8180
Fax 252-1661
Toni Day, President
4 - African-American, Hispanic

Fieldwork Phoenix, Inc.
7776 Pointe Pkwy. W.
Phoenix, AZ 85044
Ph. 602-438-2800
Fax 602-438-8555
Barbara Willens, President
4 - African-American, Hispanic, Native American

Fieldwork Phoenix, Inc. at Scottsdale
6263 N. Scottsdale Rd., Ste. 380
Scottsdale, AZ 85250
Ph. 602-443-8883
Fax 602-443-8884
Barbara Willens, President
4 - African-American, Hispanic, Native American

When the Phone Rings, Who Do You Want on the Other End?



Would you rather have experience you can count on...or count on an experience? Field Dynamics promises you quality research services unsurpassed in the industry. Educated, reliable, well-compensated interviewers that deliver dependable data. Ethnic research with the widest multi-lingual capabilities available. And centrally located, state-of-the-art facilities including 2 large focus group rooms adaptable to any style, comfortable viewing rooms that seat

15 - 20 clients, full test kitchen, 560 sq.ft. multi-purpose room and client lounge. Call us for an intelligent approach to your project!



17547 Ventura Blvd, Suite 308
Encino, California 91316
(Los Angeles)
(818) 783-2502
Fax: (818) 905-3216

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Asian & Spanish Recruiting & Interviewing

Car Clinics/Ride & Drive Tests

Large Audience/"Nial" Tasting

Medical/Executive Recruiting & Interviewing

Jury Selection

Taste Tests

Telephone Interviewing

Nationwide Field Management

Findings International
9100 Coral Way, Ste. 6
Miami, FL 33165
Ph. 305-225-6517
Fax 305-225-6522
Orlando Esquivel, President
1, 2 - Hispanic

Fleischman Field Research
200 Bush St., Ste. 1300
San Francisco, CA 94104
Ph. 415-398-4140
Fax 415-989-4506
Molly Fleischman, Principal
2 - Asian, Hispanic

Freeman, Sullivan & Co.
131 Stewart St., Ste. 500
San Francisco, CA 94105
Ph. 415-777-0707
Fax 415-777-2420
Ann Garbarino, Marketing Director
1 - African-American, Asian, Hispanic

Galloway Research
4346 N.W. Loop 410
San Antonio, TX 78229
Ph. 210-734-4346
Fax 210-732-4500
Linda Brazel, General Manager
2, 3 - Hispanic

GENESYS Sampling Systems
565 Virginia Dr.
Fort Washington, PA 19034
Ph. 215-653-7100
Fax 215-653-7114
Amy Starer, Vice President
5 (Sampling) - all ethnic groups

GENESYS has the sampling experience and the technical expertise to help you target any low-incidence target group. Our ethnic sampling capabilities include geo-targeted RDD, listed surname, dual frame and many other sampling options. We will outline all your alternatives so you can decide which option will provide the optimal balance of representational accuracy and data collection cost.

(See advertisement on p. 47)

*Hispanic Focus Unlimited
Rte. 1, Box 278
La Feria, TX 78559
Ph. 210-797-4211
Fax 210-797-4244
Ruben Cuellar, President
1 - Hispanic

*Hispanic Market Connections, Inc.
5150 El Camino Real, D-11
Los Altos, CA 94022
Ph. 415-965-3859
Fax 415-965-3874
Isabel Valdes, President
Valerie A. Mayer, V.P. Research
1 - Hispanic

Full-service research and consulting firm. Qualitative and quantitative techniques adapted to measure a very diverse market. In-house computer base sampling plan. Emphasis in strategic conceptualization, acculturation and analysis. HMC's Language Segmentation, V.I.P. (Visual Icon Probing.) AMERITEST Hispanic Copytesting, ethnographic methods. President is co-author of Hispanic Market Handbook (Gale, 3/95). (See advertisement on p. 49)

ETHNIC SAMPLING

- Armenian
- Cambodian
- Chinese
- Filipino
- Hispanic
- Indian
- Iranian
- Japanese
- Korean
- Thai
- Vietnamese
- Etc...

balancing representation & efficiency

Sampling an ethnic population often poses a unique challenge to survey researchers. As with any low-incidence target group, the researcher's goal is to collect data in an efficient, cost-effective manner while providing the client with a representative sample of their target group.

Complicating matters, study objectives often vary. Budget might be the primary concern today, while tomorrow's study demands full representation.

In the past there weren't many good alternatives, with the choices primarily limited to RDD or surname samples. Fortunately, for everyone, things have changed for the better. GENESYS Sampling Systems has the experience and technical expertise to offer a wide range of innovative options combining highly representative RDD samples with efficient listed surname methods. The result is a sample designed to your clients' specific needs.

Selection of a sampling approach often involves a delicate balance between the client's budget and objectives. By providing the critical information related to this trade-off, GENESYS will keep you from tipping the scale the wrong way.

