Hispanic buying power • Segmenting biz-to-biz markets • Researching minority health needs

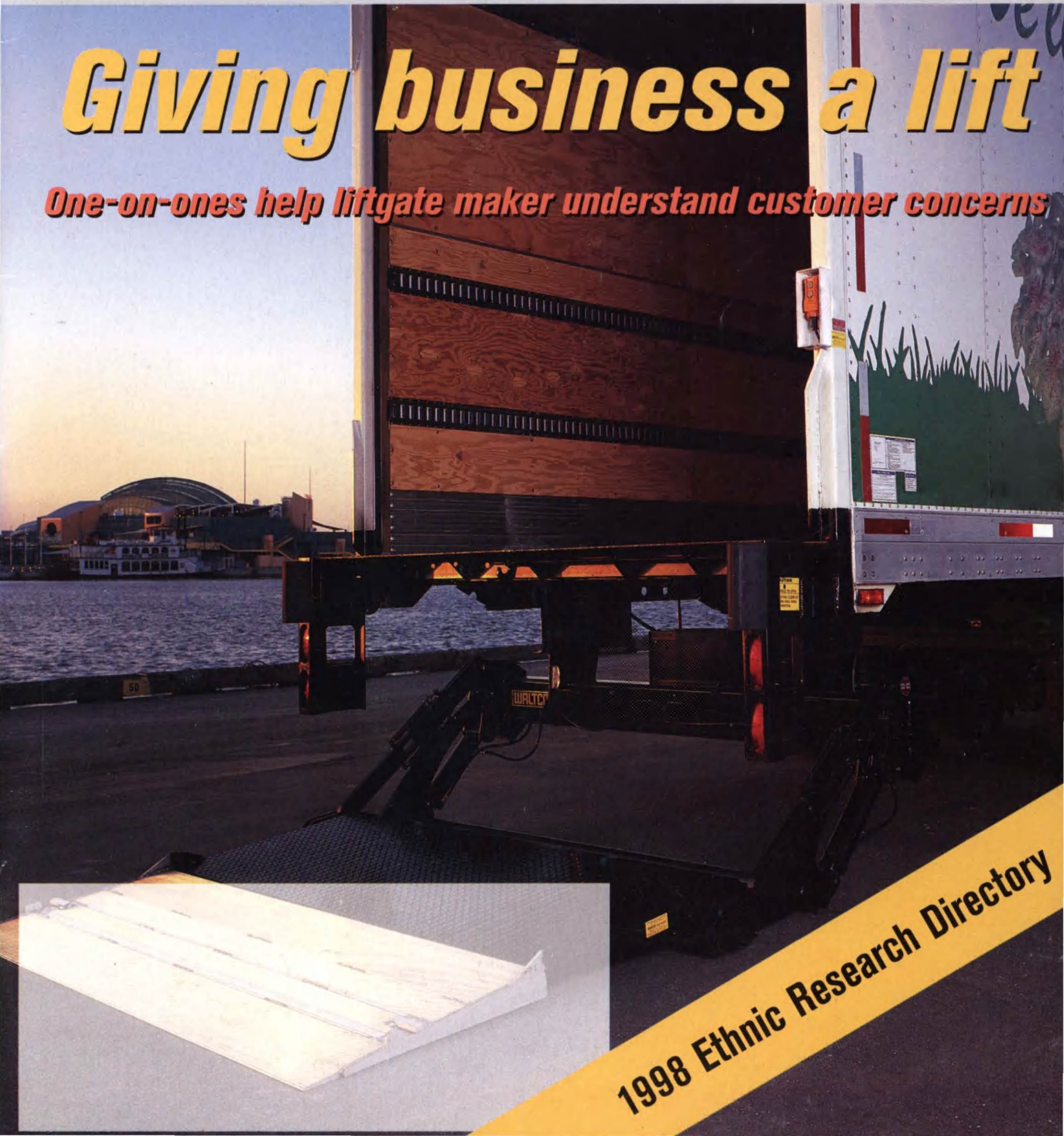
Quirk's MARKETING RESEARCH Review

Practical applications in marketing research

April 1998

Giving business a lift

One-on-ones help liftgate maker understand customer concerns



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Quirk's
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C O N T E N T S

Volume XII, Number 4 — April 1998

One-on-one interviews gave liftgate maker Waltco valuable insights into customer needs and opinions. Photo courtesy of Waltco.

F E A T U R E S

D E P A R T M E N T S

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Hispanics love sports

In a recent issue of *Inside Strategy*, a newsletter from Strategy Research Corp., Miami, Raul Lopez, the company's senior vice president, reports on findings from Strategy's "1998 U.S. Hispanic Market Study" showing that Hispanics are big sports fans. In the study, almost two out of every three respondents reported that professional spectator sports were either "extremely" or "somewhat" important (Top Two Box Score). Almost half, (48 percent) of all respondents indicated that they had been to a sports event in the past year, and nearly half (49.7 percent) of all Hispanics reported having listened to sports events on the radio in the past year.

The study also found that Hispanics attend a series of sporting events, with almost half (48 percent) of all respondents indicating that they had been to a sports event in the past year. Among Hispanic males, roughly 60 percent or three out of every five, had attended some event.

The two most-attended sporting events for the total Hispanic market and for males as a separate group were Major League Baseball, with nearly one quarter (24.8 percent) of Hispanics having attended a game in the past year, and Major League Soccer (17.7 percent).

Nearly the same percentage of women attended basketball games (9.5 percent) as soccer games (9.1 percent). This is slightly different from the male percentages which favored soccer (26.2 percent versus 21.4 percent).

Attendance to individual sports categories provided some interesting data, when looked at by country of origin of the respondent. Mexicans, traditionally considered soccer fans, are apparently also big baseball fans. Roughly 23 percent reported having been to a Major League Baseball game; this compares to 16 percent for soccer.

Baseball was by far the event of choice among respondents from the Dominican Republic, where 45.5 percent reported having attended at least one game in the past year. Further, baseball was also the sport with the highest past-year attendance among Puerto Ricans (31 percent) and Cubans (39 percent). Only 15.4 percent of the respondents from South America reported having attended a Major League Baseball Game. South Americans scored highest in soccer (40 percent) and basketball (25 percent).

Soccer was most popular among respondents from Central and South America (30.8 percent and 39.9 percent, respectively). About one in four

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Sports Events Attended in Past Year by U.S. Hispanics

		Gender		Age	
	Total	Male	Female	18-34	35+
Any attendance	47.5	59.8	35.1	52.0	42.5
Major League Baseball	24.8	32.9	16.7	24.3	25.3
National Basketball Assoc.	15.4	21.4	9.5	19.2	11.4
National Football League	12.2	18.2	6.1	13.0	11.2
National Hockey League	4.1	5.7	2.4	5.1	3.0
Major League Soccer	17.7	26.2	9.1	21.1	14.0
College sports	10.3	13.7	7.0	12.9	7.6
Professional wrestling	4.1	5.5	2.7	4.0	4.2
Professional boxing	10.5	16.6	4.5	11.5	9.5
Another prof'l sport	11.4	14.8	8.0	12.6	10.1

Wiping out kitchen bacteria

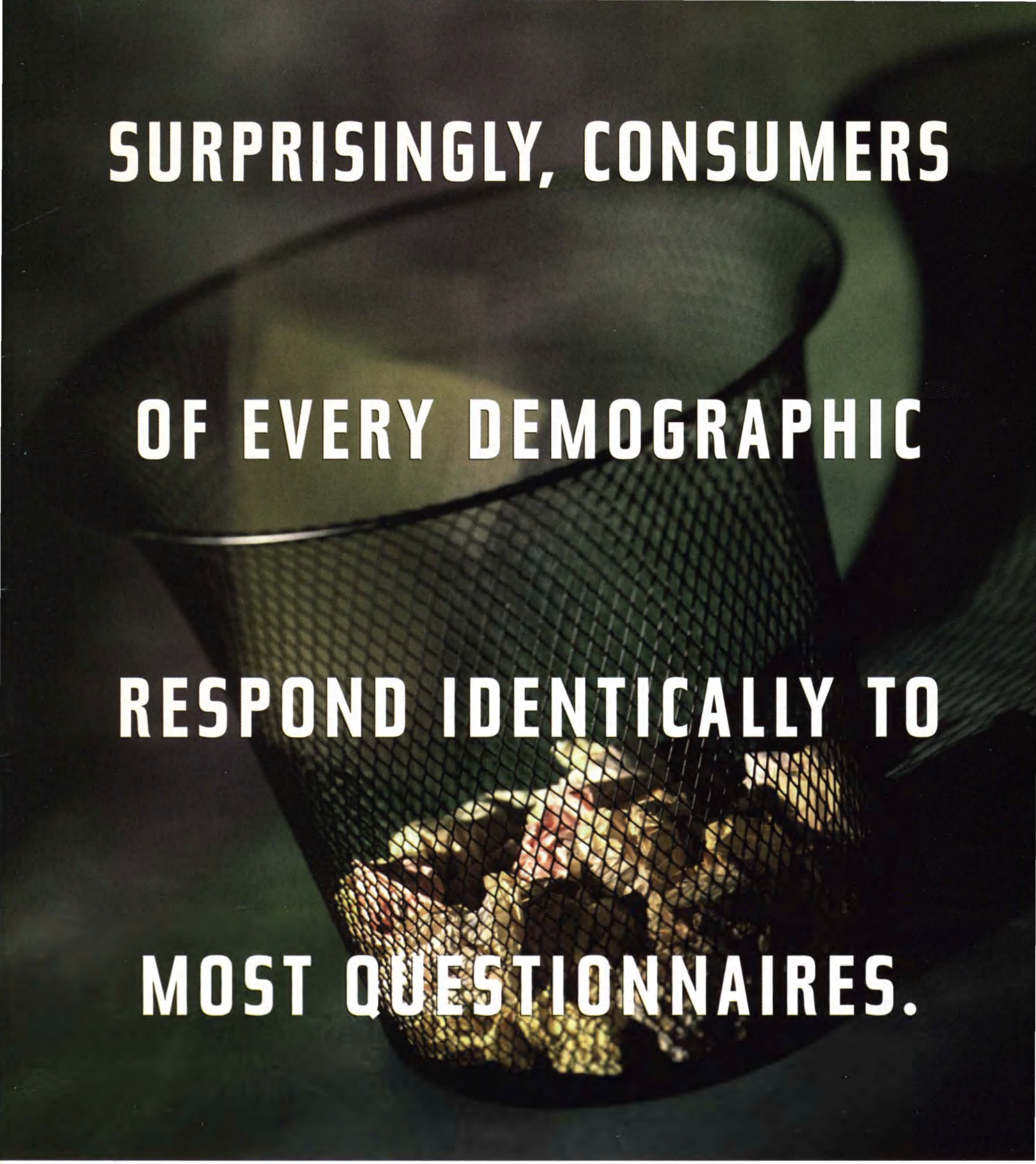
Seven out of 10 Americans say they purchase antibacterial cleaners for their kitchens in an effort to "wipe out" unsanitary germs and bacteria, according to a study by CDB Research & Consulting Inc., New York.

"Americans are becoming more conscious of the dangers of household bacteria, particularly those with young children," says Larry Chiagouris, managing director, CDB Research & Consulting Inc. "People no longer feel comfortable with just soap and water, they want to be absolutely sure the surface is clean."

The survey found that younger respondents, under 35 years of age, and parents are more concerned with buying antibacterial cleaners than adults without children and respondents over the age of 55. Six out of 10 adults say they buy antibacterial cleaners on a monthly basis, with parents being more likely than adults without children to buy these products, by a margin of 10 percent.

More than half the respondents surveyed expect to continue purchasing antibacterial products over the next three months. Parents say they will continue to purchase these products more regularly (64 percent), compared to adults without children (54 percent). Adults over the age of 55 will be less likely than younger adults (under 35 years of age) to buy antibacterial products. Almost seven out 10 of those younger adults will buy an antibacterial cleaner over the next three months, compared to just five out of 10 of the older adults.

Telephone interviews conducted by CDB Research & Consulting Inc. were completed in August, 1997. The sample consisted of a national cross section of 600 adults, ages 18 or older. The margin of error is ±4 percentage points. For more information call 212-367-6858.


SURPRISINGLY, CONSUMERS
OF EVERY DEMOGRAPHIC
RESPOND IDENTICALLY TO
MOST QUESTIONNAIRES.

New approach to choice modeling from Macro

Macro Consulting, Inc., Mountain View, Calif., has developed a hybrid approach to discrete choice modeling called the Logit-Cake Method. With the Logit-Cake Method, a large number of feature utilities (50 or more) can be estimated at the individual level while at the same time allowing for control over the experimental design in a full-profile format. Design control allows for specification of product combinations, via traditional experimental design, in advance of the interview process. This permits the incorporation of physical exhibits into the interview to minimize respondent confusion. A cluster-based solution to the heterogeneity problem is built in. First order interactions can also be estimated using the Logit-Cake Method. All of the advantages normally associated with choice models over conjoint models have been maintained. For more information call Dick McCullough at 650-964-9707 or visit the company's Web site at http://www.macroinc.com.

S-Ware offers Java-based addition to Web package

S-Ware, Halifax, Nova Scotia, is offering a new Java-based tool to complement its Web survey package, World Wide Web Survey Assistant. The new Java editor and updated Web site at http://www.surveyassistant.com are designed to make WWW Survey Assistant easier to use.

The new editor runs as an applet through any Java-enabled Web browser. As no download or installation is required, users will be able to take advantage of software enhancements as they are added. The Java editor can also be downloaded and run as an application independent of the user's Web browser. S-Ware will continue to support its CGI-based editors for users who are not yet using a Java-enabled browser.

Using WWW Survey Assistant, the survey/test administrator needs only to supply the questions. WWW Survey Assistant generates an HTML form and a dynamic CGI script and installs them on S-Ware's server. No programming experience is required. WWW Survey Assistant users need no knowledge of or access to their own WWW server.

The company offers a free demo which is fully functional for two weeks and requires no download or installation.

Features include: runtime range and type checking, custom formulas based on the user's responses, automatic skip

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Research Calendar

INSURANCE RESEARCH WORKSHOP: The Society of Insurance Research will hold a spring workshop series on June 1-3 at the Hyatt Regency Hotel in Atlanta. The event will consist of three consecutive one-day workshops which will address competitive intelligence, product development and primary market research. For more information call Stanley Hopp at 770-426-9270.

SAWTOOTH TECHNOLOGIES SEMINARS: Sawtooth Technologies will hold the following seminars near the company's offices in Evanston, Ill.: perceptual mapping: theory and practice, June 8; conjoint analysis: theory and practice, June 9-10; introduction to ACA & Sensus TradeOff, June 11. The seminars are designed for researchers who have had little or no practical exposure to the techniques. With the exception of the one-day introduction to ACA/Sensus TradeOff, the classes are not training classes for Sawtooth Technologies products. Topics covered include: study design, sampling, analysis and presentation of results; case studies are also presented. Discounts are available for three or more attendees from the same company. For information on fees and registration call Nicole Garneau at 847-866-0870 or visit the company's Web site at http://www.sawtooth.com.

MRA CONFERENCE: The Marketing Research Association will hold its 40th annual conference on June 3-5 at the Chicago Marriott Downtown. For more information call 860-257-4008 or visit the MRA's Web site at http://www.mra-net.org.

SAMPLING WORKSHOP FROM SSI: Survey Sampling, Inc. will present its workshop "Sampling for Research Professionals" in 13 cities between April and July. Covering all aspects of telephone survey research sampling from fundamental definitions to complex methodologies, the workshop is designed both for new employees with some sampling background who want to build their skills and for those with more advanced experience. The cities/dates are as follows:

Fairfield, Conn., April 16
Portland, Ore., April 28
Seattle, April 30
New York, May 5
Boston, May 7
Detroit, May 13
Teaneck, N.J., May 28
Miami, June 9
Atlanta, June 11
Philadelphia, June 16
Pittsburgh, June 18
Houston, June 23
Northbrook, Ill., July 14

The seminars begin at 8:30 a.m. and end at 11:30 a.m. For more information call your SSI account representative or Kitty Britt at 203-255-4200 or send an E-mail to info@ssisamples.com.

Mark Natarus has joined *Alliance Research*, Cincinnati, as vice president of health care services.

John Zepp has been promoted to vice president — research and statistical services at the Toledo, Ohio office of *NFO Research, Inc.* In addition, **Keith Holzmueller** has been promoted to vice president - research and analytical services. At the company's Cincinnati office, **Jeffrey Neiheisel** has been promoted to vice president - general manager.


Zepp **Holzmueller**


Neiheisel **Francis, Jr.**

Joseph L. Francis, Jr. has joined *Cooper Research, Inc.*, Cincinnati, as vice president, client services.

Custom Research Inc., Minneapolis, has added staff members at its Minneapolis, New York and San Francisco offices. **Pedro Medina** has joined the New York office as technical research manager. He had been with Beta Research Corp. in New York. **Sandra Smith** has joined the Minneapolis office as a research manager. She was formerly with BI Performance Services. **Bettina Eichel** has been named research manager at CRI's San Francisco office. She was with Field Research in San Francisco. In addition, the company announced three promotions: **Tom Neri** to senior vice president, client development at CRI's East Coast office; **Chris Sharratt** to senior vice president, client services, at the Minneapolis office; and **Eileen Taylor,** senior vice president, human resources, for all CRI offices. She is based at the Minneapolis office.

Shop'n Chek, an Atlanta mystery shopping firm, has promoted **Cleve Rowley** to president and **Laura Livers** to chief operating officer.

Digital Marketing Services, Inc., a Dallas provider of marketing programs and research services via America Online, has appointed **Dick Barthelmes** director of marketing programs. Previously he was director of interactive marketing for AOL.

Rebecca Leiviska has been promoted to account group vice president at *Conway|Milliken & Associates*, a Chicago research firm.

Tom McGee has been promoted to vice president of *Doyle Research Associates*, Chicago.

Survey Sampling Inc., Fairfield, Conn., has announced a number of promotions: **Peter Brownstein** to senior account executive; **Jerry Cap** to director of information systems; **Michelle (Missy) Richards** to production manager; **Jessica Smith** to international accounts manager. In

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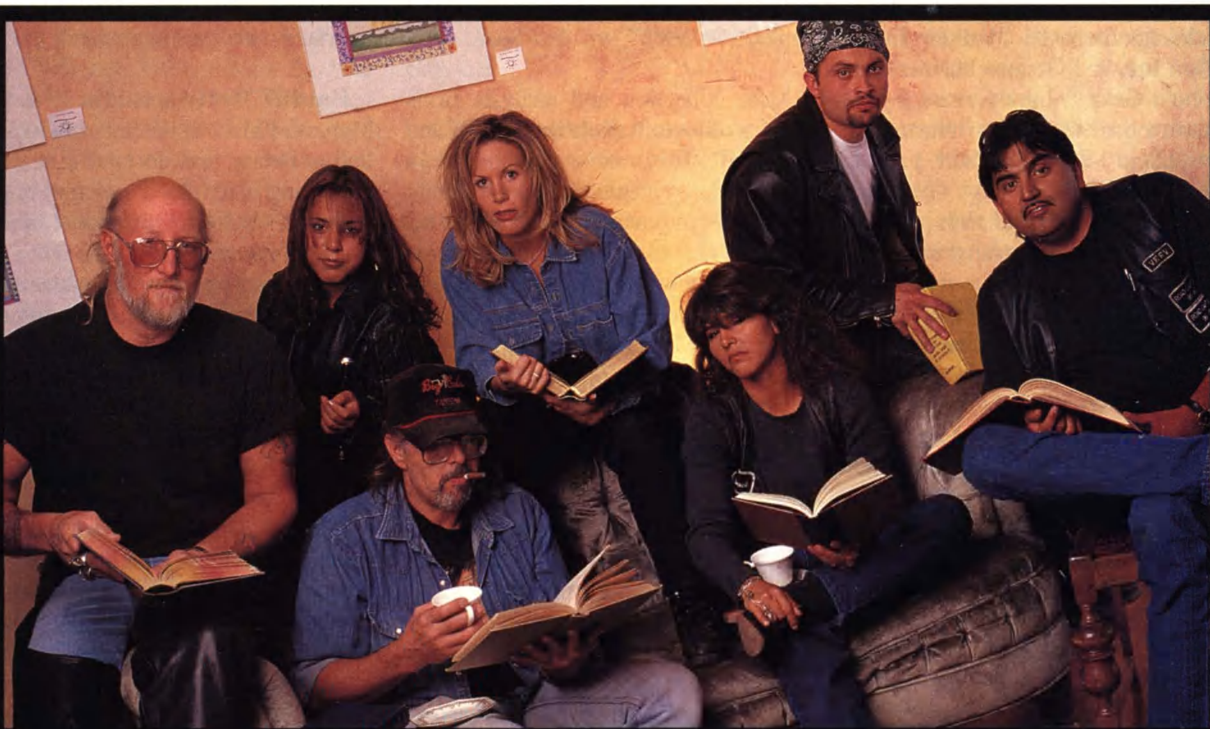


Research Industry News

Indianapolis-based **Walker Information Inc.** and German businessman Reinhold Gelszus have formed a joint venture to create Walker Information Deutschland. The firm will provide business customers in Germany, Austria and Switzerland with products to measure customer loyalty, employee commitment and corporate reputation. Walker Information Deutschland's operations will be overseen by Hans Pokorny, managing director.

San Francisco-based **Consumer Research Associates/Superooms** has opened a new focus group facility in Dallas, containing four focus group suites and a mini-group room. The space also houses the firm's on-site panel recruitment operations. Individual suites feature wraparound two-way mirrors for enhanced viewing and adjacent client lounge areas. For more information call Rich Anderson at 800-800-5055.

Data collection and analysis firms **Rockwell Automation/DataMyte**, and **StatSoft, Inc.**, have announced a worldwide strategic relationship that provides customers with data collection and analysis capabilities by offering a combination of hardware and software solutions. Under the agreement, DataMyte's portable data collectors and Quantum software line will be integrated with StatSoft's STATISTICA Industrial System software. DataMyte will offer to its customer base StatSoft's STATISTICA Industrial system, a data analysis system featuring general and specialized industrial statistics and graphs in a single package. StatSoft will offer DataMyte's Model 501 handheld data collector and the InterGage interface card as part of its integrated data collection and analysis solutions to allow its customers to interface with gage equipment.

