Business-to-business research: interviewing pharmacists; beating the competition

April 1997

Quirk's MARKETING RESEARCH Review

Practical applications in marketing research

Ethnic research issue

- Acculturation and media usage in the Hispanic market
- African-Americans express optimism
- The role of ethnographic research

1997 Ethnic Research Directory

Quirk's
MARKETING RESEARCH
Review

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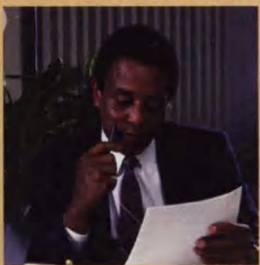

Volume XI, Number 4 April 1997

This issue features articles on business-to-business research and ethnic research and our annual directory of ethnic research providers.

FEATURES

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Quirk's Marketing Research Review, (ISSN 08937451) is issued 10 times per year – Jan., Feb., Mar., Apr., May, Jun./Jul., Aug./Sep., Oct., Nov., Dec. – by Quirk Enterprises, Inc., 8030 Cedar Ave., Ste. 229, Bloomington, MN 55425. Mailing address: P.O. Box 23536, Minneapolis, MN 55423. Tel.: 612-854-5101; Fax: 612-854-8191; E-mail: quirk19@mail.idt.net; Web address: http://www.quirks.com. Periodicals postage paid at Minneapolis, MN and additional mailing offices.

Subscription Information: U.S. annual rate (10 issues) $60; Canada and Mexico rate $90 (U.S. funds); international rate $119 (U.S. funds). U.S. single copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change. **POSTMASTER:** Please send change of address to QMRR, P.O. Box 23536, Minneapolis, MN 55423.

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Chilton offers "The 10 commandments of brand franchise extensions"

Brand franchise extension — using the brand equity held by one product as a springboard for the creation of a new or modified product with the same brand name — is a process that can be fraught with peril. The road to marketing success is littered with the sun-bleached remains of failed brand franchise extensions that seemed like a good idea at the time yet, for one or more reasons, never found favor with consumers. The road is also marked with monuments to stunning brand growth through brilliant brand franchise extensions, as illustrated by brands like Ivory and Ocean Spray.

The trip down that road need not be so daunting, says Don Dietrich, vice president and group manager for Chilton Research Services, Radnor, Pa. At a seminar on brand equity, Dietrich shared what he labels "the 10 commandments of brand franchise extension," to serve as guidelines for anyone considering such a move.

"Brand franchise extension is an area in which both risk and reward can be extremely high," says Dietrich. "There's no substitute for doing your homework, particularly through the use of a good diagnostic brand equity system, but experience has shown us that these commandments are a good place to start," Dietrich says.

1. Make sure everyone agrees on what the term brand means. Fundamentally, a brand is a promise that a particular product or service will

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Americans love their VCRs

According to Maritz AmeriPoll, 89 percent of Americans own a VCR, while 44 percent own two or more. Whether or not they own a VCR, 69 percent of Americans rent or watch a video for their own personal entertainment at least once per month. In fact, 37 percent of Americans say they rent or watch weekly. People aged 18-34 are far more likely to rent or watch videos on a weekly basis than those aged 35 and up (56 percent to 28 percent).

On average, Americans rent two videos at a time. Twenty-eight percent say they only rent one video, 47 percent say they rent two, and 24 percent claim to rent more than two each time they visit the video store.

And how about those video rental memberships? Eighty percent of Americans belong to at least one video rental store. In this group, 48 percent belong to one, 30 percent belong to two, and 22 percent belong to three or more video rental stores.

Moreover, Americans seem to prefer renting from big-name video franchises over grocery stores or other sources. Forty-three percent say they are most likely to get the videos they watch on a VCR from a franchise, 32 percent would rather frequent an independent supplier, 16 percent are most likely to rent from grocery or convenience store video departments, and nine percent get their videos from other sources.

Maritz AmeriPoll is a national consumer opinion poll conducted regularly by Maritz Marketing Research Inc., St. Louis. Mo. Results are based on telephone interviews with American adults. Accuracy of the results is within ±3.09 percent. For more information call 800-446-1690.

Product & Service Update

New shelf management system from ACNielsen

ACNielsen Corp. has launched SPACEMAN Merchandiser, a new shelf management system for retailers and manufacturers. SPACEMAN is a software product that allows users to create and view on-shelf planograms within minutes and replicate or design a shelf display on a computer screen. SPACEMAN is a 32-bit Windows 95/NT application. It is also available in a 16-bit Windows 3.1 version. For more information call 972-401-5511.

Trial version of Web survey product

3D Software Services, Foster City, Calif., has a new version of TelePrompt to design surveys for the Web. The trial version can be downloaded at www.teleprompt.com. The trial version generates a Web form that submits the response via E-mail or it can be run on a local PC where the responses are written to a text file. Registered users can setup branching. For more information call David Griffis at 800-992-0178.

Book explains satisfaction surveys

MERIT Research Services, Orem, Utah, is offering a workbook called "How to Plan and Conduct a Customer Satisfaction Survey," which is designed to help users develop an affordable research plan. The workbook

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Research Calendar

ANNUAL SAWTOOTH SOFTWARE CONFERENCE: The sixth Sawtooth Software Conference on Computer Interviewing and Analytical Methods for Marketing Research will be held August 20-22 in Seattle. There are 18 scheduled speakers covering topics such as conjoint analysis, choice-based conjoint, market segmentation, perceptual mapping, Internet surveys and multimedia interviewing. Speakers have been challenged to emphasize practical rather than theoretical topics. Sawtooth conferences are professional rather than commercial events. Attendance will be limited to 200 participants. For more information call Marilyn Stanford at 360-681-2300.

ELECTRIC UTILITY CONFERENCE: The Marketing Research Division of the American Marketing Association, the Edison Electric Institute and the Electric Power Research Institute are sponsoring the Electric Utility Customer Research Conference at the Fairmont Hotel in New Orleans on May 18-21. For more information call 800-AMA-1150.

ADVANCED TECHNIQUES FORUM: The Marketing Research Division of the American Marketing Association is sponsoring the Advanced Research Techniques Forum at the Hyatt Regency Hotel in Monterey, Calif., on June 22-25. The forum is designed for upper-level researchers, analysts, statisticians and academicians who want to learn about the latest advances in research methods and models. For more information call 800-AMA-1150.

Your prescription is ready

USP asks pharmacists to evaluate new drug information source

By Joseph Rydholm, QMRR editor

You may not have heard of United States Pharmacopeia (USP) but you're probably glad it exists. That aspirin you took yesterday? USP helps make sure it's manufactured to uniform standards of purity.

Founded in 1820, USP is a private, not-for-profit organization in Rockville, Md., made up of over 1,500 volunteer health care professionals, scientists, academicians and government officials. Among its many activities, USP sets the standards for drug packaging, purity and quality — which the FDA enforces — and provides drug information to doctors, pharmacists and other health care professionals and the public.

One of the main information sources it provides is USP DI Volume I, Drug Information for the Health Care Professional, a book of data on drug dosages, interactions, side effects, brand names, generic names, etc. Pharmacists subscribe to the book, which is issued annually and updated monthly. (Many states require pharmacists to have a copy of USP DI Volume I, or another drug reference source, on hand. Some specify the USP DI Volume I and others offer a list of acceptable substitutes.)

While such a tome (the 1997 edition runs 3,360 pages) is a natural for issuing on CD-ROM, until recently USP has only offered a print version, letting other licensed vendors

incorporate USP's drug information into their own CD-ROM products. But in April, USP's CD-ROM version, called USP DI Plus, is scheduled to debut. "We wanted to enter the electronic age," says Joan April, category manager, drug and therapeutic information, USP.

Confirm assumptions

Feedback from USP DI subscriber surveys, focus groups and research conducted at trade shows indicated interest in a CD-ROM version. But like any smart marketer, USP decided to confirm those assumptions by talking to prospective buyers.

Past mail surveys, including one inserted in the 1995 edition of USP DI Volume I, had drawn low response rates, April says, so USP decided to go with telephone interviews. With the help of Woelfel Research, Vienna, Va., pharmacists at hospitals, chain drug stores and independent drug stores who subscribed to the print version of USP DI Volume I were contacted.

Information from the research helped USP prioritize the features it emphasized in marketing USP DI Plus. "We wanted to assess their perceptions of the content of the product because we had some options about what we could add to it," April says.

Respondents were told that USP was conducting the research to get their reactions to a new product. "We gave them a basic briefing on the new product and gave them a list of potential new features and asked how useful they thought they would be," says Jeff Adler, vice president of Woelfel Research. "We told them about new features being considered for the CD-ROM version and found varying interest in them. But the features in general increased interest in the new product."

The rest of the survey touched on satisfaction with other USP products, pricing, purchase intent, awareness of competitors' products, possible names for the new product, and familiarity with various information formats.

While CD-ROM seemed the natural choice to house all the information in the USP DI Volume I, with the growth of the Internet, USP wanted to assess the popularity of other electronic delivery approaches. The research confirmed that CD-ROM was preferable to online or floppy disks. "In addition to determining ownership or accessibility to CD-ROM players, we wanted to find out if CD-ROM was the best way to go or if they had some other electronic format that they would prefer," April says.

Biz-to-biz is different

A lot of firms fail to appreciate just how different a business-to-business interview is from a consumer interview, Adler says. "In the business-to-business research project it's important to quickly communicate to the respondent the benefit to them of participating in the study. In this case, we identified the sponsor and told the respondents that we were trying to make USP DI better and more useful to them. You have to offer a monetary incentive as a token of respect but it should also be clear that they will benefit in other ways, not just monetarily, from the research."

The research process was aided by the goodwill toward USP, Adler says. Notifying respondents that USP was the sponsor earned a high level of cooperation, which, in turn, made it possible to pay an incentive ($25) that wasn't as high as most business-to-business surveys (especially those with health care professionals) normally require.

The researchers also made sure to respect the appointments they made with the pharmacists, Adler says. "That is an extremely important point in business-to-business interviews. With a consumer, if you call them at six o'clock, they tell you to call back after dinner. With business-to-business interviews if the respondent says, 'I can't talk to you now but I can talk to you at one-thirty,' that means one-thirty, not two o'clock."

And, most important, USP resisted the urge to mix research with a sales call. The old, "while we've got them on the phone we might as well see if they're interested in buying" approach not only corrupts the research process but also may make respondents less likely to participate again in research — especially if they think a hard sell is coming after the "research" is over.

"This project did a lot of things right. USP identified itself as the sponsor of the research, contacted an audience to whom the research topic was of interest, kept the interview short and interesting, and paid them an incentive. When you do those things you can produce a high completion rate and a valid, reliable survey which has some clear, actionable answers," Adler says. ❑

Acculturation, value orientation and

By M. Isabel Valdés

Editor's note: M. Isabel Valdés is president of Hispanic Market Connections Inc., Los Altos, Calif. This article draws from works previously published, presentations made at conferences and from material compiled for the Handbook on Marketing to Hispanics, *co-authored with Dr. Marta Seoane.*

The U.S. Hispanic market has grown exponentially during the past two decades to become one of the largest and wealthiest consumer markets in the Latin American world, a trend that is expected to continue well into the 21st century. The historical development of the U.S. Hispanic market — multinationalities juxtaposed to a powerful Anglo-Saxon culture — has created a distinct and complex society within a society. The U.S. Hispanic consumer market is constantly undergoing an acculturation process, where among others, language preferences (Spanish, English or both) values and media usage patterns challenge traditional methods to target mono-lingual Latin American markets. Hence it is not recommended to extrapolate from research, marketing or advertising experiences in Latin America to the United States.

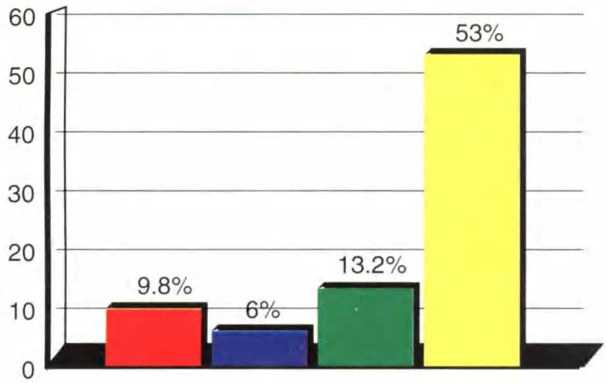
To target this lucrative and growing market, marketers and advertisers must rely on marketing research tools that provide data reflecting the unique and ever- changing mindset of the U.S. Hispanics.

This article presents a language-based segmentation developed for this purpose by Hispanic Market Connections, Inc. (HMC), Los Altos, Calif. Utilizing language questions and demographic data, His-

media usage in the U.S. Hispanic market

Chart 1

Selected percentage changes in population by race and Hispanic origin for the United States 1980 to 1990



panic consumers are grouped into four groups: "Spanish-dominant/dependent," "Spanish-preferred/bilinguals," "True bilinguals," and "English-preferred/English-dominants."

A rapidly growing and highly diverse market

Hispanics are expected to become the largest non-Anglo, or minority, group in the U.S. in as little as 15 years.

According to the 1990 U.S. Census Bureau, there are 22.4 million Hispanics residing in the United States. This growth represents a 53 percent increase over the 1980 population figures of 14.6 million (Chart 1). This increase represents more than five times the growth rate of the total U.S. population (Chart 2). These figures, despite being the final "official" 1990 population estimates, under-represent the actual population size of the Hispanic population, as stated by the Bureau of the Census. The Bureau's own post enumeration survey of the 1990 census proposes adding 1.2 million more Hispanics. The actual figures may be still higher because: 1) accurate counts of the Hispanic population are difficult to obtain; 2) because there are anywhere from two to six million undocumented Hispanics, and finally, 3) because the U.S. Census figures do not include some 3.5 million Hispanics who live in Puerto Rico.

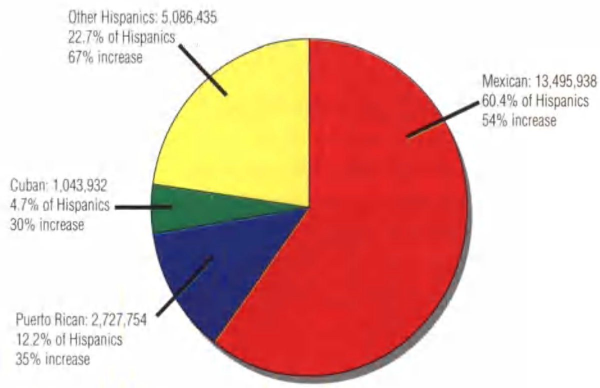
One of the major reasons for these rapid growth rates is that Hispanics have higher birth rates than the rest of the U.S. population. Another factor is that both legal and illegal immigration from Spanish-speaking countries continues at a rapid pace. Due to the traditionally higher birth rates in the Latin American countries and because the Hispanic population tends to be younger (26 is the median age compared to 32 for the total U.S. population), the high birth rates are unlikely to slow down in the near future.

The result is a very dynamic consumer market where new Hispanic immigrants are mixed together with consumers whose ancestors have resided for several generations in the U.S., each with vastly different experiences, lifestyles and historic background. Non-U.S.-born Hispanics and second generation Hispanics presently compose the largest demographic based group for the U.S. Hispanic market. These two segments are expected to fuel its growth in the foreseeable future.

Adding to the market diversity resulting from the growing immigration is the multinational background of the U.S. Hispanic market. Mexicans compose 60.4 percent of the total U.S. Hispanic market, Puerto Ricans 12.2 percent, Cubans 4.7 percent and

Chart 2

Major Hispanic subgroups as percentage of total and percentage increase, 1980 to 1990



Total Hispanic Population: 22,354,059

other nationalities 22.7 percent. Within the latter group, the largest segments are composed of Salvadorans and Costa Ricans. Consumers from all other Latin American coun-

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Neural networks: understanding back-propagation

By Mike Fassino

Editor's note: Mike Fassino, Ph.D., is president of EnVision Knowledge Products, Media, Pa. This is the first installment of a three-part series on neural networks.

Throughout the 20th century, statistical models and procedures have dominated the practice of quantitative market research. The popularity of conjoint analysis and perceptual mapping procedures as well as the ubiquity of t- and Chi-square tests in the major crosstab packages attest to our hunger for the seeming "precision" of statistics. In some fundamental ways, however, statistical models are anachronistic, having been developed in an era when calculating was extraordinarily expensive but thinking was not. Today, the economics are reversed: the pervasiveness of personal computers has lowered the cost of a calculation to virtually nothing, so the value of market research has come to lie in thinking about what the calculations mean rather than doing the calculations. While our calculating machinery has vastly improved, most of the statistical techniques market researchers rely on continue to be:

- linear
- orthogonal
- normal
- correlational rather than causal

These four assumptions of classical statistics — linearity, orthogonality, normality and acausality — provide convenient shortcuts to calculating. For example, if I want to assess the nature and strength of the relationship between five or six dependent variables (such as components of customer satisfaction on a single dependent variable like overall satisfaction) and I am willing to believe that the relationship is linear, that the independent variables are not correlated with each other and that the errors of the model are normally distributed, I could do the calculating by hand. If, however, I allow for nonlinearity, colinearity and non-normality, the calculations become enormously complex and I would have to be willing to spend years calculating this one problem by hand. With a reasonably good PC, however, these years of calculations can be performed in a few minutes.

In this series of three articles, we will examine the application of neural networks to the analysis of quantitative market research data. Neural networks approach the task of data analysis from a different perspective than classical statistical procedures, being far more computer-intensive so that more of the researcher's time can be spent thinking about what the results mean instead of transforming variables so that the data (almost) fit the assumptions and preconceived constraints of the statistical procedures. Neural networks rarely "care" whether the classical assumptions are met and rely on brute force calculating rather than statistical theory to solve analytic problems.

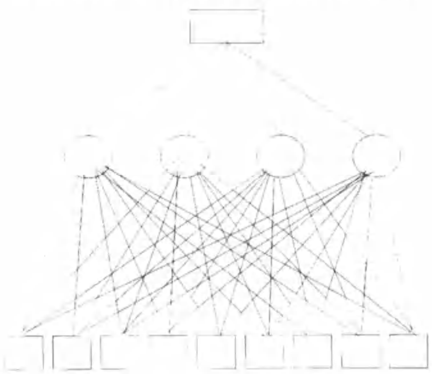
As the name implies, neural networks were, originally at least, concerned with designing software to emulate the way the nervous system works. As we all know, the human brain contains millions of nerve cells, called neurons, that communicate with each other with electrical and chemical impulses. Each nerve cell synthesizes all of the impulses from neighboring nerve cells and decides, based on this synthesis, whether it will send an impulse. Today, emulating the way the brain works is still an important area of neural network research and development. It has been demonstrated, however, that certain classes of neural networks are adept at solving difficult statistical problems. Whether they simulate or emulate the way the brain works is not relevant — they are useful analytic tools, apart from their neurobiological ancestry. The most extensively used type of neural network is called back-propagation and it is the focus of this article.

Back-propagation

Understanding back-propagation is essential for understanding the self-organizing map and time-series forecasting neural networks that I cover in the two companion articles. It is a fundamental neural network architecture.

Figure 1 shows the essential features of a back-propagating neural network. There are three components, labeled A

FIGURE 1: BACK-PROPAGATING NEURAL NETWORK ARCHITECTURE



through C. Component A is the input layer. Here the neural network obtains information about the value of the independent or input variables, such as ratings of customers' satisfaction with various facets of a company's product or service. Component B contains a series of hidden units. This is where the neural network's heavy calculations occur. Most of this article is about what goes on in the hidden layer. Component C is the output layer, where the neural network provides its estimate of the dependent or outcome variable's value, such as a rating of overall satisfaction. The data requirements for a back-propagating neural network are:

- values of the independent variables
- values for the dependent or outcome variable.

Because values of both the independent and dependent variable are provided to the network, this particular type of neural network is known as a supervised learning network. In the companion articles, we will encounter two other types of networks where the network is not given values of both the independent and dependent variables: unsupervised learning and reinforcement learning.

Both the independent and dependent variable(s) can be categorical, ordinal, interval or ratio scaled. Rather than solve for the relationship between input and output variables as is done in regression or conjoint analysis, a back-propagating neural network is trained, or "learns," the relationship. Since it simply learns the relationship, there are very few assumptions about the form of the relationship — it can be highly nonlinear and nonstationary (e.g., changing over time) and the independent variables can be arbitrarily correlated (three conditions that cause linear statistical techniques consider-

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War Stories

True-life tales in marketing research

By Art Shulman

Editor's note: "War Stories" is a regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches.