Our customer service staff will be happy to help you in determining the options that meet your needs.

GENESYS Sampling Systems
565 Virginia Drive • Fort Washington, PA 19034
(215) 653-7100



AD0001

Circle No. 121 on Reader Card



"ONE OF OUR SPECIALTIES"

ASIAN-AMERICANS

National Coverage

Sampling by Ethnic Group

Translations (Cultural/Idiomatic) and Interviewing in
Eleven Languages/Dialects

Data Processing

Focus Group Recruiting

With over eight years experience and 75,000 Asian-American surveys completed, Interviewing Service of America is the best solution for surveying this population group.

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Mandarin	Laotian
Korean	Thai
Japanese	Asian-Indian/Hindi
Vietnamese	Malay
	Tagalog/Ilocano/Cebuano

Call for a bid or to discuss your next project.

Michael Halberstam at 818-989-1044

or

Polly Kleissas at 410-827-4855



Circle No. 122 on Reader Card



Why should you have **MARKET DEVELOPMENT** conduct your Hispanic Market Research?

• Experience

MDI annually conducts over 150 qualitative and quantitative research projects in Latin America and among U.S. Hispanics.

• Personnel

MDI's staff consists of more than 25 full-time research professionals (7 bilingual moderators) including experts on the Spanish language, Hispanic culture, marketing, advertising, sociology, health science, and market research.

• Standardized Products

In addition to conducting a wide range of custom projects, MDI offers a variety of standardized services including Hispanic Copy-TRAC and Hispanic Quick-TRAC (Spanish-language copy-testing) and the MDI Hispanic Omnibus.

• MDI Interviewing Services

MDI's telephone fieldwork is administered from its own 60-station networked CATI facility staffed by native Spanish-speaking interviewers and dedicated to conducting interviews among U.S. Hispanics.

Direct Inquiries to:



Roger Sennott
Market Development, Inc.
1643 Sixth Avenue
San Diego, CA 92101-2706
Telephone (619) 232-5628

MDI is a minority business enterprise (MBE)
and a woman business enterprise (WBE).

San Diego • New York • Mexico City • São Paulo • Buenos Aires • Santiago

Circle No. 123 on Reader Card

Codes 1-4 show the types of research the firm provides.

1. Full service
2. Data collection
3. Data processing/software
4. Field service
5. Other (specified)

Next are the general ethnic groups the firm specializes in researching.

*In response to reader requests for lists of firms owned by ethnic minorities, we have placed an asterisk next to firms that indicated they are owned by a member of an ethnic minority.

*Hispanic Marketing Communication Research Div. of H&AMCR, Inc.

1301 Shoreway Rd., Ste. 100

Belmont, CA 94002

Ph. 415-595-5028

Fax 415-595-5407

Felipe Korzenny, Ph.D., President

1 - Hispanic

Spanish language marketing research in the U.S. and Latin America. Full service qualitative and quantitative. Copy testing, motivation discovery, product design and evaluation, and cultural analysis for the positioning of products and services among Hispanics. Focus groups, in-depth interviews, surveys and tracking studies. Psycho-socio-cultural Hispanic research@is our unique approach. Our own facilities in San Francisco-San Jose Bay area available.

(See advertisement on p. 3)

Interviewing Service of America

16005 Sherman Way, Ste. 209

Van Nuys, CA 91406

Ph. 818-989-1044

Fax 818-782-1309

Michael Halberstam, President

2, 3 - African-American, Asian, Hispanic, Middle Eastern, Native American

Interviewing Service of America, Inc., the largest computer-assisted telephone interviewing marketing research data collection firm on the West Coast, is headquartered in Van Nuys, CA. Now with an office on the East Coast, the firm continues its 12 year history of multi-lingual service to clients in a wide range of industries including health care, transportation, entertainment, high technology, media and telecommunications.

(See advertisement on p. 48)

*JAG Corporation

617 4th Ave. S.E.

Minneapolis, MN 55414-1613

Ph. 612-331-1586

Fax 612-628-0130

Noel Jagolino, Mgr. Marketing & Sales

1, 2, 3 - Asian

*JHR Marketing Services, Inc.