Cardiff Software, Inc., a San Marcos, Calif., maker of data collection software, has formed a strategic marketing and development alliance with OTG Software, a supplier of storage and imaging products. OTG will integrate its ApplicationExtender imaging software with Cardiff's automated forms processing software, TELEform. Separately, Cardiff has partnered with Omtool, a fax server provider, to integrate Omtool's Fax Sr. fax server software and TELEform.

MEDEC Business Direct, a list and database provider, has relocated to Two Northfield Plaza, Suite 300, Northfield, Ill., 60093-1219. Phone 800-737-5282. Fax 847-441-3772.

The WorldOpinion Web site has begun a series of on-line profiles of major market research companies in the U.S. and overseas. Each week during 1998, a five-part research company profile will be published on-line at http://www.worldopinion.com.

ACNielsen Corp., Stamford, Conn., more than doubled its operating income, net income and earnings per share in 1997. The company reported full-year net income of $35.9 million and diluted earnings per share of $0.62, both more than double prior-year levels. Operating income more than doubled, to $60.8 million, while the company's operating margin increased to 4.4 percent from 2.1 percent, both after a negative foreign currency translation impact of almost $11 million. Operating income and operating margin figures are prior to a special charge in the 1997 fourth quarter. In other news, the company has become a partner in a joint venture, IBOPE Media Information, that provides media measurement services in Latin America. The other partners in the joint venture are IBOPE, a privately held Brazilian firm engaged in media measurement and political polling, and WPP Group, a London-based communications services company.

NFO Worldwide, Inc., Greenwich, Conn., reported a fourth-quarter revenue increase of 14 percent to $51.8 million compared to $45.5 million for the same period in the previous year. Fourth-quarter net income jumped 40 percent to $4.2 million from $3.0 million a year ago. Revenues for the year ended December 31, 1997 increased by 23 percent to $190.2 million compared to $154.9 million a year earlier. Net income and earnings per diluted share increased by 18 percent for fiscal 1997 to $12.5 million and $0.60, respectively.

Information Resources, Inc., reported net earnings of $3.5 million, or $0.12 per share, compared to a net loss of ($5.6) million, or ($0.20) per share, in the fourth quarter of 1996. Fourth-quarter 1997 revenue grew 13 percent over the year-ago quarter to $121.6 million. For the year ended December 31, 1997, net earnings were $7.7 million or $0.27 per share, compared to a net loss of ($7.6) million of ($0.27) per share in 1996. Consolidated revenues were $456.3 million, up 13 percent over 1996. Revenues from the company's U.S. businesses were $366.7 million, an increase of 6 percent compared to 1996.

The Advisory Group Inc., a Calgary, Alberta, research firm, has been acquired by Telus Marketing Services.

CDB Research & Consulting Inc., New York, has formed a strategic alliance with Illuma, an independent British research agency. The partnership was formed to develop sales promotion marketing criteria from benchmark practices in the U.S. and Europe.

Moosbrugger Marketing Research, Salem, S.C., has opened a new office in Atlanta. The Atlanta office may be reached by calling 888-354-5090.

Schulman, Ronca & Bucuvalas, Inc. has joined Global Market Research, an international market research network, as the American affiliate. The consortium is coordinated by Associated Global Market Research Ltd., in London.

This fall the Master of Science in Marketing Research (MSMR) program at the **University of Texas at Arlington** will offer a record number of 20 scholarships to outstanding students. For out-of-state students, the grant of a scholarship waives out-of-state tuition. In the past three years, more than 30 students have graduated from the MSMR program. The 11-year-old program will offer the most scholarships ever, due in part to contributions from companies such as Decision Analyst, Electronic Data Systems, GTE Directories, Southwestern Bell, Burke Marketing Research, Clorox, Hallmark Cards, Coca-Cola, Roper-Starch, Kantar and M/A/R/C. For more information visit the program's Web site at http://www.uta.edu/coba/market/grad/market.html or call 817-272-2340.

IntelliQuest Information Group, Inc., Austin, Texas, has created, Marketing Information Solutions, a new division focused on providing marketing information solutions to the technology market.

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. He can be reached at 818-782-4252 or at artshulman@aol.com.

Ben Pine of Pine Company tells about his beginnings as a market researcher back in the 1950s, working for one of the pioneers of market research on the West Coast, Dorothy Corey. He was the project director on a beer product placement study to be conducted in San Francisco. At that time, there were not many trained interviewers around, and the ones that existed were being used on another study (coincidentally, being managed by the woman Pine ultimately married). So, Pine had to hire a batch of students from San Francisco State to place the product.

Pine reports that for some unexplained reason, much of the product was never actually placed. Several of the college students never returned his calls, while others gave mysterious excuses such as being in an accident and having their car impounded.

On this same study, Pine reports, the beer cans for the competitive product were supposed to be sandblasted to remove all brand identification, since this was to be a blind test. But, instead of sandblasting, the manager of their San Francisco office decided to have the cans acid-dipped.

When the client heard about this, he became furious, concerned that acid might have leaked into the beer. So Pine, an inexperienced 21-year-old, bearing the brunt of the client's anger, called Dorothy Corey, his big boss, who took the next flight up to San Francisco from Los Angeles.

Corey met with the client, poured beer from the acid-dipped cans into 12 cups, and proceeded to down them all, telling the client beforehand, "If I die, then you're right!"

Corey passed away, but not until over 40 years later, at the ripe age of 93.

Mark Michelson of Michelson & Associates tells about recently having a mystery shopper who revealed his true identity in a most unusual way. Seems this shopper had a preference for wearing women's clothing and doing cabaret performances. He decided to perform a little song and dance routine in the store about being a mystery shopper.

Jewel Alderton of Facts Consolidated tells about when she moderated a focus group in Texas. She was sitting in the respondent waiting room about 10 minutes past the scheduled start time for her group, making some last-minute changes to the discussion guide. The respondents had already been ushered into the room where the discussion would take place, leaving her alone to finish her notes.

Just then, the door opened and a man entered the facility, looked at Alderton and asked, "You here for the focus group?"

"Yes," Alderton replied, "everyone's already in the other room."

"Oh, good," he said, assuming Alderton was another respondent. "I always make it a practice to come 10 or 15 minutes late to these things. Then they pay me off and I don't have to stay."

The guy probably does this lots of times and can honestly respond in the negative when asked if he's participated in a focus group in the recent past.

Alderton also tells about conducting focus groups among women who were at least 25 pounds overweight. When discussing barriers to successful weight loss, one woman confided, "The only thing that keeps me faithful to my husband is the fact that I'm 40 pounds overweight. Just the thought of getting naked and exposing my body with these extra pounds keeps me out of trouble."

Charles Ferguson of The CIA Market Research Company tells about the time his company was recruiting mock juries in a small southern town. When one respondent was told she'd be participating in a mock jury, she responded in true southern form, "Honey, I'm in the jewry business."

Taken aback, the recruiter asked, "How can you be in the jury business?"

The reply: "I sell rings and necklaces, and all sorts of things."

Of course, if she'd sold Stars of David, she'd have been in the Jewry business in a different way.

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. ❑

Segmenting complex business-to-business markets

By Terry Grapentine

Editor's note: Terry Grapentine is principal of Grapentine Co., Inc., a marketing research and consulting firm in Ankeny, Iowa. He can be reached at 515-964-7378.

Historically, chemical manufacturers have been production and sales focused organizations. Management concentrated primarily on ways to improve production, reduce manufacturing costs and develop an effective distribution system. The existence of such a capital-intensive industry was also dependent upon a highly trained and educated sales force whose primary objective was to sell commodity chemicals once major investments in plant and equipment had been made. The term "marketing" was simply not in these companies' lexicon.

The chemical industry has changed much over the past 10 years and many of these manufacturers are beginning to integrate the marketing concept and market segmentation strategies into their overall operations. Over the past several years, one such company has conducted a variety of needs-based market segmentation studies that focus on placing customers and prospects into different segments that share common needs and wants. This firm's marketing mix, therefore, has been changed or modified to focus on the specific needs and wants of targeted market segments.

Over time, however, this company has recognized that, for complex business-to-business markets, a needs-based segmentation strategy must be augmented with other segmentation schemes as the basis for its strategic marketing plan. For one market, comprised of many industries, the company's challenge was to develop a perspective that took into account the following customer characteristics:

• distinct industry needs;

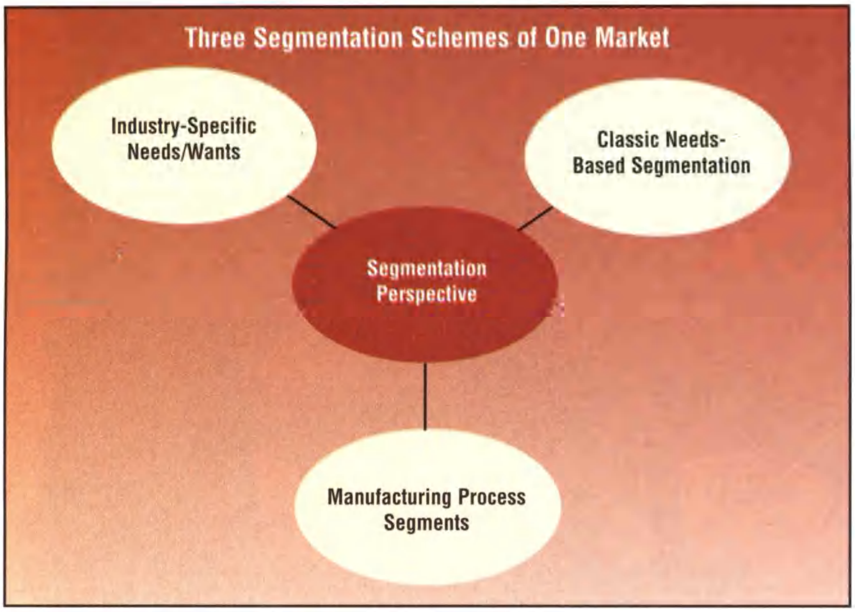
• customer needs and wants that are shared in common across industries; and

• a change in customers' manufacturing processes.

Different industries, such as toy and appliance manufacturers, use this company's product in different ways and, consequently, desire different product benefits and features. Notwithstanding these distinct industry differences, management felt there were certain customer needs and wants that were held in common among certain groups of customers across different industries. For example, new product development assistance is valued by some customers even though these customers are in different industries. Finally, the marketing plan needed to address the fact that customers' manufacturing processes were changing. With this change comes a different set of desired product attributes and benefits.

With this as background, management did not feel that a needs-based segmentation solution, by itself, would provide an actionable foundation on which to develop their strategic plans. A market perspective needed to be developed that recognized the other two market characteristics — differences related to industry applications and changes in customers' manufacturing processes.

As a result, management conducted a marketing research study that produced three different segmentation schemes which, when integrated, formed the basis for their strategic planning efforts, and is depicted in the figure below.



The industry-specific needs/wants classification recognizes that different industries use the firm's product in different ways and, consequently, seek different product benefits depending upon the industry applications. For example, one industry characteristic that differentiates companies is the amount of product required. The amount of a customer's product requirements affects a number of variables in the supplier's marketing mix such as product distribution and price. Consequently, companies that purchase relatively small product volumes are served through distributors as opposed to purchasing directly from the supplier.

The classic needs-based segmentation scheme identifies groups of customers that share similar product and service needs and wants. These different segments cross a variety of different industries. In this manufacturer's study, one of the targeted segments requires new product development

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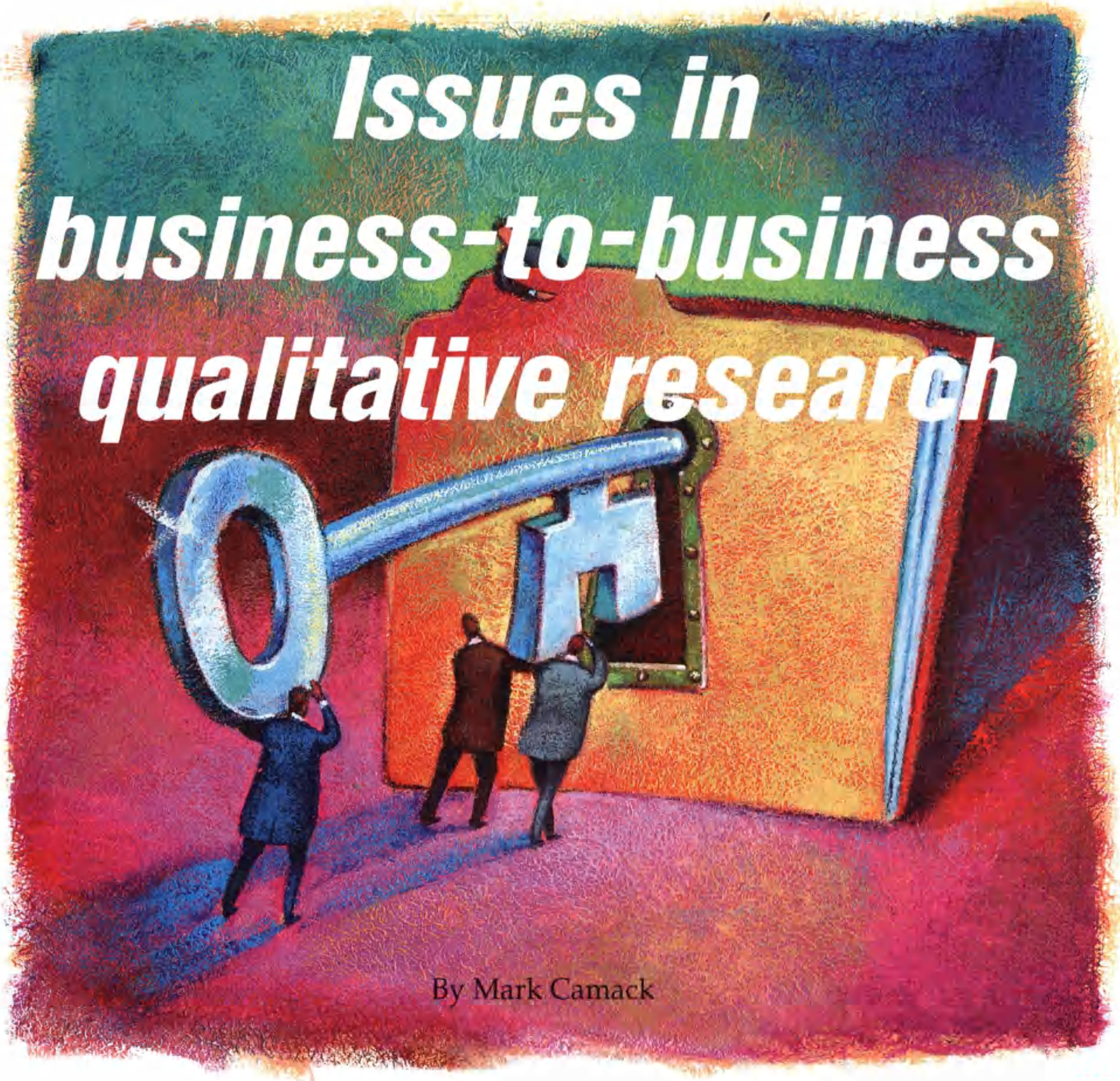
Issues in business-to-business qualitative research



By Mark Camack

Editor's note: Mark Camack is vice president of the Energy Research & Consulting Division of Market Strategies, Inc., a Southfield, Mich., research firm. He can be reached at 248-350-3020.

At first blush, it might seem that conducting business-to-business qualitative research is the same as conducting consumer qualitative. After all, recruiting is recruiting, logistics are logistics, and respondents are respondents, right? Not so!

The world of business-to-business interviewing is unique, with particular issues that require a seasoned interviewer or moderator, strong recruiters, and lots of flexibility.

To begin with, you need a plan, says Peter Brandt, former director of small business marketing for NYNEX (one of the regional Bell operating companies, recently merged with Bell Atlantic). Now a marketing consultant, Brandt says that NYNEX decided it couldn't continue to deal with its business customers on a large, medium and small basis. "We needed a more segmented market approach," he says. So NYNEX started with qualitative research to uncover common business customers' needs and wants.

What did NYNEX find out about business customers? The same things that many other companies have found. Other than among the very largest businesses, which typically had assigned account representatives, business customers felt neglected on one hand and marketed to death on the other, mostly by direct mail and by telemarketing, both interruptions in their business day. Companies hawked their products to these businesses rather than offering

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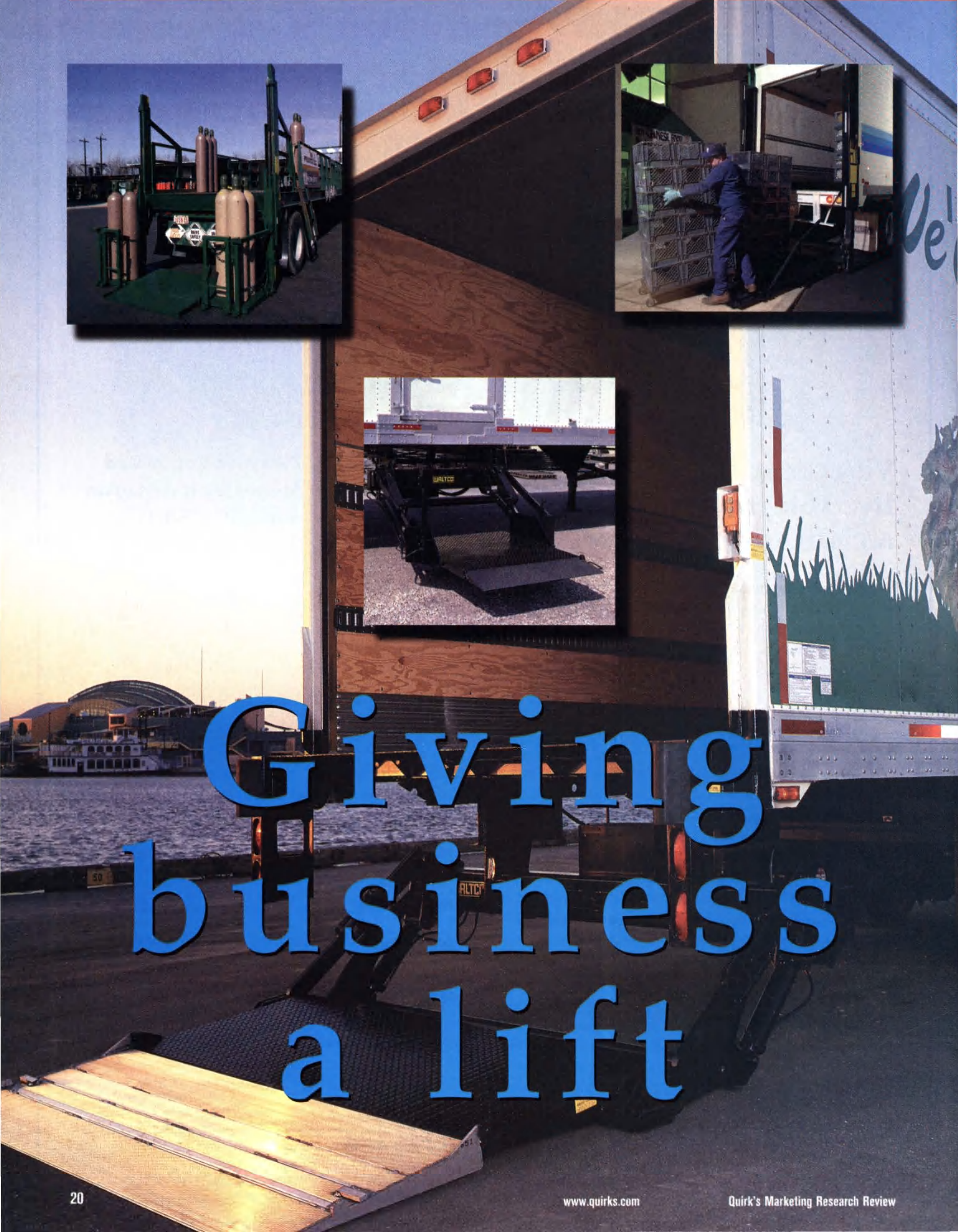

Giving business a lift

One-on-ones help manufacturing firm understand customer concerns

By David C. Lang and Catherine Zacchi

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As W. Edwards Deming said, "Learning is not compulsory...neither is survival." Conducting research is one way businesses can learn, survive and thrive.

Through competitive positioning research, for example, a company can delve into the perceived strengths and weaknesses of itself and the competition. But benefiting from that knowledge requires a willingness to change, as Waltco Truck Equipment Co. discovered.

Founded in 1954 as a division of Waltco Engineering, a parts manufacturer for the aerospace industry, Waltco Truck Equipment manufactures heavy and medium duty liftgates for the trucking industry. The liftgate manufacturer gradually grew into the market leader, with one close competitor in an otherwise fragmented field. In a flat market, Waltco can grow its leadership position only by taking market share from competitors.

"We had long used secondary research such as truck sales figures," says Rod Robinson, president of Waltco Truck Equipment. "We conducted in-house marketing projects, sending marketing and sales representatives to get feedback from our major customers, chiefly on design enhancements and support services. But when we started looking at spending three-quarters of a million dollars on product upgrades, we decided to turn to an objective third party, professional researchers, to see whether the market data supported what our instincts told us was right."

Waltco selected Markinetics Inc., a Marietta, Ohio, marketing research, planning and communications firm with experience in the transportation industry. Using the multimedia capabilities of its Automated Survey and Processing System, Markinetics developed surveys showing the new products and asking questions about them. The touch-screen system collected hundreds of responses from target market attendees at key industry trade shows. While generally confirming Waltco's instincts, the research information and recommendations provided valuable data to aid tweaking of products, positioning, pricing and promotions.

Negative findings brought forward by an objective third party invite less suspicion of hidden agendas, Robinson says. By using an outside resource, Waltco was able to quickly move past the motives of the messenger to focus on the message.

Based on their first experience with primary research, Waltco management decided to use Markinetics to conduct a competitive positioning study. Waltco felt assured that the information it received would not be filtered through the interests of its representative. In addition, customers and distributors taking part in the research could also feel more assured of confidentiality from an outside researcher than from a company representative. The expectation was the confidential, objective interviewer would be able to collect more detailed and candid information.

Decision makers targeted

Targeted research respondents were decision-makers and influencers responsible for specifying, selling, servicing or using liftgates. They were drawn from key market segments served by the company. Given the scattered locations and hectic schedules of the target decision-makers, focus groups were ruled out as impractical. Instead, Markinetics conducted one-on-one, in-depth telephone interviews lasting 20-40 minutes, depending on the depth of the answers. The telephone format also allowed the addition of a second or third decision-maker within a company without the added travel costs that in-person interviews might have entailed.