Moderator Bill Weylock of Weylock Associates recalls a focus group session which was well underway when the proprietor of the research facility interrupted by bringing some homemade muffins into the room. The well-intentioned woman was oblivious to the fact that Weylock's group had been recruited to test a new snack chip, a bowl of which was on the table.

Later in the session, after the muffins had been removed, the microphone in the ceiling fell and dangled over the table. After being summoned to the room, the proprietor climbed up on the table and put the mike back in place, all the while dexterously managing not to step on the bowl of chips.

Weylock believes the facility is now out of business.

Steve Billig of Billig & Associates tells about a focus group participant in her 60s who thought she'd been invited to a support group. At the start of the session, before people began talking about the real subject at hand, vacuum cleaners, she began telling her terribly sad story. Her husband had died a few months earlier and, soon after, her son was killed in a car accident. Her heart-rending story went on and on and she wept as she shared her sadness.

The moderator, wisely putting humanity over productivity, allowed the woman to grieve before regaining control over the focus group. The moderator did not excuse the participant. After waiting for the right moment, he explained to her the purpose of the session and offered her the option to stay or leave. She opted to stay.

Freelance moderator Paul Schneller recalls reviewing screeners for a focus group he was to conduct. One of the questions asked was, "What do you like to do in your spare time? (INTERVIEWER: RECORD VERBATIM IN SPACE PROVIDED)"

The replies were a bit briefer than Schneller had hoped. On every screener, the recruiter had written "VERBATIM," neglecting to record anything the respondent had said.

An anonymous marketer tells about a presentation of a new product launch made by someone in his marketing group. One of his large charts contained a spelling error, announcing a "Pubic Introduction."

The presenter wasn't sure why there were giggles around the room when he uncovered that chart, though when someone later explained his spelling mistake, he told them that he thought his fly might have been open — which, if true, might actually have been a "pubic introduction," in a manner of speaking.

We've talked before about clients from hell behind the one-way mirror at focus groups. How about the experience of Steve Lackow of Retail Profit Management? In the days when TelePrompTers were being tried in lieu of passing paper notes from the back room to the moderator, Lackow's client repeatedly told him on the monitor to "Get Michelle's phone number," Michelle being a very attractive and bright group participant.

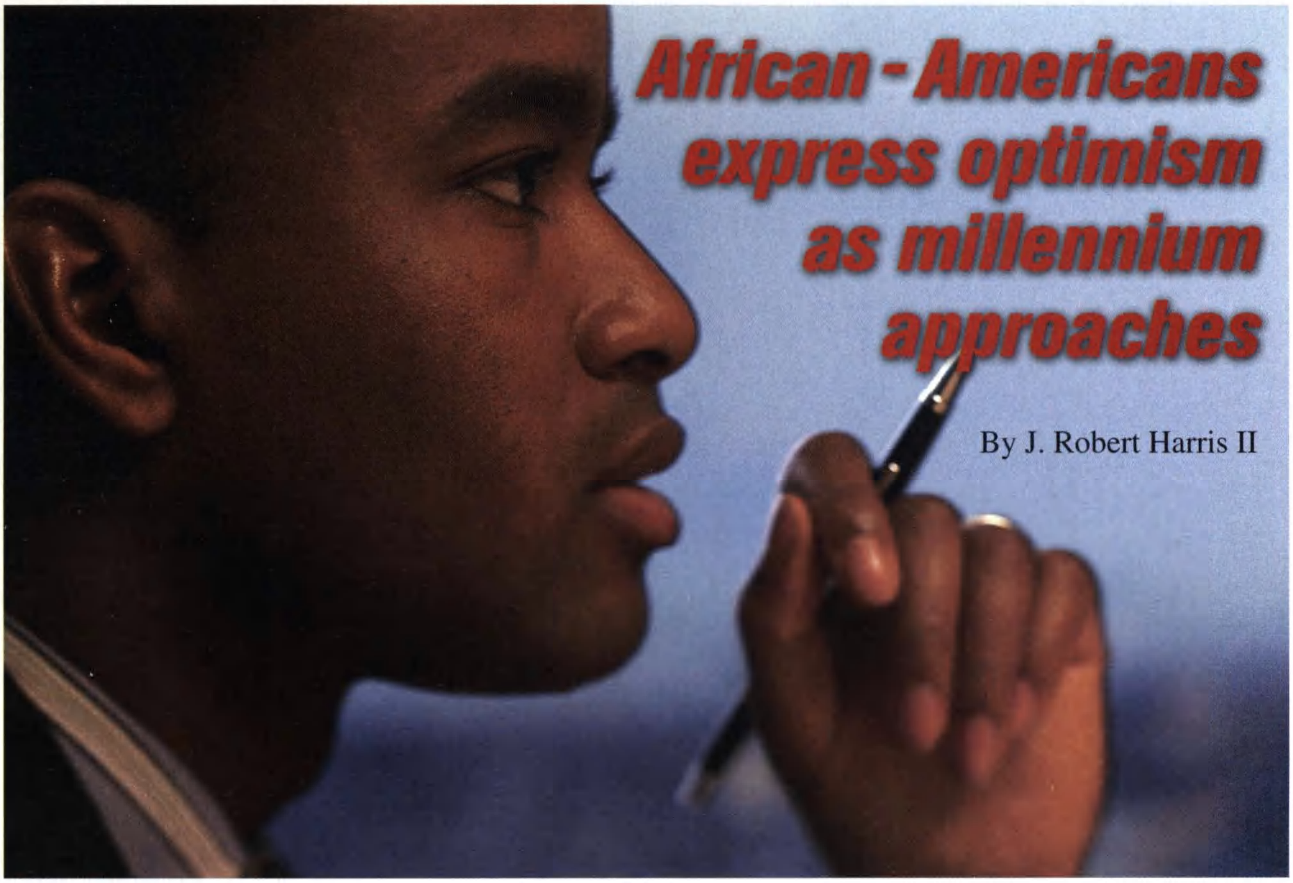
After several of these messages, an annoyed Lackow stopped the group for a short while and went to the viewing room, where he asked the slightly inebriated client to stop or he might have to cancel the group.

About five minutes later, another similar message came though the TelePrompTer. Lackow paid the participants and sent them home!

Margaret Roller of Roller Marketing Research tells about a group she was moderating on dried herbs where her client sent in a note asking her to gauge the group's reaction to the "fact" that the competitor's product consisted of 5 percent rat feces.

Roller tossed the note and continued conducting the session according to her guide. To this day she has never found out if the "fact" was correct or a guerrilla marketing ruse.

In future issues, we'll report on more quirky, loopy and strange happenings in the world of market research. If you'd like your story to be told — anything related to research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires — please call me at 818-782-4252 or, better yet, write it up and fax it to me at 818-782-3014 or E-mail me at artshulman@aol.com. ❑



African-Americans express optimism as millennium approaches

By J. Robert Harris II

Editor's note: J. Robert Harris II is president of JRH Marketing Services, Inc., New York.

As the African-American population looks toward the year 2000, they do so with the hope and expectation that their social, cultural and political environments will continue to improve and prosper. This optimistic outlook is based on the belief that the best way to achieve the goals they have set for themselves and their families is to make it happen on their own through continued dedication, commitment and hard work. Despite the negative publicity and apparent racial divisiveness as reflected by the Rodney King and O.J. Simpson cases, African-Americans are feeling better about themselves and express a desire for increased racial and social harmony, not only in their relations with others but also among themselves.

JRH Marketing Services, New York, recently completed a series of focus groups to investigate current attitudes and opinions about lifestyles and personal goals among a cross-section of African-Americans nationwide. These focus groups were the latest in a series of trended studies that we began in 1975 and have conducted periodically since then.

The latest project consisted of 10 focus groups, five each among men and women. Among the five groups conducted within each gender, two were among adults aged 21-29. We used an annual household income of $40,000 as a definition of "affluent," and one of these groups was above, and the other below, this level. The second two groups were constructed in the same way, except that the age category was 30 to 39; the fifth group consisted of respondents who were between 40 and 50, regardless of income.

Participants in all of the groups were currently employed, either full- or part-time, or were retired. In addition, we conducted eight groups among teens, four each among males and females, who were either students or were working. Among the areas of inquiry in these groups were the following:

• How do they assess their current lifestyles?

• What lessons have they learned from the past?

• What are their personal goals and aspirations?

• With whom do they spend their time?

• How sensitive are they to how others see them?

Although these and other issues were incorporated into a discussion guide document, respondents were encouraged to digress and discuss anything that they thought relevant to their perception of their lifestyle and the impact of outside influences on that lifestyle.

Perception of current lifestyles

There was a strong tendency among men and women at all age and income levels to see themselves as better off now than they were in the past. There was general agreement that the "good life" was definitely attainable. They were under no illusions, however, that this would be easy; they would have to

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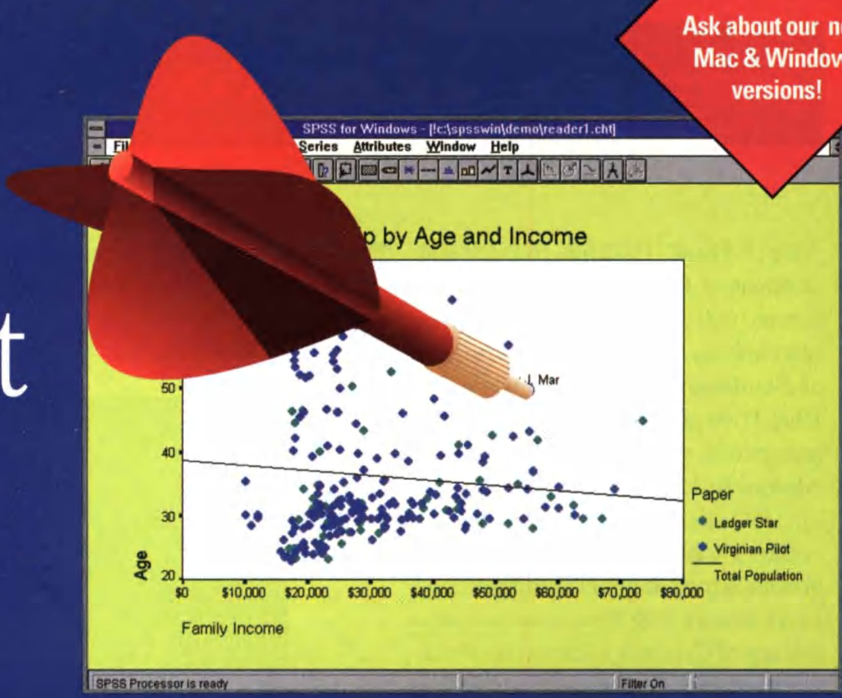

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Names of Note

Cecil "Bud" Phillips, founder and chairman of the board of *The M/A/R/C Group*, a Dallas marketing and research firm, is one of three recipients of Southern Methodist University's 1997 Distinguished Alumni Awards, presented annually by the SMU Alumni Association.

Larry Chiagouris, executive vice president and managing director of *CDB Research & Consulting*, a subsidiary of Creamer Dickson Basford, was awarded the agency's President's Award for Distinguished Performance.

Kris Dunn and **Kristen Isenhart** have been named project coordinators at *Aragon Consulting Group*, St. Louis. **Diane Dailacis** has joined the firm as vice president and senior consultant.

Marion Bergmann has been named research manager at *The Olson Research Group*, Plainsboro, N.J.

Bergmann

Xiaoyan Zhao, *Roper Starch* vice president of international operations, has been named managing director of the new Asia Pacific office of Roper Starch Worldwide in Hong Kong. **Steve Thomson**, head of the international division of London-based research company Parker Tanner Ltd., was named managing director of Roper Starch's new London office.

The Agricultural Research Group of *Maritz Marketing Research*, St. Louis, has named **Jim Kohler** director of syndicated product services. In addition, **Gina Wiseman** has been appointed director of operations for Maritz's Systems and Research Services Group.

Michelle Rothbard has joined *Newman-Stein, Inc.*, a New York research firm, as vice president, qualitative research.

Chilton Research Services, Radnor, Pa., has named **Sharon H. Williams** research consultant for its consumer products group.

Rosalind Rivin has joined *Yankelovich Partners, Inc.*, a Norwalk, Conn., research firm, as a partner.

Diane Salamon, vice president, *Burke, Inc.*, Cincinnati, has been named managing director of Burke's new subsidiary Burke Strategic Consulting Group (BSCG). Salamon will be joined by **Fran Lipson**. A second BSCG office in Atlanta will be run by **Jaci Jarrett Masztal.**

Alicia Pascual will serve as managing director of the new Asia-Pacific office of *Audits & Surveys Worldwide* in Manila, The Philippines.

Research Industry News

C.J. Olson Market Research, Inc., has moved to a new location with a larger focus group facility. The new address is: 2125 E. Hennepin Ave., Ste. 100, Minneapolis, Minn., 55413-2720. Phone 612-378-5040 or 800-788-0085. Fax 612-378-5401.

ACNielsen has reached an agreement with Safeway Inc., Pleasanton, Calif., that will enable Nielsen to report chain-specific census data for the nation's third-largest supermarket chain. Safeway operates 1,052 stores in the U.S. and Canada. Nielsen's census trading area, with a customized comparative market component, enables consumer packaged goods manufacturers to view Safeway relative to competitive chain supermarket retailers in a Safeway-defined geography.

In other news, ACNielsen has acquired the remaining 75.1 percent stake in ACNielsen South Africa from Integrated Business Information Services. In 1987 Nielsen divested its business in South Africa to Integrated Business Information Services as part of Dun & Bradstreet's withdrawal from the country. In 1994 Nielsen bought a 24.9 percent share in the South African business.

The company has also expanded its operations into Israel by acquiring a 90 percent stake in Market Share Meida Shivuki Ltd., a research firm located near Tel Aviv.

ACNielsen has released its fourth-quarter results for 1996, announcing a net income of $11.4 million, or $0.20 a share, compared with a net loss of $19.7 million, or $0.35 per share, in 1995. The 1995 fourth-quarter results exclude the impact of a $152.2 million non-recurring charge. Including the charge, the company's net loss in the fourth quarter of 1995 was $161.0 million, or $2.85 per share. For the full year of 1996, ACNielsen posted net income of $15.8 million, or $0.28 per share, compared with 1995's net loss of $65.4 million, or $1.16 per share, excluding the 1995 fourth-quarter charge and a $31.9 million provision for postemployment benefits in the third quarter of 1995. Including these items, the company had a net loss of $230.9 million, or $4.09 a share, in 1995.

ICT Group, Inc., Langhorne, Pa., reported that revenues for 1996 totaled $71.6 million, a 37 percent increase from $52.1 million in revenues in 1995. Pro-forma net income for 1996 increased 47 percent to $1,327,000 or $0.12 per share, compared to $903,000 or $0.09 per share in 1995, excluding the effect of a nonrecurring, non-cash charge for IPO-related compensation in the second quarter of 1996. Revenues for the three months ended December 31, 1996 were $19.7 million, a 23 percent increase from $16.0 million for the same period in 1995. Net income for the three months ended December 31, 1996 was $0.03 per share compared to $0.05 pro-forma net income per share in 1995.

The Olson Research Group, Inc. has moved to: The Office Center, Ste. 1210, Plainsboro Rd., Plainsboro, N.J., 08536. Phone 609-799-5311. Fax 609-716-7161.

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Understanding Hispanic culture: a case for ethnographic research

By Roberta Maso-Fleischman

Editor's note: Roberta Maso-Fleischman is a qualitative research consultant based in Cupertino, Calif.

As the Hispanic market expands, manufacturers desirous of targeting and attracting this segment of the market are increasing their consumer research among Hispanics. The qualitative research methodologies used are generally conventional, mainly focus groups. However, there is an alternative in qualitative research which is already being used in the general market — the ethnographic study — which can provide greater insights into a particular culture and furnish richer information than conventional methods.

That's not to suggest that ethnographic studies replace conventional methodologies in Hispanic research. But there are situations where essential, in-depth information about the Hispanic culture is of fundamental importance. For instance, a) when a category or a brand is being introduced for the first time in the Hispanic market; and b) at the start of a major marketing or advertising strategy for Hispanics.

In this article we will examine the ethnographic study in marketing and advertising and illustrate how it can be used to enrich Hispanic research.

Ethnographic studies in marketing and advertising

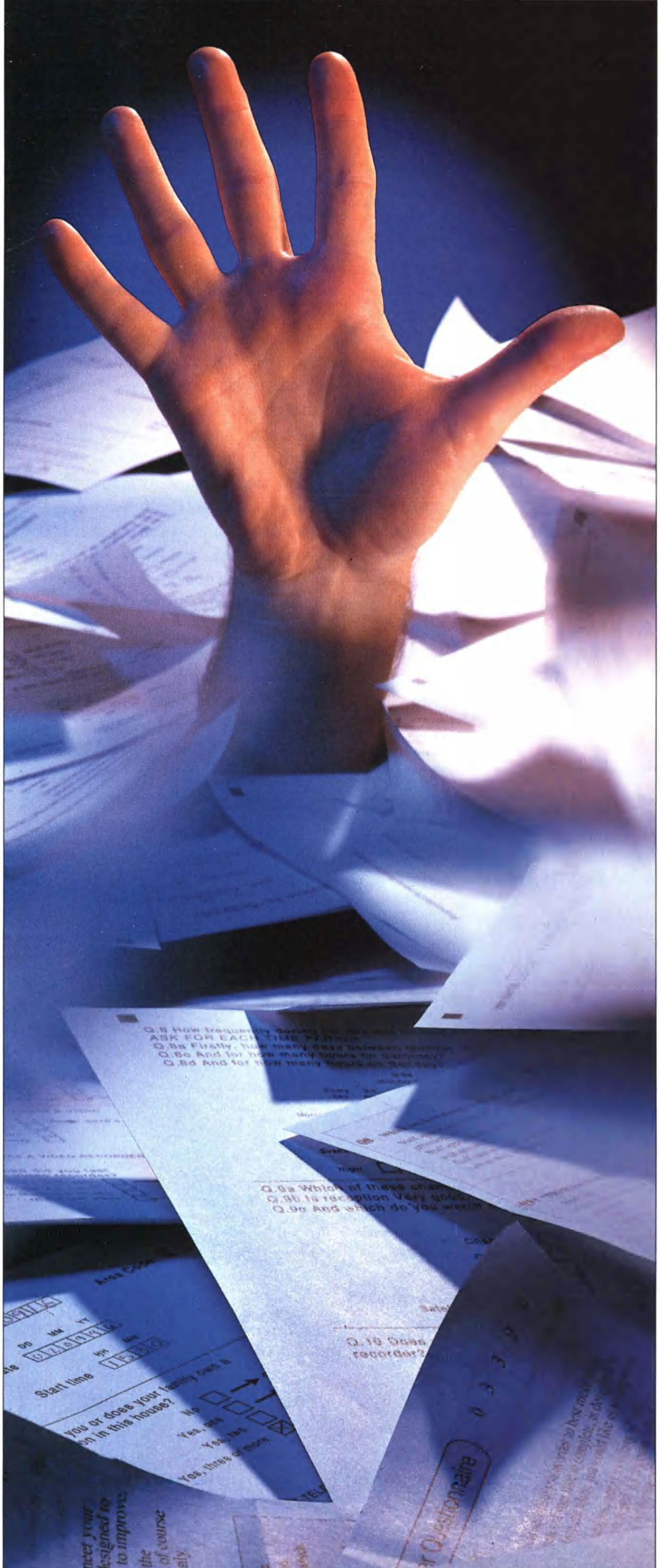
The ethnographic study first emerged as a tool to study small, non-Western cultures. It is now successfully being used to study modern cultures.

The study of a culture involves exploring two levels of consciousness: the explicit and the tacit. Explicit culture is what we see: behaviors, objects, interactions; it is a level of knowledge which people can communicate about with relative ease (Spradley, 1980). Tacit culture, on the other hand, is that which is implicit and unspoken. It is the domain of meanings, where behavior is generated and where the ethnographer must probe in order to understand experience.

Ethnography is the study of both the explicit and the tacit levels of a culture. For marketing and advertising this type of study is a way to explore symbols, beliefs and values. It aids in understanding patterns of behavior and uncovers specific areas of desire and dissatisfaction. That's why it is suggested to conduct this type of study when a category or a brand is being introduced for the first time in a particular segment of the market, and at the beginning of a major marketing or advertising strategy. The information obtained will aid the creatives with the emotional language needed to reach the targeted segment, and marketing strategists will acquire a greater understanding of their consumers and their culture.