29-27 41st Ave. (Penthouse)

New York, NY 11101

Ph. 718-786-9640

Fax 718-786-9642

J. Robert Harris II, President

1 - African American, Asian, Hispanic, Middle Eastern, Native American

L.A. Focus
17337 Ventura Blvd., #301
Encino, CA 91316
Ph. 818-501-4794
Fax 818-907-8242
Lisa Balelo, Field Director
1 - African-American, Hispanic

*Leflein Associates, Inc.
8 Millay Ct.
Teaneck, NJ 07666
Ph. 201-801-0159
Fax 201-801-0748
Barbara Leflein, President
1 - African-American, Asian, Hispanic, Middle Eastern,
Native American

*Market Development, Inc.
1643 Sixth Ave.
San Diego, CA 92101
Ph. 619-232-5628
Fax 619-232-0373
Roger S. Sennott, Vice President/General Manager
1 - Hispanic

Qualitative/quantitative research among U.S. Hispanics/Latin America. Focus groups (bilingual moderators); surveys (telephone/in-person); Hispanic Copy-Trac/Quick-Trac (Spanish language copy-testing); Hispanic Omnibus, MDI Interviewing Services (CATI facility staffed w/native Spanish speakers); data collection in Latin America.
(See advertisement on p. 48)

*Market Intelligence
6440 Flying Cloud Dr.
Eden Prairie, MN 55344
Ph. 612-942-8595
Fax 612-933-6825
Ahmed Abdelaal, President
1 - African-American, Asian, Middle Eastern

*Market Segment Research, Inc.
1320 S. Dixie Hwy., Ste. 120
Coral Gables, FL 33146
Ph. 305-669-3900
Fax 305-669-3901
Gary L. Berman, President
1 - African-American, Asian, Hispanic

Marketing Matrix
2566 Overland, Ste. 716
Los Angeles, CA 90064
Ph. 310-842-8310
Fax 310-842-7212
4, 5 (Focus Group) - Hispanic

High-quality service. Care and comfort for all your needs in a professional environment. Highest quality recruiting specializing in medical, legal and technical professionals, entertainment, communications and financial executives, children, Hispanic and general market consumers. Conveniently located just minutes from LAX and near the intersection of major L.A. freeways. Competitive pricing. Large group room with spacious three-tiered viewing room. Cozy one-on-one room with viewing. Private entrance for observers.
(See advertisement on p. 50)

*McLaughlin Research Interviewing Svce., Inc.
1118 Galloway St. N.E.
Washington, DC 20011
Ph. 202-526-0177
Fax 202-526-8747
Alma McLaughlin, Manager
2 - African-American, Native American

*MDI Interviewing Services
1101 Bay Blvd.
Chula Vista, CA 91911
Ph. 619-424-4500
Fax 619-424-4501
José Suárez, Manager
2 - Hispanic
(See advertisement on p. 48)

New York Focus
12 E. 41st.
New York, NY 10017
Ph. 212-481-3780
Fax 212-779-8623
Nancy Opoczynski, President
5 (Focus Group) - African-American, Asian, Hispanic

OMR (Olchak Market Research)
7255-A Hanover Parkway
Greenbelt, MD 20770
Ph. 301-441-4660
Fax 301-474-4307
Jill L. Siegel, President
2 - African-American

Hispanics tend to preserve their cultural values, traditions, and identity.

The ability to understand Hispanic cultural values and forecast their influence on a purchasing decision is vital to successful Hispanic marketing programs.

In fact, an understanding of Hispanic lifestyle and values, as well as an appreciation of the subtleties of their cultural contextualizations, can mean the difference between marketing success and failure.

Hispanic Market Connections, Inc. is a bilingual, bicultural full service market research firm that provides insightful and timely market intelligence about the Hispanic community's perceptions, attitudes and purchasing patterns.

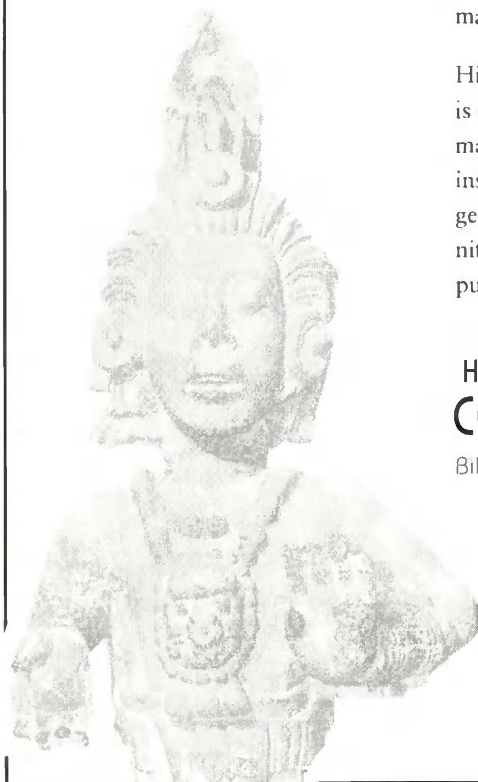
Hispanic MARKET CONNECTIONS, INC.

Bilingual/Bicultural Market Research

415/965-3859

5150 El Camino Real
Suite D-11
Los Altos, California 94022
Fax: 415/965-3874

Woman/minority owned.



Codes 1-4 show the types of research the firm provides.

1. Full service
2. Data collection
3. Data processing/software
4. Field service
5. Other (specified)

Next are the general ethnic groups the firm specializes in researching.