Markinetics' Senior Consultant Bob Higney designed and conducted the interviews, did the analysis and, with other Markinetics personnel, developed the recommendations. "Every research project begins with three fundamental questions," says Higney. "What do you really want to know? Why do you want to know this? What do you plan to do with the knowledge once you have it? Waltco's concerns were qualitative – answers to 'why' instead of quantifiable statistics to measure 'what.' "

Objectives for Waltco were to gain insight into the following:

• What are the market's attitudes toward and perceptions of Waltco? Why?

• What does the market consider to be Waltco's strengths and weaknesses? Why?

• Of these perceived strengths and weaknesses, what does the market

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HISPANIC BUYING POWER

By Ricardo A. López

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Buying power is a measure of interest for many businesses trying to market to a particular group. It is not proper to talk about buying power for the Hispanic market as a whole. That is because Hispanic buying power varies tremendously within the market. The Hispanic market needs to be studied as an ethnic group that is composed of many different sub-groups that sometimes have very little in common. In addition, the Latino culture is so different from the general market culture that the rules on how much buying power is needed for a particular product or service no longer apply. This article explores the actual buying power of the Hispanic market segments and the differences in what Latinos buy with their buying power as compared to the general market.

The power

The Hispanic market enjoys a very strong economic power that marketers should not ignore. Buying power is defined as the income that is available, after taxes, for spending on goods and services. With a combined buying power of over $223 billion, this market represents an enormous potential to U.S. marketers. Yet, as I mentioned, looking at this figure as a whole is not as meaningful as trying to expose the real market potential. Because it is difficult to find accurate quantitative information on the Hispanic segments, I will attempt to combine my qualitative market knowledge with other

sources of qualitative and quantitative information. Regardless of what the actual numbers are, I have no doubt that the Hispanic market can be very profitable to marketers of goods and services. What makes it truly unique is that, unlike other segments of the U.S. population (that are reached through regular mass media), the Hispanic market can be accessed directly. The Hispanic market media is less saturated with advertising and is more cost effective than the regular market media. This means that, not only do Latinos have purchasing power, but there are also established channels available to gain access to this power.

According to the Bureau of the Census, the average Hispanic (over 15) makes $19,099, as compared to $24,359 for the non-Hispanic population. It is interesting, however, to look at income by Hispanic and ethnic background.

As you can see from the table above, income levels vary greatly among Hispanic subgroups. Cubans have a significantly larger income level and, as a result, enjoy higher disposable income. In fact, the average Cuban income level is not significantly different from that of the general population. A further study would reveal that Cuban income levels vary considerably within the U.S. Cuban population. In fact, there are more distinct social class differences among U.S. Cubans than among any other Hispanic market segment. In contrast, the income level of U.S. Mexicans and Central & South American Latinos is extremely low and has continued to decline in the past two years. U.S. Census statistics (1995 numbers released in January 1997) indicate that median family income rose for every racial and ethnic family group except for Hispanics - the fastest growing group. This downward turn has surprised many experts that predicted a rise in Hispanic income levels.

Why has Hispanic income gone down? Many reasons have contributed to the decline but most of them have to do with the new influx of Hispanic immigrants. New immigrants are coming to this country with minimal education and work skills. While many are capable of performing well in blue-collar jobs, changes in the economy have reduced the number of well-paying blue-collar jobs. A large obstacle in gaining employment is the inability of new immigrants to speak English. Discrimination has also played a role in their difficulty in finding good jobs. Of the two million new immigrants that came into this country from Latin America between 1990 and 1994, the majority were poor. They moved to inner cities and crime-infested areas, making it very difficult for them to advance themselves. Many Hispanics end up working in low-paying positions in the service industry that have few or no opportunities for advancement.

Earnings of Persons Age 15 and Over by Race-Ethnicity and Sex

Ethnic Background	Male	Female	Combined
Mexican	17,730	12,413	15,072
Puerto Rican	21,909	16,413	19,161
Cuban	31,388	16,635	24,012
Central & South America	18,692	12,646	15,669
Other Hispanic	22,391	15,147	18,769
White Not Hispanic	32,223	17,944	25,084
Black Not Hispanic	20,480	16,066	18,273
Other Not Hispanic	30,208	20,592	25,400

Source: Census Bureau - Hispanic population from the March 1994, current population survey.

Social history and income levels

A closer look at the different Hispanic market segments will reveal some of the reasons behind the different income levels. The Cuban community in Miami is largely made up of exiled educated professionals and skilled laborers that left Cuba for political reasons. It was indeed

Cuba's middle and upper class that flooded Florida during the Cuban revolution. In contrast, the Puerto Ricans who went to New York arrived there looking for a better economic situation than what they were experiencing on the island. They were poor. Interestingly, they originally came to New York because it was the main airline route to the United States. Since these immigrants were already U.S. citizens, there was nothing that prevented them from leaving the island for New York. During the great depression, thousands of Puerto Ricans looked for New York to offer them a better lifestyle.

The Puerto Rican immigration history is a lot closer to that of today's new immigrants. Today's immigrants are fleeing from deplorable economic situations in their countries of origin. They are also poor, but despite their tough economic status in the U.S., they are often doing better than they were doing back home. Many immigrants come to the United States illegally, on a temporary basis, in order to make some money to take back to their country. That is the case of thousands of Mexicans who cross the border to find jobs in the U.S.

The Mexican population is also highly fragmented. Many Mexicans are long-time U.S. citizens. In fact, many of them never migrated. Their ancestors were there when the U.S. took over the West in 1848, as a result of the Mexican War. They are the original U.S. Hispanics. Many others just recently crossed the border. Since many of these new and illegal immigrants lack any formal education, they all compete for the available blue-collar jobs. Although many industries in the Southwest depend on Mexican labor, the jobs pay very little because of the very large pool of available workers.

Why do most Hispanics stay poor?

The U.S. is the land of opportunity. Over the years, immigrants from all over the world have come to this country and managed to work hard to improve their economic situation. What is different about the Hispanic immigrants? To answer that question, you have to take into account the fact that the times have changed. Today's immigrants do not arrive here by breaking all ties with their homelands. While just a century ago people would take a long boat trip across the Atlantic to get to this country, today's immigrants can move here overnight and go back to visit the following week. They never have to lose touch. From the airlines to the telephone to the television and even the Internet, new immigrants can keep in touch with their homeland. Even in this country, the Hispanic community keeps in touch by creating its own home away from home. Hispanics have Spanish television, can read most product labels in Spanish, can easily purchase their favorite ethnic food at the local supermarket or bodega, and can socialize with others who speak their language and share their culture. This is indeed very different from the old melting pot culture where immigrants forced their children to forget their mother tongue and become part of the new culture.

Hispanics place a high value on being able to maintain their customs, language, and culture. The U.S. freedom allows it, and it is indeed attractive. Yet, I argue that not "melting into the pot" creates a difficult situation that leads to lower income. By insisting on being "different," Latinos are promoting discrimination. When Puerto Ricans wear their flag on everything from their cars to their T-shirts, they are making a statement that says, "I am proud of my heritage," but it is often read as "I am not part of this country." That leads to a common reaction: "Well, get the heck out!" which is also known as discrimination. Discrimination often leads to a lower income. This is especially true of Hispanic communities that consist of individuals with minimal education and labor skills. These communities depend on the jobs provided by members of an outside community. The number of Hispanic businesses that provide job opportunities to their own community is extremely low, compared to other ethnic groups like Asian Americans. There are exceptions. One, of course, is the Cuban community in Miami, whose Hispanic-owned businesses hire four times as many people than Hispanic-owned businesses in New York City.

Besides discrimination, there are other factors that affect income. To keep their culture, Hispanics often move near other Hispanics in typical Latino neighborhoods. Some of these neighborhoods have deteriorated — victims of crime and drug problems. To complicate matters, public education systems in many Latino neighborhoods are overcrowded and underfinanced. As a result, Hispanic young people are not receiving an equal education. Since English is not the language of choice in most Hispanic neighborhoods, and the schools are not adequate, many Latinos are not proficient enough in English to obtain decent employment. What is worse, because Spanish is not taught in school, many Hispanic Americans grow up not knowing how to read and write in Spanish.

Despite my contention that Latinos would be better off financially if they tried to blend into the American culture, I don't agree with that approach. Looking at the situation from an economic standpoint you must give value to the desire of Hispanics to keep their customs, language and culture. I argue that this value is so high that it justifies whatever negative effects may occur — discrimination, lower income, or even bad neighborhoods. Since the Hispanic population continues to grow at a higher rate than any other minority group, these problems will eventually disappear. Even today, Spanish culture is quickly becoming ingrained into the American culture. Tacos are now as popular as hot dogs and hamburgers in the typical American diet, and Spanish words are becoming part of the American language — ¿Comprende?

Low income...large purchasing power?

While the income level of U.S. Hispanics has gone down, the combined purchasing power keeps going up. This is, of course, because the numbers keep growing. The Hispanic population is projected to account for 44 percent of the U.S. population growth between 1995 and 2025. That is 32 million Hispanics out of a total of 72 million people added to the nation's population. Hispanics will continue to value their culture and heritage. Businesses that cater to them directly and pay attention to the Hispanic culture and heritage will benefit from tapping into this large source of purchasing power. It is indeed the Latinos' desire to maintain their roots that makes this market so receptive to target marketing.

Differences in use of disposable income

Hispanic buying habits are different from those of the general population. Despite their low income, many Hispanics will spend an inordinate amount of money for products that cater to their Latino needs. Hispanic consumers spend more on food than their non-Hispanic counterparts. They tend to buy brand name products that advertise on Spanish television. Brands that sell well in their Hispanic country of origin also do well with Hispanics here in the U.S. Most importantly, the Latino community will embrace any product that is manufactured and marketed to meet their needs, regardless of cost. Let me illustrate this point with a case history of an actual product:

Efficient Laboratories is a small, family-owned pharmaceutical company based in Puerto Rico. It specializes in marketing products to Hispanic consumers. One of its products is a cough syrup called Cough Out. Cough Out is an expectorant, whose active ingredient, guaifenesin, is the same ingredient found in almost all other expectorant products. A bottle of Cough Out contains 3 ounces of the syrup, while a bottle of a well-known brand like Robitussin typically has 8 ounces. Yet Cough Out sells for at least double the price of Robitussin. Here's why.

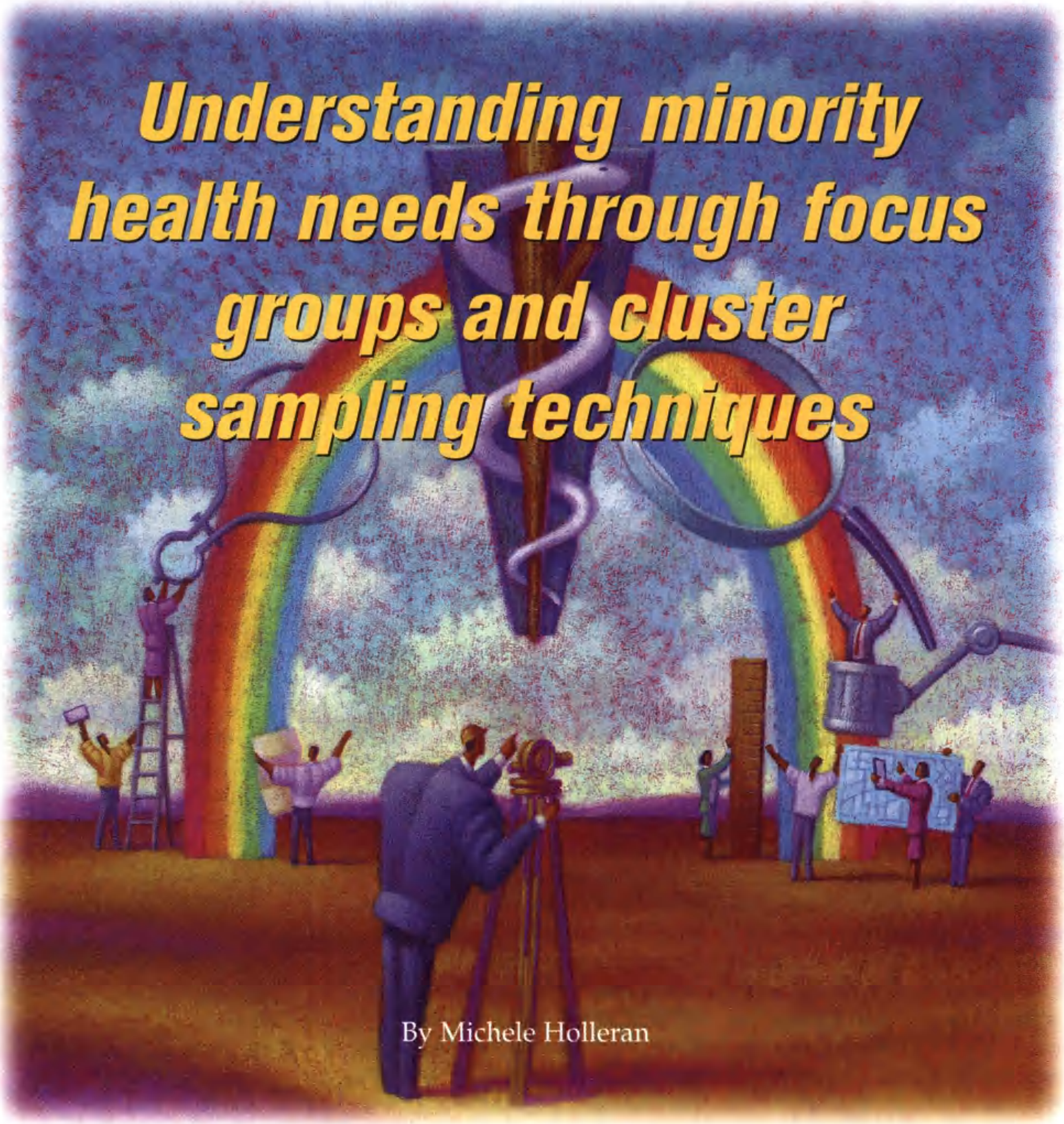
Cough Out was designed with the target market in mind. To appeal to the Puerto Rican community in New York, an English name was selected. The company knew that although Puerto Ricans value a product targeted to them, they want to feel that it comes from a reputable company. The research told the people at Efficient that an English name translated into "American Quality"— a positive when it came to a product that is to be ingested. The label, however, is written in English and Spanish. To be able to compete effectively in the crowded expectorant market, the product had to have a unique selling proposition. Research again came with the answer. Many Puerto Ricans and Dominicans believe that one of the best expectorants available is aloe vera. It was also indicated through the research that they saw honey as the best soothing remedy for a sore throat. Efficient asked their lab if they could add aloe vera and honey to their cough medicine formula. They did.

A TV campaign was developed emphasizing the fact that this product was different. In order to comply with the law the voice-over mentioned that the active ingredient guaifenesin came suspended in a base that contained aloe vera and honey. The aloe vera plant was emphasized visually. The product sold very well. Later research indicated that consumers who regularly bought the product stood by it, regarding it as a much better expectorant.

This product was manufactured specifically to meet the market's needs, but that doesn't have to be the case. More often it is a matter of positioning the product correctly. But you cannot use your regular market knowledge as a guide to how Hispanics will use their disposable income. It is important to study the Latino culture and its different segments. That's where marketing research comes in.

No need to wait

Given its projected growth, reaching the U.S. Hispanic market should be a part of every company's marketing plan. But there is no need to wait for the projections to come true. Marketing to Hispanics can pay off now! Companies that set aside a budget to target the Latino market find it to be a very profitable and worthwhile decision. ❑



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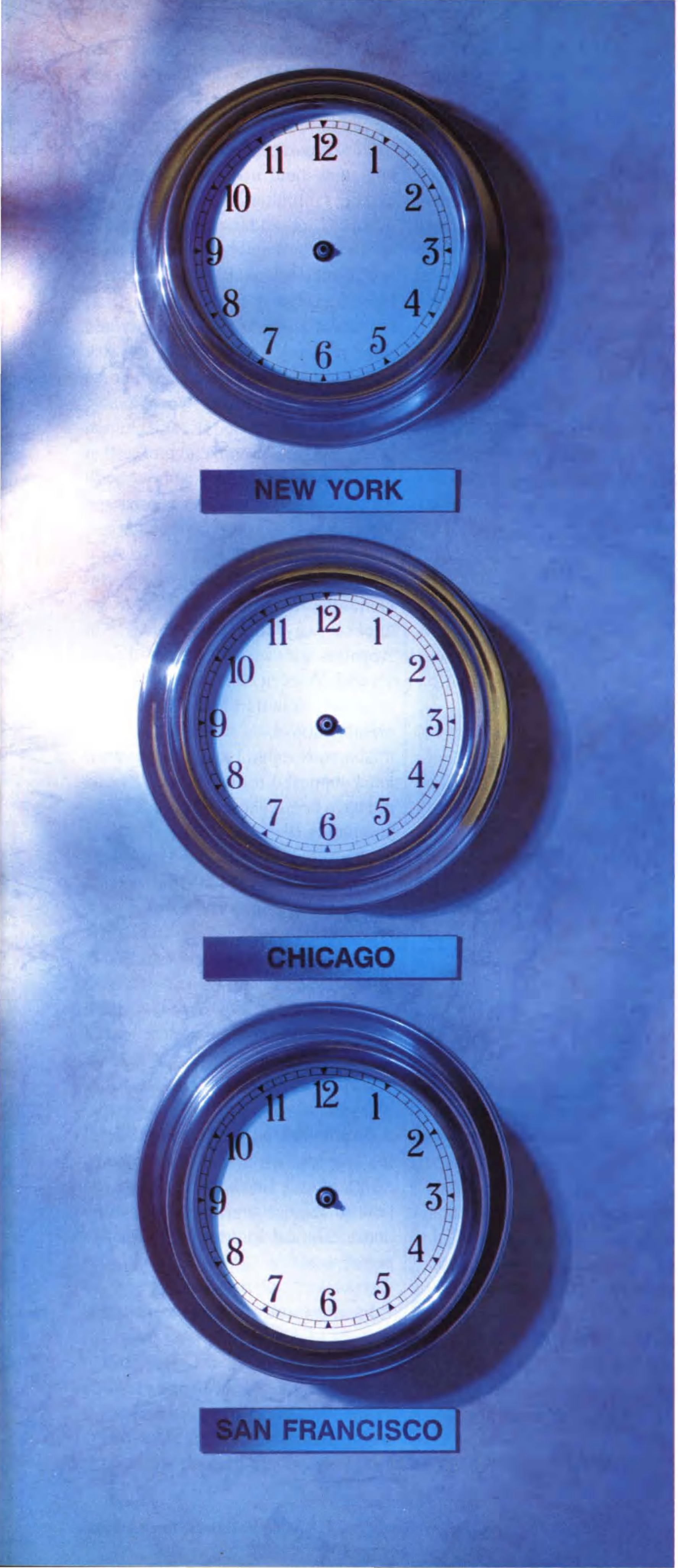
Minority health issues have come center stage in the past year as managed care has embraced new subscribers and uncompensated care by hospitals has reached an all-time high.

"Minority," for the purposes of this article, is defined as any group of persons under-represented in traditional population-based health research due to lack of access, interest, or ability to participate in such studies. Such individuals include the unemployed, homeless, illiterate, some ethnic minorities, the disabled, and medically indigent. As a group, these individuals represent a significant portion of the population. However, their individual health needs, risk behaviors and circumstances may look very different from one another. Certain types of health risk behaviors are more prevalent among this group and, therefore, health professionals stand to gain a lot by getting behind the health risk behaviors to understand motivations and perceptions which contribute to those behaviors.

A classic example is the case of Hispanic male youths who are encouraged by their Latin culture to smoke cigarettes. Because the number of Hispanics is growing in the United States, health professionals are very interested in understanding what, if anything, could be done to discourage smoking among this pop-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ulation. According to Healthy People 2000 (a national health initiative coordinated by the U.S. Public Health Service), tobacco use is estimated to cause more than one of every six deaths in the United States and is a major contributor to heart disease, lung and other types of cancers. Hispanic males residing in the United States are almost twice as likely to smoke (40 percent do) compared to the United States average.

As another example, it has been found that many African-American females with addictions and chronic health problems need non-traditional approaches to rehabilitation and disease management. Studies have linked these illnesses to "internalized racism" (the erroneous belief that African-Americans are inferior to some races), suggesting that until the self-esteem of these females is improved, their health will not.

Focus groups lend useful insight

Much of the knowledge we possess today about minority health has been garnered through qualitative research such as focus groups. Because many members of minority groups are skeptical of government or hospital sponsored survey processes, face-to-face research may be more appealing because it allows two-way dialogue. The perception of minority members is that their collective voice is heard more accurately and completely in a focus group session than it would be using a more impersonal technique such as a written or phone survey. Face-to-face research also allows participation by people who can't read or write.

However, traditional focus group research has its limitations as well. Without anonymity, minority populations asked to discuss controversial health issues such as domestic violence, child abuse and sexual behaviors, may be hesitant to speak up unless their opinions can be shared confidentially. One tool useful in preserving confidentiality is a wireless keypad system. It works like this: participants are asked to respond to a statement such as, "Women who smoke during and after pregnancy put the lives of their children at risk." Participants are asked to indicate their level of agreement with the statement by pressing the keypad number that corresponds to their opinion (1 = strongly disagree; 2 = disagree; 3 = somewhat disagree; 4 = somewhat agree; 5 = agree; 6 = strongly agree). Once all the participants have voted, their numbers are recorded and displayed on a screen for all to see and discuss. This approach depersonalizes the opinions and can reassure participants who see that others may share their same opinions. Often this realization prompts participants to talk about why they hold a certain opinion. A skilled facilitator can further probe group members by asking questions about their knowledge on certain health subjects and their personal risk behaviors. Going further, the facilitator can often learn about what would need to change in order for the risk behavior to be eliminated. In the case of smoking during pregnancy, women's perceptions can change after they hear concrete evidence that smoking contributes to low birth weight babies, as well as asthma and respiratory illness among young children.

In one memorable focus group session, the facilitator was able to uncover why poor women living in Appalachia refused to have breast screenings even when those screenings were free and offered at convenient locations.

Shared one participant: "Now what am I supposed to do if I found out I did have breast cancer? I'd have to get an operation, get chemotherapy, have a long recovery and end up dead within a year anyway. I'd be worried sick the whole time and drive myself crazy, not to mention fret about the cost of medical bills. How would this affect my kids, knowing their mama is going to die? No ma'am I don't need to or want to know if I have breast cancer. I'd be better off just not knowing and letting nature take her course."