In an ethnographic study the respondents do not go to a focus group facility. Instead, the researcher goes to the respondents' own surroundings. For instance, if the subject of the study is food consumption, where mothers or housewives function as gatekeepers the investigation takes place in the kitchen or pantry. When the study is carried out on-site respondents usually feel very proud and are excited to let the researcher into their homes and into their lives and to show her/him what their daily existence is like. Respondents feel singled out, important and honored and feel they have a responsibility in participating in this type of a study.

The openness and willingness of the respondent to participate greatly helps the researcher, who, after a brief introduction, guides the conversation to glean information from the explicit level and begins to probe for meanings at the tacit level. The researcher has a set of probing areas which are the basis for the exploration. These probing areas and their objectives have been previously discussed with the client. Besides



posing questions the researcher observes the surroundings and takes photographs of the respondent in her/his setting. If an activity is being studied, then photographs are also taken of the activity. The researcher audiotapes the conversation with the respondent for future reference.

Areas covered may include:

- how a category/product fits into a person's or a family's life
- what a category/product symbolizes
- beliefs that surround a category/product
- values associated with a category/product
- the origin of beliefs and values, whether recent or passed on generationally
- emotional content of beliefs and values
- language used to refer to a category/product
- uses of a category/product
- habits and routines associated with a category/product
- satisfaction/dissatisfaction with a category/product
- unmet needs with regard a category/product

An ethnographic investigation with each respondent usually lasts from two to four hours. If the study is to probe category or brand meaning, it lasts approximately two hours. It may last up to four hours if it is to explore: an activity and its meaning, e.g., cooking with a certain product, or dishwashing; categories or brands currently used at home and deciding between brands or categories at the supermarket; items used at home and shopping for these items at a department store or at a mall.

The number of respondents in an ethnographic study is usually from six to 12 per market.

Ethnographic studies vs. conventional qualitative methodologies

Ethnographic studies vs. focus groups

Focus groups are usually the preferred methodology for a qualitative study, possibly because they are relatively easy to organize, are the least time consuming of qualitative methodologies and offer observers immediate payoff. Focus groups are particularly well suited to generate ideas, to test copy, concepts or packages, to help fine-tune a creative strategy or to test for damage control.

However, the way focus groups are typically structured and used often limits the posssibility of obtaining in-depth information to the fullest. A characteristic focus group, as a rule, has a lengthy and packed topic discussion guide to be carried out in a limited amount of time, usually two hours. This does not give the facilitator too much in-depth probing time or many opportunities to explore other valid aspects.

An ethnographic interview is not burdened by the demanding topic discussion guide that typically steers a focus group. There is ample time to explore the necessary aspects with each respondent and, as pointed out above, it is structured to go beyond the explicit and to probe into the meaning of a category, a brand or an activity in a particular cultural setting.

In a focus group it is also possible for respondents to be untruthful about the products they use and how these are used, and there is no feasible way to verify their information. In an ethnographic interview there is normally little pretense or lying, because this can be easily be discovered and probed.

Focus group interaction is lively but not all respondents participate fully. If there is a respondent with a strong personality he/she is can sway the opinions of the group. In an ethnographic exploration each respondent participates to the fullest.

Ethnographic studies vs. one-on-one interviews

One advantage an ethnographic interview has over a one-on-one interview is that the respondent is in her/his setting and is not inhibited. Going to a facility for an interview is always an artificial situation. Having a conversation at home is informal, comfortable; the respondents feel at ease. Respondents who are interviewed in their own surroundings tend to talk more freely about their likes and dislikes, their dissatisfactions and wishes, and to describe more willingly the explicit aspects of their culture. It is also easier for the researcher to probe into the tacit aspects of their culture.

Ethnographic studies applied to Hispanic market research

Marketers, some of whom are unfamiliar with Hispanic culture, need to be very well informed to successfully merchandise a brand or a category to Hispanic consumers. Marketers must understand how and why a certain brand or category is important or not important for Hispanics; they also need to know habits related to the product or category's consumption so as to better direct their strategy.

An ethnographic study will provide an in-depth look at a section of Hispanic culture and will be able to explain to a marketer:

- how a product/category fits into the lives of Hispanic families
- which patterns of behavior are related to a product/category
- which values and beliefs are associated with it
- the different usages of a product/category
- satisfaction or dissatisfaction with a product/category
- unmet needs with regard to a product/category

An ethnographic study will help advertisers determine:

- what the product/category symbolizes
- the emotional content of beliefs and values related to a product/category
- the emotional language used to refer to a product/category

Recruiters know that when a researcher has to go to a Hispanic community and to a respondent's home the researcher will be able to tell immediately whether a respondent fits the desired profile or not. Thus ethnographic studies force recruiters to be honest.

By going to a community it is easier to find respondents who have not had previous experience with market research, i.e., virgin respondents (Mariampolsky, H., et al, 1994). ❑

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Research uncovers Hispanic advertising impact

By Felipe Korzenny, Rebecca Abravanel and Adrien Lopez Lanusse

Editor's note: Felipe Korzenny, Ph.D., is president; Rebecca Abravanel, Ph.D., is director of quantitative research; and Adrien Lopez Lanusse is research analyst, at Hispanic & Asian Marketing Communication Research, Inc., Belmont, Calif.

Spanish-dominant Hispanics are influenced by Spanish language television ads to a larger extent than by English language ads. This may sound like a simple truism but it is not.

Consider this: The largest Hispanic markets in the U.S. are Los Angeles, New York, Miami, the San Francisco-San Jose area, Chicago and Houston. In each of those markets, Hispanics have many more television choices in English than in Spanish.

Spanish language choices are generally two, i.e., Univision and Telemundo, and in some cases up to five options, if cable or satellite are included. In contrast, English language channels can number 50 or more depending on cable or satellite availability.

A reasonable marketer may then conclude that English language television has a better chance of reaching even Spanish-dominant consumers. After all, television ads are highly visual and one might therefore conclude that most people should be able to understand them.

Qualitative U.S. Hispanic research has suggested that Spanish language ads are more effective than English language ads in persuading Spanish-dominant consumers for several reasons:

• Language alone helps increase understanding of the ad if the person is not fluent in English. Consider that only about 40 percent of U.S. Hispanics report being totally fluent in English and that 75 percent of Hispanics report speaking Spanish at home[1]. Language alone, then, can make a difference in terms of denotation alone, i.e., being able to understand what the ad says.

• Further, there are contextual aspects in culturally tailored ads that communicate beyond words. A typical example is the use of humor because it doesn't always translate well across cultures. Another is the emotional or cultural relevance of the ad's context for the consumer. Hispanics tend to enjoy food and many other consumer products in the company of friends and family. Other contextual aspects include music, backgrounds, models or talent, communication styles, themes, etc.

• Additionally, Hispanic consumers have generally said they ascribe goodwill to advertisers who communicate to them in Spanish. Hispanics often view Spanish language advertising as sign of recognition and respect on the part of the advertiser.

Also, dubbed or translated ads do not seem to do as well as those produced originally in Spanish with Spanish-speaking talent. The contextual cues of translated ads tend to be missing and the emotional appeal tends to be lower.

Is there, then, any evidence that Spanish language television ads are more effective among U.S. Spanish-dominant Hispanics? A study conducted in November and December of 1996 in the greater San Francisco-San Jose area provided such evidence. It was a telephone survey conducted with women heads of household who indicated speaking Spanish at home most of the time and being most comfortable communicating in Spanish. Interviews were conducted in Spanish with 314 randomly selected respondents who have listed telephone numbers.

First, it is important to notice that exposure to Spanish language television was about twice as prevalent as that to English television. The average weekly exposure to Spanish television was 15.8 hours in contrast to 7.5 for English television. This is despite the fact that these consumers have much more opportunity to watch English television. Thus, watching Spanish language television seems to have added value gratification.

Second, and probably of greater importance, is the finding that Spanish language television advertising was quoted as being twice as impactful in producing sales than English television advertising. Respondents were asked, "Think about the products you have purchased in the past month. Did any advertisement you saw on Spanish language television influence any of these purchases?" Almost half the sample (46 percent) said they had been so influenced. The response to a parallel question regarding English language advertising was that less than a quarter of the sample (23 percent) had been influenced. The substantive difference in impact between advertising in the two languages suggests that language, as part of culture, can strongly affect decision making.

Additional evidence in favor of Spanish language advertising was that a relatively large segment of the sample indicated they would place more credence in a Spanish language ad than in the same ad in English. Thirty-nine percent of the respondents indicated they would believe most the version of the ad in Spanish than in English. Only 3 percent said they would put more credence in the English language version.

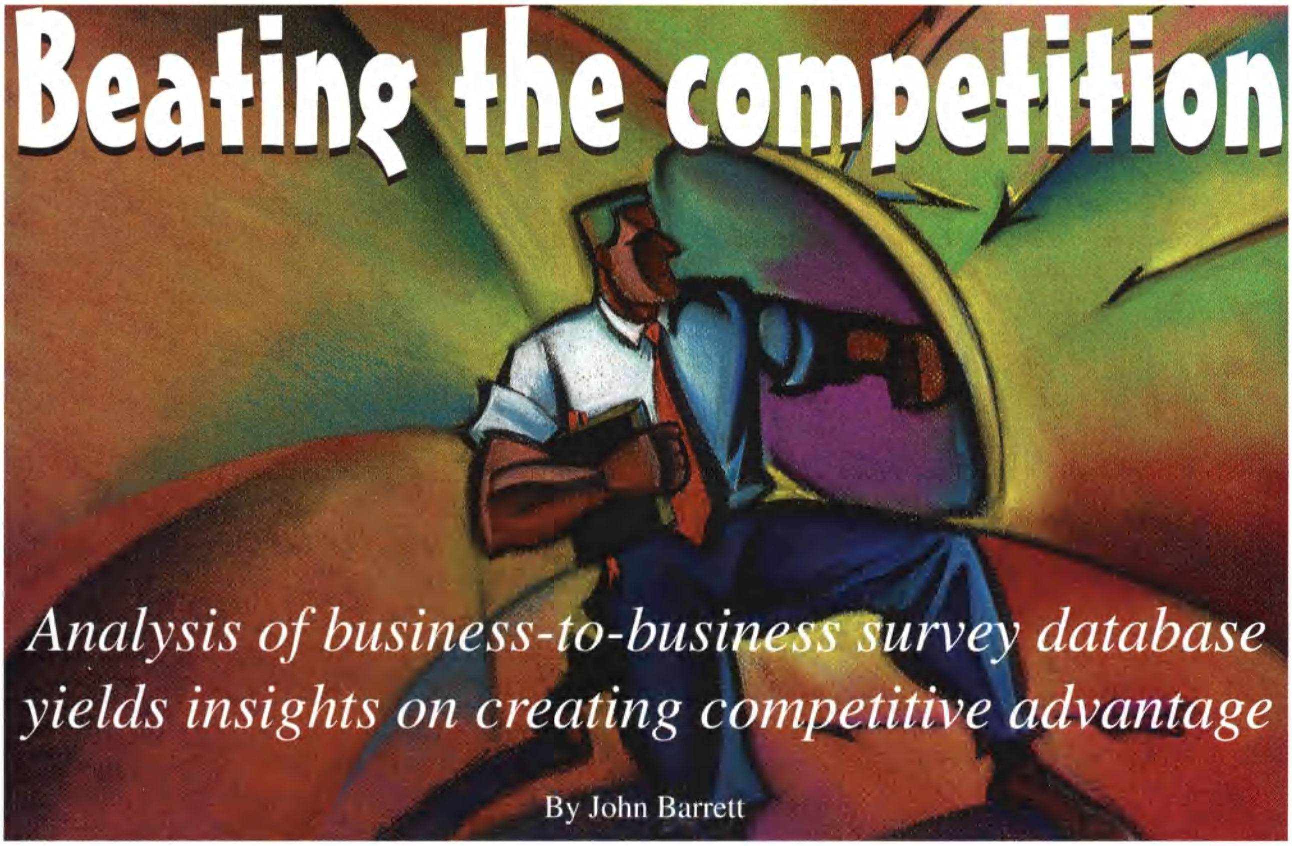
The implications for marketing practice seem obvious. If the marketer is eager to reach Spanish speaking consumers s/he may do best in trying to communicate to them in their primary language.

The implications for research practice are also important. Conducting Spanish language research, both qualitative and quantitative can render insights that may only be discernible if a concerted effort is done to reach those who prefer speaking Spanish. Insights derived from Spanish language research are more likely to reflect the attitudes and behaviors of the growing Spanish-dominant base of Hispanic consumers in the US[2]. ❑

[1] These are 1990 census figures.

[2] It is calculated that there are approximately 30 million Hispanic consumers in the U.S. About half of the size of the market has been estimated to have been generated by immigration during the past 15 years.

Beating the competition



Analysis of business-to-business survey database yields insights on creating competitive advantage

By John Barrett

Editor's note: John Barrett is vice president of Priority Metrics Group, Spartanburg, S.C.

The objective of building and sustaining competitive advantage is central to the long-term success and even survival of a business. While definitions vary, most agree that competitive advantage is the unique value a firm is able to create and deliver to its customers.[1] If the business is to survive, that value must exceed the total cost of production.[2]

The difficult part, of course, is not in defining what competitive advantage is, but in actually creating it. How does a business create competitive advantage? Recent articles have espoused a wide variety of programs for creating competitive advantage. Some examples of business activities that are supposed to create competitive advantage are: creative pricing, output flexibility, technology, expense controls, customer service, reengineering, 360° feedback, people, information systems, information services, employment testing, compensation, packaging, innovation, electronic data interchange (EDI), quality, value-added service, and on and on.

But many of these ideas are championed by consultants trying to sell their services, or by practitioners who have limited experience outside of their current profession or industry. In this article, we will describe research we have recently completed to discover what has actually worked in creating competitive advantage for companies selling their products through business-to-business channels. The research was completed using a database of customer survey results from work conducted by Priority Metrics Group over the past few years.

Priority Metrics Group, Spartanburg, S.C., is an industrial consulting and market research firm that provides customer surveys and a variety of related services to corporate clients. A large

Table 1

Attribute Category	Examples of Specific Survey Attributes
Product Quality:	
Adherence (to Spec.)	caliper, moisture level, brightness, hardness
Appearance	aesthetic quality, print registration, yarn defects
Consistency	color consistency, width consistency' consistent quality
Performance	runnability, bonding, flatness, yield, stacking strength
Service Quality:	
Accuracy	shipment accuracy, accuracy of information, invoice accuracy
Complaint Resolution	handling of complaints, innovative solutions to packaging products
Customer Service	inside sales, customer service, emergency response
Delivery	on-time delivery, condition of received goods, order lead-times
Design & Development	product innovation, creativity in development efforts, customized styling
Equipment, Systems	condition of plant & equipment, effective us of SPC
Packaging, Labeling	packaging & labeling, product identification
Personal Service	accessibility, communications, responsiveness, knowledge
Price, Credit	perceived value
Product Line	breadth & variety of product line
Sales Representation	contact frequency, sales representation, understanding needs
Technical Services	technical assistance, availability of technical help, field service
Time, Speed	prompt assistance, responsiveness to customer requests

majority of our clients market their products and services to other businesses. We have compiled results of customer surveys that have used a seven-point scale into a proprietary database. (See sidebar)

The specific design of the questionnaire used on each survey project, including the wording of attributes, is unique to each study. However, for the purposes of this research project we grouped the attributes into 17 categories as shown in Table 1.

Most of the 17 categories are service-related. This is due to the fact that the "performance" category includes a large number of attributes which contain industry- and application-specific terms. These attributes cannot be further grouped or categorized in a meaningful way.

Research findings

Each of the studies included in this research asked participants to provide a numeric rating of the study sponsor (our client) and their "best alternate supplier" (BAS). By "best alternate supplier" we mean the supplier they consider to be the best option to the study sponsor in supplying the same or a substitute product. When we compare ratings given to the sponsor and the BAS, we can determine the extent of competitive advantage — by attribute.

Figure 1

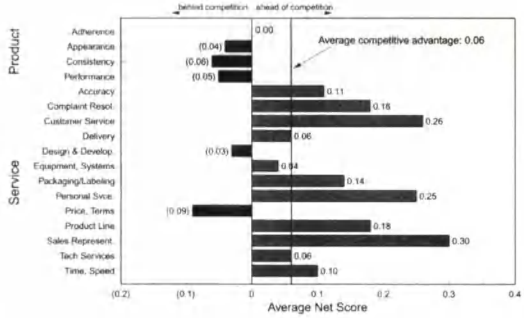


Figure 1 shows the results of this analysis across the 17 categories. In aggregate, firms in the database are rated higher than their competition. In other words, the business conducting a survey of its customers has a measurable competitive advantage. There are two explanations for this positive performance gap:

1) Current customers will tend to rate an active or primary vendor higher than other vendors due to specific and objective knowledge of the vendors' product or service quality, or even as justification of a purchase decision.

2) Firms conducting customer surveys are, by nature, the leading firms in a given industry, and will be rated relatively high in performance. And, conversely, firms that do not conduct customer surveys are the followers in an industry and will be rated relatively low.

In the first case, the advantage is among current customers. In the second, it is industry-wide. In either case, the survey is a tool by which the perceived advantage held by one firm over another can be measured. As shown in Figure 1, the average positive gap — or competitive advantage — is 0.06, on a seven-point scale.[3]

Perhaps the most startling finding from this analysis is the contrast between product and service attributes: all of the product attributes are below or at parity with competition. Since the respondents behind these numbers are current customers, the product quality must de facto be perceived to be at or above some minimum level of performance. However, the implication clearly is that customers are willing to endure product quality that is somewhat inferior to competitive products if the supplier provides stronger service.

It is also interesting to note that the category of price and terms is rated, on average, below the BAS. In fact, it is the largest competitive disadvantage. From discussion with clients regarding low ratings on attributes related to price, we often hear two explanations:

1) Many contacts at customer locations are directly or indirectly responsible for the purchase of the product. As such, it is in their best interest to communicate to the supplier that the price is too high.

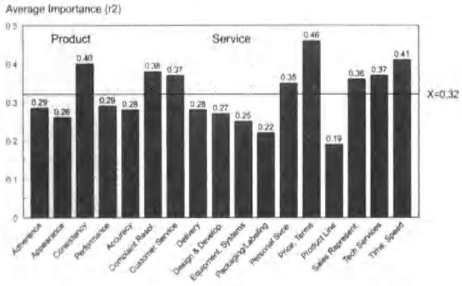
In those studies where we have been able to break out results by functional responsibility, it frequently is the case that buyers tend to rate the study sponsor below competition on attributes dealing with price, terms, value, etc. Conversely, users of the product and support personnel (in quality or technical job functions, for example) will often rate the sponsor ahead of competition on the same attributes.

2) One could argue that strategically, a company should be rated slightly below competition on price-related attributes, as long as the overall performance, and particularly overall satisfaction, is rated ahead of competition. If the customer is pleased with the product and service provided and perceives the price to be better than competition, money is probably being left on the table.

Finally, three categories stand out as having an average rating versus competition that is much higher than average — customer service, personal service, and sales representation. Out of the 13 categories of service quality, these three could be seen as those in which individual employees play the most important and most visible role.

To this point in our discussion of the results, we have assumed that each of the 17 categories are of equal importance. To determine the importance of attributes, a number of techniques may be used. In each of the studies included in this research, importance was determined statistically, by computing the square of the correlation (r^2) between the ratings given the sponsor on each attribute and those given for overall satisfaction. The scale for importance (r^2) ranges from 0 to 1. Thus, if an attribute would tend to be rated high when satisfaction is rated high, and low when satisfaction is rated low, the importance would be closer to one. If there is little or no pattern between ratings for an attribute and ratings of overall satisfaction, the importance is at or near zero.

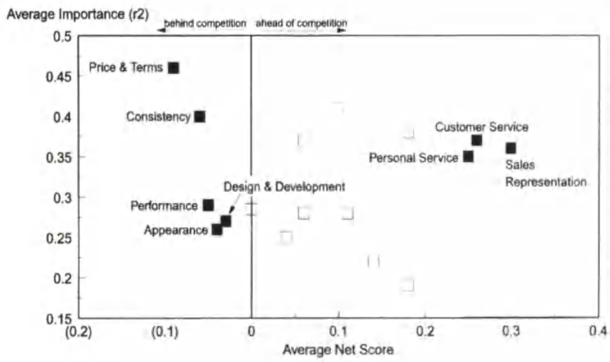
Figure 2



The average importance of each attribute category is shown in Figure 2. The fact that price is the single most important category is consistent with the sample make-up in many of the studies being dominated by buyers.