*In response to reader requests for lists of firms owned by ethnic minorities, we have placed an asterisk next to firms that indicated they are owned by a member of an ethnic minority.

Paria Research Group
390 W. 800 N., Ste. 104
Orem, UT 84057
Ph. 801-226-8200
Fax 801-226-4819
Stephen Zimmerman, President/CEO
2 - African-American, Asian, Hispanic, Middle Eastern, Native American

Phase III Market Research
1150 N. First St., Ste. 211
San Jose, CA 95112
Ph. 408-947-8661
Fax 408-293-9909
Nancy Pitta, President
2 - Asian, Hispanic

OFact Marketing Research, Inc.
9908 Carver Rd.
Cincinnati, OH 45242
Ph. 513-891-2271
Fax 513-791-7356
2 - African-American

QualiData Research, Inc.
170 Garfield Pl.
Brooklyn, NY 11215-2106
Ph. 718-499-4690
Fax 718-499-0576
Hy Mariampolski, Ph.D., Principal
1 - African-American, Asian, Hispanic, Middle Eastern, Native American

*Rizzo Research International, Inc.
One University Pl., 9C
New York, NY 10003
Ph. 212-260-0790
Fax 212-982-1984
Roberto Rizzo, President
2 - Asian, Hispanic

*Roslow Research Group, Inc.
16 Derby Rd.
Port Washington, NY 11050
Ph. 516-883-1110
Fax 516-883-4130
Peter Roslow, President
1 - Hispanic

*Carol Smith & Associates
3706 TreeCrest Pkwy.
Decatur, GA 30035
Ph. 404-593-9174
Fax 404-593-9368
Carol Smith, President
1 - African-American

*Southern Spectrum Research, Inc.
1600 Canal St., Ste. 400
New Orleans, LA 70112
Ph. 504-539-9222
Fax 504-539-9228
Linda DeCuir, Office Manager
2, 3 - African-American, Asian, Hispanic

*Strategic Directions Group, Inc.
119 N. Fourth St., Ste. 311
Minneapolis, MN 55401
Ph. 612-341-4244
Fax 612-341-4127
Carol Morgan, President
1 - Hispanic

Strategy Research Corp.
100 N.W. 37th Ave.
Miami, FL 33125
Ph. 305-649-5400
Fax 305-649-6312
Jim Loretta, Sr. Vice President
1 - Hispanic

*Ray Suh & Associates, Inc.
12 Perimeter Park Dr., Ste. 101
Atlanta, GA 30301
Ph. 404-986-9267
Fax 404-986-9485
Ray Suh, Principal
1 - Asian

We focus on the details so you can focus *in L.A.*

Marketing Matrix is dedicated to provide you with the highest quality focus group support. Our facility has been designed with your needs in mind. Located conveniently. Fashioned for comfort. Maintaining the highest quality recruiting and client services.

With many years of experience in qualifying the types of respondents you're interested in, such as: Consumers, Teens and Children • Executives • Specialized professionals and managers • Hi-Tech experts • and Health care professionals.

Whatever amenities you desire: special foods, hotel reservations, tape transcriptions, qualified moderators, or any other needs -- we'll provide you with top-quality service.



Ask us for a bid. In addition to being professional, we're cost-competitive. Just call Batya Rawlinson or Marcia Selz. We'll focus on the details and help you focus *in L.A.*

2566 Overland, Suite 716
Los Angeles, CA 90064
(310) 842-8310 • FAX (310) 842-7212

Circle No. 125 on Reader Card

■ Survey Methods Group

For all your data collection and focus group recruiting needs

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**MULTI-CULTURAL
POPULATIONS AND
BI-LINGUAL
INTERVIEWING**

FIELD & TAB

Specializing in:

- Multi-language & bi-lingual
- Healthcare
- Social research
- Business to business
- Difficult to interview populations

140 Second Street, Suite 400
San Francisco, CA 94105
Telephone 415.495.6692
Fax 415.995.8185

SuperDatos de México

Ensenada 61, Colonia Hipodromo
Mexico, D.F., 06100
Mexico
U.S. Ph. 800-800-5055
U.S. Fax 415-392-7141
Rich Anderson
1 - Hispanic

SuperDatos de México provides a wide range of quantitative and qualitative research services throughout Mexico, including central location intercept interviewing, telephone interviewing, data tabulation and analysis, focus group facilities, and focus group moderation and analysis. It is jointly owned by two highly regarded U.S. firms, Hispanic Marketing Communication Research and Consumer Research Associates/Superrooms.

(See advertisement on p. 51)

Survey Methods Group

140 Second St., Ste. 400
San Francisco, CA 94105
Ph. 415-495-6692
Fax 415-995-8185
Linda Rynazewski, V.P. Marketing

Forty CATI station telephone center specializing in multilingual, sensitive subject, high response studies for health care, social marketing, customer satisfaction. Nationwide recruitment of hard-to-reach respondents for focus groups.