Getting behind the whats and delving into the whys of behavior helps health professionals gain insight on how to remove barriers and develop non-traditional solutions for minority populations.

Education and the right communications message

Sometimes those solutions lie in more accurate education or a message from a compelling, respected spokesperson with whom they identify. This was the case in a northern

New Jersey town where prostate cancer among male African-Americans was significantly higher than rates among other ethnic populations. A national awareness campaign featuring actor Danny Glover encouraged African-American men to have prostate cancer screenings. The message was delivered through African-American churches and the local hospital offered the screenings free at convenient locations. This campaign was enormously successful and resulted in a sizable number of prostate cancer screenings among the target population.

Profiling high-risk minority populations has interesting implications for disease and demand management programs. Persons in minority groups are often categorized as "avoiders," meaning they avoid care unless they are severely ill or injured; they are not particularly interested in seeking health information and they are minimally involved in their own health or the health of their families. Consequently, they are less responsive to communications about their health and much less likely to be motivated about disease prevention and management. However, they will respond if approached in a manner that is culturally sensitive and hits a hot button.

Cluster sampling as an alternative

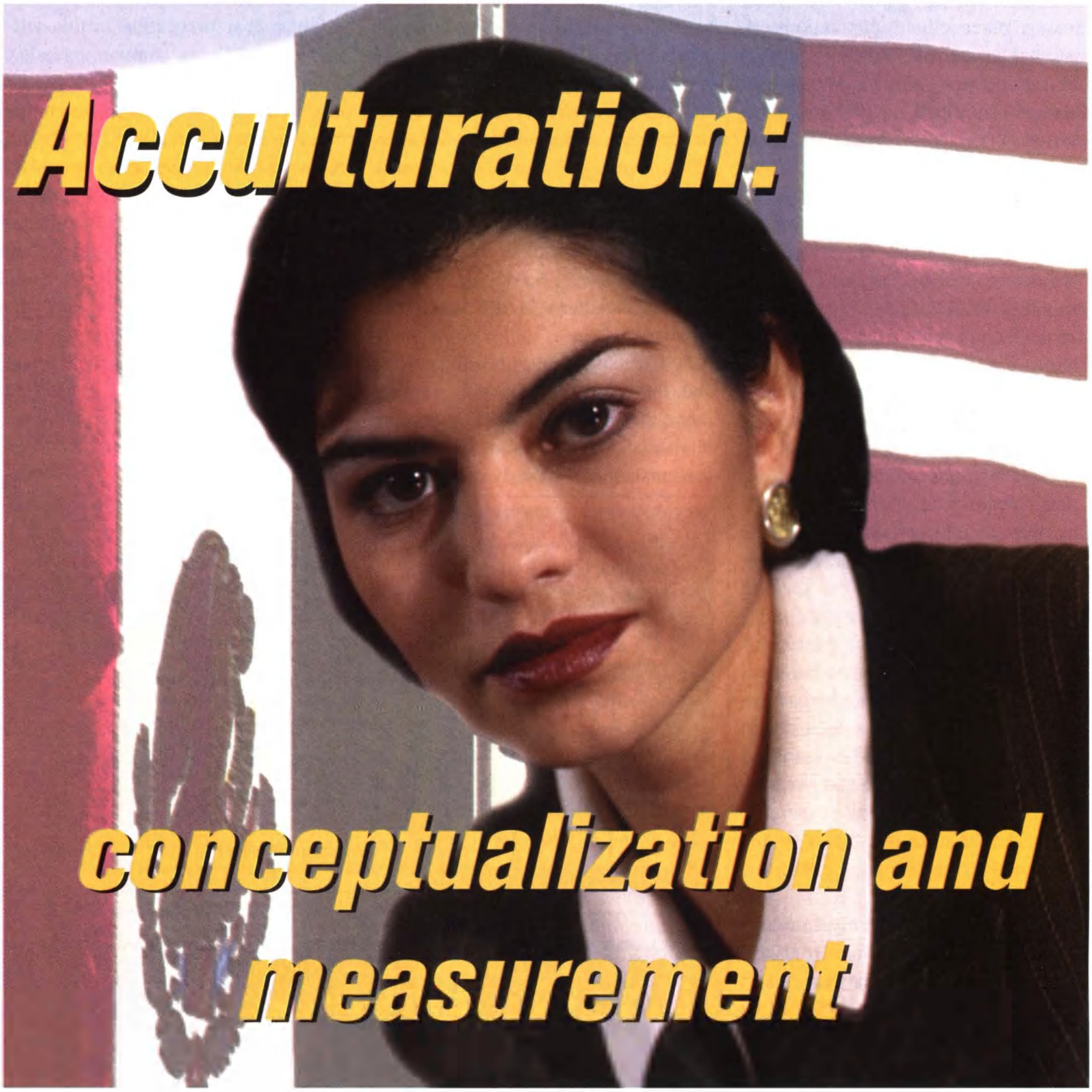
Cluster sampling is another useful technique used to identify health needs among minority populations. The homeless are more likely to participate in a health survey process if they are able to be led through a facilitated session at a convenient, safe location within their community. Such research can shed light on the propensity of the homeless to have their children immunized, eat a healthy, balanced diet or be at risk of AIDS. Such information can help public officials establish policies and health care marketers devise appropriate communication messages.

Data from cluster sampling should be viewed as directional input because it is not considered projectable to the entire sub-population universe being studied. A cluster sample is a more informal process, gathering together groups of people who fit a certain demographic or psychographic profile to participate in a survey process. Nonetheless, if enough individuals are recruited for participation, strong trendlines emerge, giving health researchers excellent insight into areas of concern. As with focus groups, cluster sample participants may need to be given a monetary incentive in exchange for their feedback.

Self-management is the long-term strategy

Self-management of health is a crucial dimension of demand management, the concept of the right amount of care at the right time. Health professionals today strongly advocate the adage "an ounce of prevention is worth a pound of cure," especially in this era of managed care.

Given that preventive health self-management is more readily embraced by better educated, higher income groups with few access barriers, this poses a challenge for health marketers. How can health providers provide incentives to certain minority populations (the "avoiders") to better manage their personal health so they won't end up in the emergency room with a costly illness or disease? The answers are complex and vary greatly by each sub-population. Each group has different reasons for neglecting their health. Focus group and cluster sample research can get to the bottom of them. ❑



Acculturation: conceptualization and measurement

By Felipe Korzenny and Rebecca Abravanel

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As market researchers, a question we frequently hear is: "Aren't Hispanics gradually assimilating into the mainstream of U.S. culture and, consequently, becoming part of the general market?"

This is an important and understandable question, deserving of careful consideration. The research answer involves an understanding of immigration patterns, socio-political realities, and cultural tendencies of Hispanics in the U.S. Some marketers may argue that if Hispanics are becoming part of the general market, why should anyone bother to design specialized strategic approaches to target them?

The conceptualization and measurement of acculturation becomes particularly relevant in addressing that key concern. Marketing practitioners can only answer that question empirically, through research.

A conceptual framework

In contrast to tendencies of immigrants who came to the U.S. at the turn of the century, Hispanics have seemed to maintain their original culture to a large extent. The reasons are complicated and include the following:

• It is estimated that about 75 percent of all U.S. Hispanics were born outside the U.S., consequently their

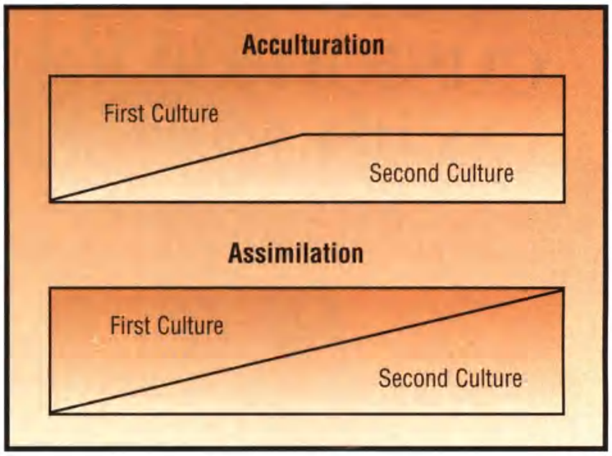
first language is Spanish. Also, immigration of Latin Americans to the U.S. continues to be strong, particularly from Mexico.

- U.S. Hispanics find welcoming niches in U.S. society where they can enjoy their original language and culture.
- Many U.S. Hispanics are very close geographically to their country of origin (most U.S. Hispanics, about 65 percent, are from Mexico).
- Modern telephony and aviation allows for frequent contact with their culture of origin.
- Electronic media, including movies, television, video recordings, and the Internet, allow for the continuation of the cultural experience initiated in their countries or origin.

So to a large extent, U.S. Hispanics and other modern day immigrants can customize their private cultural experience. Many U.S. Hispanics continue to speak Spanish and are closely tied to their cultural roots; however, many do learn the language and culture of the majority society, and thus become bicultural and bilingual to varying degrees.

Acculturate or assimilate?

Enculturation is the process of learning one's first and original culture. That is, the socialization process that influences how we behave, think, and feel from early in life. Acculturation, on the other hand, is generally considered to be the process of learning a second culture. Further, and in contrast to acculturation, assimilation is understood to be the abandonment of one's first culture in favor of a second culture.



So all people are enculturated in a culture of origin. Some immigrants to another country may gradually lose their original culture in favor of the second, thus assimilating. Many immigrants, however, may learn the second culture but prefer to preserve their original culture as well. That is, they decide to acculturate by adding a second culture to their behavioral repertoire.

Those who acculturate but do not assimilate may keep their culture of origin for enjoyment around friends and family, and for personal satisfaction. That is what seems to happen with a large number of Hispanics. They may in varying degrees learn the U.S. mainstream culture but do not abandon their original culture.[1]

Acculturation and assimilation are continua

There are multiple degrees of acculturation and assimilation. Talking about perfect biculturalism may be fruitless because people acquire cultures to varying degrees. So we are talking about continua. The diagrams may serve to illustrate the concepts.

In describing acculturation, one sees a gradual acquisition of the second culture, and then a state of equilibrium in which both cultures play a role. The exact point at which the first and the second culture stabilize is expected to vary widely. For some, the first culture may play a role of much greater importance throughout their entire lives than the second culture.

For others, the second culture may take over completely, as illustrated in the lower part of the diagram. In this case, assimilation can be viewed as an extreme case of acculturation, in which the second culture dominates totally.

Also, it is important to notice that acculturation and/or assimilation can happen in one generation or across several generations. For example, some individuals of Mexican origin in Falfurrias, Texas, may still preserve the culture of their ancestors with relatively little modification, and their participation in the U.S. general culture may be somewhat limited.

Diverse indicators

So, how do we measure acculturation? There are diverse indicators of acculturation, the most common ones being:

- Language usage
- Media behavior
- Ties to people in country of origin
- Length of U.S. residency
- Value expressions
- Interpersonal network composition

In our practice of marketing research, the indexes used to account for acculturation may include measurements for many or just a few of the above indicators. One would choose fewer indicators when the nature of the study requires brevity. Sometimes the choice of items depends on the conceptual nature of the study.

Language indicators

A good proxy for language usage is

a set of items measuring the amount of English or Spanish spoken in different situations. A very appropriate scale is: On a scale[2] from zero to 10, zero being "not at all" and 10 being "a lot" please tell me how much you[3]...

- Speak Spanish when at home?
- Speak English when at home?
- Speak Spanish when at work?
- Speak English when at work?
- Speak Spanish with friends?
- Speak English with friends?

While other context-specific items can be included, these should suffice to provide an indication of the prevalence of Spanish and English spoken in key daily life contexts. The reader can see that by having a separate scale for each item, a respondent could give a high score to all items. That would demonstrate a relatively high degree of acculturation into the second language while at the same time preserving the first language.[4]

Media behaviors

Media exposure tends to be even more amenable to continuous measurement. Thus, asking the following renders good discrimination:

- About how many hours per week do you usually spend watching television in Spanish?
- About how many hours per week do you usually spend watching television in English?
- About how many hours per week do you usually spend listening to the radio in Spanish?
- About how many hours per week do you usually spend listening to the radio in English?

Other media behaviors, particularly for print, can also be included. Again, the nature of the study generally influences which items may be most relevant. Clearly, the resulting mix of number of hours of exposure to each medium and language can be in any combination. That allows for the measurement of any degree of acculturation or assimilation.

Length of U.S. residency

This is an interesting indicator of exposure to the U.S. mainstream. The number of years of U.S. residency divided by age provides a fraction that indicates the proportion of an individual's life spent in the second culture.

Value expressions

Attitude statements that reflect cultural orientations are of great value in the measurement of acculturation. We usually measure these statements on a zero to 10 scale similar to that described above, i.e., On a scale from zero to 10, where zero means "totally disagree" and 10 means "totally agree," how much do you agree with each of the following statements?

- One of my most important goals is to get ahead in life.
- My family comes first in my decisions about life options.
- I long to return to the land of my ancestors.

These are only three examples of a large battery from which we choose value orientations. These represent expressions of values that lean towards the U.S. mainstream or to traditional Hispanic values.

Interpersonal network composition

The proportion of friends who are

of one's own cultural background also serves as an indicator of acculturation or lack of it. Thus, one can ask: Of 10 of your friends, how many of them are Hispanic?

Other indicators of acculturation can also be used, including kinship relationships, and food customs. For the sake of example, however the above categories may suffice.

Creating the index

An index of acculturation can then be created as follows:

• Run a confirmatory, one factor, factor analytic solution on all the above indicators.

• Use the factor score coefficients of the solution, preserving their sign.

• Create an index of the following type:

$$\text{Acculturation Index} = (\beta 1)X1+(\beta 2)X2+(\beta 3)X3+.....(\beta n)Xn$$

In the above index the beta coefficients are the factor score coefficients from the factor analytic solution. Consequently, the final index reflects the degree to which an individual uses language, media, second culture residency, expresses cultural values, and has a first culture network. The meaning of the sign of the resulting score can be interpreted depending on the sign patterns obtained in the factor analysis. That is, if those items leaning towards Spanish tend to load positively, then the English ones are likely to load negatively.[5]

A powerful index

The resulting index can be used for the prediction of different types of consumer behaviors. As a continuum it allows marketers to talk about acculturation as a matter of degree.

Those who prefer categories can take segments of the continuum in the index to label diverse types of consumers, thus constituting insightful psychographic profiles.

And quite importantly, the continuum of acculturation allows for the empirical answer to the question: To what extent do Hispanics assimilate or acculturate? ❑

[1]Another important consideration is that culture is contextual. Certain aspects of culture may be selectively learned or preserved depending on the specific needs of the individual. Someone may be "very Mexican" in family life, and quite "American" at work.

[2]A zero to 10 scale has been shown to be reliably and validly used by Hispanic respondents.

[3]The full instruction for the scale is not included here. It needs to be stressed to respondents that they can use any number in the scale. Also the scale needs to be read for them at least for the first two items.

[4]Someone could argue that speaking Spanish or English are discrete activities, and that one could not speak a lot of English and Spanish at the same time. Perceptually, however, expressing that one speaks both languages "a lot" could best represent the reality of an individual, and that duality may more accurately portray his/her degree of acculturation.

[5]Depending on the subgroup being studied, this is not always the case. A bicultural community may have all items loading positively.

Kwanzaa and its marketing implications

By Joan Lawton and Karen Gunn

Editor's note: Joan Lawton is vice president of Erlich Transcultural Consultants (ETC), a research and consulting firm in Woodland Hills, Calif. Karen Gunn is one of ETC's African-American moderators and diversity consultants.

In marketing to the African-American population, one must consider the obvious ways in which it is segmented such as age, economic class and geographic region. In addition, diversity exists in political affiliation, family composition and lifestyle.

Having addressed all of these factors, what may still remain unanswered is: Are there any potentially unifying viewpoints or characteristics with implications for marketers? The African-American celebration of Kwanzaa, observed from December 26 to January 1, serves as a source of understanding that can be used by marketers to produce the positive, dignified images that will serve to attract and retain African-American consumers.

Kwanzaa revolves around seven principles for life and lifestyle that are purposefully Afrocentric. These principles were offered by Kwanzaa's originator, Dr. Maulana Ron Karenga, as fundamental universal laws for people of African descent. (While these principles permeate the African-American population, they cannot be considered stereotypes.) Begun in 1966, Kwanzaa "is an outgrowth of many customs, joined with ancient African tribal practices"[1] and employs Swahili, an East African language, to identify the seven principles. The holiday is enjoyed as a festive yet mindful group-affirming celebration. Marketers can link some of Kwanzaa's principles to successful marketing efforts — if their implications can be sensitively articulated. Our company's research experience suggests that many African-American consumers have generally adopted these values which would be likely to impact their particular views and perceptions of products and advertising messages.

Umoja expresses the value of achieving family, community, and ethnic unity; working towards solidarity, mutual support and interdependence. Thus, it would be important for marketers to present positive, inclusive images. For example, the different physical statures and characteristics in the population and various forms that "family" can take (from extended to single- and dual-headed households) need to be evident in advertising and visual displays. One application of this idea would be using mannequins (at retail outlets) that are more representative of African-Americans and which depict the various, actual body shapes for both men and women. Marketers might also include a variety of family images in advertising (e.g.,

multigenerational, nuclear, and single-parent families).

Using music that ranges from hip-hop to blues to jazz in advertising is another reflection of umoja and tends to appeal to African-Americans. It reflects this population's experiences and feelings as members of U.S. society and, to some extent, documents and depicts African-Americans' journey through U.S. history. Great care should be taken, however, to ensure that any advertising creates an approach that reflects the vast diversity within the African-American population. Advertising that portrays people in mutually respectful interaction and acceptance has value with many consumers.

Marketers can link some of Kwanzaa's principles to successful marketing efforts – if their implications can be sensitively articulated.

Kuumba encourages African-Americans to employ their imagination, creativity, and unique talents as a form of self-expression and to improve the aesthetic and physical environment of their communities. This has many implications for marketing strategies. In one respect, past ETC research has shown that many African-American women tend to seek "highstyle," brightly colored fashions that may be worn to work or to community events along with Afrocentric accessories and various types of hats. The expression of African-American individual creativity in this manner is an important consideration. A current promotional spot for the United Negro College Fund, for instance, depicts a woman shopping for a hat to wear at her grandchild's college graduation. Seeing African-American women represented in this manner in advertising might fit with the consumer's self-image and, thus, make the marketer's ad campaign more effective. Seen from another perspective, marketing a product through images of African-Americans engaged in some creative or community project or activity would, most likely, capture the attention of consumers who are invested in this particular Kwanzaa principle.

Kujichagulia endorses group self-determination and valuing group history, goals and individual ethnic identity. *Nia* stresses a (re)dedication to preserving and appreciating African-American heritage and passing it along to younger generations. Together, these principles of Kwanzaa encourage the representation of the wide range of occupations in this population, incorporating images of historically important figures and showing artwork by well-known African-American artists. The blending of these two Kwanzaa principles has been particularly successful in the Afrocentric greeting cards by Hallmark's Mahogany line and by Carole Joy Creations. The successful application of these principles can also be seen in the FUBU ("For Us By Us") apparel line and at Charleston's Nu South Boutique.

Another example of this successful blend can be seen in African-American-themed films now coming from Hollywood (e.g., *Eve's Bayou*, *Soul Food*, and *Amistad*). When these films emphasize family entities or a universal family of ancestors and especially when they are produced by African-Americans, they tend to be well received.

Many African-American consumers respond favorably to images that affirm accomplishments, leaders, inventions and contributions to society as a whole. Showing African-Americans in positions of leadership, authority, and camaraderie across a spectrum of age and economic classes is appealing to many. Embedding these images in a context where people of all ethnic groups are present and where everyone appears engaged in amicable, egalitarian interactions is the preference of many African-American consumers whom ETC has researched.

The principle of *ujamaa* evokes a sense of profiting together by building and maintaining African-American businesses. Its relevance could extend to including African-Americans on a company's marketing team or to publicizing a business as African-American-owned.

Marketers who are sensitive to and apply these principles of Kwanzaa in advertising will find acceptance among African-American consumers. ❏

[1]Winbush, Dorothy, *The Complete Kwanzaa - Celebrating Our Cultural Harvest*. Harper Collins, 1995.

Simultaneous interpretation in qualitative research

By Horacio Segal

Editor's note: Horacio Segal is a senior research associate at Hispanic & Asian Marketing and Communication Research, Belmont, Calif. He can be reached at 650-595-5028.

As ethnic research becomes more prevalent throughout the U.S., the need for researchers to identify high quality simultaneous interpreters is also rapidly increasing. Hispanic qualitative research is no longer confined exclusively to only major multicultural cities such as Los Angeles, Miami and New York, but is continuously spreading to newer regions such as Rhode Island and Las Vegas, and to new areas in states where Hispanic research is already very common, such as El Paso and Laredo, Texas.

This article attempts to provide some basic guidelines to clients and researchers in finding skilled interpreters who will add quality to their research, so they will obtain better results.

Heard and understood

Having the right interpreter means that the researcher's every word is heard and understood by clients in the back room, but most important of all, every word and answer uttered by the respondents is accurately interpreted within the appropriate cultural context and meaning.

What's an interpreter? Very few people are truly bilingual and with a full command of two languages. Most bilingual persons speak, write and understand one of the languages much better, usually the one used most during formal education years.

Even when a person is completely bilingual, this does not necessarily guarantee he/she can interpret, especially simultaneously. A high-quality simultaneous interpreter can rapidly transfer from one language to another words, meanings and context, never literally, but in a culturally relevant form.

Simultaneous interpretation is truly a special skill that requires very strong concentration. During the sessions, the mind of the interpreter is on auto pilot. Most interpreters need to practice very hard in order to develop the required speed and end a sentence about a second after the original-language speaker.

Identifying and selecting skilled interpreters

There are several guidelines that can help you find a high-quality focus group interpreter, one who conveys not only meaning but also inflection and cultural relevance:

—Stay away from impromptu interpreters whose only qualification is being Hispanic by surname or by some ability to speak Spanish. Some facilities will attempt to offer as interpreters a secretary, office assistant or recruiter, when in fact this person may have no professional training, and his/her Spanish may be limited to what they have heard from or used with parents or grandparents during childhood. Chances are that they never attended school in a Latin American country, so they have no formal education in the language. Their accent in English might be perfect but their understanding of respondents' Spanish could be limited.