In the area of product quality, consistency stands out as being much more important than appearance, adherence to specification, or even performance. In many production environments, while the equipment is able to accommodate a variety of raw material specifications, machines are set at specific parameters with sometimes narrow tolerances. When the specifications of incoming raw material vary outside the tolerance limits, equipment must be recalibrated, set-up times increase correspondingly and productivity drops.

Figure 3



On the service side, product line and packaging/labeling stand out as being relatively lower in importance, while time and speed, customer service, complaint resolution, and technical services are of noticeably greater importance.

The implicit message appears to be that a superior product or a broad selection of products are of less importance than a reliable product offered by a responsive supplier who is able to solve problems, answer questions, and provide needed technical support in a timely manner.

Figure 3 summarizes this information in a form that may be thought of as a performance "map." The horizontal axis is the performance versus the BAS (or "net score"). All points on the left side of the map are competitive disadvantages, all on the right are advantages. The vertical axis is the average category importance. Moving up in the chart identifies categories that contribute relatively more to competitive position.

We have identified the points on the left side of the map that are behind competition. We have also identified the points towards the upper right corner of the map (average rating well ahead of competition and relatively important). Beyond price, product consistency is the largest source of competitive disadvantage. Stated differently:

For a company providing a competitive product (meeting the "table stakes" established by a given market segment) inconsistency in product quality is a larger determinant of competitive position in the segment than is the actual performance of the product.

At one company — a large, specialized producer of folding cartons — profitability was largely determined by their ability to keep production lines going. A major obstacle to this objective was inconsistency in the caliper (thickness) between rolls of purchased paperboard. As the huge rolls of paperboard are fed through machinery, individual cartons are cut out, scored along corners to allow a clean bend, and printed. Variation in caliper causes poor scoring or cutting which means the finished cartons will not fold properly, or will have rough, uneven edges where cuts were not made cleanly. While this company had a long-standing policy of dual or multiple sources for all major purchased material, they had agreed to sole source paperboard (which represents well over 50 percent of their total production cost) if a supplier could provide a board with consistent caliper.

While product inconsistency appears to detract from competitive position, three categories — customer service, personal service and sales representation — appear to be the largest contributors to competitive advantage. Not only do these three categories have the highest rating versus competition, they are also among the most important.

In large part because of the heavy "people" component in these performance areas, competitive advantage once attained is not easily usurped. And, unlike product attributes, elements of

About the database

Priority Metrics Group is an industrial market research and consulting firm based in Spartanburg, S.C., that provides customer surveys and strategic planning assistance to a variety of corporate clients. Most of our clients market their products and services to other businesses.

In our customer survey work, we normally ask our clients' customers to rate our clients' performance and the performance of a competitor, on a number of key performance attributes. We have found that a seven-point scale is particularly good when rating a supplier against competition since it provides three rating points on each side of the scale midpoint (4). This provides more flexibility than, say, a five-point scale (with only two rating points on each side of the midpoint) to accurately convey the competitive situation on any given attribute.

We have compiled results of completed customer surveys into several databases. For this analysis we used a database of surveys completed for manufacturing businesses, all of which used a seven-point scale. This database includes over 3,000 individual responses from over 30 separate studies completed in a number of industries, although textiles and packaging are most heavily represented. All of the surveys have been completed within the last three years, and all are of current customers only — we have excluded prospective or former customers.

A typical study would include performance ratings on 20-30 attributes, ranging from specific indicators of product quality to account representation, customer service, delivery, etc. The design of the questionnaire and selection and wording of attributes are unique to each study. However, for purposes of this research we have grouped the attributes into 17 categories as shown in Table 1.

Within each category, for example "sales representation," there are between 10 and 65 individual attributes that were used in various studies. Sometimes an attribute is used in multiple studies with the same wording. For example, in the delivery category the attribute "accuracy of shipments" was used in seven different studies.

Some attributes, particularly those used to evaluate product quality, are unique. For example, in the category of performance, "wet tack" is an attribute used to describe the performance of certain adhesives and appears in the database only once. The performance category in particular contains many attributes that are unique to an industry or even to a single business. Although the performance category has the largest number of attributes of any category, it is difficult if not impossible to break this category into smaller groupings. This is the primary reason why there are more service-related attributes than product-related.

service can rarely be patented. One author noted recently that, "few service features (other than brand identification) can be patented against imitation by competitors. Competitive advantage usually emphasizes performance on the supplementary service elements."[4]

Conclusions

First, we should emphasize that the results presented here are based on a limited sample. The particular survey database we used:

• includes only manufacturing businesses;

• is further limited to relatively mature businesses most of which are in two industries — packaging and textiles;

• is comprised of surveys completed for businesses selling to other businesses;

• including only surveys using a seven-point scale.

With these limitation, there are at least four important conclusions which may be drawn.

• A business conducting a customer survey will likely be rated higher than its competition. Whether due to the presence of an established customer-supplier relationship, or actual superior performance, a firm conducting a survey of its customers is likely to be rated ahead of its best competition as identified by the same customers.

• Among product attributes, consistency is more important than performance. In fact, consistency is more important than appearance, adherence to specification and performance.

One characteristic of industrial market for manufactured goods is that some value is added to the purchased product prior to being sold to the end user. The value may be relatively simple (e.g., applying a brand name) or complex (e.g., using a purchased good as one of hundreds of components or ingredients in a final product). For a business-to-business marketer, service is usually aimed at the immediate customer, not the end user. So the value that transfers to the end user is largely or exclusively product-related.

A consistent product may be thought of as one that operates smoothly within the customer's value-adding processes, creating fewer interruptions and surprises. It may not be the best looking or even offer the highest levels of performance, but it allows the customer to concentrate their resources on satisfying the end-user instead of solving problems with their supplier.

• Service performance makes a larger contribution to competitive advantage than product performance. From the data examined in this research, it seems clear that competitive advantage is more a function of service performance than product characteristics.

As noted above, most of the businesses included in this study are "mature" in the sense that they compete against established and readily identifiable competitors, they are experiencing modest growth rates, and growth above a modest rate comes at the expense of a competitor (or, stated another way, industry growth is also modest). However, in some industries or markets, product characteristics may be a source of competitive advantage.

In fact, we have seen just that. One client, a large packaging business with a new, unique industrial product, conducted a customer survey one year after initial commercialization, then completed a second survey about two years

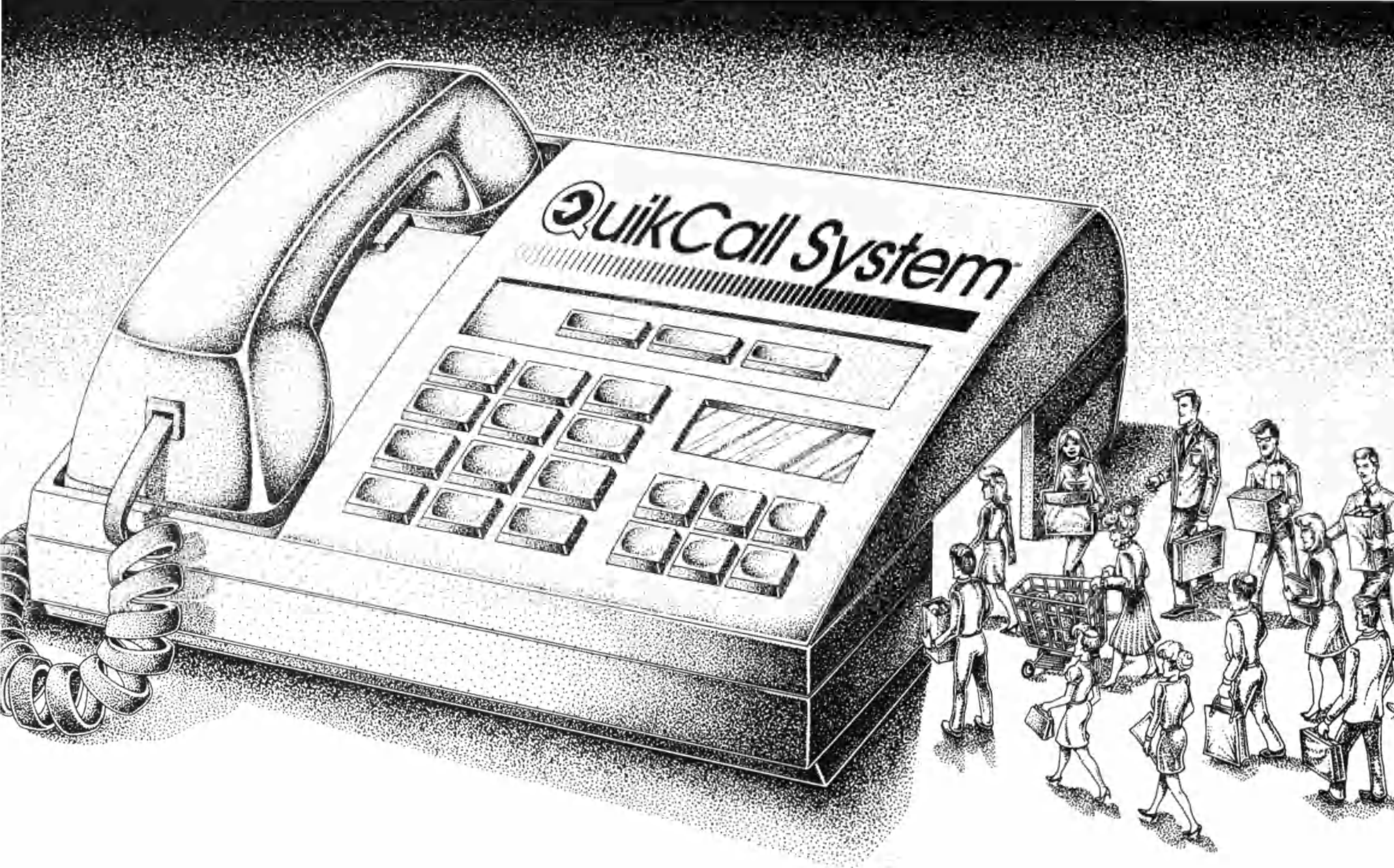
after the first. During that two-year period, several competitors entered the market with similar products. In the first survey, product attributes were more important than service attributes. However, the importance of product attributes dropped dramatically in the second study compared to the first, while service attributes showed a corresponding increase in importance. As the market matured, the relative importance of product quality declined.

• The performance of key individuals appears to be the primary source of competitive advantage. The categories of business performance that contribute most to competitive advantage are those in which individuals play a prominent role.

While this has some "romantic" appeal, it is also a result of sweeping changes in the world economy: the shortening of product life cycles, the deregulation of many markets, and increased access to financial markets, to name a few. These changes are decreasing the ability of companies to create and maintain competitive advantage on product characteristics, and heightening the importance of employees and how they work together in the organization to determine competitive success. Further, "people" skills and capabilities are more difficult to duplicate and thus more likely to be a sustainable advantage.[5]

While the conclusions of the research presented here may not be surprising to some readers, they are nonetheless important in understanding the process of creating competitive advantage and the role of customer surveys in providing critical data necessary to achieve that understanding. We hope to extend this research to explore other factors influencing the creation of competitive advantage and, by looking at survey results over time, to understand how to sustain competitive advantage. ❑

1 Treacy, Michael and Fred Wiersema, *The Discipline of Market Leaders*, Addison-Wesley, 1995.
2 Porter, Michael E., *Competitive Advantage: Creating and Sustaining Superior Performance*, The Free Press, 1985.
3 This difference is significantly different from zero at the 98 percent confidence level.
4 "Competitive Advantage Lies in Supplementary, Not Core, Services," Christopher H. Lovelock, *Marketing News*, v. 23, January 30, 1989, p.15.
5 Pfeffer, Jeffrey, *Competitive Advantage Through People: Unleashing the Power of the Work Force*, Harvard Business School Press, 1994.



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27 focus groups, seven ethnicities, seven languages and 11 locations

By Joan Lawton

Editor's note: Joan Lawton is director of operations at Erlich Transcultural Consultants, Woodland Hills, Calif.

Summer is an interesting season for a market research firm. A company can be relatively quiet and have an opportunity to catch up on hibernating administrative issues or it can be wildly busy. Such was the summer when our firm, Erlich Transcultural Consultants (ETC), Woodland Hills, Calif., handled a complex project for the United States Centers for Disease Control (CDC) and Westat, Inc., a Rockville, Md., research firm.

Westat approached ETC wanting to know if we did multicultural work. If so, could we conduct a study among people who have diabetes and who belong to the following ethnic groups: Hispanic, Korean, Filipino, Vietnamese, Chinese (Cantonese and Mandarin-speakers), African-American and Native American? Could we recruit participants from primarily low-income metropolitan areas? Could we conduct the groups in-language? Did we have simultaneous interpreters for each language? Could we coordinate a study in Los Angeles that took place not only in professional facilities throughout the country but also in a rural Georgia community center? Did we have moderators for focus groups with Native Americans?

Since the answer to nearly every question was yes, we began to juggle the schedules of facilities, moderators, interpreters, translators, a Westat project director and an ETC project director.

Native American moderators (seated left to right) Scott Carlson, Pauletta Butterfly, Debbie Tatsey and Laurie Smith display the certificates they earned for completing the moderator training program developed and taught by Andrew Erlich, Erlich Transcultural Consultants (standing, left), and Chris Fiore, University of Montana.

Once a confirmed schedule was in place, we attacked the problem of recruiting. All the respondents had to be one of the appropriate ethnicities, had to have Type II (adult onset) diabetes, had to be 40-70 years old and low- (under \$20K/year) or middle- (\$20K-\$50K/year) income, and could not have checked their blood glucose level in the 24-hour period prior to the recruitment call.

How did we find these people? Certainly not by any traditional methods. We were in constant contact with community centers, churches, neighborhood pharmacists, various state and city departments of health, hospitals, universities and a maze of personal and professional contacts. Flyers were distributed by some very cooperative health care professionals who worked at clinics that service the ethnic populations we were seeking. Some clinic personnel personally invited their clients to attend the groups. Some respondents were generated by posting notices at senior centers. All information from the flyers (in all cities) was sent to the ETC office and then relayed to the recruiters. In Los Angeles, some of our recruiters simply made calls from their databases with hopes of finding ap-

propriate participants. This method was only somewhat successful.

When the groups were finally recruited, we faced the problem of refreshments at the research sites. We couldn't feed these respondents submarine sandwiches, M&Ms and gummy bears. All the facilities we dealt with were cooperative and provided sugar-free, low-fat snacks along with the traditional respondent fare so that participants would be able to make healthy choices and would not feel pressured to eat only the "right" foods.

Our client, Westat, assisted with logistics in rural Georgia and on the Native American reservations.

When it came time to determine who would moderate the Native American groups, the CDC agreed, at the suggestion of the Indian Health Service, that ETC President Andrew Erlich should train four Native American undergraduate students to moderate the groups for their own and other tribes. ETC created an intensive training program, taught it at the University of Montana in Missoula, and generated four moderators, who, along with the Westat and ETC project directors and a representative from the CDC, eventually traveled to Minneapolis and to reservations in Missoula and Lame Deer, Mont., Riverton, Wyo., and near the Canada-Montana border. They conducted groups with Shoshone, Northern Cheyenne, Blackfoot, Flathead, Chippewa and Arapaho tribe members.

The comprehensive moderator training program, based on ETC's in-house moderator development program, included training in the understanding of group dynamics and communication, listening skills, conceptualizing the focus group process, screener and discussion guide design, probing, dealing with difficult respondents, focus group protocols and both analysis and report writing.

These groups were difficult to arrange, as all details and requests had to be approved by various tribal councils, some of which only meet once a month, and had to be scheduled around pow-wows and other activities. Another issue to be resolved was any discussion of traditional healing remedies, which participants said were sacred to them and not to be shared.

Another significant issue in the Native American groups was the possibility of interrupting a respondent in order to move on to a different subject. The Native American moderators explained that interrupting, even to change topics, was considered to be a sign of disrespect, especially when a younger person interrupted an older person. Interruptions had to be very infrequent and had to be handled with delicacy and diplomacy, even more diplomacy than is required in Asian groups, where the elderly are revered and cherished.

When the entire project was done, ETC had conducted 27 groups in seven languages in 11 locations among seven different ethnic groups, trained four Native American moderators, achieved professional satisfaction and uncovered a wealth of information for Westat and the CDC.

Are there marketing implications from this study? Absolutely. If there is a difficult and complex marketing research problem, don't simplify it — at least not too much. Be flexible, creative, and approach it head-on. ❑

Data Use

continued from p. 15

able trouble).

Notice in Figure 1 that there are lines connecting each of the independent variables to each of the processing units in the hidden layer. Similarly, there are lines connecting each processing unit in the hidden layer to the output layer. Each of these lines represents a weight. This network is known as fully connected since each and every independent variable connects to each and every unit in the hidden layer and each processing unit in the hidden layer connects to the output layer, but there is no direct connection from the input to the output layer: the relationship between inputs and output is completely mediated by the hidden layer.

The process of learning is achieved by slowly and systematically adjusting each of the weights (remember, each line represents a weight) so that the network's estimate of the output variable, based on a weighted combination of the input variables' values, closely matches the actual output variable's value. The process of slowly and systematically adjusting the weights is referred to as training.

Back-propagation works through four steps:

Step 1: Obtain values for the independent (input) variables by randomly selecting a line of data from the database.

Step 2: Calculate an estimate for the dependent (output) variable. The network's estimate of the dependent variable is a weighted combination of the input values. Each processing unit in the hidden layer multiplies each of the independent variables values by its own idiosyncratic weight and then adds all these together. So each processing unit in the hidden layer takes on a single value composed of the weighted sum of its inputs. These single values are then transmitted from the hidden layer to the output layer. As implied in Figure 1, the single values from the hidden layer are also weighted by the output layer's idiosyncratic weights on their way from the hidden to the output layer. So, the output layer's estimate of the dependent variable is a weighted sum of the hidden layer's output (which, in turn, is a weighted sum of the input variables).

Step 3: The network's estimate of the dependent variable is compared to the actual dependent variable. Any difference between these two is called error. The network then reverses its flow, sending information about the magnitude and direction of the error downward. The information sent downward through the network (i.e., propagated backwards, or back-propagated) tells the network how much each weight should be modified so as to minimize the error.

Step 4: Once all the weights have been adjusted, a new line of data is randomly selected and the process of feeding an estimate of the dependent variable forward and information on the error backward repeats itself. After a number of such iterations, the error either reaches zero, in which case the network's estimate of the dependent variable is equal to the actual dependent variable for all cases in the database, or (as is more often the case) there is no more improvement and the error rate stays at the same, hopefully small but non-zero level, for all successive iterations.

In the discussion of these four steps we have left out a tremendous amount of detail, like whether weights are adjusted after every single line of data, or if errors are accumulated over many observations and then a more complex but complete picture of error is back-propagated, or how the network "knows" exactly which of the many weights should be adjusted at any given iteration.

The references in the bibliography at the end of the third installment will provide mind-numbing details on these important but highly technical issues.

A critical turning point in neural network research came in 1989 when it was proved with all the mathematical rigor of a proof that a neural network like that shown in Figure 1 operating through these four steps could approximate a nonlinear function of any degree of complexity to any desired level of precision as long as there was no limit placed on the number of hidden units. This proof demonstrated that back-propagating neural networks are universal approximators, since even the most complicated non-linear function could be accurately modeled using a neural network with enough processing units in the hidden layer. Deciding on the number of hidden units to use and how best to preprocess the independent variables is still very much part of the art of deploying neural networks.

We will now apply a neural network to two familiar market research problems. Our first example is a conjoint analysis presented in Paul Green's classic text *Research For Marketing Decisions*. Green presents an orthogonal main effects plan for a new carpet cleaner described by six product factors (package design, brand name, price, Good Housekeeping seal and money back guarantee) using 18 cards. Table 1 shows the design along with one respondent's ranking of preference for each of the 18 product configurations.