(See advertisement on p. 50)

Survey Sampling, Inc.

One Post Rd.
Fairfield, CT 06430
Ph. 203-255-4200
Fax 203-254-0372
Terrence Coen, V.P. Sales & Marketing
5 (Sampling) - African-American, Asian, Hispanic

Leading source for statistically accurate and cost efficient samples for telephone, mail and door-to-door survey research. SSI's New Software, SSI-SNAP™ lets you place sample orders using your own PC and modem! Target race/ethnicity, income, age, low-incidence groups, and businesses. Partners with researchers since 1977.

(See advertisements on pp. 18, 35)

Surveys Unlimited, Div. of Horowitz Accts.
1971 Palmer Ave.
Larchmont, NY 10538
Ph. 914-834-6564
Fax 914-834-5998
Alisse Waterston, Ph.D., President
1 - African-American, Hispanic, Middle Eastern

TAi - Chicago
180 N. Stetson Ave., Ste. 4450
Chicago, IL 60601
Ph. 312-565-4343
Fax 312-565-4450
Maggie Brown, Client Services Mgr.
5 (Focus Group) - African-American

*Target Market Research Group, Inc.
5805 Blue Lagoon Dr., Ste. 185
Miami, FL 33126-2019
Ph. 305-262-1606
Fax 305-262-0372
Martin G. Cerda, President
1 - Hispanic

*Technometrica, Inc.
85 Kinderkamack Rd.
Emerson, NJ 07630
Ph. 201-986-1288
Fax 201-986-0119
Ravi Iyer, Executive President
1 - African-American, Asian, Hispanic, Middle Eastern,
Native American

*V & L Research and Consulting
4294 Memorial Dr., Ste. D
Decatur, GA 30032
Ph. 404-298-0139
Fax 404-298-0026
Delphyne Lomax, Principal
1 - African-American, Asian, Hispanic, Middle Eastern,
Native American

Venture Marketing Associates, Inc.
3155 Hickory Hill Rd., Ste. 203
Memphis, TN 38115
Ph. 901-795-6720
Fax 901-795-6763
Alex Klein, President
1 - African-American, Hispanic

*Visual Research Communications
61 Pearl St.
P.O. Box 428
Metuchen, NJ 08840
Ph. 908-906-6556
Fax 908-906-6558
Ellen Waldie, Account Manager
1 - Hispanic

*The Winters Group, Inc.
14 Franklin St., Ste. 920
Rochester, NY 14604
Mary-Frances Winters, President
Ph. 716-546-7480
Fax 716-546-7427
1 - African-American, Asian, Hispanic, Native American

Margaret Yarbrough & Associates
934 Shorepoint Ct., #100
Alameda, CA 94501
Ph. 510-521-6900
Fax 510-521-2130
Audrey Bramhall, Project Director
2 - African-American, Asian, Hispanic

M E X I C O

In-store and mall interviews throughout México.
Dependable focus group recruiting.

SuperDatos™ de México
Ensenada 61, Colonia Hipodromo, Mexico, D.F. 06100

Call Toll Free 1 800 800 5055
or Phone: 415 392 6000 Fax: 415 392 7141

Jointly owned by Hispanic Marketing Communication Research
and Consumer Research Associates/Superrooms™

A unique blend of expertise, quality and reliability.

1994-95 Researcher SourceBook Supplement

Editor's note: This supplement lists firms that were not included in the 1994-95 Researcher SourceBook. Also included are updated listings that reflect changes to information contained in the SourceBook.

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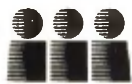
CALIFORNIA

Los Angeles

Peryam & Kroll Mktg. & Sensory Rsch. (Br.)
4175 E. LaPalma
Anaheim, CA 92807
Ph. 714-572-6888
Fax 714-572-6808

Phoenix Consultants
5627 Arch Crest Dr.
Los Angeles, CA 90043
Ph. 213-294-5648
Fax 213-294-9730
Diane Sanders, President

San Diego



Market Development, Inc.
1643 Sixth Ave.
San Diego, CA 92101
Ph. 619-232-5628
Fax 619-232-0373
Roger Sennott, General Manager

Leading U.S. research company dedicated to conducting research among U.S. Hispanics/in Latin America. Qualitative and quantitative (in-person & telephone interviewing). Services include: HISPANIC COPY-TRAC (standardized copy-testing for Spanish-language commercials); HISPANIC OMNIBUS (shared-cost U.S. Hispanic survey conducted quarterly); MDI Interviewing Services (50-station, bilingual facility w/CATI); data collection capabilities in all major Latin America countries. (See advertisement on p. 48)

San Francisco

Bruzzone Research Company
2215 Santa Clara Ave., #104
Alameda, CA 94501
Ph. 510-523-5505
Fax 510-523-5507
Donald E. Bruzzone, President
R. Paul Shellenberg, Director of sales

BRC, specializing in advertising research, was the first to use recognition-based measures of likability and diagnostics to measure advertising effectiveness. BRC made a major breakthrough in cost when it perfected a version of these tests that could be conducted validly by mail.