—Look for interpreters who have had previous experience in focus groups. Be sure to ask them for references and check them carefully to make sure they have the essential skills you need.

—In the event these seasoned focus group interpreters are not available, look for interpreters who have worked or currently work in the courts. These professionals have the required training and vocabulary and they practice their skills daily. Regarding these interpreters, however, be sure that they are aware that a focus group environment does not have the order and organization of a court. They will have to get used to the chaos of focus groups, where many people often speak at the same time.

—Conference interpreters can also be considered a good option for this type of assignment, but they also must adapt to not being able to switch duties every 30 minutes with a partner, as is

Interview with a Vampire.

It is late and dark.
*Our hero is alone in the comfort of his home.
The phone rings.
He reaches for the receiver only to be greeted by Fang, a creature wanting to know all of his experiences with widgets.
Except the more our hero listens, the more he realizes that the creature on the other end of the line is himself ignorant of widgets.
Before the last question is out, his scant patience is gone, and so are his true opinions.*

Unfortunately, the only neck sticking out of this encounter is yours.

That is if you've ever had the misfortune to hire a telephone interviewing company that doesn't take time to educate their people as to what they are researching, then you know this scenario is no joke. Research skewed by annoyed participants reacting disingenuously toward speech affected interviewers is a real nightmare.

Opinion Access Corp. has always recognized the value of polite sincerity in the voice of our interviewers.
In English or Spanish—and a variety of dialects—we access the market in the language of that target audience.

That's just part of what separates us from the crowd.

We are the one-stop-shop for all your telephone interview, data processing and data management needs. We make the calls, interpret and tabulate the data. We supply the complete package, leaving you only to incorporate the results into your market analysis.

And those results are the most accurate in the business. Beyond our predictive dialing CATI system which ensures rapid access to your marketplace, our carefully selected interviewers are taught first to understand your business, studying the product before they pick up the telephone.

All this to give you the most exact information possible. So call Opinion Access Corp. with your next project, you'll sleep well, knowing your job's being handled correctly.
Even when there's a full moon.

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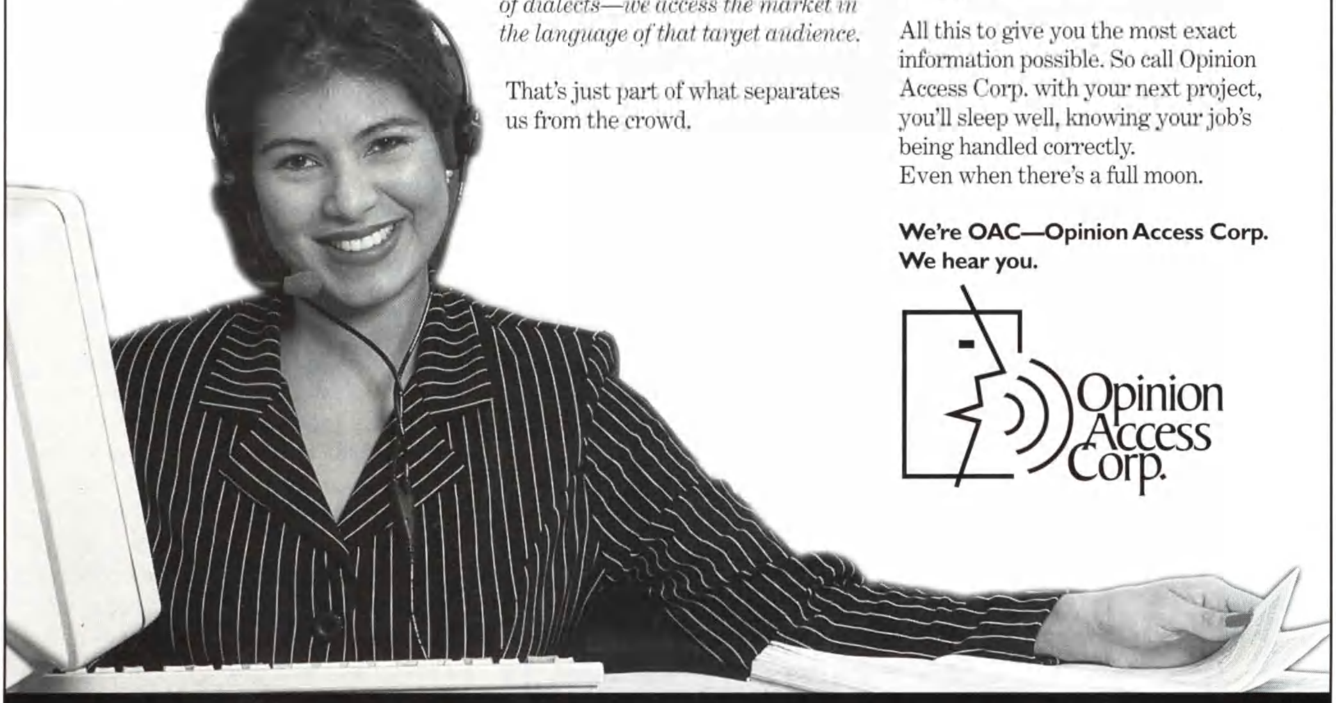

31-00 47th Avenue, Long Island City, New York 11101 • Phone 718-729-2OAC or toll free 888-489-DATA customary in conference interpreting. Experience in interpreting in formal situations like the U.N., for example, may not necessarily mean the interpreter can interpret a focus group. The spontaneity of a focus group can be exasperating to even the best conference interpreters.

—Good qualitative interpreters are usually good performers. They are able to emote and convey a wide variety of inflections in their voice, which is a key element of qualitative interpretation, because a monotone interpretation strips away content and context from what is being said, besides inducing listeners to fall asleep and lose interest in the focus group session.

Country-specific expressions

One of the most common misconceptions regarding the Spanish language spoken in Latin America is the belief that there are distinct dialects used in each country, and people from one country cannot understand those from other countries in the region.

Spanish is Spanish in every Latin American culture as well as Spain. Correct Spanish is taught in a consistent manner in every country in the region. However, there are idiomatic expressions and ways of speaking that are exclusively used in specific countries and a Spanish speaker from another country would not only not understand, but would very likely conduct an incorrect interpretation.

For example, a blonde woman is called a *rubia* by Cubans, a *güera* by Mexicans and a *mona* by Colombians. Another typical example is that of food names and ingredients. For example, Mexicans call beans *frijoles*; in some countries in the Caribbean region they are called *habichuelas*.

Look for interpreters who are familiar with the varied vocabulary used by respondents to describe colors, feelings, time related issues, and certain products in each of their respective countries. Hispanic respondents are not only from Mexico, Cuba and Puerto Rico anymore; people from Honduras to the Dominican Republic, and from Colombia to Guatemala are increasingly participating in sessions all over the U.S.

A good interpreter is also familiar with "invented" words that come from English or reverse translations, used by some Hispanics in the U.S. Cubans in Miami say *loncheando* for having lunch; *parqueando* for "to park," and Cuban students use *dropear* for dropping a class; while Puerto Ricans in New York use *hangueando* to refer to hanging out, all incorrect in Spanish. Instead of the word in Spanish *camioneta* for pick-up truck, some Mexicans drive a *troca*. A used old car that just takes one anywhere is a *mueble* for Mexicans (literally: furniture) and a *transportation* for Cubans.

Adds value

These are some general guidelines for the selection of focus group interpreters. Moderators who go back to the viewing room and get good feedback from their clients know that a skilled simultaneous interpreter adds value to their research. Clients who tend to not miss any detail, whether it is words or emotional reactions, also know that a good interpreter can make a good focus group session engaging, and make them feel as if they truly understand Spanish, even though it's not their native language. ❑

Survey Monitor

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Puerto Rican, Cuban, and South American respondents reported having attended an NBA basketball game, while 17 percent of Central Americans answered the same. Professional wrestling was most popular among Puerto Rican respondents.

The NFL had the highest reported attendance among Cuban respondents, 23 percent having been to a game in the past year. South Americans were second highest with 18 percent past year NFL attendance, while they were number one in past year attendance to NHL games (13 percent). Cubans were second, with 6 percent having attended an NHL game in the past year. For more information call 305-649-5400.

Topeka is most-surveyed market

Topeka, Kan., was the most attractive market for survey research in 1997, according to Fairfield, Conn.-based Survey Sampling Inc. (SSI). Researchers might be surprised that the most popular markets are not necessarily the largest. Rather, they appear to be small to midsized metro areas across the country. Less than half of the top 25 markets can be considered large metro areas.

Most-Surveyed Markets	
1.	Topeka, Kan.
2.	Kenosha, Wis. PMSA
3.	Sheboygan, Wis.
4.	Racine, Wis. PMSA
5.	Milwaukee-Waukesha, Wis. PMSA
6.	Pittsburgh, Pa.
7.	Raleigh-Durham-Chapel Hill, N.C.
8.	Portland, Maine NECMA
9.	Greenville-Spartanburg, S.C.
10.	Buffalo-Niagara Falls, N.Y.

Least-Surveyed Markets	
1.	Anchorage, Alaska
2.	Jamestown, N.Y.
3.	Terre Haute, Ind.
4.	St. Joseph, Mo.
5.	Hattiesburg, Miss.
6.	Wilmington, N.C.
7.	Jacksonville, N.C.
8.	Lima, Ohio
9.	Honolulu, Hawaii
10.	Albany, Ga.

Each year, SSI tracks millions of telephone numbers selected for survey research studies on its random digit database. The distribution of numbers from January through December 1997 was analyzed by metropolitan statistical area (MSA) to determine the most popular survey research markets defined as the number of sample numbers per household.

Study examines differences between bankruptcy filers

A study by Experian, an Atlanta credit information firm, that examined differences in the credit profiles of consumers who filed Chapter 7 and those who filed Chapter 13 bankruptcy in 1996 showed that consumers with more unsecured credit, larger revolving balances, and more recent delinquencies are more likely to file for Chapter 7 bankruptcy. On the other hand, Chapter 13 filers had higher levels of assets relative to liabilities than did Chapter 7 filers.

Experian found that the current trend in bankruptcy favors Chapter 7 filings. Out of the 426,000 bankrupts examined, about 70 percent filed for Chapter 7, while 29.7 percent filed for Chapter 13. Experian also looked at regional concentrations of bankruptcy filings, and found that a large number of the Chapter 13 filings were concentrated in the southeast, specifically in eight states: Alabama, Arkansas, Georgia, Louisiana, North and South Carolina, Tennessee, and Texas.

The study by Experian was based on requests from many lenders, who wanted to know if there is a difference in the credit profiles of Chapter 7 and Chapter 13 bankruptcy filers.

"Lenders have an interest in whether a consumer files Chapter 7 or 13 bankruptcy," says Steve Darsie, senior vice president at Experian. "With Chapter 13, lenders may recover at least a portion of the debt owed them, because there is a plan for at least partial repayment. But with Chapter 7 bankruptcy, the lender must charge off the entire debt owed them."

Experian examined accounts that went bankrupt between July and September of 1996, a total of 426,744 accounts. These accounts were observed at one month prior to filing bankruptcy in June of 1996. By looking at the credit profiles of these consumers at one month prior to filing, Experian found several characteristics where consumers who filed for Chapter 7 differed from Chapter 13 filers.

According to the study, prior to filing for bankruptcy, Chapter 7 filers had:

• 30 percent more total trades (lines of credit);

• 68 percent more active or open trades;

• 58 percent more open bank card trades;

• two times as many recent delinquencies;

• $2,339 more in outstanding bank card balances;

than did Chapter 13 filers.

On the other hand, Chapter 7 filers had:

• lower ratio of assets to liabilities;

• 12 percent fewer open auto loans;

• 25 percent fewer new auto loans;

• 14 percent fewer open personal finance loans;

• credit profiles that were 8 percent less derogatory;

than did Chapter 13 filers.

"Although there are many outside factors that will affect whether a consumer files for Chapter 7 or 13 bankruptcy, such as legal advice and state laws regarding bankruptcy, it seems that overall, those who file Chapter 7 are looking for the quicker and easier way out," says Darsie. "The study shows that customers who have more unsecured credit, larger revolving balances, and more recent delinquencies are more likely to file for Chapter 7. Most of these debts will be dismissed in Chapter 7.

"On the other hand," Darsie says, "Chapter 13 consumers had fewer revolving debts and more installment debts, possibly involving security. Chapter 13 customers also had higher levels of assets relative to liabilities than did Chapter 7 customers. To protect these assets, they are more likely to file for Chapter 13."

For more information call 404-841-1400.

You call it mail, we call it spam

A recent issue of *Cyber Insider*, a newsletter published by Cyber Dialogue and Yankelovich Partners Online, reported that as the electronic delivery of marketing messages becomes more commonplace, direct marketers and retailers are being forced to struggle with difficult practical and ethical questions stemming both from the Internet's comparative newness as a delivery vehicle and from the entrenched computer culture that derides traditional mass marketing techniques.

In part, however, this conflict arises from the development of Internet marketing practices whose use tarnishes the reputability both of the medium and of legitimate Internet marketing businesses. The public and private outcry over the practice of sending unsolicited E-mail — commonly known as "spam" — to addresses culled from bulletin boards and list-servers is so great that it has even provoked large ISPs into retaliatory action against "spammers."

Recently, allegations have surfaced that some "entrepreneurial" individuals have not only been ignoring requests for removal, but have actually been using these requests to control for defunct addresses on the lists they sell to marketers. Even more serious is the suggestion that some bulk mailers have been exploiting a bug in an older version of the UNIX Sendmail program to use other companies' domain names in their E-mail headings, defeating spam filters and misdirecting the ire of unwilling E-mail recipients.

In Cyber Dialogue's November 1997 OMNIBUS, respondents reported receiving an average of nine unsolicited E-mails a week, and almost a third (27 percent) were bombarded with 15 or more. Yet bulk E-mailers continue to be encouraged by the "effectiveness" of spam when compared to more traditional marketing methods. Not only is E-mail quick and cheap, but the Seventh WWW User Survey, conducted by Georgia Tech in April 1997, revealed that fully 11 percent of users actually read spam.

Responses to spam vary according to age and geography, with young users in Europe being the most likely to retaliate against spammers, while older users on both Europe and North America are more likely to simply delete the offending E-mail. Overall, 61 percent of users reported simply deleting the message, 19 percent of respondents asked to be removed from future mailings, and 5 percent of users retaliated with "E-mail bombs" or other forms of electronic harassment.

In the WWW User Survey, 39 percent of those surveyed says that they would like to see a registry created where users could indicate their wish not to receive unsolicited E-mail. Nineteen percent of users wished to see spammers blacklisted by Internet Service Providers, and 14 percent would like to have some kind of "impact fee" assessed. Just 8 percent desired some form of government intervention.

Another solution, one seized upon by software manufacturers, is the development of desktop spam filters capable of recognizing and blocking spam automatically. The OMNIBUS data suggests that the market for such filters is large, with 30 percent of respondents indicating that they "would ever consider purchasing a software package that could block unsolicited E-mails, and a further 55 percent of users reporting that they "might" consider purchasing such a package.

Despite the overwhelmingly negative response of E-mail users to unsolicited, and untargeted E-mail, the success of service providers like Juno Online suggests that a middle ground exists. A new Juno client is asked to complete a survey detailing his or her interests so that promotional material can be targeted according to specific criteria. Juno users accept marketing material as the "price" of a free E mail service and trust Juno not to deluge them with unwanted and irrelevant material.

In testimony before the Federal Trade Commission, Tom Hill, a director of Cyber Dialogue, indicated that this type of open and honest exchange may well be the key to profitability on the Internet "...unless and until trust is established or enhanced in the on-line world, we are not going to realize the commercial potential of [the Internet]." Hopefully, the more responsible and upfront practices of providers such as Juno Online will pave the way to a spam solution. For more information call 212-255-6655.

Who makes the best office furnishings?

Contract furniture dealers, interior designers and facility managers have reached a consensus on which office furniture manufacturers make the best desks. When it comes to files, however, there's far less agreement.

That was among the findings in the fall '97 installment of OFFICE TRENDS, a semi-annual research study by Wirthlin Worldwide, Grand Rapids, Mich., that tracks developments in the office furniture industry by surveying a representative sample of key buying groups.

In one section of the survey, more than 400 dealers, designers and facility managers were asked to identify which companies are the leaders in several product categories. Here's an overview of the results:

• Freestanding wood desks. Kimball is perceived as the leading manufacturer among all groups of panelists.

• Freestanding metal desks. Steelcase is perceived as the leader among all groups of panelists.

• Lateral files. Facility managers from small companies identified HON as the leader, and dealers gave the nod to Meridian, the first time either group elevated any company other than Steelcase to the top spot. Facility managers from large companies continue to pick Steelcase number one — as they have every year since OFFICE TRENDS began tracking this category — while designers say Meridian is tops for the fourth year in a row.

• Vertical files. Meridian snagged the top spot from Steelcase for the first time among designers, and HON took the lead from Steelcase among small facility managers. Among large facility managers, however, Steelcase remains the overwhelming favorite. Meanwhile, dealers put HON first for the third year in a row.

• Tables. Dealers rank Steelcase and HON in a tie for first, slightly ahead of Kimball, which had been the top choice the previous two years. Designers favor Knoll, large facility managers prefer Steelcase, and small facility managers like Herman Miller.

• Storage units. Dealers, designers and large facility managers pick Steelcase number one. Among small facility managers, Herman Miller sneaked past Steelcase for the first time.

OFFICE TRENDS also asks dealers, designers and facility managers to rate the customer satisfaction performance of each manufacturer they deal with. When the perceptions of all groups of panelists are compiled, Meridian emerges as the industry leader for customer satisfaction a recognition it's earned in four of the last seven surveys.

When the perceptions of individual groups of panelists are considered, Miller SQA is the top choice of dealers. Its score of 4.9 on a five-point scale is the highest customer satisfaction rating ever recorded by OFFICE TRENDS. Designers say Knoll and Metro deliver the best customer satisfaction, while facility managers at large companies like Meridian and their counterparts at small companies favor Knoll. For more information call Richard Kennedy at 616-954-0200.

Wireless phone companies register low awareness

The Strategis Group, Washington, D.C., finds that two-thirds of future subscribers are unable to name a wireless phone carrier in their area. Among all non-users between the ages of 18 and 29, the age group which demonstrates the highest interest in wireless phones, 74 percent did not know any carriers in their area.

"This means nearly three out of four GenXers would not know what carrier to call if they wanted to subscribe to wireless service," says Elliott Hamilton, vice president of North American Telecommunications at The Strategis Group. "These figures indicate that increasing brand awareness could be a key competitive differentiator."

Limited brand awareness of future subscribers is not limited to wireless carriers. Over 50 percent of future subscribers cannot name any wireless phone brands. Motorola registered the highest brand awareness among those who know a phone brand.

Other findings highlight differences between current and future subscribers and the impact on trends in distribution, demographic profiles, and usage.

"User profiles will change considerably as over 61 million users are added to the subscriber base over the next five years. It's important to understand how future customers differ from current subscribers," says Kent Olson, consultant in The Strategis Group's Cellular and PCS practice area. "For example, future subscribers intend to spend less on a wireless phone and use it less for business than current subscribers."

Subscriber growth will affect more than demographic and usage profiles; it will also impact distribution channels. A higher percentage of future subscribers intend to purchase their phone in a discount retailer or an electronic/appliance store than current subscribers.

Results are part of the research presented in The Strategis Group's "Cellular and PCS Consumer Trends. Mid-Year 1997." Based on quarterly surveys, this study provides primary market research on topics including: attitudes toward wireless, customer satisfaction, Internet and paging usage, demographic profiles, and phone usage — e.g., minutes of use and churn. For more information call 202-530-7500.

Product & Service Update

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patterns, random question order, ability to generate multiple page surveys, data and security violation logging, WYSIWYG editing. For more information, visit the company's Web site at http://www.surveyassistant.com or call 902-492-0009.

Socratic debuts Web module

Socratic Software, San Francisco, has introduced VISUAL Q Web Player, a new module that enables surveys created by the company's VISUAL Q survey design software to be conducted on the World Wide Web. Questionnaires developed using VISUAL Q will be automatically converted to HTML by the new Web Player module to create Dynamic Web Surveys, the company's proprietary on-line survey technique. The new module supports logic of skip patterns, piping, randomization, variables, and error checking. For more information call 415-648-2802 or visit the company's Web site at http://www.sotech.com.

New product from Spatial Insights

Spatial Insights, Inc., a Vienna, Va., geographic information services company, has developed a menu-driven application used for extracting and appending GDT's Dynamap data on the fly from within MapInfo. Using the application, GDT's Dynamap data are extracted directly from CD-ROM, and data for multiple themes covering multiple states and/or counties are appended in one operation.

The GDT's Dynamap Extract and Append application was developed in response to consulting projects that required the integration of Dynamap data covering multiple states or counties. Over 30 specific themes, including census and postal geographic boundaries, roadway systems, and a variety of infrastructure location and attribute data can be extracted and appended for any user-specified area. The application was developed using MapBasic, and runs directly within MapInfo Professional. For more information call 800-347-5291 or visit the company's Web site at http://spatialinsights.com.

CRS adds Spanish dictionary to The Survey System

Petaluma, Calif.-based Creative Research Systems, a maker of PC-based survey software, has added a Spanish dictionary to The Survey System for Windows, its Windows-based survey research software package. The addition of Spanish dictionary facilities will enable users to verify both question text and answers. Users can add their own specialized dictionaries of technical terms. CRS plans to add other languages in the future. For more information call Bill Eaton at 707-765-1001 or visit the company's Web site at http://www.surveysystem.com.

New Web-based survey program

Virtual Architechs, LLC, Sausalito, Calif. has introduced SurveyBuilder.com, an automated survey service that lets users create and conduct a Web-based survey in minutes and view results in real time from their Web browser.

SurveyBuilder.com eliminates the need for survey software, programming and administration. Clients go to the SurveyBuilder.com Web site, enter the questions they want to ask, and SurveyBuilder.com handles the rest.

To experience SurveyBuilder.com's capabilities, anyone can build and conduct a free, no obligation 50-response survey before making a purchase decision. Users simply access the SurveyBuilder.com Web site (www.surveybuilder.com), follow a wizard through the step-by-step survey design phase, and link the completed survey to their Web site by inserting a few lines of HTML.

SurveyBuilder.com surveys can be deployed across the Internet, intranets and extranets allowing companies to connect with customers, employees and vendors both domestically and internationally. Clients can then invite survey participation using SurveyBuilder.com's pop-up invitations on their Web site, or by sending targeted E-mail invitations that link to the survey. The latest survey results can then be viewed, printed or downloaded as they come in through real-time reports on the SurveyBuilder.com Web site. For more information call 800-809-9764 or E-mail to info@surveybuilder.com.