TABLE 1: CONJOINT EXAMPLE

CARD	PACKAGE DESIGN	BRAND NAME	PRICE	GOOD HOUSEKEEPING SEAL	MONEY-BACK GUARANTEE	RESPONDENT'S RANKING
1	A	K2R	$1.19	NO	NO	13
2	A	GLORY	1.39	NO	YES	11
3	A	BISSELL	1.59	YES	NO	17
4	B	K2R	1.39	YES	YES	2
5	B	GLORY	1.59	NO	NO	14
6	B	BISSELL	1.19	NO	NO	3
7	C	K2R	1.59	NO	YES	12
8	C	GLORY	1.19	YES	NO	7
9	C	BISSELL	1.39	NO	NO	9
10	A	K2R	1.59	YES	NO	18
11	A	GLORY	1.19	NO	YES	8
12	A	BISSELL	1.39	NO	NO	15
13	B	K2R	1.19	NO	NO	4
14	B	GLORY	1.39	YES	NO	6
15	B	BISSELL	1.59	NO	YES	5
16	C	K2R	1.39	NO	NO	10
17	C	GLORY	1.59	NO	NO	16
18	C	BISSELL	1.19	YES	YES	1

The neural network shown in Figure 1 is reproduced in Figure 2 to illustrate its connection to the conjoint design (note that the input layer has a node representing each of the product factors). The network was trained using the data shown in Table 1. Following the four steps outlined above, lines of data were randomly presented to the network and information on the error — the difference between the network's estimate of the preference rank and the actual value — was propagated backward through the network and the weights adjusted.

FIGURE 2

Figure 3 shows the correlation between the actual value of the dependent variable and the network's estimate at various points in the training process. The figure is quite typical of the course of learning: at the beginning, the network has very

TABLE 2

MODEL "FIT"

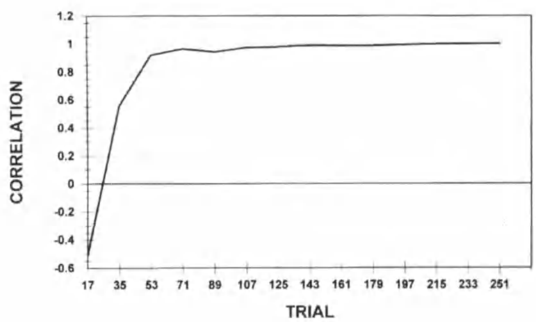
CARD	ACTUAL RANK	PREDICTED "RANK" (NN)	PREDICTED "RANK" (OLS)
1	13.00	13.00	12.17
2	11.00	11.00	12.00
3	17.00	17.00	16.83
4	2.00	2.00	2.00
5	14.00	14.00	12.33
6	3.00	3.00	2.67
7	12.00	12.00	10.83
8	7.00	7.00	6.67
9	9.00	9.00	10.00
10	18.00	18.00	18.33
11	8.00	8.00	8.17
12	15.00	15.00	14.50
13	4.00	4.00	4.17
14	6.00	6.00	7.00
15	5.00	5.00	5.83
16	10.00	10.00	11.50
17	16.00	16.00	15.83
18	1.00	1.00	0.17

CORRELATION MATRIX

	ACTUAL RANK	PREDICTED "RANK" (NN	PREDICTED "RANK" (OLS)
ACTUAL	1		
NN	1.0000	1	
OLS	0.9874	0.9878	1

bad estimates of the dependent variable. As learning proceeds, the weights quickly come into alignment so that after 161 presentations, the correlation is 0.9865 and by the 233rd presentation, the correlation is perfect. The perfect correlation implies that the network exactly reproduces the 18 respondent rankings. Table 2 shows the neural network's estimate of each card's rank, as well as the rank estimated with

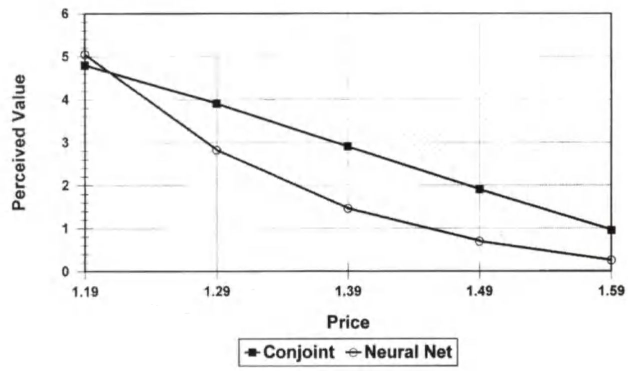
FIGURE 3: THE COURSE OF LEARNING



a simple linear regression. The matrix on the right of Table 2 shows that the correlation (R) between the ranks and the regression model is 0.987 (i.e., R^2=0.974), while the R^2 for the neural net is 1.0.

Since each of the lines in Figure 2 represents a weight, it is a relatively simple matter to "look inside" and discover what the network has learned. For example, Figure 4 compares what the neural network and the linear regression "learned" about price. Notice that the neural network learned a nonlinear mapping between price and preference. By being forced to model this relationship linearly, the regression model's R^2 suffered. Figure 5 shows that the neural net found that Designs B and C had slightly greater positive impact on preference than the conjoint model. Finally, Figure 6 illustrates that a neural network can easily provide a measure of the relative importance of the factors, just like conjoint. Figure 6 was derived by examining the network weights. Because the neural network provides better fit to the data, there are

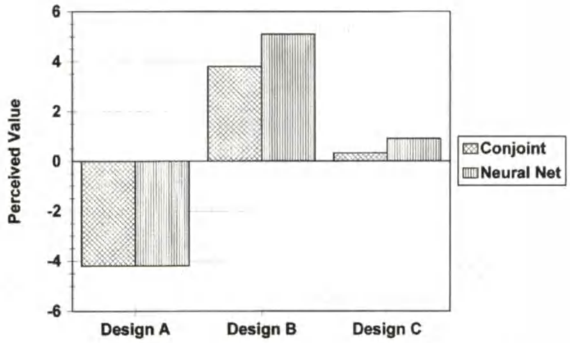
FIGURE 4: PERCEIVED VALUE OF PRICE



minor differences in relative importance, although the rank order is preserved.

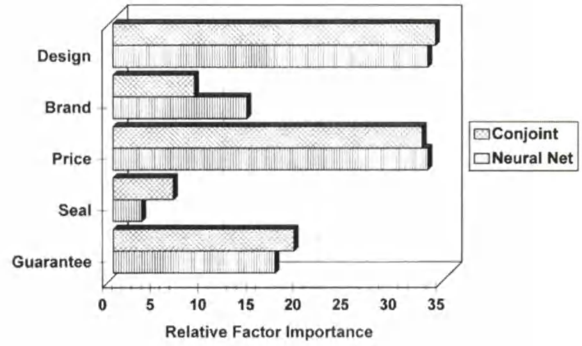
We will conclude with one more brief example. In this

FIGURE 5: PERCEIVED VALUE OF PACKAGE DESIGN



case 1,250 farmers who used a particular product were asked to rate their overall satisfaction with the product on a 10-point scale and to rate the product's performance on five attributes. Farmers were divided into two groups, satisfied and unsatisfied, based on the distribution of the overall satisfaction score. We randomly selected 825 respondents and trained a neural network to predict whether a farmer would be in the satisfied or unsatisfied group from the five component satisfaction scores. We also ran these 825 respondents through discriminant analysis. We then used the neural network and the discriminant func-

FIGURE 6: FACTOR IMPORTANCE (SALIENCE)



tions to predict into which group, satisfied or unsatisfied, the remaining 425 respondents fell.

The following table compares the accuracy of the two procedures:

	Percent Correctly Classified	
	Training	Testing
Neural Net	100	94
Discriminant Analysis	86	71
N	825	425

Although it is beyond the scope of this article to fully explore the superior performance of the back-propagating neural network in this simple classification task, even superficial analysis of the data reveals the main reasons:

1. The five component satisfaction scores are very highly correlated with each other, causing the discriminant analysis to suffer from multicolinearity. If the pattern of correlation in the test sample is not identical, its prediction will falter.

2. The covariance of the five components is different for satisfied and dissatisfied customers, thus violating one of the basic assumptions of discriminant analysis.

3. The components interact: respondents who think the product does very well on two attributes are much more satisfied than would be expected by looking at respondents who are satisfied with either, but not both, of the components.

4. The relationship between satisfaction and some of the components is markedly nonlinear: if performance is below a certain threshold, satisfaction is very low. Satisfaction then increases slowly before "skyrocketing." This complex non-linearity is completely lost on the discriminant analysis whereas the neural network learns it within the first few hundred presentations of data.

While the general tone of this article has been favorable to neural networks, they are not a panacea and certainly have their own inherent limitations. Four of these limitations are so severe as to warrant careful consideration:

1. In large problems with many input variables, it is very, very difficult to determine what the network has learned because of its proclivity to find nonlinear relationships. This inability to clearly document what the network learned often leads to the network being treated as a black box — it is able to predict with very high levels of accuracy, but exactly how it does this is a mystery.

2. You usually need lots of data to adequately train a neural network.

3. You cannot (easily) calculate confidence intervals or tests of significance for the weights.

4. Neural networks are prone to "overlearning" — they tend to learn so much about a database, including the random error and noise, that when you present a new set of data with different random error characteristics, the network has trouble providing accurate predictions.

5. Some neural networks take a very long time to train. For a database with 30,000 respondents and 150 variables, it might take two to three days of constant running of a Pentium 150 MHz computer.

6. There has been no strong theoretical assessment of sampling and measurement errors for neural nets, so many of the tools statisticians have come to rely on in evaluating model performance (such as confidence intervals) are unavailable.

Even though neural networks have their own limitations and problems, their appetite for nonlinear, nonstationary and highly interacting data might just make them perfect for market research. In the next article we will describe an unsupervised learning neural network, known as the Kohonen Self-Organizing Map, and show how it can be used in market segmentation and perceptual mapping contexts. ❑

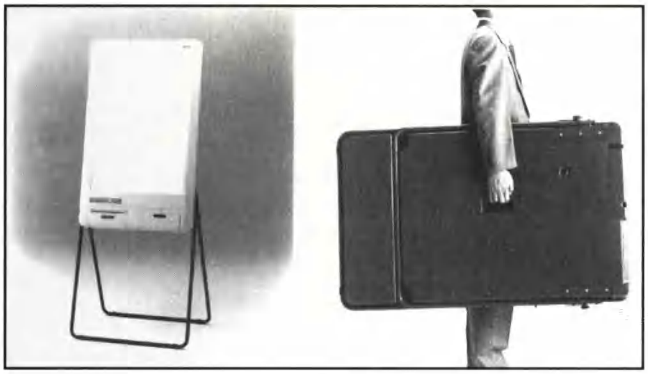
Product & Service Update

continued from p. 8

shows organizations with limited exposure to market research how to conduct their own customer satisfaction surveys. For organizations with more exposure, the workbook may serve as a tool or reference guide for customer satisfaction projects. For more information call 888-996-3748 or visit the company's Web site at http://www.meritresearch.com.

New portable electronic flip chart

PLUS Corporation of America, Allendale, N.J., now offers a one-piece electronic flip chart-sized copyboard, featuring both a built-in printer and a personal computer interface. Designed to be as compact as the traditional flip chart, the BF-060 electronic flip chart features a two-panel 35.4"(H) X 24"(W) writing surface and a built-in storage compartment. Its one-piece design enables users to fold the stand up into the back of the copyboard. It can then be inserted into an optional carrying case for transportation. Users can write on the flip chart's surface and print out the text on its built-in thermal printer. They can also transmit written information to a Windows-based PC if they purchase the optional PC interface. For more information call 800-BUY-PLUS.



MarketSight adds Web capabilities

Decision Architects, Cambridge, Mass., has introduced MarketSight 2.5, a new release of its Windows-based market research software program that now allows users to conduct online research and analyze Web-based questionnaires. The new release combines prepared question options with the ability to create an HTML-coded page for use as a survey tool on a Web site. After consulting customers, the company added three new features: 1) "wizards," built-in guides that lead users through common tasks; 2) Web integration, HTML page production for use within intra- or Internetworks; and 3) new survey composition options. Minimum system requirements include a PC running Windows 3.1, Windows 95 or Windows NT; 8 MB RAM; 12 MB of available hard disk space; VGA or higher resolution monitor; and a 3.5-inch disk drive. For more information call 800-788-8840 or visit the company's Web site at www.decisionarc.com.

LEXIS-NEXIS adds research reports

FIND/SVP MarketLooks market and industry briefing reports are now available on the LEXIS-NEXIS online service. FIND/SVP MarketLooks are 10-to 20-page market summaries of an industry sector or demographic market and are developed specifically for the online environment. The data found in the reports have been compiled from longer, in-depth FIND/SVP and Packaged Facts market intelligence reports. Also now available on LEXIS-NEXIS are Bloomberg News and the Bloomberg Daily Market Summaries. Bloomberg News covers governments, corporations, industries and major financial markets in the Americas, Europe, Middle East and the Pacific Rim. Market coverage includes government, corporate and municipal bond markets, equity markets, key indices, commodities and currencies. Bloomberg Daily Market Summaries give users access to worldwide stock market indices, foreign exchange rates, worldwide government bond yields and futures and options pricing. For more information call 800-255-3947 or visit the company's Web site at http://www.lexis-nexis.com/.

Free demo of Infomark

Equifax National Decision Systems, San Diego, Calif., is offering free CD-ROM demos of Infomark, its marketing information system. With Infomark, companies can evaluate sites, analyze markets, profile customers, identify their best customers for target marketing, define sales territories based on actual market potential, measure market penetration, conduct gap analysis and perform competitive analyses. Infomark provides immediate access by CD-ROM to more than 65 national marketing databases and has analysis, reporting and mapping capabilities. Copies of the Infomark demo CD are available by calling 800-250-7817. E-mail: prodinfo@ends.com. Web site: http://www.ends.com.

Survey Monitor

continued from p. 6

deliver the same benefits today that the buyer has come to expect. The brand's promise must be relevant, distinctive and trustworthy. The promise translates into the buyer's assurance that he knows what he gets by buying that brand — a tremendous asset for any product.

2. Understand the customer-leverageable attributes of the new category at least as well as you understand those of the base category. Remember that you are marketing a brand, not a category. Pay strict attention to the fit between "parent category" and "child categories" as regards both tangible and intangible attributes.

3. Be honest about the real level of awareness and reputation of your brand in the customer's mind. The phrase, "I've heard of that" merely indicates a degree of awareness, not a fully-developed reputation. Likewise, national distribution does not necessarily equate with broad-scale appreciation of the benefits of the brand. A brand like Armorall may have a strong reputation among its users, but its user base is limited and so may be the ability to extend its franchise to new categories.

4. Use the brand franchise extension as part of a brand plan. For example, consider licensing, component branding, family/corporate branding, etc., in the mix, and recognize the trade-offs between focus and efficiency. Licensing offers perhaps the greatest dollar efficiency, but very little focus on your brand. Brand franchise extensions and line extensions offer significantly less dollar efficiency, but much more focus on the brand. The most focused strategy, of course, is simply sticking with a solo brand.

5. Create a brand organization, not a category organization. The brand plan must not conflict with the company organization. If the brand spans different categories, consider structural changes that will drive conflict resolution and brand thinking versus category thinking.

6. Only the top two or three brands in a category make any money. That's what Jack Welch, chief executive officer of General Electric, believes and who can dispute his company's success? Proceed with extreme caution in any brand franchise extension that uses niche positioning in a category that is new to your company. The economies of scale in making, distributing and selling the product won't be helped by use of a brand extension strategy.

7. Don't franchise extend a "near-generic" brand name. For better or worse, some brand names have come to represent an entire category in the mind of many consumers — Scotch tape, Band-Aid and Coke, to name a few. In cases like these, franchise extension is troubled by "ingredient" expectations. You can extend a brand, but you can't extend a category, except through an "ingredient strategy."

8. It's less risky to invade by land than by sea. Brand equity can be diluted by extensions that go too far afield or even confuse the customer. It's better to stick closer to home.

9. Multiple brand franchise extensions create multiple brand planning needs. When considering multiple brand franchise extensions, it is definitely NOT "one size fits all." Each brand extension requires its own plan. Bear in mind that every member affects every other member, and sequence counts.

10. There are three ways to gain the benefits of brand equity, just as there are three ways to obtain wealth: Earn it (build it from scratch); inherit it (through brand franchise extension, for example); and "marry" it (buy it). Often, a good path to growth in a new category is to buy a brand from another firm when you can expand and manage it better.

Adds Dietrich, "While these commandments are not carved in stone like their better-known counterparts, they do have one attribute in common: break them, and there can be hell to pay."

Jiang's control secure for now

The death of China's paramount leader Deng Xiaoping will not produce any traumatic political changes in the short term, and the government's desire to attract foreign investment is unlikely to be affected by his passing, according to a report from The PRS Group (formerly Political Risk Services), an East Syracuse, N.Y., firm that monitors political, financial and economic risk in 147 countries. Although President Jiang Zemin does not enjoy the power or the prestige of Deng, he has moved in recent years to strengthen his control of the government. His authority is respected at the upper levels of the military, and he faces no serious threat from the armed forces as long as stability is maintained and the interests of military leaders are not threatened. For the time being, top Chinese officials will present a unified front, ruling through a collective leadership that recognizes Jiang as the first among equals.

Jiang's political fortunes have been helped by the country's economic performance. Foreign investment has been strong over the past two years, and with real GDP growth of nearly 10 percent and inflation stable at 6 percent in 1996, the basic economic signs are good and look set to remain so through the end of the decade. As long as conditions remain positive, Jiang's conservative opponents will have difficulty altering the balance of power within the government. At the same time, Jiang is unlikely to make any bold moves in the area of economic liberalization.

Deng's death is likely to impact the relationship between the military and the government over the longer term. The power of the armed forces has been growing since Deng was forced to call out troops to suppress the demonstrations in Tiananmen Square in 1989. Aggressive actions in the second half of 1996 with respect to Taiwan and territorial claims in the South China Sea reflect the military's growing strength. Lacking Deng's symbolic connection to the revolution, the current civilian leadership will find itself hard-pressed to reverse the trend of military assertiveness in political affairs.

Perhaps the greatest threat to Jiang's position is the potential for social unrest as the Chinese people face the harsh realities of growing income differentials, layoffs as enterprises seek greater efficiency, and attempts by the central government to reverse the trend toward greater autonomy in the provinces. Organized demonstrations that require military assistance would undermine Jiang's control and could instigate a power struggle within the central leadership. For more information call 315-431-0511 or E-mail custserv@polrisk.com.

Apparel sales grew moderately in 1996

Total retail dollar sales of apparel reached $161.4 billion in 1996, a 5.8 percent increase over 1995 sales, according to The NPD Group Inc., Port Washington, N.Y. In its 1996 Topline Report, the firm reported that unit sales were also up, rising 3.8 percent in 1996.

While womenswear underperformed slightly with a 5.1 percent growth rate, sales were much stronger than last year's 1 percent increase for the women's apparel market. Total retail dollar sales for women's apparel for 1996 were $85.1 billion, NPD reported. Top-performing segments of the market were juniors (up 7.4 percent) and large sizes (up 6.1 percent).

For the second year in a row, sales of men's apparel outpaced the total market. During 1996, menswear sales grew 7.3 percent, reaching a total dollar volume of $49.3 billion. The top performing categories were those which fit into more casual wardrobes, such as knit sport shirts, sweaters and casual slacks, all of which posted double digit dollar sales gains. Combined results for men's tailored clothing categories were nearly flat, up only 1.5 percent.

Boys' and girls' apparel posted moderate increases. Sales of boyswear were stronger, with dollar sales up 4.4 percent. Girlswear posted a 1.9 percent increase.

The NPD report showed that much of the growth in apparel spending is being driven by consumers with annual household incomes over $60,000. During 1996, these consumers increased their apparel spending by nearly 14 percent, or more than double that of the general population.

In 1996, consumers with annual household incomes over $60,000 accounted for 38 percent of all retail dollars spent on apparel. Their share of spending has risen six percentage points since 1993, when consumers with household incomes over $60,000 accounted for 32 percent of total apparel spending.

Major chains (including Sears, JC Penney, Kohl's and others) posted a 7.5 percent increase in dollar sales, making them one of the fastest growing retail channels for 1996 in dollar terms. Discount stores also performed better than the market average, up 6.2 percent in dollar sales.

According to NPD, department stores continued to show weak growth in 1996, with dollar sales up only 2.7 percent, following a period of no growth from 1994 to 1995. Specialty stores were also a "nonwinner," with sales up only 2.4 percent for the year. Specialty chains, however, were a bright spot, with an increase of 6.3 percent shown.

The NPD Topline Report for apparel is compiled quarterly from information provided by NPD's American Shoppers Panel. The American Shoppers Panel has operated since 1977 and currently consists of 16,000 households nationwide. The panel is constructed to reflect the behavior of the U.S. consuming public, and information provided by the panel is projected to represent consumer behavior on a national level. For more information call 516-625-0700

Do loyalty cards work?