European Center for Economic
Research & Strategy Consulting
611 Burnett Ave., Ste. 19
San Francisco, CA 94131
Ph. 415-647-4446
Fax 415-647-0547
Claudia Hess, Director of Client Services

Since 1959. U.S. companies have relied on our indus-

try reports, full-service market research/consulting solutions and local government and industry contacts. Based in Switzerland with offices in Western and Eastern Europe. We help you enter or expand European markets cost-effectively through expert advice and effective implementation. Specialize in strategic planning, tactical sales and marketing, product services, channel management and strategic partner identification and qualification. Multi-client studies on European market opportunities, trends, development scenarios and forecasts in 5 languages. Lead identification service. Concise reports and actionable results.

Griffin Dix Research Ascts.
1895 San Juan Ave.
Berkeley, CA 94707-1621
Ph. 510-527-1451
Fax 510-527-4497
Grif Dix, President

I.S.I.S. - Integrated Strategic Information Services
611 Burnett Ave., Ste. 19
San Francisco, CA 94131
Ph. 415-647-4446
Fax 415-647-0547
Marc C. Limacher, Managing Dir.

Specialists in full-service market research and consulting services in the United States, Western & Eastern Europe and the Pacific Rim. Qualitative and quantitative. Expert phone and personal interviews. Inter-disciplinary research approach. In-house database of prequalified industry and government contacts. Questionnaire development, sample selection, data collection, translation, analysis, tabulation, verbatims, final report. Actionable results. Custom research and multi-client studies. Annual off-the-shelf industry and country reports available. Branch offices and partners in Europe and S.E. Asia. Increase revenues, improve bottom line results, save time and resources, and identify new customers in existing and emerging markets with ISIS' comprehensive market research solutions.

San Jose

The Pathfinder Companies
P.O. Box 66438
Scotts Valley, CA 95067-6438
Ph. 408-438-1000
Fax 408-438-2286
David Hodgkin, Chairman

CONNECTICUT

New Haven

Cabrera Marketing Research Svces.
127 N. Cliff St.
Ansonia, CT 06401
Ph. 203-734-2355
Fax 203-734-2355
Sally L. Cabrera, Principal

Stamford

FocusVision Network, Inc.
1266 E. Main St.
Stamford, CT 06902
Ph. 203-961-1715
Fax 203-961-0193

Gazelle International, Inc. (Br.)
37 North Ave.
Norwalk, CT 06851
Ph. 203-849-2895
Fax 203-849-2896

Information for Marketing
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Listing Additions

Please note the correction to the following listing from the 1994 Directory of Mall Research Facilities (corrected text shown in bold):

Facts 'n Figures
Antelope Valley Mall
1233 W. Ave. P, Ste. 701
Palmdale, CA 93551
Ph. 805-272-4888
Fax 805-272-5676
Contact: Renee Stapleton
H-20% M-70% L-10%
Stat.-8 1,2,3,4

Please add the following facility to the 1994 Directory of Mall Research Facilities:

Facts 'n Figures
Valencia Town Center Mall
24201 Valencia Blvd., Ste. 2317
Valencia, CA 91355
Ph. 805-222-2278
Fax 805-222-2287
Contact: Tammy Tallent
H-25% M-70% L-5%
Stat.-20 1,2,3,4

Please add the following firm to the 1994 Customer Satisfaction Research Directory:

Behavioral Science Research
2121 Ponce de Leon Blvd.
Coral Gables, FL 33134
Ph. 305-443-2000
Fax 305-448-6825
David Tanis, Senior Research Associate

Please add the following firm to the 1995 Directory of Focus Group Facilities

Peryam & Kroll Marketing and Sensory Research
6323 N. Avondale Ave.
Chicago, IL 60631
Ph. 312-774-3100
Fax 312-774-7956
Contact: Jeffrey J. Kroll
1, 3, 4, 7C

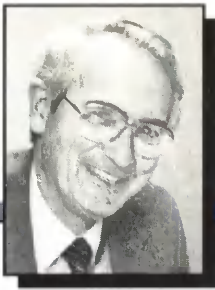
Sales Offices

Headquarters: Evan Tweed, *Quirk's Marketing Research Review*,
6607 18th Ave. So., Minneapolis, MN 55423, Phone: 612-861-8051.
Fax: 612-861-1836

West Coast: Lane Weiss, Lane Weiss & Associates, 10 Black Log Rd.,
Kentfield, CA 94904, Phone: 415-461-1404, Fax: 415-461-9555

Correction

In the Fall 1994 QMRR Researcher Card Deck, I/H/R Research Group's card contained the statement "MRA certified interviewers." This phrase was intended to communicate that the company's interviewers were trained using the official MRA (Marketing Research Association) training video and other MRA materials, including the MRA's scoring of test results and issuance of a certificate of completion of the training program. However, the MRA has asked that the phrase "MRA certified interviewers" not be used. In compliance with this request, I/H/R Research Group asked QMRR to omit the phrase from its card. But due to an oversight, QMRR failed to do so. QMRR apologizes for any inconvenience may have caused.