SSI offers international samples on-line

Random digit telephone samples for six countries can now be ordered through SSI-SNAP, Survey Sampling Inc.'s on-line sampling software. On-line samples are available for Canada, Germany, Italy, the Netherlands, the U.K. and the U.S. Sampling for other countries, as well as expanded geography selections for current countries, will occur throughout 1998. Users install SSI-SNAP on their computers. The Windows-based software is designed to communicate with SSI's computer and databases. SSI provides SSI-SNAP at no charge. For more information call 203-255-4200.

Free statistical software

Decision Analyst, Inc., Arlington, Texas, is offering its new, improved STATS statistical software free to marketing researchers at corporations, nonprofit organizations, government entities and advertising agencies. The new version includes a more powerful and flexible Chi-square module and a new module for paired-comparison tests. The Windows-based package performs several statistical functions, including: generating random numbers, calculating sample sizes for surveys, computing the mean, standard deviation, standard error and range and other statistics for keyboard-entered data, and determining the standard error of proportion. To obtain a copy of the software, call 817-640-6166 or download it from http://www.decision-analyst.com.

PR research guide from Ketchum

The 1998 edition of "A Guide to Public Relations Research" an 80-page reference manual for PR professionals which is prepared and updated annually by the Ketchum Public Relations Worldwide Research and Measurement Department, is now available. The manual contains five major sections, including a checklist of things PR practitioners ought to consider when they do research, a comparison of six different types of research that are often used in public relations, a listing of secondary data sources, a glossary of terms, and a selected bibliography of key books and articles. The manual is $25. Checks or money orders should be made payable to "Ketchum Public Relations Worldwide" and sent to Walter K. Lindenmann, Research and Measurement Department, Ketchum Public Relations Worldwide, 292 Madison Ave., New York, N.Y., 10017. Purchase orders are not accepted. For more information call 212-448-4213.

Euromonitor offers directory of European retailers

Euromonitor International, Chicago, is now offering the "European Directory of Retailers and Wholesalers," which provides contact information plus background details, including ownership and subsidiaries, number of employees and sales geography, private labels, and financial data, on 4,800 European companies. The directory covers 27 types of outlet or form of organization, including buying group, cash and carry, concession, convenience store, department store, duty-free, hypermarket, mail order, service station, vending machine, and wholesaler. For more information call T.J. Remmetter at 800-577-EURO or visit the company's Web site at http://www.euromonitor.com.

Names of Note

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addition, **Bob Buturla** has joined the firm's operations department as microcomputer administrator; **John Jiemback** has been named software engineer; and **Mike Miller** has been named manager of software engineering.

Walker Information, Indianapolis, has appointed **Joe Bankovich** vice president, business development, and **Mike Grindstaff** vice president technology consultant.

Ted Watson has joined **Jay Stewart White Sr.** as a partner of *The Baltimore Research Agency,* Ruxton, Md.

Otis Anderson has joined *Maritz Marketing Research Inc.* as an account manager in the Chicago office. Previously he was with Market Probe as a senior account executive and sales coordinator.

The Olson Research Group, Inc., Plainsboro, N.J., has added **Emily Wood** as senior project coordinator, **Darlene Okita** as research associate, and Cary Sullivan as senior project coordinator. In addition, **Lynn Welsh** has been promoted to project manager.

Rick Harnish has joined *Blattner/Brunner, Inc.*, a Pittsburgh advertising agency, as market research manager.

Chilton Research Services, Radnor, Pa., has added **Lori Fein** as a research consultant specializing in print and broadcast media. In addition, **Doug Keith** has joined the firm as research manager in the company's media and entertainment group.

Russell Branaghan has joined *Fitch Inc.* as associate vice president. He will provide user interface design and usability evaluation services for software and hardware products.

James Fink, executive director of Opinion Research Corp.'s international corporate reputation and branding practice, has been named to the advisory board of the University of Texas at Arlington's Master of Science in Marketing Research degree program.

Martin Green has joined the San Francisco office of *Burke Customer Satisfaction Associates* as an account manager.

Issues in qualitative

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business-focused solutions designed to help them compete more successfully.

NYNEX used what it heard in the customers' firsthand accounts and developed a small-business market center focused on helping these businesses be more profitable. Ultimately, this meant more sales to NYNEX, but it started with the appreciation of the customer needs that were voiced in qualitative research. "To a person, the customers were astounded and delighted that for once we did more than just send them a bill," says Brandt.

Good qualitative research can help to flip subsequent quantitative research on its head, so that it has an outside-in, not inside-out, perspective.

Act on what they hear

Senior management buy-in is also very important to the business-to-business qualitative process, says Jim Lagowski, former marketing director of the non-manufacturing segment for Detroit Edison, which conducted numerous focus groups with its business customers. Senior management needs to support doing the interviews, because they need "to agree in their heart to act on what they hear the customer saying," Lagowski says.

And they have to be open to acting on both the good news and the bad. One danger of qualitative research is listening to customer comments that reflect good news and rejecting negative comments as rare exceptions. If you tend to hear the same bad news across a broad range of your qualitative research, something's wrong. Further evaluation in follow-up quantitative research may be necessary.

Need a focus

Some consideration is necessary before you decide to target customers of every size. Given business customers' diversity in terms of SIC (Standard Industrial Classification) codes, how you reach them and what you ask them once you have them on the phone can be costly and time consuming if you don't have a focus. That's where qualitative research fits in best.

Good qualitative research steers the overall research effort and helps the researcher formulate a tighter — and therefore less lengthy and expensive — quantitative survey. "The qualitative research up front is what allows you to narrow your perspective onto the critical issues," in the quantitative phase, says Wayne Piper, a telecommunications consultant.

Piper, who previously directed marketing of high-end business-to-business data technologies at Ameritech (another regional Bell company), says that years ago, "The business-to-business research involved finding one or two valuable business customers, installing a beta version of the technology at their location, and then doing post-conversion interviews."

Unfortunately, this approach did not replicate the real world. "No one honestly displayed those services in a contextual environment, where the customer actually had to install it, make it work with everything else in their business, and really, honestly, evaluate it holistically. That was the fault of the research," Piper says.

This kind of mentality, which affects businesses across a broad spectrum of industries, is based upon the premise of "Build it and they will buy," or "We know what our customers want." Go ask them what they want. You might be surprised by the answer.

Why qualitative?

Once a company overcomes the idea that it doesn't need research to know what its business customers are thinking, the next hurdle is "Why qualitative?" To some, one-on-one interviews and focus groups are too "soft and fuzzy" to be actionable. This can be particularly true in organizations that are run by engineers, CFOs and other numbers-oriented individuals.

Jeffrey Lange, now a professor at Cleveland State University, was the market research coordinator at Centerior Energy (now FirstEnergy) in Ohio. Lange puts the value of qualitative business-to-business research in this context: "Qualitative research is very valuable in terms of being surprised in a structured way. When you do quantitative research, it's like being an attorney in a courtroom: you don't want to get any answers that you don't already know. In qualitative research, you're open to new ideas, new expressions, new answers and to open up new avenues of inquiry."

Bob Bohle, president of a St. Louis research firm, has conducted thousands of one-on-one interviews and focus groups with business customers since 1984. "Business-to-business qualitative research can be more important than it is for consumer research. I think there are more levels of criteria that people apply to the decision-making process in business."

The more complex the issues or decision-making process, Bohle suggests, the more qualitative research should be conducted first.

In-person interviews or focus groups?

What kind of qualitative should you do? "Look at the kind of research you are doing," Piper says. "Are you really after strategic, directional, blue sky research? If you have a focused concept, then a focus group is fine. One-on-ones evoke more thoughtful, deliberative answers about broad strategic issues."

"Focus groups give you scope, primarily because you have interaction between respondents, whereas one-on-ones give you a better handle on an individual's beliefs vis-a-vis their particular industry," Bohle adds.

Conducting dyad or triad interviews — that is, with two or three interview participants — can be enlightening, Lagowski says. "Interviewing different people with different backgrounds, you learn more than with one person. When you have more than one interviewer or participant, I think the quality of the interview rises," he says. A multiperson interview can, in microcosm, represent that company's decision-making process.

Location, location, location

Regarding the location of an in-person interview, the more senior the individual, the more you should lean toward interviewing them in their office, Piper says. "If you're after middle management, no problem bringing them to a facility."

"The customer premises is probably least desirable from the researcher's point of view and most desirable from the interviewee's point of view," adds NYNEX's Peter Brandt.

Some of the pros and cons of conducting in-person interviews on the participant's premises are:

Pros

• The participant is more comfortable on his or her own turf.

• They may take more time with the interviewer, perhaps even bringing others into the conversation if needed.

• They can show the interviewer their facility and business process, which may help to illustrate a point.

Cons

• The interview may be interrupted or even terminated if more pressing business occurs; last-minute cancellations are also more frequent since time may not have been carved out of the participant's schedule.

• It may be harder to audiotape the interview (making note-taking potentially more obtrusive in the interview).

• The research subject may not be focused on the interview topic with other distractions at hand.

• More interviewers may be needed, since interviews may be dispersed over a wide territory.

In a facility, the researcher gains the upper hand of being the host, and professional audiotaping is much easier. The participant is in a research environment, which may help them to focus on the topic at hand more easily. And an uninterrupted time block can be established. It also tends to give the researcher greater credibility, particularly important if the research sponsor is not identified.

In all cases, though, the research execution needs to center on the research objectives. What type of interview and location will likely produce the best result for the client, within the budget and time allotted?

To pay or not to pay?

The issue of whether and what to pay a participant in a business-to-business qualitative study can be a thorny one. Today, an honorarium of some sort is usually required for focus groups and increasingly for one-on-one interviews.

You pay an incentive for several reasons:

• it helps to increase willingness to cooperate, and therefore helps to reduce overall recruiting costs;

• it helps to decrease the likelihood of last-minute cancellations or no-shows, which can affect both the project budget and timeline; and

• it compensates business people for their time (How much is 90 minutes of your own time worth?).

Business incentives today can range from $75 to several hundred dollars for specialized occupations, such as physicians or CEOs. The proper incentive is also related to the amount of recruiting sample available. Generally speaking, the smaller the recruiting list, the higher the incentive.

While some may consider the use of incentives to be "buying answers," Lagowski calls them "a necessary evil," and points out that this makes it even more incumbent upon the interviewer to evidence total neutrality. If the interviewer or moderator reacts defensively to negative comments, this can make the research participant feel like the incentive is a payoff for giving the "right" answers. The payment of incentives is never based upon the nature of the responses, and the interviewer or moderator needs to make that point clear to participants.

Although most research participants accept the honorarium in compensation for their time, in a few cases they request that the incentive be donated to a charity or given back to the client.

The interview guide and interviewer preparation

Once the participant is recruited for

the focus group or in-person interview, the interview guide needs to be developed, and the interviewers armed with all the necessary background possible. "If you can articulate what you need to know before you get into the session itself, then spend the up-front time agonizing on the interviewer's guide, then it's not soft and fuzzy. It's very actionable information," says Brandt.

"It's very important that you use an experienced interviewer," Piper adds, "one who can deal with almost any kind of situation you can walk into, because you will walk into those situations. You may have to modify things on the fly."

There are some characteristics that a good moderator or interviewer should have, Bohle says. "One is open-mindedness. What is critical is that both the language and the body language that is used is neutral, non-threatening."

To illustrate his point, Bohle relates the story of a hostile interview he once conducted with the board of a local electric cooperative. Walking in, the board's engineer said, "I don't know why [the client] even bothered to waste their money on your services. They're not interested in our answers."

At first, Bohle thought the scheduled 60-minute interview would be terminated immediately. Two and a half hours later, he knew why the board had been hostile, and believes that his neutrality helped to facilitate the incredibly long and in-depth interview. The board actually viewed the researcher's willingness to take it on the chin as an indication of the company's commitment to listen, and although somewhat skeptical, gave in-depth responses to all of the interview questions.

Finding the needle in a haystack

Once you decide to conduct research, what do you do next? Your company may not have lists that identify decision-makers among your small and medium commercial customers, and your large business customers may not have the time you need to conduct an interview.

This is where you need to have solid, mature recruiters, preferably ones with some previous experience in the business world. They may have to wade through gatekeepers, voice mail or automated phone systems to find the right respondent.

It helps if the recruiters are given some qualitative information of their own: What is the purpose of the study? What type of person are you looking to interview? These pieces of information are critically important for business-to-business recruiters, since every company has varying job titles, and, as Bohle suggests, the decision-making process is different from company to company. Armed with more than just a recruiting screener, a mature, experienced recruiter will get your man, or your woman.

Integral part

Properly conducted, business-to-business qualitative research can be an integral part of the customer relationship. Having respect for the respondents' time and expressing gratitude for their participation, combined with an honest and open airing of issues and perspectives, can actually enhance customers' opinions of the sponsoring company, even when their pre-interview attitudes may have been negative.

So the watchwords of qualitative business-to-business interviewing are: develop a cohesive, long-range research game plan (qualitative and quantitative), with a proper understanding of the use and value of the qualitative research, and execute it with business-savvy recruiters and interviewers. Then sit back and listen! ❑

Waltco

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consider important? Why?

• What does the market feel Waltco does better than its competitors? Not as well? Why?

• How do customers like doing business with Waltco? Why?

"Because of our limited interview time, we had to home in on specifics quickly," says Higney. "First, we organized part of the interview like a company report card with six or seven essential variables in the areas of manufacturing, engineering and customer service. Using the report card as a basis for discussion, we probed to find out why a particular grade was given."

Too often, research follows a pattern of question-response-next question. That approach yields "facts but no insights," Higney says. The key to qualitative research, he says, "is looking behind the face value of the answer. When the interviewee says 'This manufacturer is unresponsive,' the interviewer says 'Tell me more.' You probe to define the ways in which the company is unresponsive. It could be the company doesn't attend trade shows, or doesn't call on this particular account as frequently as the interviewee would like, or doesn't return his telephone calls."

Better relationships

The competitive positioning study revealed that the marketplace was not yearning for better product, but better relationships. "In general, the research confirmed some of our intuitions, but we also found some surprises," says Waltco's Rod Robinson. "We weren't as deficient in some areas as we thought we were. Certain issues we expected to be raised, such as delivery, didn't come up. We weren't as good in some areas as we thought we were. The results show us what the marketplace perceives as important, so we can direct our resources there."

Target audiences indicated Waltco and its nearest competitor have good products and good people, with some giving Waltco the edge in quality and innovation. Since either brand would do the job, the marketplace based its selection on relationships. It wanted "face time" with sales staff, engineers and management. It valued quick and effective response to problems.

The competitive positioning research recommendations were that Waltco:

• could gain advantage by generating a different training approach to meet training concerns of key market segments;

• review its policies and procedures to deal with identified concerns and problem areas;

• work to improve its relationships with its accounts by enhanced accessibility and visibility of its management team; and

• develop an ongoing method of collecting feedback in all of the areas from its customers.

Impact of training

Waltco decided to immediately test the ability of training to make a difference with key accounts. It selected a large, well-recognized account where it had achieved only minor successes during the last few years. Some new product introductions that Waltco felt should have been well received by this customer had not gained serious consideration because of the lack of an acceptable relationship.

Waltco management moved quickly and, gaining commitment from its field sales people, developed and conducted on-site training for this customer's service personnel. As the customer ran round-the-clock facilities, this meant the Waltco sales force worked multiple shifts. In one particularly active day, a Michigan Waltco sales manager shuttled between three account locations in Detroit, each with three shifts, conducting a total of nine training sessions. In less than five months from the start of the program, Waltco trained more than 1,100 of the target account's service personnel.

"We developed the training to be universally applicable to liftgate types – our competitors' as well as our own brand," Robinson says. "When possible, we used our liftgates in the training. At sites that did not have any of our liftgates, we conducted training using the competitor's product. Afterward, we asked the trainees to fill out an evaluation. We delivered those evaluations to their corporate offices. We recently received a major order from them. That training was cited as a decisive factor."

Says Waltco Marketing Manager Joe Halpin, "We had to have both product and training. We would not have been successful with either one alone."

Adds Robinson, "We identified additional training needs in their organization that we had never considered before and we are now making changes to address them. The training has been so valuable that we are rolling it out as a value-added program to other accounts where we are already the primary supplier."

Policies and procedures

During recent years, Waltco has instituted a number of new procedures to improve efficiency. The company is now revisiting those procedural changes to ensure that their implementation hasn't created an unwanted side effect of making things more difficult for its customers. Minor changes have already been made in some areas and major changes in others.

Before the competitive positioning research, Waltco had revamped its warranty claim processing to be more efficient. The company was surprised, therefore, when target audiences rated its warranty response as less than stellar.

Waltco traced the problem to two sources. In some instances, internal Waltco representatives evaded customer ire by inaccurately disclaiming authority to make warranty decisions at a field level, placing the blame on Waltco policies. That, says Robinson, underscored for him the advantage of conducting research through an objective third party instead of relying on internal sources who might have their own interests to protect.

The second problem was what Robinson describes as "a black hole" in warranty response tracking. Completed claims were processed quickly, but claims missing information were shunted aside to an exception stack, where they were no longer actively tracked. Waltco is now implementing a new tracking system that requires a formal written response to all claims, even incompletes, within a specified number of days.

"We found that often, we had informally contacted people about their incomplete claims," says Robinson. "We would tell the service manager who submitted the incomplete claim what was needed, but he would not always inform accounts receivable and say, hey, I had to resubmit that claim. The information was not being passed along to everyone who needed to know. Now we formally notify the accounts receivable person that we have a warranty claim that cannot be processed due to incomplete information."

Personal visits

In the competitive research, some interviewees had described Waltco upper management as less accessible, even aloof. "We were so busy running the business, we didn't spend as much time with customers as the customers wanted," Robinson says. Now, managers are responsible for making personal visits to assigned accounts at least twice a year.

Robinson also changed his approach with sales representatives. "We'd always said if the salesperson needed us to go with them on a call, let us know and we'd go," he says. "I realize now if I sit in my office and wait for them to call, I'm not going to see these customers. Now I tell my sales people 'I'm going to be in your area from this date to that date. Here are major customers I'd like to see with you. Make use of my time.' Already in the first quarter of a year-long program, we've made some visits we would not have made before."

Waltco also decided to stay in touch with its many customers and to measure how it was doing by using the Markinetics' Market Ongoing Research and Evaluation (MORE) program. Under this program, Markinetics talks each month with customers in each of the market segments. Results are reported quarterly, with analysis and recommendations to be provided biannually. Piloted at the end of 1997, in 1998 MORE will provide a consistent way to gain feedback and measure progress throughout the year.

Following through

Waltco is in the early stages of following through on the recommendations. But with the intelligence gathered by objective research, it has the advantage of knowing which battles it needs to fight. "Research is meaningless unless you're willing to do something with it," Robinson says. "You have to commit to take action on what you find out. Initial results have been outstanding. Markinetics is already finding positive differences in responses received in our ongoing feedback program. We were a good company before. Research provides information we can use to build a better company." ❑

Moderator MarketPlace

Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 612-854-5101/ fax 612-854-8191.

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Fax 415-751-3620
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http://www.alexpark.com
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http://www.hamcr.com
Contact: Dr. Sandra M.J. Wong
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Contact: Ron Riley
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Consumer, Business Groups and One-On-Ones.

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Qual. & Quant. Rsch.: Consumer, Advg., Bus./Bus., Hi-Tech.

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Contact: Stephen Daniel
FOCUS/IT Understanding Technology Buying Processes.

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Contact: Jerry W. Thomas
Depth Motivation Research. National Firm.

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Waltham, MA 02154
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Contact: Reva Dolobowsky
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Full Service Marketing Research. Health Care & Pharmaceuticals.

Doyle Research Associates, Inc.
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C&R Research Services, Inc.
Cambridge Associates, Ltd.
Daniel Associates
Fader & Associates
First Market Research Corp. (Heiman)
Greenleaf Associates, Inc.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Marketing Advantage Rsch. Cnslts.
James Spanier Associates
Yarnell, Inc.

CONSUMERS
Best Practices Research
C&R Research Services, Inc.
Consumer Opinion Services
Decision Drivers
The Eisenmann Group
Greenleaf Associates, Inc.
Pat Henry Market Research, Inc.
Just The Facts, Inc.
Knowledge Systems & Research, Inc.
Macro International
Marketing Advantage Rsch. Cnslts.

CORPORATE SPONSORSHIP
Performance Research

CUSTOMER SATISFACTION
BAIGlobal Inc.
Best Practices Research
Elrick and Lavidge
Fader & Associates
guskey & heckman, research consultants
Low + Associates, Inc.
Markinetics, Inc.
QS&A Research & Strategy
Research Data Services, Inc.

DIRECT MARKETING
BAIGlobal Inc.
Best Practices Research
Greenleaf Associates, Inc.
MindSearch
Perception Research Services, Inc.

DISCRETE CHOICE/CONJOINT
Yarnell, Inc.

DISTRIBUTION
Burr Research/Reinvention Prevention
GraffWorks Marketing Research

EDUCATION
Cambridge Associates, Ltd.
Greenleaf Associates, Inc.
Just The Facts, Inc.
Marketing Advantage Rsch. Cnslts.

ELECTRONICS
Leichliter Assoc. Mktg. Rsch./Idea Dev.

ETHNOGRAPHIC RESEARCH
Alexander + Parker

EXECUTIVES
BAIGlobal Inc.
C&R Research Services, Inc.
Decision Drivers
Dolobowsky Qual. Svcs., Inc.
Fader & Associates
First Market Research Corp. (Heiman)
John Fox Marketing Consulting
Marketing Advantage Rsch. Cnslts.
Paul Schneller - Qualitative
Strategy Research Corporation

FINANCIAL SERVICES
Jeff Anderson Mktg. Rsch. Consulting
BAIGlobal Inc.
Best Practices Research
Burr Research/Reinvention Prevention
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
The Deutsch Consultancy
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
The Eisenmann Group
Fader & Associates
First Market Research Corp. (Reynolds)
Lieberman Research Worldwide
Low + Associates, Inc.
Marketing Matrix, Inc.
Matrixx Marketing-Research Div.
MCC Qualitative Consulting
James Spanier Associates
Widener-Burrows & Associates, Inc.