You can't buy love, but how about loyalty? That's not an idle question. An article in a recent issue of Audits & Surveys Worldwide's *Report to Retailers* newsletter says an increasing number of retailers in the U.S. and abroad are trying to do just that.

Loyalty cards are designed to help retailers keep their customers faithful and free-spending by offering discounts on merchandise, gifts or other incentives. The cards have the added benefit of producing a shopper database that enables the retailer to target offers to consumers based upon their past buying habits.

Supermarkets are at the forefront of loyalty card issuance. Some offer a small discount on all purchases. Other retailers have taken a page from the Las Vegas and Atlantic City marketing book by targeting incentives at high spenders who contribute disproportionately to sales volume at the expense of shoppers at the lower end of the food purchasing chain, who tend to cherry-pick sales items.

Some supermarkets have a three-tiered incentive system in which customers spending less than $20 get a slight discount, those spending $20 to $50 get a bit more and those spending more than $50 receive a discount as high as 20 percent occasionally. Others have opted for a dual-pricing system in which they sell some or all items at either the regular "shelf price" or the discounted "members' price" for those using a loyalty card.

Another variation on this theme has cardholders swiping their plastic through readers as they enter the store. The readers are connected to a database in which the consumers' previous shopping history has been recorded. The shoppers are then rewarded with a customized collection of discount coupons good for specific products that fit each shopper's past buying profile.

Loyalty cards are a powerful tool for capturing large amounts of data, but huge databases are of little value unless the retailer is prepared to devote the resources to use them. Merchants that make the effort are often rewarded for their trouble. Wal-Mart has mined its extensive database to analyze shoppers) market baskets in search of buying patterns that go beyond the obvious and have used this insight to improve product placement. For example, when research revealed that many buyers of cold remedies also bought fresh orange juice, Wal-Mart beefed up orange juice sales by placing a juice display in the pharmacy aisle.

While most retailers have neither the resources nor the inclination to use their growing databases in ways that seriously threaten the privacy of customers, the potential for abuse is understandably alarming to civil libertarians. Law enforcement agencies could monitor the sale of such perfectly legal products as fertilizer or scales and target individuals for special scrutiny because they may be engaged in bomb making or drug dealing. This data could also be abused by non-governmental entities. Employers or insurance companies, believing that we are what we eat and drink, could use the data to identify applicants whose past purchases suggest an unhealthy lifestyle. The possibilities for misuse are obvious.

Concern about consumer privacy is mounting. The National Retail Federation and other groups would like to preempt government regulation with industry-drafted guidelines to restrict disclosure. It remains to be seen whether self-regulation will work or if it will succeed in derailing anticipated legislative attempts to impose limits on data collection and stiff sanctions for privacy violations.

It may be that the only regulation loyalty cards run afoul of is the "truth in labeling" law. Many consumers collect loyalty cards the way kids collect baseball cards — they can never have too many. Disloyal cardholders may be on to something. They continue to buy bargains wherever they find them and reveal less of their personal shopping habits to any given vendor. For more information call 212-627-9700.

Outsourcing index predicts 35 percent growth

The first quarterly Outsourcing Index, measuring the use of external staff resources by companies, projects 35 percent outsourcing growth in the 12-month period ending June 1997, an increase in outsourcing industry revenues from about $80 billion annually to $108 billion. Developed jointly by The Outsourcing Institute and Dun & Bradstreet Receivable Management Services, the Outsourcing Index is designed to reflect historical, current and planned levels of outsourcing activity by U.S. corporations with more than $80 million in annual sales.

More than 50 percent, or $40 billion a year, of current outsourcing is concentrated in information technology, marketing and sales, and financial functions, such as banking, credit and collections, according to the Index. Information technology represents the largest single area of outsourcing, an estimated 22 percent, currently worth over $17 billion. Finance, marketing and sales, and administration account for about 13 percent, or $10.4 billion annually. Manufacturing makes up 11 percent, or about $8 billion per year, of the total.

Additional key findings include:

• more than half of the organizations surveyed have increased their level of outsourcing in the second half of 1996;

• current users planning to expand outsourcing to additional functions within their company will account for approximately 75 percent of the expected increase;

• approximately 15 percent of all functional areas within large companies use some outsourcing activity.

"The Index reflects just how rapidly outsourcing is being adopted as a management strategy. The period growth of 35 percent is especially significant when compared to the 15 percent growth of the highly touted computer software industry," says Marq Ozanne, vice president, market research and planning of D&B, and an adjunct professor of business at the University of Connecticut.

The initial Index findings project growth in the U.S. for the 12-month period from July 1996 to June 1997, with a 95 percent confidence level and a margin of error of ±3 percent. Projections were made based on a survey with 600 respondents conducted during the second and third quarters of 1996. For more information and a copy of the Outsourcing Index Management Briefing, call The Outsourcing Institute at 800- 421-6767 or D&B at 800-700-0756.

African-Americans

continued from p. 18

strive for it, perhaps more than other ethnic groups. It was clear to them that no one was going to give them anything, but they were convinced that all they really needed was an equal opportunity to improve their lives and those of their loved ones.

As a group, the men indicated that they took great satisfaction and pride in the fact that they were accomplishing personal goals, establishing their independence and economic security, and making important choices for themselves. Most of these men perceived that their lives were improving or had improved because of the control they were taking over their own destiny. They expected to make more money in the future and to experience increased spiritual and personal growth. This was especially true of, but not limited to, the younger men. The most important challenges they saw in life were related to concerns about unemployment and downsizing, concerns about personal health, increased responsibility in relationships with women, and heightened sensitivity to levels of racism toward black men.

The reactions among women were even more positive than those expressed by the men. Overall, they were more confident and self-satisfied than black women of previous generations. They perceived the future as getting better because they were more focused, better able to cope with problems, and had a higher level of appreciation for the good things in their lives. "Stand by your beliefs," "Imagine what might be," and "Take a chance" were the attitudes that best described their approach to life and lifestyle decisions.

Compared to their predecessors, they expected to make more money, possess more household conveniences and to better provide for their children's education. Their strong sense of self-esteem was very evident: they said that they were accomplishing personal goals, were eating better, and were generally happy about their marital status. Positive expectations were particularly strong among younger women, while a sense of accomplishment was very evident among those who were older.

Impact of outside influences

The male respondents felt that they had to develop as many skills as possible for the future to keep pace with the economy. Male teens were well aware of the importance of education; computer literacy was mentioned as a skill that was particularly important. In general, there was little concern about foreign policy, except among those who saw it as affecting the economy or the availability of jobs.

There was a higher level of concern about domestic politics. Politics, and in particular some politicians and political parties, were seen as contributing to the degradation of their communities by scaling back social programs and by not doing enough to combat drugs, violence and negative influences among young people. Race relations were less important as a political abstract, although very important on a personal development level, i.e., how they got along with coworkers and how that affected their potential for advancement. These men expressed increased confidence in

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themselves, very high confidence in black women, some confidence in religious affiliations and very little confidence in the media's commitment to provide an unbiased reporting of social and political events. For example, they, as well as black women, did not all believe that O.J. was innocent, although they felt that the media wanted others to believe they did.

African-American women of all ages and income levels shared many of the same attitudes as the men. They felt, perhaps even more strongly, that they were directly affected by the economy, politics, foreign policy, and drugs and disease. Because they were more likely than in the past to have careers and be independent, they were increasingly concerned about race relations in the workplace, and although they expressed a desire to get along with others, they felt that racism directed at them was difficult to control. Despite these outside pressures, they expressed enormous confidence in themselves and increased confidence in black men.

How lifestyles have changed

Males reported that socializing was less spontaneous than in the past, and there was an increased tendency to spend leisure time at home as opposed to going out. Clearly, they were becoming more sensitive to the "quality" in quality time spent with their family, which was becoming a higher priority than socializing with their peers. Although this attitude was stronger among the older respondents, younger men were also relatively conservative and introspective, and were spending less time "on the streets," in recognition of the increasing costs and potential hazards associated with street life. When they did socialize with friends it was geared more toward relaxation; they saw themselves as more "responsible" and having "direction" and "control" over themselves than in the past.

The desire to spend free time at home with their family was also prevalent among the women, yet there was also increased interest in developing and cultivating a close circle of female friends, following the same-gender friendship patterns that have traditionally been attributed to men. Their approach to leisure time was a function of the increased work and family responsibilities they had, and going to clubs and spontaneous partying were of less importance, even among the younger women.

Despite the importance of family and female peers, these women felt it was very important to make time for themselves alone. They were interested in activities that were selfimproving and were willing to spend money on themselves to achieve this end, which was regarded as an indication of their continued optimism about their self-image and earning power. Teenaged girls seemed more mature than in the past. Although they liked to socialize and have fun, they recognized the awesome responsibility of raising children and were less inclined to rush into relationships, preferring instead to concentrate on their education and beginning to secure their financial future.

Freedom and opportunities

African-Americans from all walks of life shared a positive outlook on their place in society, both as an ethnic group and as individuals. There was a feeling, particularly among the younger and more affluent respondents, that they were standing on the shoulders of those who had come before them and had fought to attain the freedom and opportunities that they currently enjoyed or could expect to realize if they applied themselves. There was a sense of reality, which the participants liked to refer to as "maturity," in the understanding that although freedom and opportunities were increasingly available to them, these ideals were not necessarily easy to obtain.

They had no false hopes or illusions. Nothing would be handed to them on a silver platter, and in fact, there were elements in society that might still seek to hold them back. If they wanted a good education, they would have to earn it by hard study and application. If they wanted a good job, they would have to struggle for it. If they wanted the "good life" for their family, they must establish that as a priority and find a way to make it happen.

They believed that affecting social change was best accomplished through legal means and that learning to get along with themselves and others was essential. If there was a central theme or focal point of their attitudes regarding their current hopes and expectations, it was that the door to a successful future, while still closed, had been unlocked; it was up to them to push it open and walk through. ❑

Hispanic media usage

continued from p. 13

tries are represented in the "other" category.

As is to be expected, successful marketing to the U.S. Hispanic market presents unusual challenges. Marketing and marketing research must take into account not only the U.S. business and market contexts but also the unique dynamics of the U.S. Hispanic market and the acculturation process affecting these Latin American consumers. Certainly some common denominators are present in terms of cultural heritage, such as the Spanish language, values and lifestyles. But again, these as well as other behaviors are in constant change, affected by the impact of the acculturation process.

The acculturation process

Acculturation is defined as "The process of integration of native and traditional values with the dominant culture's values." With the newly arrived individuals at one end of the acculturation road, and the U.S.-born multigenerational Hispanic consumers at the other, the degree of assimilation can vary drastically. (Assimilation assumes a total adoption of the host country's values and forms of interactions, at all levels in society, inside the household as well as the macro level or ideologically.) The acculturation process is a phenomenon unique to the U.S. Hispanic market. No other Latin American consumer is in such constant re-examination and confrontation with their own culture.

Chart 3 highlights some cultural differences between the Anglo-American middle class culture and the traditional Hispanic culture. (The

CHART 3
Value Orientation Differences
Hispanic vs. Anglo American Middle-Class

	HISPANICS	AMERICANS
Children	Dependence Authoritarian	Independence Egalitarian
Family	Define Roles	Role Diffusion
Males (Sex roles in social relationships)	Male Dominance	Sex Equality
How we see ourselves	As part of a family, clan or group	Within ourselves, as individuals
Who we rely on for help	Family, friends, community	Ourselves and institutions
What we value in people	A person's background	What a person can achieve through special skills
How we relate to people of different status or authority	Stress differences, show respect	Minimize the differences; everybody's the same
Where do mothers derive their personal strength?	Even among working mothers, from her role as a mother	From her career

author recognizes that this is an oversimplification in order to provide a general guide for exploration of the subject at hand.)

More acculturated individuals tend to reflect the Anglo-American value orientation; the less acculturated tend to identify with the traditional Hispanic value orientation. The acculturation process, a subject in and of its own, takes place to varying degrees depending on a myriad of variables and factors. These range from external factors, such as the concentration of Hispanics in the place of residence, to internal factors, such as particular individual personality traits. These factors help speed up or slow down the acculturation process; they either facilitate or add barriers to the full integration and participation in American society.

For example, an obvious example is the degree of fluency in English upon arrival in the U.S. English language proficiency greatly facilitates interaction with Anglo Americans and American mainstream media, exposing the new immigrant to the host country's culture, value system, etc. Lack of English language skills on the other hand, not only limits the immigrants' level, quality, type and

A note of caution: language proficiency alone is by no means the only factor that determines acculturation rate but it tends to be an excellent predictor of degree of acculturation. Language is but the tip of the iceberg in terms of culture and cultural identity. Many other factors and variables affect this ongoing process.

amount of interaction with American culture, but also their labor opportunities, and overall insertion in American society. Knowledge of English language acts as a catalyst in terms of exposure to, and interaction with, a different culture, that correlates to a significant degree with the level of acculturation of a person.

A note of caution: language proficiency alone is by no means the only factor that determines acculturation rate but it tends to be an excellent predictor of degree of acculturation. Language is but the tip of the iceberg in terms of culture and cultural identity. Many other factors and variables affect this ongoing process.

Acculturation models that take into account socio- psychological and value-sensitive variables in addition to language usage are better predictors of acculturation effects in purchase intent and other specific products and services. These tend to be costly to develop and implement. Hence, the language-based segmentation is a good starting point to marketing and marketing research in the U.S. Hispanic market.

A language-based segmentation

The present language proficiency-based segmentation was developed by HMC utilizing the data from two very large studies with the California Hispanic population. This segmentation has been very useful in the determination of acculturation status and its impact on product and service familiarity, awareness, usage, switching behavior, tracking studies and others. The language segmentation questions are usually included in all our tracking studies, awareness and usage studies, copy testing studies, etc.

Methodology

A total of 2,014, one-hour interviews were conducted with Hispanic consumers in the Southern California market. Interviews were conducted in each of the three ADIs which comprise the Southern California market: Los Angeles ADI (1,314 interviews), San Diego ADI (400), El Centro-Yuma ADI (300). Respondents were qualified to participate in this survey if they 1) defined themselves as being of Hispanic, Latin, or Spanish origin and 2) if they were at least 18 years old.

Half of the interviews were conducted by telephone; half were conducted door-to- door. The sample was drawn using the most up-to-date demographic information available, including recent immigration data. The sampling plan was weighted according to the percentage of the Hispanic population in each area, county, and ZIP code. Telephone prefixes matched by Hispanic population penetration per ZIP code were used to generate the telephone sample on a weighted bases. All ZIP codes with Hispanic residents were included in the sampling plan. Care was taken to ensure equal male and female partici-

TABLE 1

Language Proficiency Between Segments

	Total Sample	Spanish Dep.	Spanish Pref.	No Pref.	English Dep./Pref.
Base: Language usage	(2014) %	(962) % a	(664) % b	(267) % c	(117) % d
Claimed Ability to Speak Spanish					
Very well/well	97	100d	100d	100d	40
A little/very little	2	-	-	-	36abc
Not at all	-	-	-	-	24abc
Claimed Ability to Read Spanish					
Very well/well	87	89d	94acd	86d	26
A little/very little	10	9b	5	1 lb	40abc
Not at all	3	2	1	3	34abc
Claimed Ability to Speak English					
Very well/well	33	-	43a	100ab	100ab
A little/very little	27	18cd	57cd	-	-
Not at all	-	82bcd	-	-	-
Claimed Ability to Read English					
Very well/well	33	1	43a	97ab	99ab
A little/very little	25	15cd	54cd	2	-
Not at all	42	84bcd	3	1	1

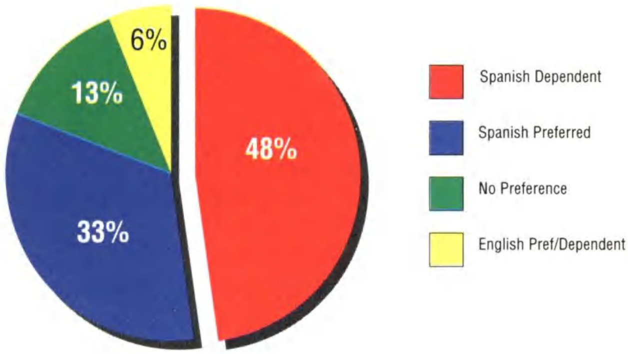
Letters in the tables denote differences between subgroups which are statistically significant at the 95 percent level of confidence.

pation in the survey. Within each household, the adult who had celebrated the most recent birthday was selected for participation.

Survey respondents were given the choice of being interviewed in Spanish or English; the vast majority chose Spanish. All interviews were conducted by trained professional, bilingual personnel, seven days a week, both during the daytime and evening hours. This ensures equal representation by gender and by all age groups. Sample respondents were given a small incentive to participate, and were entered into a raffle for a large color television.

Chart 4

Language subgroups among adult Hispanics
Southern California



Based on the battery of 12 language proficiency rating questions, for both English and Spanish, algorithms were generated to cluster the U.S. Hispanic market into five segments: "Spanish-dependent," "Spanish-preferred," "No preference," "True bilinguals" "English-preferred" and "English-dom-inant." Based on the analysis and due to the small number of people in the two latter groups, these were collapsed into one group, "English-preferred/dominant."

"Spanish-dependent" are non-U.S. born, average 10 years of residence in the U.S., "Spanish-preferred" tend to be non-U.S. born and average 14 years of residence in the U.S. These segments combined represent over 80 percent of the California Hispanic market and are mostly composed of Mexicans and Central Americans. They tend to depend heavily on Span-

TABLE 2
Demographic Profile of Segments

	Total Sample	Spanish Dependent	Spanish Pref.	No Pref.	English Dep/Pref.
Base: Language usage	(2014)	(962) % a	(664) % b	(267) % c	(117) % d
Country of Birth					
U.S.A.	16	2	10a	48ab	89abc
Foreign-born (net)	84	98	90	52	11
Mexico	73	88bcd	75cd	42d	7
El Salvador	4	5	5	3	-
Guatemala	3	3	4	2	-
Other Central/South America	2	6	5	4	-
Years Lived in the U.S.(Foreign-born)					
10 years or fewer	46	62bcd	42cd	14d	-
Average # years in U.S.	12	10	14a	18ab	28abc
Educational Achievement					
Att./compl. grade school	38	54bcd	30cd	15d	4
Att./compl. high school	32	43	46a	42	-
Att./compl. college	22	10	26a	39a	54ab
Income (U.S.$)					
Ave. HH annual income (000's)	$23	$17	$23	$30	$48

TABLE 3
Value Orientation Differences Between Segments

	Total Sample	Spanish Dep.	Spanish Pref.	No Pref.	English Dep/Pref.
Base: Lang. usage	(2014)	(962) a	(664) b	(267) c	(117) d
% AGREEING THAT Children should always follow their parents' beliefs	69	77bcd	64	61	55
Parents should sacrifice to send their children to coll./univ.	86	90cd	87cd	78	74
The child who doesn't show respect for the family makes the family lose respect in the community	82	84d	81d	81d	65
It is important that known American brands advertise in Spanish	89	91cd	92cd	83d	67

ish language media "True bilinguals" and "English- preferred/English-dominants" tend to be U.S. born, and non-U.S. born with an average of 18 and 28 years of residence in the U.S.

They depend heavily on English-language media and have the highest household incomes of all four segments.

As in most regions, the Spanish-dependent Hispanic segment makes up the largest portion of the Southern California market (48 percent), followed by the Spanish-preferred Hispanics (33 percent). One in eight (13 percent) showed no preference between the English and Spanish languages ("True bilinguals") while only a few (6 percent) preferred/or are dependent upon English.

The same language sub-segments were observed in other geographical regions in the U.S., but the proportions of each segment varies considerably between regions.

The make up of the Hispanic market in Miami and New York tends to be from Caribbean countries and the balance between English-language and Spanish- language proficiency varies greatly depending on age. Texas Hispanics tend to be the most acculturated and hence, the most English-preferred/English-dominant. Californians tend to be Mexican and Central Americans and the most Spanish- dependent. Data analyzed by the segments reflects how acculturation rates have an impact on media usage and value-orientation.

The Spanish-dependent and Spanish-preferred consumers are primarily non-U.S.- born, while the others are much more likely to be U.S.-born. The Spanish- preferred and dependent consumers have lived in the U.S. only half as long as the English dependent/preferreds and those with no preference. The Spanish-dependent and Spanish-preferred consumers reported significantly lower educational achievement and annual incomes than those who did not have a preference or who prefer/depend upon English. (Table 2)

As could be expected, Spanish-dependent consumers indicated significantly higher preference for television shows and radio programs in Spanish and significantly less interest in English language programs than other groups, but language crossover is present in all language subgroups.