From the Publisher

By Tom Quirk

Booking a facility? It pays to shop around

High quality standards are critical to the success of a research project. But as a moderator friend of mine recently discovered, the best service doesn't always come from the highest-priced facility.

My friend was hired to conduct focus groups in a major Midwestern city, so he gathered cost proposals from seven facilities. After we discussed the hard figures, I asked him for his opinion of each of the facilities.

The numbers and my friend's assessments proved beyond a doubt that it pays to shop around when booking a focus group facility. In the market we looked at, the highest-priced facility wasn't the best choice.

The chart on this page compares the seven facilities' rates for room rental, recruiting and videotaping, in addition to their overall rates. The lowest rate in each category is represented by the figure 1.00; the other numbers reflect each firm's rates in comparison. So, for example, facility D offers the cheapest room rental; facility B is twice as expensive.

Clearly, the cost differences among

the facilities are considerable. As we had expected, room rental fees varied widely. The oldest facility in the market had the cheapest room rental, but the highest-priced units were neither the

Facility	Room Rental	Recruiting	Videotaping	Total
A	2.32	1.50	1.88	1.34
B	2.00	1.74	1.38	1.32
C	1.36	1.44	1.88	1.14
D	1.00	1.56	1.00	1.00
E	1.82	2.30	1.80	1.58
F	2.45	1.00	1.38	1.09
G	1.77	1.30	1.99	1.17

newest nor the best appointed. The most expensive facility charged almost double the fee quoted by the one my friend ultimately chose to use (C).

Recruiting rates also varied considerably. The highest-priced recruiting weighed in at more than double the price charged by the cheapest. Recruiting is critical to the success of a project, but my moderator friend has found marginal correlation between cost and quality.

As for videotaping, my friend noted, the more expensive facilities did not explain why they charged more. Nor did they detail the additional benefits, if any, clients received for their money.

In this instance, the moderator chose to hold the groups at facility C because, quite simply, he felt that it was the best in the market — despite its relatively low price. The facility was of excellent quality, his previous recruiting experience with the facility was positive, and he believed the videotaping would be adequate.

As the example shows, it's important for those seeking research services to thoroughly evaluate as many providers as possible. Here at QMRR, we try to help you do that by providing comprehensive directories that list all of the research providers we can find. With the exception of our directory of moderators, there is no charge for listings in any of our annual directories. The upshot is that readers have more choices when looking for research providers. And as my moderator friend's experience shows, having more choices usually means you get better value for your research dollar.

We are proud of the information we provide, and we will continue to produce the best possible directories. As always, please let us know if there are ways we can improve them. □

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1. The best seminar in marketing I've ever taken. Very timely. The content is absolutely excellent. Speaker - excellent, engaging. It's nice to have someone who can help us to understand... Finally, a marketing seminar which is both in-depth and practical.

Director of Market Research, Faultless Starch/Bon Ami

2. Fantastic - I finally understand the stuff that good college professors could not explain if their lives depended on it. Great manual. Speaker is really great - I have learned more from him in 2 days than I did in 2 years in grad school!

Market Administrator, GTE Directories

3. If the wealth of information, knowledge and understanding I walked away with could be converted to money, I would be a millionaire from hereafter. I was never more impressed with an instructor and a seminar as I was with this. Workbook like none I have ever been exposed to... somewhat similar to the Encyclopaedia Britannica. Speaker dynamic, exciting, brilliant, showed tremendous interest in the subject as well as each participant.

Project Coordinator, General Foods

4. Super - best 2 day seminar I've ever had. Totally targeted. Best workbook I've seen in terms of walking away with a great memory jogger. Super speaker.

Manager, ICI Pharmaceuticals

5. I have listed more than 30 ideas for immediate implementation at my company. Outstanding speaker: expert, enthusiastic, as good a listener as he is a teacher.

Manager, Consumer Research, Heinz

6. Fantastic and on-track! The manual will be a great addition to our reference library! Priceless! So well laid out. Speaker excellent, interesting - on-track.

Product Researcher, Midmark Corporation

7. The best (seminar) I've attended. Outstanding association of statistics to marketing research problems. Linked statistical background of MBA to study concerns I face everyday. (The speaker) explains statistics and methods better in 2 days than most professors have done in a semester of undergrad and grad work.