FOOD PRODUCTS/NUTRITION
Alexander + Parker
BAIGlobal Inc.
C&R Research Services, Inc.
CJRobbins
Greenleaf Associates, Inc.
Just The Facts, Inc.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Macro International
The New Marketing Network
Outsmart Marketing
Perception Research Services, Inc.
Paul Schneller - Qualitative

FOOTWEAR
Best Practices Research

HEALTH & BEAUTY PRODUCTS
BAIGlobal Inc.
Paul Schneller - Qualitative
Thorne Creative Research

HEALTH CARE
Alexander + Parker
Jeff Anderson Mktg. Rsch. Consulting
Colburn & Associates
Directions Data Research
Dolobowsky Qual. Svces., Inc.
The Dominion Group Mktg. Rsch.
D/R/S HealthCare Consultants
Elrick and Lavidge
Erlich Transcultural Consultants
The Eisenmann Group
First Market Research Corp. (Reynolds)
Irvine Consulting, Inc.
Knowledge Systems & Research, Inc.
Lieberman Research Worldwide
Low + Associates, Inc.
Macro International
Market Navigation, Inc.
Matrixx Marketing-Research Div.
MedProbe™, Inc.
Research Options, Inc.
Spiller Research Group, Inc.
Strategy Research Corporation
V & L Research and Cnsltg., Inc.
Widener-Burrows & Associates, Inc.
Susan M. Williams Rsch. & Disc. USA

HISPANIC
Data & Management Counsel, Inc.
Erlich Transcultural Consultants
Hispanic Marketing Communication Research
In Focus Consulting
Lieberman Research Worldwide
Mari Hispanic Field Services
The Market Connections Group
Market Development, Inc.
Francesca Moscatelli
Strategy Research Corporation
Target Market Research Group, Inc.

HI-TECH
Greenleaf Associates, Inc.
Market Navigation, Inc.
Research Connections, Inc.
Perception Research Services, Inc.
Thorne Creative Research

HOUSEHOLD PRODUCTS/CHORES
Paul Schneller - Qualitative

IDEA GENERATION
Analysis Research Ltd.
BAIGlobal Inc.
Best Practices Research
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
Elrick and Lavidge
John Fox Marketing Consulting
Just The Facts, Inc.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Matrixx Marketing-Research Div.
Paul Schneller - Qualitative

IMAGE STUDIES
Cambridge Associates, Ltd.

INDUSTRIAL
First Market Research Corp. (Heiman)
Market Navigation, Inc.

INSURANCE
Burr Research/Reinvention Prevention
Erlich Transcultural Consultants
Low + Associates, Inc.

INTERACTIVE PROD./ SERVICES/RETAILING
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Research Connections, Inc.

INTERNET
Knowledge Systems & Research, Inc.
Research Connections, Inc.

INTERNET SITE DEV.
Perception Research Services, Inc.

INVESTMENTS
The Deutsch Consultancy

LATIN AMERICA
Best Practices Research
Market Development, Inc.

MANUFACTURING
Best Practices Research

MEDICAL PROFESSION
Cambridge Associates, Ltd.
Colburn & Associates
D/R/S HealthCare Consultants
Pat Henry Market Research, Inc.
Matrixx Marketing-Research Div.
MedProbe™, Inc.
QS&A Research & Strategy
Paul Schneller - Qualitative
Susan M. Williams Rsch. & Disc. USA

MODERATOR TRAINING
Cambridge Associates, Ltd.
Macro International

MULTIMEDIA
Marketing Advantage Rsch. Cnslts.

NEW PRODUCT DEV.
Jeff Anderson Mktg. Rsch. Consulting
BAIGlobal Inc.
Best Practices Research
Milton I. Brand Marketing Consultant
C&R Research Services, Inc.
Cambridge Associates, Ltd.
CJRobbins
Daniel Associates
Data & Management Counsel, Inc.
Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
Elrick and Lavidge
Fader & Associates
First Market Research Corp. (Heiman)
Greenleaf Associates, Inc.
Just The Facts, Inc.
Bart Kramer & Associates
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Lieberman Research Worldwide
Marketing Advantage Rsch. Cnslts.
The New Marketing Network
Outsmart Marketing
Paul Schneller - Qualitative
Sundberg-Ferar, Inc.

NON-PROFIT
Doyle Research Associates

OBSERVATIONAL
Doyle Research Associates

ON-LINE FOCUS GROUPS
Research Connections, Inc.
Thorne Creative Research

PACKAGED GOODS
BAIGlobal Inc.
Best Practices Research
C&R Research Services, Inc.
CJRobbins
Doyle Research Associates
Just The Facts, Inc.
Thorne Creative Research

PACKAGE DESIGN RESEARCH
Perception Research Services, Inc.
Treistman & Stark Marketing, Inc.

PANELS
Greenleaf Associates, Inc.

PARENTS
Fader & Associates

PET PRODUCTS
Cambridge Research, Inc.

PHARMACEUTICALS
BAIGlobal Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Colburn & Associates
The Dominion Group Mktg. Rsch.
D/R/S HealthCare Consultants
Irvine Consulting, Inc.

Macro International
Market Navigation, Inc.
MCC Qualitative Consulting
MedProbe™, Inc.
QS&A Research & Strategy
Paul Schneller - Qualitative
Spiller Research Group, Inc.
Susan M. Williams Rsch. & Disc.
USA

POLITICAL/SOCIAL RESEARCH
Cambridge Associates, Ltd.
Francesca Moscatelli

POSITIONING RESEARCH
Paul Schneller - Qualitative

PUBLIC POLICY RSCH.
Cambridge Associates, Ltd.
JRH Marketing Services, Inc.

PUBLISHING
Best Practices Research
Cambridge Associates, Ltd.
The Eisenmann Group
First Market Research Corp. (Heiman)
Greenleaf Associates, Inc.
Lieberman Research Worldwide
Marketing Advantage Rsch. Cnslts.

RETAIL
Pat Henry Market Research, Inc.
Knowledge Systems & Research, Inc.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Lieberman Research Worldwide
MCC Qualitative Consulting

SENIORS
Fader & Associates

SERVICES
guskey & heckman, research consultants

SMALL BUSINESS/ ENTREPRENEURS
Linda Fitzpatrick Rsch. Svcs. Corp.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
MindSearch
Strategy Research Corporation
Yarnell, Inc.

SOFT DRINKS, BEER, WINE
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Grieco Research Group, Inc.
Strategy Research Corporation

SPORTS
Performance Research
Research Options, Inc.

TEACHERS
Greenleaf Associates, Inc.

TEENAGERS
C&R Research Services, Inc.
Doyle Research Associates
Fader & Associates
Matrixx Marketing-Research Div.
MCC Qualitative Consulting
Thorne Creative Research

TELECOMMUNICATIONS
BAIGlobal Inc.
Daniel Associates
Elrick and Lavidge
Erlich Transcultural Consultants
First Market Research Corp. (Heiman)
Knowledge Systems & Research, Inc.
Linda Fitzpatrick Rsch. Svcs. Corp.
Horowitz Associates Inc.
Marketing Advantage Rsch. Cnslts.
MCC Qualitative Consulting
Strategy Research Corporation

TELECONFERENCING
Cambridge Research, Inc.

TELEPHONE FOCUS GROUPS
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Doyle Research Associates
Market Navigation, Inc.
MedProbe, Inc.

TELEVISION
Best Practices Research

TOURISM/HOSPITALITY
QS&A Research & Strategy
Research Data Services, Inc.

TOYS/GAMES
Fader & Associates
Greenleaf Associates, Inc.

TRANSPORTATION SERVICES
Low + Associates, Inc.
Markinetics, Inc.
Strategic Focus, Inc.

TRAVEL
Best Practices Research
Cambridge Associates, Ltd.
Greenleaf Associates, Inc.
Research Data Services, Inc.
James Spanier Associates

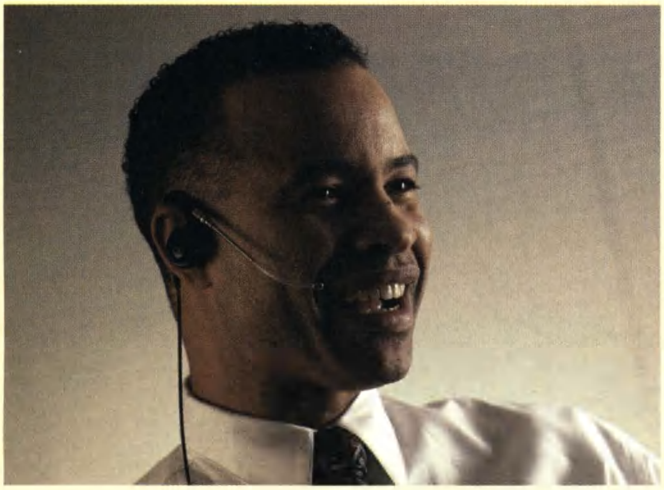
UTILITIES
Cambridge Associates, Ltd.
Fader & Associates
Knowledge Systems & Research, Inc.

WEALTHY
The Deutsch Consultancy
Strategy Research Corporation

YOUTH
Fader & Associates
Macro International

Quirk's
MARKETING RESEARCH
Review

1998 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 are marked with an asterisk.

*A.I.M. Field Service
1428 E. Semoran Blvd., Ste. 104
Apopka, FL 32703
Ph. 407-886-5305 or 407-886-5365
Fax 407-884-0333
Patricia Blackwell, President
Data collection/Field service, Data processing
African-American, Hispanic

*Adrian Information Strategies (AIS)
14677 Midway Rd., #201
Dallas, TX 75244-3125
Ph. 972-980-0227
Fax 972-385-7745
E-mail: RCCDallas@aol.com
Adrian Reyes, President
Full service, Data collection/Field service, Data processing
African-American, Asian, Hispanic

AFFORDABLE SAMPLES, INC.™
Since 1991, Delivering Quality Survey Research Samples

Affordable Samples, Inc.
185 Sound Beach Ave.
Old Greenwich, CT 06870
Ph. 800-784-8016 or 203-637-8563
Fax 203-637-8569
E-mail: ASISAMPLING@compuserve.com
James Sotzing, President
Data processing, Sampling
African-American, Asian, Hispanic, Middle Eastern

The Other Sampling Company In Connecticut™ - Quality ethnic and religious samples at affordable prices since 1991. Many selections available: African-American, Arabian, Armenian, Asian, Burmese, Catholic, Chinese, East European, East Indian, English, French, German, Hindu, Hispanic, Indian (Asian), Indonesian, Irish, Italian, Japanese, Jewish, Korean, Laotian, Malaysian, Middle Eastern, Muslim, Pakistani, Polish, Scandinavian, Scottish, Singapore, Sri Lanka, Swedish, Thai, Vietnamese.
(See advertisement on p. 70)

Aim Research
10456 Brian Mooney
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

*Almiron-Caban & Assoc. Bilingual Rsch., Inc.
141-22 85th Rd.
Briarwood Queens, NY 11435
Ph. 718-523-9323
Fax 718-657-5743
E-mail: ACBR1@aol.com
Laura Caban, Field Director
Data collection/Field service
African-American, Hispanic

*Asia Link Consulting Group
10 W. 66th St.
New York, NY 10023
Ph. 212-721-5825
Fax 212-595-1993
Wanla Cheng, Principal
Full service
Asian, Hispanic

HISPANIC & ASIAN MARKETING COMMUNICATION RESEARCH, INC.

***Asian Marketing Communication Research**
A Div. of Hispanic & Asian Marketing Communication Research, Inc.
1301 Shoreway Rd., Ste. 100
Belmont, CA 94002
Ph. 650-595-5028
Fax 650-595-5407
E-mail: gateway@hamcr.com
http://www.hamcr.com
Sandra M.J. Wong, Ph.D., Research Director
Full service
Asian, Hispanic

Full-service qualitative and quantitative research in most Asian languages. Copy testing, motivational discovery, product design and evaluation, and cultural analysis for the positioning of products and services among Asians in the U.S. and abroad. Focus groups, in-depth interviews, surveys and tracking studies. Psycho-socio-cultural Asian research© is our unique approach. Our own facilities in the multicultural San Francisco Bay area available.
(See advertisement on p. 77)

BARRY LEEDS & ASSOCIATES INC

Barry Leeds & Associates, Inc.
38 E. 29th St.
New York, NY 10016
Ph. 212-889-5941
Fax 212-889-6066
E-mail: info@barryleedsassoc.com
http://www.barryleedsassoc.com
Paul Lubin, Exec. Vice President
Full service, Data collection/Field service, Data processing
African-American, Asian, Hispanic, Native American

Market researchers and consultants serving the financial, consumer and corporate industries. Specializing in discrimination testing and research, mystery shopping, concept/product testing, customer satisfaction research, account retention research, brand image research, branch/store intercepts and Call Center TeleShops™. Over 1 million mystery shops at more than 80,000 branches/stores and service centers completed. Pioneered the application of matched pair testing for detecting potential discriminatory treatment by financial institutions. Serving the financial services industry and corporate America since 1977.
(See advertisement on p. 71)

* Indicates a firm owned by an ethnic minority

Behavior Research Center
1101 N. First St.
P.O. Box 13178
Phoenix, AZ 85002-3178
Ph. 602-258-4554
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, Data processing
Hispanic

*The Blackstone Group
360 N. Michigan Ave., Ste. 1500
Chicago, IL 60601
Ph. 312-419-0400
Fax 312-419-8419
Ashref Hashim, President
Full service, Data collection/Field service, Data processing, Focus groups
African-American, Asian, Hispanic

*C R Market Surveys
9510 S. Constance, Ste. C-6
Universal City Professional Bldg.
Chicago, IL 60617-4734
Ph. 800-882-1983 or 773-233-0481
Fax 773-233-0484
E-mail: CRMS1@aol.com
http://www.crmarket.com
Cherlyn Robinson, Project Coordinator
Full service
African-American, Hispanic

C&R Research Services, Inc.
Creative & Response Research Services, Inc.
500 N. Michigan Ave., 12th fl.
Chicago, IL 60611
Ph. 312-828-9200
Fax 312-527-3113
E-mail: info@crresearch.com
http://www.crresearch.com
Jim Flannery, Dir. Business Development
Full service, Data collection/Field service, Data processing
African-American, Asian, Hispanic, Middle Eastern

C&R Research Services, Inc. is a full-service custom research and consulting company with 202 full-time employees including 34 project directors/analysts. C&R provides customer satisfaction, strategic studies, new product development, brand imagery and positioning research, concept and advertising testing, research among children (Kid Power), and concept development using a panel of highly creative individuals (Idea Team) as well as multi-media PC interviewing (CRIMSON). C&R conducts approximately 1,200 group interviews a year, 1.7 million mail, telephone and mall intercept interviews. In addition to Chicago, C&R has client service offices in New York City and Detroit and full-service offices in Buenos Aires, Sydney and Honolulu as well as affiliations with other quality research firms throughout the world. Fieldwork, Inc., a subsidiary of C&R, has 12 focus group facilities in eight metro markets. Fieldwork also operates a 60-station, CATI-equipped telephone interviewing facility in Chicago.
(See advertisement on back cover)

Cambridge Focus
600 Memorial Dr.
Cambridge, MA 02139-4814
Ph. 617-494-0310
Fax 617-494-0910
E-mail: details@cambridgefocus.com
Data collection/Field service, Focus groups
African-American, Hispanic

*Castillo & Associates
3604 Fourth Ave., Ste. 2
San Diego, CA 92103
Ph. 619-683-3898
Fax 619-683-3820
E-mail: castassoc@aol.com
Enrique F. Castillo, Principal
Full service
Hispanic

Chicago Focus
7 E. Huron St.
Chicago, IL 60611
Ph. 312-951-1616
Fax 312-951-5099
Focus groups
African-American, Hispanic

*Covington-Burgess Market Research Service
666 Eleventh St. N.W., Ste. 730
Washington, DC 20001
Ph. 202-628-4641
Fax 202-628-3840
Elizabeth J. Burgess, President
Data collection/Field service, Focus groups
African-American, Hispanic

Creative Data
7136 Haskell Ave., Ste. 100
Van Nuys, CA 91406
Ph. 818-988-5411
Fax 818-988-4057
E-mail: creativedata@earthlink.net
http://www.interviewingservice.com
Jennifer von Schneidau, V.P./G.M.
Full service, Data collection/Field service, Data processing, Focus groups
African-American, Asian, Hispanic, Middle Eastern

Data & Management Counsel, Inc.

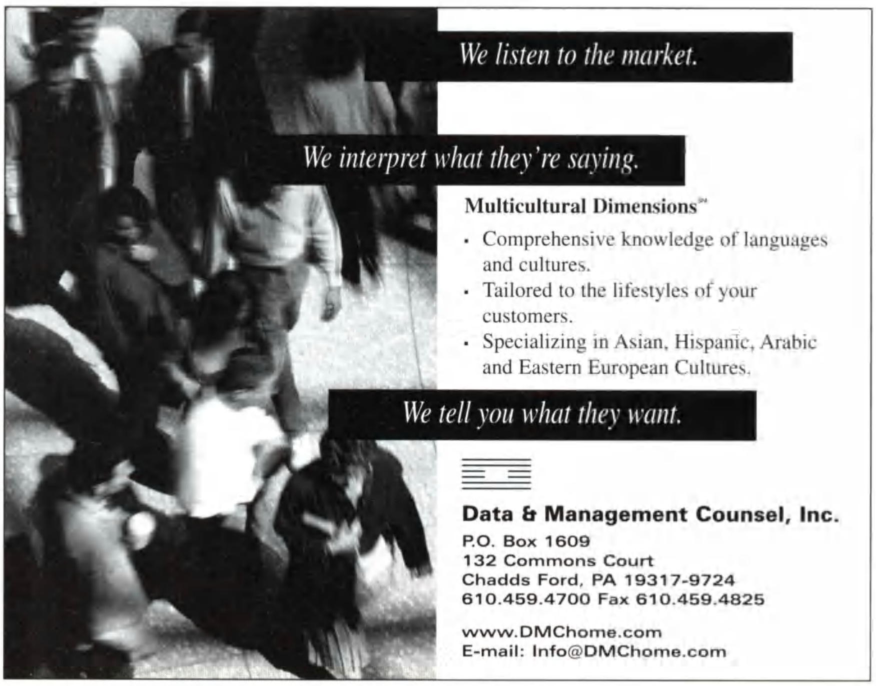
Data & Management Counsel, Inc.
P.O. Box 1609
132 Commons Ct.
Chadds Ford, PA 19317-9724
Ph. 610-459-4700
Fax 610-459-4825
E-mail: Info@DMChome.com
http://www.DMChome.com
Bill Tripp, Managing Director
Bill Ziff-Levine, Managing Director
Phil Rosenberg, Vice President
Full service, Choice & Market Modeling
Asian, Hispanic

Branch office:
International Tower
5200 S. Yale Ave., Ste. 102
Tulsa, OK 74135
Ph. 918-492-6324
Fax 918-492-7147
http://www.DMChome.com
John McKay, Vice President

Attentive, responsive full-service research firm uniquely qualified for even the most demanding projects. Telecommunications. Information technologies. Healthcare. Insurance. Financial services. Business-to-business. Industrial markets. Multicultural and international. Using the most advanced research techniques, coupled with comprehensive knowledge of languages and cultures, we conduct qualitative and quantitative research tailored to the special needs and circumstances of your business and your customers.
(See advertisement on p. 72)

Databank Marketing Research, Inc.
Rte. 1, 109F Hwy. 718
Rhome, TX 76078
Ph. 817-489-2300
Fax 940-433-2248
Renae Neves, Co-Owner
Data collection/Field service
Hispanic

Directions In Research
8593 Aero Dr.
San Diego, CA 92123
Ph. 800-676-5883 or 619-299-5883
Fax 619-299-5888
E-mail: info@diresearch.com
David Phife
Full service, Data collection/Field service, Data processing
Hispanic



Eastern Research Services
1001 Baltimore Pike, Ste. 208
Springfield, PA 19064
Ph. 610-543-0575
Fax 610-543-2577
Kean Spencer, President
Data collection/Field service, Data processing
African-American, Hispanic

***Ebony Marketing Research, Inc.**
2100 Bartow Ave., Ste. 243
Bronx, NY 10475
Ph. 718-217-0842
Fax 718-320-3996
E-mail: emr@interport.net
Bruce Kirkland, Vice President
Full service, Data collection/Field service
African-American, Asian, Hispanic, Middle Eastern, Native American

Ebony Marketing Research, Inc. is a full field service company specializing in ethnic market segments, locally, nationally and internationally. With three New York mall locations, offices in Central America, and state-of-the-art focus group, telephone and test kitchen facilities, EMR has the reach, resources and community rapport to produce timely, accurate data on a wide range of specialized and mainstream markets.
(See advertisement on p. 73)

Erlich Transcultural Consultants
21241 Ventura Blvd., Ste. 193
Woodland Hills, CA 91364
Ph. 818-226-1333
Fax 818-226-1338
E-mail: ETCethnic@aol.com
Andrew Erlich, Ph.D., President
Full service
African-American, Asian, Hispanic, Middle Eastern, Native American

ETC provides full-service Hispanic, Asian, African-American and general market qualitative and quantitative research both in the U.S. and abroad. This includes focus groups, in-depth individual interviews, and the complete spectrum of quantitative studies conducted and supervised by bilingual, bicultural marketing professionals. ETC specializes in providing research that is culturally insightful.
(See advertisement on p. 13)

Field Dynamics Marketing Research
17547 Ventura Blvd., Ste. 308
Encino, CA 91316
Ph. 818-783-2502
Fax 818-905-3216
E-mail: fielddynam@aol.com
Tony Blass, President
Full service, Data collection/Field service
African-American, Asian, Hispanic

* Indicates a firm owned by an ethnic minority

Fieldwork, Inc.
500 N. Michigan
Chicago, IL 60611
Ph. 773-282-2911
Fax 312-527-3113
E-mail: SANDYA1111@aol.com
http://www.fieldwork.com
Branch offices:
Fieldwork Atlanta, Inc.
200 Galleria Pkwy., #1850
Atlanta, GA 30339
Ph. 770-988-0330
Fax 770-955-1555
http://www.fieldwork.com
Bette Hayden or Verah Turner
Data collection/Field service
African-American

Fieldwork Chicago, Inc.
6200 N. Hiawatha, Ste. 720
Chicago, IL 60646
Ph. 773-282-0203
Fax 773-282-6422
E-mail: SANDYA1111@aol.com
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. 773-714-8700
Fax 773-714-0737
E-mail: FieldworkO@aol.com
http://www.fieldwork.com
Susan Brody, President
Data collection/Field service
African-American, Asian, Hispanic, Middle Eastern