In addition to demographic differences, clear, value-based, accultura-

TABLE 4
Clothing Store Information Sources by Segments

	Total Sample	Spanish Dep.	Spanish Pref.	No Pref.	English Dep/Pref.
Base: Lang. usage	(2014)	(962) a	(664) b	(267) c	(117) d
Source of Store Information					
Family/friends	33	44bcd	29cd	18d	4
Television	16	11	22ab	21ab	10
Coupon mailers	14	12	19acd	9	8
Flyers	11	10	13	8	8
Newspapers	8	6	11a	8	3
Local shopping guides	8	6	10a	9	3
Catalogs	8	6	10a	8	4
Window signs	8	7	11ac	5	8
Radio	7	4	12ad	9a	3
Magazines	6	5	9a	6	1
Yellow pages	5	2	7a	5	3

tion differences can be observed between the segments. Spanish-dependents are the most "traditional" in their beliefs; the English dependent/preferred are the least traditional,

Marketers and advertisers who want to capitalize on the opportunity presented by this $200 billion market must take into consideration the acculturation process and how it affects the communication strategy and the life cycle of the particular product or service being promoted.

closer to the Anglo American culture. (Table 3)

Differences in terms of shopping behavior, product usage, couponing and others can also be tracked by language subsegments. For example, Spanish-dependents said they primarily consult family and friends for information on places to shop for clothing. Other groups rely on other sources of information as well, such as print and broadcast media.

The media usage challenge

In addition to language, one of the most unique and challenging factors when marketing to Hispanic consumers in the U.S. are the English and Spanish media mix usage patterns. There is little in common with dominant-language societies, where media is tracked, planned and rated in one single language. Until the advent of Nielsen's Hispanic Television Index in 1992, no on-going, reliable data was available on the Hispanic consumer language/media mix usage. Their TV ratings data is also tracked based on language sub-segments which mirror very closely the language segments described above.

Presented below is a summary chart of the media usage patterns of these four subgroups, based on HMC's California data. The consumers who are Spanish- dependent or prefer

Spanish tend to predominantly use Spanish broadcast and print media, while those with no preference or who prefer/depend upon English tend to use English media most often. (Table 5)

As could be expected, Spanish-dependent consumers indicated significantly higher preference for television shows and radio programs in Spanish and significantly less interest in English language programs than other groups, but language crossover is present in all language subgroups. The acculturation continuum can be observed and tracked based on the different language usage rates, English versus U.S. Spanish across segments.

Not a simple task

Targeting the U.S. Latin American Hispanic consumer is not a simple task. Historical differences, as well as the tremendous diversity within the Hispanic market, make this important Latin American market an elusive group to target successfully.

Marketers and advertisers who want to capitalize on the opportunity presented by this $200 billion market must take into consideration the acculturation process and how it affects the communication strategy and the life cycle of the particular product or service being promoted.

Research studies, qualitative and quantitative, based on language-based segmentations, are efficient tools for targeting and measuring the U.S. Hispanic consumer behavior. They provide direction to fine-tune creative strategies, with culturally-relevant messages in the appropriate language and the right language, media mix. ❑

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TABLE 5

Media Usage Profile (Spanish/English) by Segments

	Total Sample	Spanish Dep.	Spanish Pref.	No Pref.	English Dep/Pref.
Base: Language usage	(2014)	(962) a	(664) b	(267) c	(117) d
AVG. # HRS. WATCH					
Spanish TV on weekdays	3.4	4.1bcd	3.1	2.5	0.7
Spanish TV during weekends	4.9	6.1bcd	4.5	3.2	1.1
English TV on weekdays	2.0	1.2	2.4a	3.3ab	4.1
English TV during weekends	2.8	1.6	3.4a	4.2ab	7.4
AVG. # HRS. LISTEN TO					
Spanish radio on weekdays	2.4	2.9bcd	2.4	1.8	0.6
Spanish radio during weekends	2.4	2.7bcd	2.3	1.9	0.6
English radio on weekdays	1.1	0.5	1.3a	2.4ab	2.7
English radio during weekends	1.2	0.5	1.4a	2.6ab	3.0
% SAYING THEY READ					
Spanish newspapers	47	48cd	56d	36d	10
Spanish magazines	33	32cd	41acd	30d	9
English newspapers	35	12	48a	63ab	87abc
English magazines	20	4	23a	46ab	78abc

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Fax 305-649-6312
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http://.icanect.net/strategy
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Ph. 800-500-1492
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Contact: Martin Cerda
Hispanic Qual./Quant. Research-National Capability.

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Fax 801-487-5820
E-mail: dennis.valley@aros.net
http://www.valley-research.com
Contact: Dennis L. Guiver
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Annapolis, MD 21401
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Fax 410-841-6380
E-mail: WBandA@aol.com
Contact: Dawne Widener-Burrows
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Focused Solutions

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Just The Facts, Inc.
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Linda Fitzpatrick Rsch. Svcs. Corp.
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Strategy Research Corporation

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Grieco Research Group, Inc.
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Performance Research

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YOUTH
Fader & Associates
Outsmart Marketing

Research Industry News

continued from p. 21

MarketWise has moved to 831 E. Morehead St., Ste. 150, Charlotte, N.C., 28202. Phone 704-332-8433. Fax 704-332-0499.

Burke, Inc., Cincinnati, has formed Burke Strategic Consulting Group (BSCG), a wholly owned subsidiary, to help companies achieve their goals by aligning and improving their organization structure, management practices and business processes. BSCG will be headquartered in Boston. The new company will be headed by Diane Salamon, vice president, Burke, Inc., and managing director BSCG. Salamon will be joined by Fran Lipson. A second office for the group in Atlanta will be run by Jaci Jarrett Masztal.

SOFRES, a research company headquartered in Paris, has acquired Intersearch Corporation, Horsham, Pa. Bruce Shandler, former president of Intersearch, will now be the chief executive officer of Intersearch.

Audits & Surveys Worldwide has opened its Asia-Pacific headquarters in Manila, the Philippines. Alicia Pascual will serve as managing director of the Manila office. The address is: 14/F The World Centre, 330 Sen. Gil J. Puyat Ave., Makati City, Metro Manila, Philippines. Phone 632-842-3044. Fax 632-809-4828.

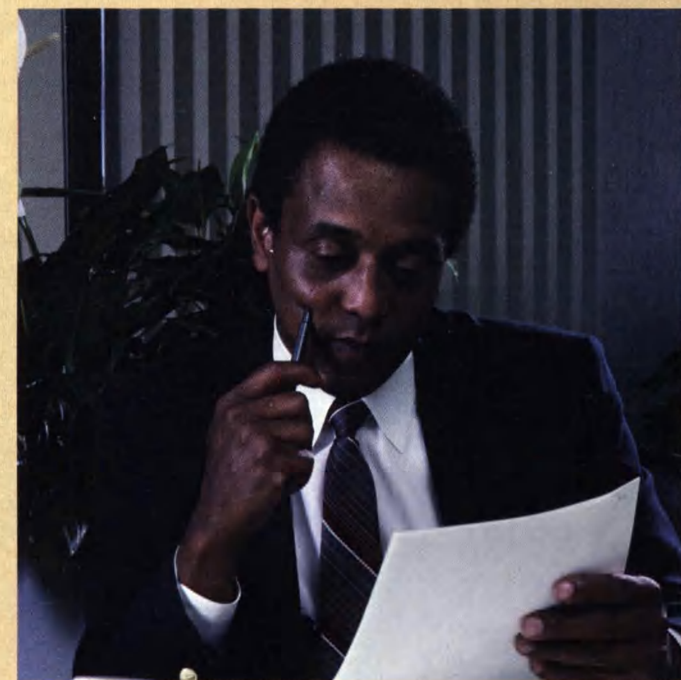
Roper Starch Worldwide has opened an Asia-Pacific headquarters in Hong Kong and a European headquarters in London. Xiaoyan Zhao, Roper Starch vice president of international operations, has been named managing director of the Asia Pacific office, which will be located at Suite 1008A, Shui On Center, 6-8 Harbour Rd., Wanchai, Hong Kong. Phone 011-852-2877-7828. Fax 011-851-2802-7848. Steve Thomson, head of the international division of London-based research company Parker Tanner Ltd., was named managing director of Roper Starch's London office.

In February, Rockbridge on the Web, the Web site of **Rockbridge Associates, Inc.**, a Vienna, Va., research firm, won the Marketing Research Resource Center's Web Site of the Month award. The address for the site is http://www.rockresearch.com.

QMRR welcomes press releases containing news of research company expansion, relocation, new accounts, awards, etc., as well as other information of interest to the industry. Send them to Joe Rydholm, Quirk's Marketing Research Review, P.O. Box 23536, Minneapolis, MN 55423. Fax: 612-854-8191. E-mail: joeqmrr@mn.uswest.net.

Quirk's MARKETING RESEARCH Review

1997 Ethnic Research Directory



This directory was developed by mailing forms to firms we identified as specializing in ethnic research and/or are a certified ethnic minority-owned business. In addition to each company's vital information, we've included the type of research services the firm offers (e.g., full-service, data collection, data processing) and the ethnic group(s) the organization specializes in researching. As an added feature, firms that are certified ethnic minority-owned businesses have been marked with an asterisk.

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(See advertisment on p. 32)

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El Paso, TX 79935
Ph. 915-591-4777
Fax 915-595-6305
E-mail: 76265.2167@compuserve.com
http://www.aimresearch.com
Linda Adams, Owner/Director
Data collection/Field service
Hispanic

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(See advertisemnt on p. 81)

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Fax 602-252-2729
E-mail: brc@primenet.com
http://www.primenet.com/~brc/
Earl de Berge, Research Director
Full service, Data collection/Field service
Hispanic

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Fax 312-419-8419
Ashref Hashim, President
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E-mail: ReynaH@CResearch.com
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Ph. 800-882-1983
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Fax 619-683-3820
E-mail: castassoc@aol.com
Enrique F. Castillo, Principal
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Hispanic

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Chicago, IL 60031
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Fax 312-787-4156
E-mail: cmalatina@cma-mkting.com
http:www,cma-mkting.com
Daniel Bloom, Director
Full service
Hispanic

*Covington-Burgess Market Research Service
666 Eleventh St. N.W., Ste. 730
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Fax 202-628-3840
Elizabeth J. Burgess, President
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African-American

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608 Chadds Ford Dr.
Chadds Ford, PA 19317
Ph. 610-459-4700 or 610-388-1500
Fax 610-459-4825
E-mail: WZL4DMC@aol.com
Bill Ziff-Levine, Managing Director
Full service
Asian, Hispanic

Directions In Research
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Fax 619-299-5888
E-mail: CALLDIR@aol.com
David Phife
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Hispanic

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Fax 718-320-3996
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Ebony Marketing Research, Inc. is a full field ser-

* indicates a firm owned by an ethnic minority

vice marketing research firm, specializing in Black, Asian and Hispanic research. We have a state-of-the-art focus group facility as well as two malls located within the New York/New Jersey metropolitan area.
(See advertisement on p. 77)

etc
Erlich Transcultural Consultants

Erlich Transcultural Consultants
21241 Ventura Blvd., Ste. 193
Woodland Hills, CA 91364
Ph. 818-226-1333
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(See advertisement on p. 15)

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African-American, Native American

Fieldwork Boston-Downtown
The Prudential Tower
Prudential Center
Boston, MA 02199
Ph. 617-899-3660
Fax 617-893-5574
http://www.fieldwork.com
Sarah Webber, President
Data collection/Field service
African-American, Hispanic

Fieldwork Chicago, Inc.
6200 N. Hiawatha, Ste. 720
Chicago, IL 60646
Ph. 312-282-2911
Fax 312-282-8971
http://www.fieldwork.com
Sanford Adams, President
Data collection/Field service
African-American, Hispanic, Native American

Fieldwork Chicago-O'Hare
8420 W. Bryn Mawr Ave., Ste. 650
Chicago, IL 60631
Ph. 312-714-8700
Fax 312-714-0737
http://www.fieldwork.com
Susan Brody, President
Data collection/Field service
African-American, Hispanic

Fieldwork Chicago-West
1450 E. Amerkan Ln., Ste. 1880
Schaumburg, IL 60173
Ph. 847-413-9040
Fax 847-413-9064
http://www.fieldwork.com
Pam White, President
Data collection/Field service
African-American, Hispanic

Fieldwork Denver, Inc.
At the Tivoli
900 Auraria Pkwy., #601
Denver, CO 80204
Ph. 303-825-7788
Fax 303-623-8006
http://www.fieldwork.com
Anne McIntyre, President
Data collection/Field service
African-American, Hispanic, Native American

Fieldwork East at Westchester
555 Taxter Rd., Ste. 390
Elmsford, NY 10523
Ph. 914-347-2145
Fax 914-347-2298
http://www.fieldwork.com
Maria Garcia
Data collection/Field service
African-American, Hispanic

Fieldwork East, Inc.
2 Executive Dr., 5th fl.
Fort Lee, NJ 07024
Ph. 201-585-8200
Fax 201-585-0096
http://www.fieldwork.com
Carol H. Tauben
Data collection/Field service
African-American, Hispanic

Fieldwork Los Angeles, Inc.
In Orange County
Lakeshore Towers
18101 Von Karmen Ave.
Irvine, CA 92715
Ph. 714-252-8180
Fax 714-251-1661
http://www.fieldwork.com
Toni Day, President
Data collection/Field service
African-American, Hispanic

Fieldwork Phoenix at Scottsdale, Inc.
6263 N. Scottsdale Rd., Ste. 380
Scottsdale, AZ 85250
Ph. 602-438-2800
Fax 602-438-8555
http://www.fieldwork.com
Barbara Willens, President
Data collection/Field service
African-American, Hispanic, Native American

Fieldwork Phoenix, Inc.
7776 Pointe Pkwy. W., Ste. 240
Phoenix, AZ 85044
Ph. 602-438-2800
Fax 602-438-8555
http://www.fieldwork.com
Barbara Willens, President
Data collection/Field service
African-American, Hispanic, Native American

Strategic locations in key metro markets enable us to draw from a large, diversified and ever-changing population. Fieldwork delivers the right respondents and the right results for any single or multi-market study. Why are Fieldwork databases the best in the field? First, we develop and maintain a separate, custom database at each Fieldwork facility. We even maintain separate databases for specific respondent categories. Fieldwork databases are cleaned frequently, so they're current and accurate. What's more, they're immediately accessible; it takes us less than an hour to produce the thousands of prospective respondents a project may require. Next, we employ a staff of specialists, trained in the nuances of recruiting, who know how to select qualified, well-screened applicants from our extensive database. Finally, we offer a full spectrum of integrated, up-to-the-minute services. Like faxed recruiting reports, which are updated each day. Immediate screening that lets us take your specs and develop screening questions for you when you're in a crunch. Plus, the ability to quickly create a computerized study universe that adheres to your research requests. If you're serious about the quality and accessibility of respondents, stop playing the field. Look to Fieldwork to deliver the best demographic resources in the country.
(See advertisement on the back cover)

Findings International Corp.
9100 Coral Way, Ste. 6
Miami, FL 33165
Ph. 305-225-6517
Fax 305-225-6522
Orlando Esquivel, President
Full service, Data collection/Field service
Hispanic

Fleischman Field Research
220 Bush St., Ste. 1300
San Francisco, CA 94104
Ph. 415-398-4140 or 800-277-3200
Fax 415-989-4506
E-mail: FFR@ffrsf.com
Molly Fleischman, Principal
Data collection/Field service, Focus group
Asian, Hispanic

Four luxurious new focus group rooms (one at 16'x18', three at 21'x25') and one mini room (12'x14') seating eight to 10 viewers. Full-sized rooms feature three-tiered seating for 15+ viewers + adjoining client lounges. Local/regional/national recruiting and interviewing with tabulation. English, Spanish, Mandarin, Cantonese, Tagalog, Vietnamese, Korean, Thai available. Owner operated firm - ensures high quality, professional service, outstanding reputation.
(See advertisement on pp. 66, 78)

Focuscope, Inc.
1100 Lake St., Ste. 60
Oak Park, IL 60301
Ph. 708-386-5086
Fax 708-386-1207
E-mail: foscope@aol.com
Kevin Rooney, Sr. Proj. Dir.
Data collection/Field service
African-American, Hispanic

* indicates a firm owned by an ethnic minority

GENESYS Sampling Systems
565 Virginia Dr.
Fort Washington, PA 19034
Ph. 215-653-7100
Fax 215-653-7114
E-mail: amystarer@aol.com
Amy Starer, Vice President
Sampling
African-American, Asian, Hispanic, Middle Eastern, Native American

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. 79)

*Gonzalez Marketing Research Services
1543 Raymond Dr., Ste. 101
Naperville, IL 60563
Ph. 630-637-0826
Fax 630-637-7229
Linda Gonzalez, Owner
Data collection/Field service
Hispanic

*HAMARC, Inc.
Hispanic America Mktg. & Rsch Cnslts., Inc.
116 Weldon Way, Ste. 1
Pennington, NJ 08534-1829
Ph. 609-683-7755
Fax 609-466-7430
E-mail: HAMARC@aol.com
Dr. Jose Acuna, President
Full service, Consultation
Hispanic

*Hispanic Focus Unlimited
Rte. 1, Box 278
La Feria, TX 78559
Ph. 210-797-4211
Fax 210-797-4244
E-mail: hspfocus@aol.com
Ruben Cuellar, President
Full service, Data collection/Field service
Hispanic

Hispanic MARKET CONNECTIONS, INC.
Bilingual / Bicultural Market Research

***Hispanic Market Connections, Inc. (HMC)**
5150 El Camino Real, Ste. D-11
Los Altos, CA 94022-1527
Ph. 415-965-3859
Fax 415-965-3874
E-mail: info@hmc-research.com
http://hmc-research.com
M. Isabel Valdes, President
Full service
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, AcuPoll Hispanic, Hispanic LIVES and ethnographic methods. President is co-author of Hispanic Market Handbook (Gale, 3/95).
(See advertisement on p. 80)

HISPANIC & ASIAN MARKETING COMMUNICATION RESEARCH, INC.

***Hispanic Marketing Communication Research A division of H&AMCR, Inc.**
1301 Shoreway Rd., Ste. 100
Belmont, CA 94002
Ph. 415-595-5028
Fax 415-595-5407
E-mail: gateway@hamcr.com
http://www.hamcr.com
Felipe Korzenny, Ph.D., President
Full service
Hispanic

Spanish and Portuguese language marketing research in the U.S. and Latin America. Full service qualitative and quantitative. Copy testing, 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. Expanded CATI facilities. Psycho-socio-cultural Hispanic research© is our unique approach. Our own facilities in San Francisco-San Jose Bay area available.
(See advertisement on p. 81)

House of Marketing
836 S. Arroyo Pkwy.
Pasadena, CA 91105
Ph. 818-793-9598
Fax 818-793-9624
E-mail: HMResearch@aol.com
Data collection/Field service
African-American, Asian, Hispanic

*IMAGES Market Research
1718 Peachtree Rd., Ste. 650
Atlanta, GA 30309
Ph. 404-892-2931
Fax 404-892-8651
E-mail: IMAGES USA@aol.com
Robert L. McNeil Jr., President
Full service, Data collection/Field service
African-American, Asian, Hispanic, Native American

In Gold Research Services, Inc.
17501 Janesville Rd.
Muskego, WI 53150
Ph. 414-679-2600
Fax 414-679-1445
Marguerite Ingold, President
Data collection/Field service
African-American, Middle Eastern

Interviewing Service of America, Inc.
16005 Sherman Way, Ste. 209
Van Nuys, CA 91406
Ph. 818-989-1044
Fax 818-782-1309
Michael Halberstam, President
Data collection/Field service, Sampling, Translations
African-American, Asian, Hispanic, Middle Eastern, Native American

IPC

IPC (International Point of Contact)
32 E. 31st St.
New York, NY 10016
Ph. 212-213-3302
Fax 212-213-2554
E-mail: RBrooks597@aol.com
Rhoda Brooks, Partner
Data collection/Field service
African-American, Asian, Hispanic

Comprehensive market research services specializing in international and domestic foreign language projects. Data collection by telephone, mail or personal interviews in the U.S. or abroad. Call us for your customized research needs. Not limited to large projects.
(See advertisement on p. 82)

*JRH 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
Full service
African-American, Asian, Hispanic, Middle Eastern, Native American

* indicates a firm owned by an ethnic minority

*Juarez & Associates
12139 National Blvd.
Los Angeles, CA 90064
Ph. 310-478-0826
Fax 310-479-1863
E-mail: juarez@ix.netcom.com
Nicandro Juarez, President
Full service, Data collection/Field service
African-American, Hispanic

*Las Vegas Surveys, Inc.
3405 S. Cambridge St.
Las Vegas, NV 89019
Ph. 702-650-5550
Fax 702-598-0883
Carlos Kelley, V.P./Research Director
Full service, Data collection/Field service
African-American, Hispanic

Lee Slurzberg Research, Inc.
379 Windsor Rd.
Englewood, NJ 07631-1424
Ph. 201-567-2265
Fax 201-567-5661
Lee Slurzberg, President
Full service
African-American, Hispanic

Macro Consulting, Inc.
2581 Leghorn St.
Mountain View, CA 94043
Ph. 415-964-9707
Fax 415-964-9949
E-mail: dick@macroinc.com
http://www.macroinc.com
P. Richard McCullough, President
Full service, Data collection/Field service, Consultation
Asian, Hispanic

MACRO INTERNATIONAL INC.