Business Research Analyst, Dow Chemical

8. Fantastic! Even though I have an M.S. in stats I have never had such a clear picture of how to apply stat techniques before. Wonderful examples to explain the theories, ideas, philosophies-superb (speaker)! Helped to motivate me to expand my use of different techniques and explore more possibilities.

Marketing Research Analyst, Consumer Power Company

9. "Intensive" is an understatement. But, I sure feel I got my money's worth. I got everything I came for, and more. Incredibly helpful and useful information. Terrific workbook. Unique instructor... someone who can "do" and "teach". Wonderfully enthusiastic.

Principal, CreBive Focus

10. Incredible - better than I expected. "Biggest Bang for the Buck" of any seminar I've ever attended. Fanjastic.

Marketing Research Analyst, Depuy

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October-December 1994 dates precede the 1995 dates in the following list.

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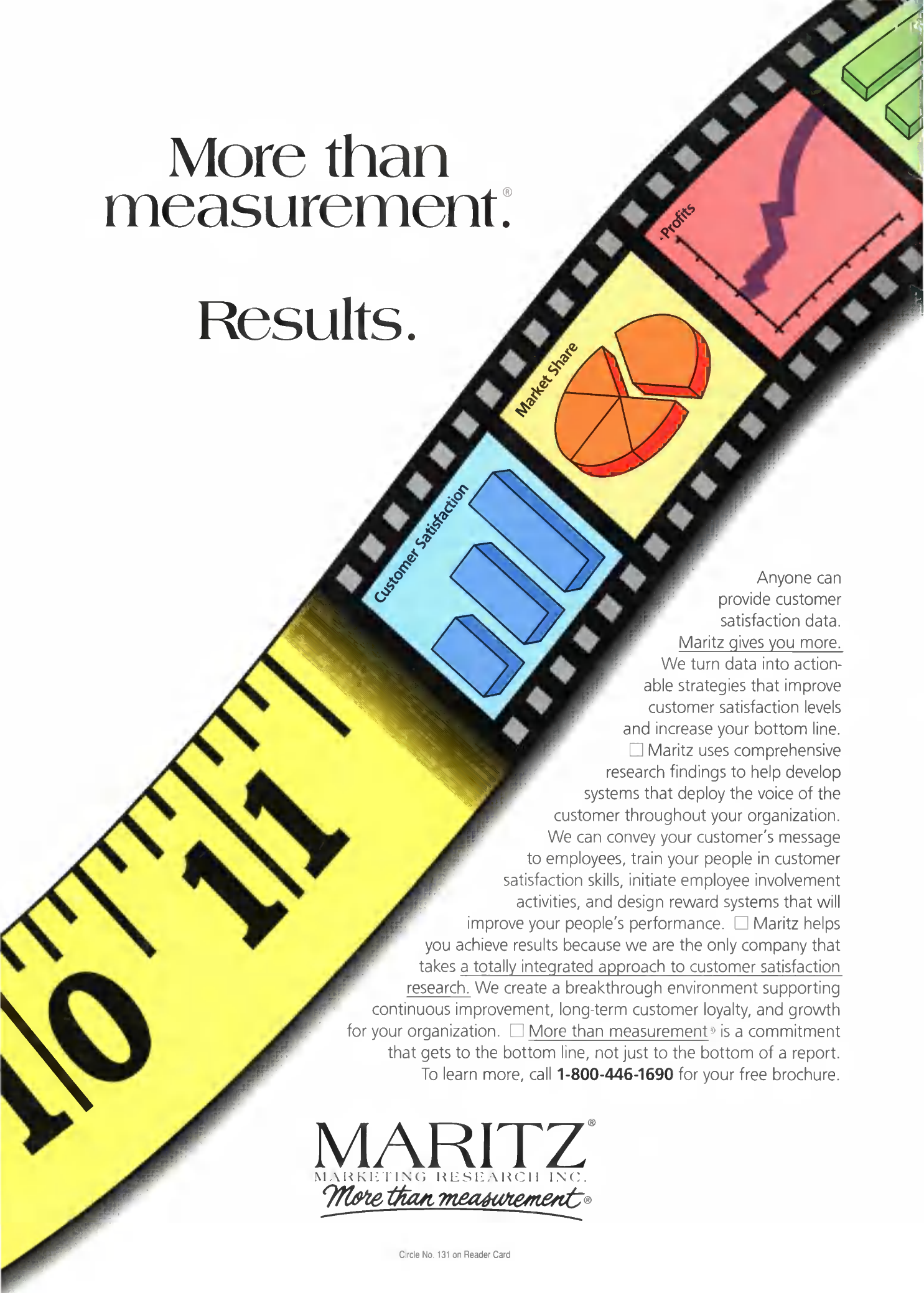
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