Macro International, Inc.
100 Avenue of the Americas
New York, NY 10013
Ph. 888-MACRO-US
Fax 212-941-7031
E-mail: Rhindress@macroint.com
http://www.macroint.com
Mindy Rhindress, Sr. Vice President
Full service
Hispanic

Full-service, custom-designed qualitative/quantitative research. Consumer, executive, business-to-business research; concept and copy testing, positioning, segmentation and tracking studies; mystery shopping and legal research. Full multivariate skills; predictive dialing, 201-station in-house CATI telephone facility or personal outside interviewing. Spacious on-premise conference/focus group center with state-of-the-art video/audio capabilities in both New York and Burlington, VT. Test kitchen. Brochures available.
(See advertisement on p. 29)

Market Development Associates, Inc.
5050 Poplar Ave., Ste. 920
Memphis, TN 38157
Ph. 901-682-1011
Fax 901-684-5352
E-mail: MKTDEVLP@aol.com
http://www.mdaresearch.com
John Choate, President
Full service, Data collection/Field service
African-American

*Market Development, Inc.
1643 Sixth Ave.
San Diego, CA 92101
Ph. 619-232-5628
Fax 619-232-0373
Roger S. Sennott, V.P./G.M.
Full service
Hispanic

*Market Segment Research, Inc.
1320 S. Dixie Hwy., #120
Miami, FL 33146
Ph. 305-669-3900
Fax 305-669-3901
Gary L. Berman, President
Full service
African-American, Asian, Hispanic

*Market Study International, Inc.
9700 Richmond Ave., Ste. 108
Houston, TX 77042
Ph. 713-952-1400
Fax 713-952-1488
Rafael Mendoza, Vice President
Full service, Data collection/Field service
Hispanic

Marketing Matrix
2566 Overland, Ste. 716B
Los Angeles, CA 90064
Ph. 310-842-8310
Fax 310-842-7212
E-mail: Mmatrix@primenet.com
Lynn Walker Moran, Facility Manager
Data collection/Field service, Focus group
Hispanic

MBC
366 Madison Ave.
New York, NY 10017
Ph. 212-599-7400
Fax 212-599-7410
E-mail: padmbc@attmail.com
Dr. Peter Demetriou, Partner
Full service
African-American, Asian, Hispanic, Middle Eastern

*McLaughlin Research Interview Service, Inc.
1118 Galloway St. N.E.
Washington, DC 20011
Ph. 202-526-0177
Fax 202-526-8747
Alma McLaughlin, Field Director/Owner
Data collection/Field service
African-American, Hispanic, Native American

*MDI Interviewing Services
1101 Bay Blvd., Ste. D
Chula Vista, CA 91911
Ph. 619-424-4550
Fax 619-424-4501
Jose Suarez, Operations Manager
Data collection/Field service
Hispanic

* indicates a firm owned by an ethnic minority

Meadowlands Consumer Center INC.
The Plaza at the Meadows
100 Plaza Dr., 1st fl.
Secaucus, NJ 07094
Ph. 201-865-4900 or 800-998-4777
Fax 201-865-0408
Lauren Heger, Field Director
Focus Group
African-American, Hispanic

*Meneses Research & Associates
11956 Bernardo Plaza Dr., Ste. 318
San Diego, CA 92128-3538
Ph. 619-676-9643
Walter Meneses, President
Data collection/Field service
Hispanic

MGZ Research
5715 Silent Brook Ln.
Rolling Meadows, IL 60008
Ph. 847-397-1513
Fax 847-397-9016
Martha Garma Zipper, President
Consultation
Hispanic

*Miami Market Research, Inc.
6840 S.W. 40 St., Ste. 201A
Miami, FL 33155
Ph. 305-666-7010
Fax 305-666-7960
E-mail: miamktrsch@aol.com
Luis Padron, President
Data collection/Field service
Hispanic

*MOI, Inc.
Marketing and Strategic Research
P.O. Box 1439
Princeton, NJ 08542
Ph. 609-683-0555
Fax 609-683-7411
E-mail: MOIINC@worldnet.att.net
Mila Montemayor-Orr, President
Full service
African-American

NorTex Research Group/Dallas
8700 N. Stemmons Fwy., Ste. 190
Dallas, TX 75247-3715
Ph. 800-315-TEXX
Fax 214-630-6769
Kelly Lynn Ireland, Facility Director
Data collection/Field service
African-American, Hispanic

*Novasel Associates
67-45 179th St.
Flushing, NY 11365
Ph. 718-591-7736
Fax 718-591-7386
Judy Novasel, President
Full service
African-American, Asian, Hispanic, Middle Eastern, Native American

Olchak Market Research (OMR)
7255-A Hanover Pkwy.
Greenbelt, MD 20770
Ph. 301-441-4660
Fax 301-474-4307
E-mail: omr dc@aol.com
Jill L. Siegel, President
Data collection/Field service
African-American

*OmniTrak Group, Inc.
725 Davies Pacific Center
841 Bishop St., Ste. 725
Honolulu, HI 96813
Ph. 808-528-4050
Fax 808-538-6227
E-mail: 103377.2665@compuserve.com
Alan Ellis, Vice President
Full service, Data collection/Field service
Asian

Paria Group, Inc.
Central Park East
1815 S. State St., Ste. 4000
Orem, UT 84097
Ph. 801-226-8200
Fax 801-226-4819
E-mail: mail@paria.com
http://www.paria.com
Stephen M. Zimmerman, President
Data collection/Field service
African-American, Asian, Hispanic, Middle Eastern, Native American

Perceptive Market Research, Inc.
2306 S.W. 13th St., Ste. 807
Gainesville, FL 32608
Ph. 800-749-6760 or 352-336-6760
Fax 352-336-6763
E-mail: 102403.203@compuserve.com
Dr. Elaine M. Lyons-Lepke, President
Full service
African-American, Asian, Hispanic

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
Data collection/Field service
Asian, Hispanic

Prange & O'Hearn, Inc.
Marketing & Research Group
6401 S.W. 87th Ave., #120
Miami, FL 33173
Ph. 305-271-8788
Fax 305-271-9448
Randy Prange, CEO
Full service
Hispanic

QualiData Research, Inc.
170 Garfield Pl.
Brooklyn, NY 11215
Ph. 718-499-4690
Fax 718-499-4690
E-mail: qualidata@aol.com
Sharon Wolf, Principal
Full service
African-American, Asian, Hispanic, Middle Eastern, Native American

***Recruiting Resources Unlimited**
131 Beverley Rd.
Brooklyn, NY 11218
Ph. 718-435-4444
Fax 718-972-3926
Connie Livia, President
Data collection/Field service
African-American, Asian, Hispanic, Middle Eastern, Native American

New York's largest recruiting service for focus groups, mock juries and IDIs. Our specialties include: corporate executives; technical, medical, legal and financial professionals; millionaires; foreign language studies; ethnic markets - Asian, Middle Eastern, Russian, Polish, Black, Latino; and extraordinary consumers recruited throughout the entire tri-state area from our extensive computerized databank, or from the sample of your choice. Rush groups are our forte. RRU's professional staff of on-site recruiters can successfully recruit projects of any size or scope with attention to your specifications. We provide frequent computerized respondent profile updates. Call us and have an experienced team behind you.
(See advertisement on p. 85)

Reyes Research
1165 Kingston Ln.
Ventura, CA 93001
Ph. 805-278-1444
Fax 805-278-1447
Michele Reyes, General Partner
Data collection/Field service, Focus group
African-American, Hispanic

MARKET RESEARCH AND DEMOGRAPHY

***Rincón & Associates**
6060 N. Central Expwy., Ste. 670
Dallas, TX 75206
Ph. 214-750-0102
Fax 214-750-1015
E-mail: info@rinconassoc.com
http://www.rinconassoc.com
Dr. Edward T. Rincon, President
Full service
African-American, Asian, Hispanic

Rincón & Associates specializes in ethnic consumer research utilizing such tools as survey research, focus groups, and demographic analysis. Bilingual interviewers and moderators experienced with Hispanic, African-American, and Asian markets. Studies include copy testing, segmentation analysis, demographic analysis, taste tests, image assessment, legal issues, and customer satisfaction. Beautiful focus group facility, central telephone interviewing center, and test kitchen. Hispanic owned and operated.
(See advertisement on p. 27)

*Roslow Research Group, Inc.
151 Haven Ave.
Port Washington, NY 11050
Ph. 516-883-1110
Fax 516-883-4130
Peter Roslow, President
Full service
Hispanic

San Diego Surveys, Inc.
4616 Mission Gorge Pl.
San Diego, CA 92120
Ph. 619-265-2361 or 800-895-1255
Fax 619-582-1562
Jean Van Arsdale, President
Full service
African-American, Hispanic

Scientific Telephone Samples
6 Hutton Centre Dr., Ste. 1245
Santa Ana, CA 92707
Ph. 800-944-4-STS or 714-241-7900
Fax 714-241-7910
E-mail: STSSAMPLES@aol.com
Steve Clark, Partner
Sampling
African-American, Asian, Hispanic

STS is the best choice for quality random digit (RDD) and demographically targeted RDD sampling. Five cents per number, with aggressive discounts. One cent extra per number for demographic or lifestyle targeted samples. Free business purging. Any geography or RDD sampling method. Standard turn-

* indicates a firm owned by an ethnic minority

around 24 hours, one-hour service if needed. Quality service and RDD sampling since 1988.
(See advertisement on p. 43)

SEGMENTATION AMERICA Inc.

***Segmentation America, Inc.**
8351 Roswell Rd., Ste. 349
Atlanta, GA 30350
Ph. 770-591-7730
Fax 770-591-5209
Mario de la Guardia, President
Full service
African-American, Asian, Hispanic

The Consumer Products Specialists. Segmentation America works side by side with marketers to acquire the consumer insight necessary to gain the marketing advantage. We understand consumer marketing and design research to gain actionable insights. At Segmentation America, we specialize in concept optimization, brand name and image testing, advertising communication, packaging communication and product optimization. We look forward to the opportunity to serve you.
(See advertisement on p. 5)

*Southern Spectrum Research, Inc.
1600 Canal St., Ste. 400
New Orleans, LA 70112
Ph. 504-539-9222
Fax 504-539-9228
Linda DeCuir, Research Coordinator
Data collection/Field service
African-American, Asian, Hispanic

*Strategic Directions Group, Inc.
46 E. 4th St., #1100
St. Paul, MN 55101
Ph. 612-228-7250
Fax 612-228-7260
Carol Morgan, President
Full service
Hispanic

*Strategic ReSource Associates
105 S. Joshuas Way
Yorktown, VA 23692
Ph. 757-833-7867
Shelia Carter-Little, Consultant
Full service
African-American

Strategy Research Corporation
100 N.W. 37th Ave., 3rd fl.
Miami, FL 33125
Ph. 305-649-5400
Fax 305-649-6312
E-mail: strategy@icanect.net
Richard W. Tobin, President/CEO
Full service
Hispanic

*Ray Suh & Associates, Inc.
12 Perimeter Park Dr., Ste. 101
Atlanta, GA 30341
Ph. 770-986-9267
Fax 770-986-9485
Ray Suh, Principal
Full service, Consultant
Asian

Survey Methods Group
140 2nd St., Ste. 400
San Francisco, CA 94105
Ph. 415-495-6692
Fax 415-995-8185
Linda Rynazewski, Vice President Marketing
Data collection/Field service
African-American, Asian, Hispanic, Middle Eastern, Native American

Survey Sampling, Inc.

Survey Sampling, Inc.
One Post Rd.
Fairfield, CT 06430
Ph. 203-255-4200
Fax 203-254-0372
E-mail: info@ssisamples.com
http://www.ssisamples.com
Christopher De Angelis, Nat'l. Sales Mgr.
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 on-line sampling 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 advertisement on pp. 20, 49, 83)

Surveys Unlimited, Inc.
232 Vincent Dr.
East Meadow, NY 11554
Ph. 516-794-5650
Fax 516-794-3841
E-mail: SURVEYSUNL@aol.com
Gladys Ronco, President
Data collection/Field service
African-American, Hispanic

Target Market Research Group, Inc.

***Target Market Research Group, Inc.**
4990 S.W. 72nd Ave., Ste. 110
Miami, FL 33155-5524
Ph. 800-500-1492 or 305-661-1492
Fax 305-661-9966
E-mail: martin_cerda@tmrgroup.com
http://www.tmrgroup.com
Martin G. Cerda, President
Full service, Data collection/Field service, Consultation
Hispanic

Full-service qualitative and quantitative research among U.S. Hispanics on a national level. Specializing in custom/proprietary marketing and creative strategy studies, exploratory/ideation research, concept/product research, advertising pretesting/tracking and market segmentation studies. Emphasizing quality in project design, implementation and analysis. Approved supplier for leading advertisers according to gross Hispanic media expenditures. Brochure and references available upon request. Minority business enterprise (Hispanic).
(See advertisement on p. 84)

* indicates a firm owned by an ethnic minority

Taylor Research

Taylor Research
Video Conferencing Center
1545 Hotel Circle S., Ste.350
San Diego, CA 92108
Ph. 619-299-6368 or 800-922-1545
Fax 619-299-6370
E-mail: MKTRES@taylorresearch.com
http://www.taylorresearch.com
Harriett Huntley, Operations Manager
Data collection/Field service
African-American, Asian, Hispanic, Native American

San Diego's diverse population and proximity to Mexico makes it an ideal location for recruiting Hispanics and Asians. Taylor has bilingual interviewers and supervisors on staff to handle your most complex project. As Southern California's most client service-oriented field office we enjoy a reputation for the highest quality interviewing and facilities along with closeness to the airport, hotels and downtown. Our popularity and volume of work allow us to offer competitive pricing with superior quality.
(See advertisement on p. 87)

V&L Research & Consulting, Inc.

***V & L Research & Consulting, Inc.**
4294 Memorial Dr., Ste. D
Decatur, GA 30032
Ph. 404-298-0139
Fax 404-298-0026
Delphyne L. Lomax, Principal, Quant. Rsch.
Full service, Data collection/Field service
African-American, Asian, Hispanic, Middle Eastern, Native American

Qualitative and quantitative research among the general market, with expertise in specialty markets; African-American, Hispanic, Asian, elderly and rural. Full-service - methodological design, moderation, recruiting, questionnaire development, telephone interviewing, data processing and analysis. AAU/image satisfaction studies. Advertising development/testing. Intercept studies. Product placement/tracking. Executive/medical interviewing.
(See advertisement on p. 86)

*The Winters Group, Inc.
14 Franklin St.
Rochester, NY 14604
Ph. 716-546-7480
Fax 716546-7427
E-mail: maryfwin@aol.com
Mary Frances Winters, President
Full service, Data collection/Field service, Focus group
African-American, Asian, Hispanic, Native American

Classified Ads

Listing Additions

On p. 59 of the February issue, the listing for First Market Research Corp. in the 1997 Data Processing/Statistical Analysis Directory contains an incorrect ZIP code. The code should read 02215.

Please add the following firm to the 1997 Directory of Data Processing, Statistical Analysis and Software:

Geo Demographics, Ltd.
69 Arch St.
Johnson City, NY 13790
Ph. 607-729-5220
Fax 607-729-5909
Warren Crowder, Marketing Director
Services: CD, DE, DT, SA

Please add the following firms to the 1997 Directory of Mystery Shopping Firms:

National Shopping Service Network, LLC
P.O. Box 75
Eastlake, CO 80614
Ph. 303-451-0538
Fax 303-451-0325
E-mail: NSSN@worf.omn.com
http://www.omn.com/nssn
Howard Troxel, President
Nationally - Data Collection/Field Svc.
B, E, F, R, RT, S

Sales & Service Evaluators, Inc. (SSEI)
5050-B Gulf Blvd.
St. Pete Beach, FL 33706
Ph. 813-367-7574
Fax 813-367-3348
Dick German, President
Nationally — Full Service
B, E, F, R, RT, S

Sales Offices

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Trade Talk

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vides a quick look at the role of research in package design.

The centerpiece of the book is an exhaustive, informative chapter by Herbert Meyers of Gerstman + Meyers Inc., a brand identity and design consulting firm. In 60 pages Meyers covers all the aspects of package design, from the roles of color, copy and shape to researching and producing the final product.

Doyle closes the book with "The Consumer Side of Packaging Power," a snapshot of where consumer perceptions of packaging are now, gleaned from the thousands of consumers who participate in Doyle's Consumer Network panel.

The book's strengths are its thoroughness and its readability. The writers have plenty of knowledge to impart but they address the audience as peers rather than students. No jargon or convoluted academic double-talk here; just solid, real-world information. ❑

Packaging Strategy: Winning the Consumer *($45.00, hardcover, 179 pages), edited by Mona Doyle, is available from Technomic Publishing Company, Inc., Order Dept., 851 New Holland Ave., Box 3535, Lancaster, Pa., 17604. Phone 800-233-9936. Fax 717-295-4538. Web site http://www.techpub.com. E-mail: marketing@techpub.com. A detailed brochure describing the book and listing its complete table of contents is available from the publisher upon request.*

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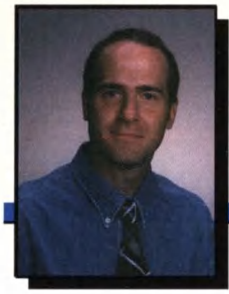

Trade Talk

By Joseph Rydholm/QMRR editor

Packaged facts: book wraps up packaging knowledge

The packaging for the average consumer product has a lot of jobs to do. It must handle the rigors of shipping and stocking, catch the consumer's eye, quickly communicate what the product is and what it does, and allow for easy storage and usage. And with tens of thousands of new products and line extensions introduced each year, not to mention the assault of private label brands, it has to do all that in a noisy, hostile environment.

Marketers who send packaging into that fray may benefit from reading *Packaging Strategy: Winning the Consumer*. Edited by Mona Doyle, founder of The Consumer Research Network, a Philadelphia research firm, the book presents real-world information on packaging and packaging research from the people who design, research and write about packaging for a living.

In 13 chapters, the various contributors to the book cover pretty much everything you always wanted to know about packaging and packaging research, from just what a T-scope is and how it works to the often contradictory effects of environmental concerns on packaging choices.

Tony Adams, former vice president of marketing research and planning at Campbell Soup Company, and a director of strategic marketing research at Coca-Cola (how's that for examples of legendary packaging?) muses on the value of color and shape in package design.

In "Packaging, Solid Waste, and Environmental Trade-Offs," Lynn Scarlett, vice president of research at the Reason Foundation, a public policy think tank in Los Angeles, and frequent writer on environmental policy issues, gives an overview of the issues surrounding "green packaging," including some interesting insights on how supposedly environmentally-friendly packaging solutions — like McDonald's switch from polystyrene burger pods to paper and cardboard, and roundly condemned packaging like juice boxes — aren't what they seem to be.

Craig Erickson, editor of the newsletter *Shelf Presence*, provides food for thought on copycat packaging in "The Cons and Cons of Copycat Packaging." Gerald Meier, vice president, packaging for Paper Machinery Corp., in Milwaukee, contributes a thoughtful piece on (among other things) how the production capabilities of packaging manufacturers influence packaging design. Lorna Opatow, president of Opatow Associates, a New York City research firm that specializes in packaging research, pro-

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Farcus

by David Waisglass
Gordon Coulthart

"It's a 30,000-page study that proves we don't need to change the way we work."

Dave was less than impressed with the recruiting tactics.