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

Fieldwork East, Inc.
2 Executive Dr.
Fort Lee, NJ 07024
Ph. 201-585-8200
Fax 201-585-0096
E-mail: NJFWE@aol.com
http://www.fieldwork.com
Sandy Star or Barbara Meeks
Data collection/Field service
African-American, Hispanic

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

Fieldwork Phone Center
6200 N. Hiawatha, Ste. 700
Chicago, IL 60646
Ph. 773-282-0203 or 888-TO-FIELD
Fax 773-282-6422
E-mail: PhoneRoom@aol.com
http://www.fieldwork.com
Data collection/Field service
Hispanic

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

Fleischman Field Research
250 Sutter St., Ste. 200
San Francisco, CA 94108-4403
Ph. 800-277-3200
Fax 415-989-4506
E-mail: ffr@ffrsf.com
http://www.ffrsf.com
Molly Fleischman, Principal
Data collection/Field service, Focus groups
Asian, Hispanic

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

*Garcia Research Associates, Inc.
2550 Hollywood Way, Ste. 110
Burbank, CA 91505
Ph. 818-566-7722
Fax 818-566-1113
E-mail: info@garciaresearch.com
http://www.garciaresearch.com
Ted Dahl, Vice President
Full service, Data collection/Field service, Data processing, Focus groups
African-American, Hispanic

GENESYS Sampling Systems
565 Virginia Dr.
Ft. Washington, PA 19034-2706
Ph. 800-336-7674
Fax 215-653-7114
E-mail: jpalish@genesys-sampling.com
http://www.genesys-sampling.com
Jeff Palish, Vice President
Sampling
African-American, Asian, Hispanic, Middle Eastern, Native American

GENESYS Sampling Systems has the experience and resources to help you define and reach any low-incidence target group. Ethnic sampling capabilities include geo-targeted RDD (random digit dialing), listed surname, dual frame and other options. We will outline your alternatives in balancing representational accuracy and data collection costs. Additionally, we offer full database management, analysis and exploitation capabilities.
(See advertisement on p. 45)

*Gonzalez Marketing Research Services
1543 Raymond Dr., Ste. 101
Naperville, IL 60563
Ph. 630-637-0826
Fax 630-637-1229
Linda Gonzalez, Owner
Data collection/Field service
Hispanic

Greenfield

Greenfield Consulting Group, Inc.
NovaVista/Greenfield
274 Riverside Ave.
Westport, CT 06880
Ph. 203-221-0411
Fax 203-221-0791
E-mail: greenfield@greenfieldgroup.com
http://www.greenfieldgroup.com
Shaela Saxon
Full service
African-American, Hispanic

NovaVista/Greenfield provides multi-cultural and urban marketing qualitative research with a specific emphasis on Hispanic and African-American audiences. Our extensive knowledge of ethnic and urban markets, combined with Spanish language capabilities and Greenfield's vast experience in qualitative research provide our clients with a comprehensive knowledge base about these unique markets.
(See advertisement on p. 74)

*HAMARC, Inc.
Hispanic America Mktg. & Rsch. Cnslts.
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, Consultant
Hispanic

*HeadFirst Market Research
332 Osprey Point
Stone Mountain, GA 30087
Ph. 770-879-5100
Fax 770-879-0014
E-mail: headfirst@mindspring.com
Greg Head, President
Full service
African-American

* Indicates a firm owned by an ethnic minority

*Hispanic Focus Unlimited
Rte. 1, Box 278
La Feria, TX 78559
Ph. 210-797-4211
Fax 210-797-4244
E-mail: hispfocs@gte.net
http://home1.gte.net/hispfocs/index.htm
Ruben Cuellar, President
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Hispanic

HISPANIC & ASIAN MARKETING COMMUNICATION RESEARCH, INC.

***Hispanic Marketing Communication Research**
A Div. of Hispanic & Asian Marketing
Communication Research, Inc.
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Belmont, CA 94002
Ph. 650-595-5028
Fax 650-595-5407
E-mail: gateway@hamcr.com
http://www.hamcr.com
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(See advertisement on p. 77)

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836 S. Arroyo Pkwy.
Pasadena, CA 91105
Ph. 626-793-9598
Fax 626-793-9624
E-mail: HMResearch@aol.com
Amy Siadak
Data collection/Field service, Data processing, Focus groups
African-American, Asian, Hispanic

House of Marketing is the largest multi-lingual focus group and fieldwork company in the Los Angeles area. Our language capabilities include: Spanish, Mandarin, Cantonese, Korean, Japanese, Tagalog, Vietnamese and Armenian. Since 1977, House of Marketing has delivered information of the highest quality and accuracy. Our goal is to allow our clients to make successful decisions with confidence because of the high quality information we provide.
(See advertisement on p. 76)

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***IMAGES Market Research**
1718 Peachtree St., Ste. 650
Atlanta, GA 30309
Ph. 404-892-2931
Fax 404-892-8651
E-mail: IMAGES USA@aol.com
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African-American, Asian, Hispanic, Middle Eastern, Native American

IMAGES Research is a full-service minority owned research firm providing turnkey, cost effective nationwide, qualitative and quantitative general and ethnic market services. We offer focus group recruiting, multilingual telephone/field and executive interviewing featuring a 40-station CATI system. Come visit one of our focus group facilities located throughout the country. Ask about our specials!
(See advertisement on p. 78)

In Focus Consulting
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Menlo Park, CA 94025-6709
Ph. 650-854-8462
Fax 650-854-4178
E-mail: echardon@compuserve.com
Full service
Hispanic

Interviewing Service of America, Inc.
16005 Sherman Way, Ste. 209
Van Nuys, CA 91406
Ph. 818-989-1044
Fax 818-782-1309
E-mail: mhalberstam@interviewingservice.com
http://www.interviewingservice.com
Michael Halberstam, President
Data collection/Field service, Data processing
African-American, Asian, Hispanic, Middle Eastern, Native American

IPC

IPC (International Point of Contact)
32 E. 31st St.
New York, NY 10016
Ph. 212-213-3303
Fax 212-213-2554
E-mail: RLBIPC@aol.com
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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. 79)

*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

*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

L.A. Focus
17337 Ventura Blvd., Ste. 301
Encino, CA 91316
Ph. 818-501-4794
Fax 818-907-8242
Lisa Balelo, Partner
Wendy Feinberg, Partner
Full service
African-American, Hispanic

Lieberman Research Worldwide
1900 Avenue of the Stars, #1550
Los Angeles, CA 90067
Ph. 310-553-0550
Fax 310-553-4607
Dave Sackman, President
Full service
Hispanic

M G Z Research
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Rolling Meadows, IL 60008
Ph. 847-397-1513
Fax 847-397-9016
Martha Garma Zipper, President
Consultant
Hispanic

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MACRO Consulting, Inc.
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Mountain View, CA 94043
Ph. 650-964-9707
Fax 650-964-9949
E-mail: dick@macroinc.com
http://www.macroinc.com
P. Richard McCullough, President
Full service, Data collection/Field service, Data processing, Consulting
Asian, Hispanic

MARI HISPANIC

Mari Hispanic Research & Field Services
2030 E. Fourth St., Ste. 205
Santa Ana, CA 92705
Ph. 714-667-8282
Fax 714-667-8290
E-mail: mari.h@ix.netcom.com
Mari R. Lindemann, President
Lance Lindemann, Sr. Manager
Data collection/Field service
Hispanic

Mari offers complete Hispanic interviewing with multiple field sites in Orange and LA County. Product/concept survey placement/test markets/all sites with video and TV copy testing/accurate data about Hispanic consumerism/cross country assignment translation available. Focus group Spanish translation, recruitment and moderator.
(See advertisement on p. 31)

The Market Connections Group
of Cultural Access Worldwide
5150 El Camino Real, Ste. D-11
Los Altos, CA 94022-1527
Ph. 650-965-3859
Fax 650-965-3874
E-mail: info@hmc-research.com
http://hmc-research.com
M. Isabel Valdes, President
Mary Lou Derrers, Exec. Vice President
Full service
African-American, Asian, Hispanic

Market Development Associates, Inc.
5050 Poplar Ave., Ste. 920
Memphis, TN 38157
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Fax 800-480-0861
E-mail: Mktdevlp@aol.com
http://www.MDARESEARCH.com
John Choate, President
Full service, Data collection/Field service, Data processing
African-A
merican

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600 B St., Ste. 1600
San Diego, CA 92101
Ph. 619-232-5628
Fax 619-232-0373
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Hispanic

20 years of expertise in the field of Latin American and U.S. Hispanic research. MDI's scope of syndicated and customized research services include: qualitative, focus groups, mini-groups, triads, in-depth interviews. Quantitative, strategic market and A&U studies, tracking surveys, omnibus services, Copy-TRAC and Quick-TRAC standardized copy-testing services. MDIIS has 100 Quancept CATI stations, state-of-the-art data collection facility. General market, U.S. Hispanics, Latin American and Portuguese interviewing.
(See advertisement on p. 79)

Market Intelligence
Hospitality Research & Consulting
15421 Lake St. Ext.
Minnetonka, MN 55345-1914
Ph. 612-933-6825 or 612-961-7751
Fax 612-962-5093
E-mail: ahmed@mn.uswest.net
Ahmed Abdelaal, CEO
Full service
Middle Eastern

*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, Data collection/Field service, Data processing
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. 716
Los Angeles, CA 90064
Ph. 310-842-8310
Fax 310-842-9493
E-mail: moran@markmatrix.com
Lynn Walker Moran, Facility Manager
Full service, Focus groups
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
Mary Baroutakis, MBA, Partner
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The premier qualitative and quantitative research organization for the general, Hispanic and international markets. Our innovative and proprietary methods assure clients of the most thorough and fail-proof research. The most demanding clients have acknowledged our work as the "Gold Standard."
(See advertisement on p. 81)

*McLaughlin Research Interview Service
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, Inc.**
1101 Bay Blvd., Ste. D
Chula Vista, CA 91911
Ph. 619-424-4550
Fax 619-424-4501
E-mail: jsuarez@mktdev.com
http://www.mktdev.com
Jose Suarez, Operations Manager
Data collection/Field service
Hispanic

MDI Interviewing Services is a 100 CATI-station telephone data collection facility conducting research in the Latin American and U.S. Hispanic markets. With a full-time and part-time staff of nearly 200, MDIIS is one of the largest data collection facilities in the country and has conducted over 2,000 projects among Spanish, Portuguese and English speaking respondents since the company opened its doors in 1990.
(See advertisement on p. 79)

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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
E-mail: MCCINC@compuserve.com
Lauren Heger, Field Director
Focus groups
African-American, 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.
Global Strategic Intelligence
P.O. Box 1439
Princeton, NJ 08542
Ph. 609-730-8188
Fax 609-730-8111
E-mail: MOIINC@worldnet.att.net
Mila Montemayor, President
Full service
Asian

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506 Ft. Washington Ave., #3C
New York, NY 10033
Ph. 212-740-2754
Fax 212-923-7949
E-mail: ROMANAAA@aol.com
Francesca Moscatelli
Focus groups
Hispanic

National Opinion Research Services
760 N.W. 107th Ave., Ste. 106
Miami, FL 33172
Ph. 800-940-9410
Fax 305-553-8586
E-mail: quality@nors.com
http://www.nors.com
Daniel Clapp, President
Data collection/Field service
Hispanic

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, Data processing
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

*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: omntrak@aloha.net
Frances Pirie, Exec. Vice President
Full service, Data collection/Field service
Asian

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

***Opinion Access Corp.**
31-00 47th Ave.
Long Island City, NY 11101
Ph. 718-729-2OAC(2622) or 888-489-DATA (3282)
Fax 718-729-2444
E-mail: OAC@opinionaccess.com
Joe Rafael, President
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African-American, Hispanic

Opinion Access Corp. provides market researchers with a one-stop shop for all data collection, tabulating, coding and data entry services, utilizing a unique combination of experienced staff, leading edge CATI software and predictive dialing.
(See advertisement on p. 43)

*Paradigm Technologies Int'l.
20 Valley Ave., Ste. A18
Westwood, NJ 07675-3604
Ph. 201-722-3550
Fax 201-722-3557
E-mail: ravipara@aol.com
http://www.paradigmtek.com
Ravi Iyer, President
Full service, Data collection/Field service, Data processing
African-American, Asian, Hispanic, Middle Eastern

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2306 S.W. 13th St., Ste. 807
Gainesville, FL 32608
Ph. 800-749-6760 or 352-336-6760
Fax 352-336-6763
E-mail: surveys@pmrresearch.com
http://www.pmrresearch.com
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Precision Gathering & Management, Inc.
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Orem, UT 84057
Ph. 801-434-9546
Fax 801-434-7304
E-mail: generic@pgmincorporated.com
http://www.pgmincorporated.com
Data collection/Field service, Data processing
African-American, Asian, Hispanic, Middle Eastern, Native American

Phase III Market Research
1150 N. First St., Ste. 211
San Jose, CA 95112
Ph. 408-947-8661
Fax 408-293-9909
E-mail: npphase3@3cjps.net
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
http://www.prange-ohearn.com
Randy Prange, CEO
Full service
African-American, 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
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Brooklyn, NY 11218
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Fax 718-972-3926
Connie Livia, President
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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. 82)*

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Ventura, CA 93001
Ph. 805-278-1444
Fax 805-278-1447
E-mail: reyesresearch@reyesresearch.com
http://www.reyesresearch.com
Michele Reyes, General Partner
Data collection/Field service, Focus groups
African-American, Hispanic

*Rincon & 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

*Roslow Research Group, Inc.
151 Haven Ave.
Port Washington, NY 11050
Ph. 516-883-1110
Fax 516-883-4130
E-mail: ROSLOWGRP@aol.com
Peter Roslow, President
Full service
Hispanic

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Scientific Telephone Samples
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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
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The best choice for quality random digit (RDD),demographically targeted RDD, listed, and business sampling. RDD sampling for 5 cents per number, with aggressive discounts. Free business purging and record coding. Any geography or sampling method (EPSEM, Type B, etc.). Fast turnaround. Radius sampling. Complete mapping and geodemographic capabilities. On-line/in-house sampling system available. Quality sampling since 1988.
(See advertisement on p. 34)

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Atlanta, GA 30350
Ph. 770-591-7730
Fax 770-591-5209
Mario de la Guardia, President
Full service
African-American, Asian, Hispanic

*Smithmark Corporation
9942 Hard Key Circle
Indianapolis, IN 46236-7360
Ph. 317-826-9095
Fax 317-826-9095
Michael Smith
Full service, Data collection/Field service
African-American

*Southern Spectrum Research, Inc.
1600 Canal St., Ste. 400
New Orleans, LA 70112
Ph. 504-539-9222
Fax 504-539-9228
E-mail: Lindecuir@aol.com
http://www.bja.com/spectrum
Linda DeCuir, Research Coordinator
Data collection/Field service, Data processing
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
http://www.4growth.com
Carol Morgan, President
Full service
Hispanic

Strategy Research Corporation
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Miami, FL 33125
Ph. 305-649-5400
Fax 305-643-5584
E-mail: strategy@icanect.net
http://www.strategyresearch.com
Richard W. Tobin, President/CEO
Full service
Hispanic

Strategy Research Corporation is a full-service marketing research company, providing survey research and focus groups throughout the Western Hemisphere since 1971. Extensive Hispanic research capabilities, providing reliable custom marketing research studies, market profiles, tracking studies, and more; expertise in conducting multi-country studies with own personnel in those countries. Authors of Latin American Market Planning Report and U.S. Hispanic Market study.
(See advertisement on p. 83)

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

***SuperDatos de México**
61 Ensenada
Colonia Hipodromo
Mexico D.F., Mexico CP 06100
Ph. 650-595-5028 (U.S.) or 52-5-553-2754 (Mex.)
Fax 650-595-5407 (U.S.)
E-mail: gateway@hamcr.com
http://www.hamcr.com
Jennifer Mitchell
Full service
Hispanic

SuperDatos de México provides a wide range of quantitative and qualitative research services throughout Mexico, including central location intercept interviewing, telephone interviewing, data tabulation and analysis, focus group facilities, and focus group moderation and analysis. It is a wholly-owned subsidiary of Hispanic & Asian Marketing Communication Research, Inc.
(See advertisement on p. 77)

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
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(See advertisement on p. 46, 59, 80)

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Fax 516-794-3841
E-mail: NYSURVEYS@aol.com
Gladys Ronco, President
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African-American, Asian, Hispanic

Target Market Research Group, Inc.

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4990 S.W. 72nd Ave., Ste. 110
Miami, FL 33155-5524
Ph. 800-500-1492 or 305-661-1492
Fax 305-661-9966
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Martin G. Cerda, President
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(See advertisement on p. 84)

Taylor Research
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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, Data processing
African-American, Asian, Hispanic, Native American

*Technometrica, Inc.
85 Kinderkamack Rd.
Emerson, NJ 07630
Ph. 201-986-1288
Fax 201-986-0119
E-mail: mayur@technometrica.com
http://www.technometrica.com
Raghavan Mayur, President
Full service, Data processing
African-American, Asian, Hispanic, Middle Eastern, Native American

United Marketing Research
1516 53rd St.
Lubbock, TX 79412
Ph. 806-744-6740
Fax 806-744-0327
E-mail: UMR297@internetmci.com
David McDonald, Sales/Marketing Dir.
Data collection/Field service, Data processing
Hispanic

V AND L

***V & L Research & Consulting, Inc.**
655 Village Square Dr., Ste. 101
Stone Mountain, GA 30083
Ph. 404-298-0139
Fax 404-298-0026
E-mail: VLResearch@mindspring.com
Delphyne L. Lomax, Principal, Quant. Rsch.
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(See advertisement on p. 85)

Venture Marketing Associates, Inc.
6064 Apple Tree Dr., Ste. 5
P.O. Box 171392
Memphis, TN 38187
Ph. 901-795-6720
Fax 901-795-6763
E-mail: VMA3155@aol.com
Alex Klein, President
Full service, Data collection/Field service, Data processing
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- Hispanic
- Asian
- Senior
- Wealthy Affluent/Low-to-Moderate Consumers
- Other Specialty Markets

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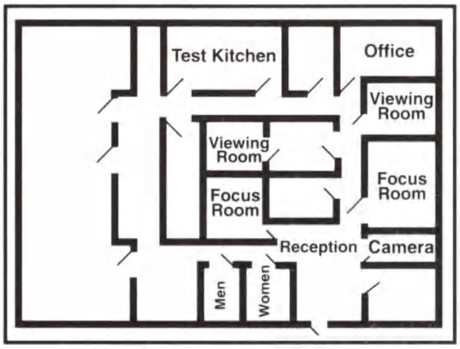
- Attitude Awareness and Usage Studies
- Advertising Concept Development
- Product Development/Feasibility Studies
- Satisfaction Studies
- Positioning Studies

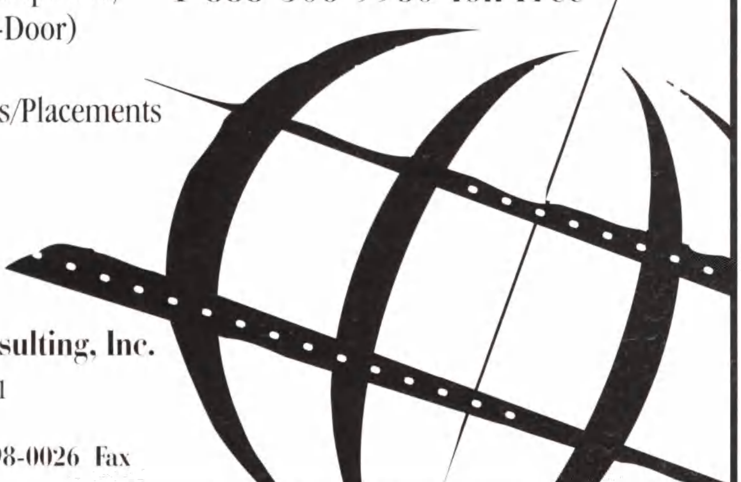
Methods
- Focus Groups/In-depth Interviewing
- Data Collection-(Telephone, Intercept, Door-to-Door)
- Store Audits
- Sampling Programs/Placements

Facilities Rental
- Two (2) Focus Rooms
- Test Kitchen
- 5,040 Square Feet
- Audio/Video-1/2 and 3/4 inch formats
- Central Location Testing



V & L Research and Consulting, Inc. is conveniently located 17 miles from the airport and 14 miles from downtown Atlanta. For a quote or more information call: Dydra Virgil or Delphyne Lomax.

1-888-506-9980 Toll Free



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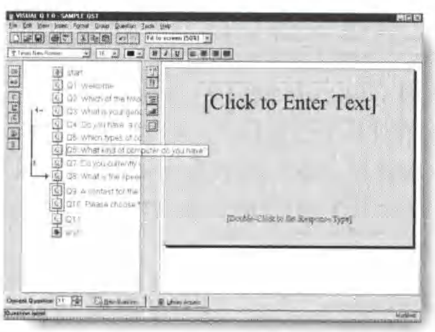

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Columbus, OH 43212
Ph. 614-488-3123
Fax 614-421-1154
Betty Spencer, Vice President
Services: CD, DE, DT, SA

Segmenting markets

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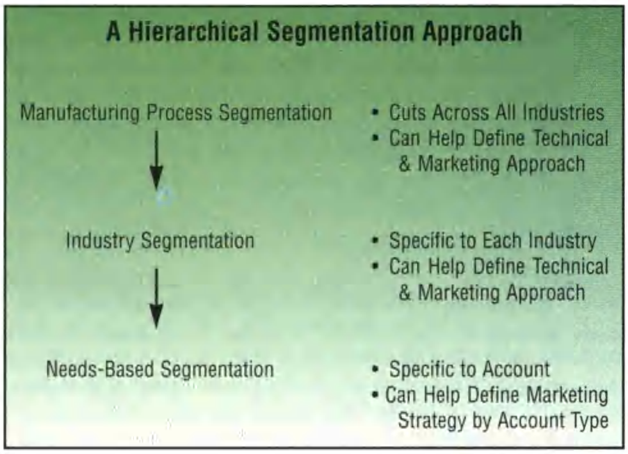
assistance which complements one of the supplier's competitive strengths. Thus, this supplier plans to create a new product development assistance resource that will help companies in different industries find new and different ways to utilize the firm's products in their manufacturing processes.

In this particular market, there is a major move from one kind of manufacturing process to another. The manufacturing process segmentation scheme helps the supplier take advantage of this opportunity. This firm developed strategies designed to motivate and to better enable companies to change to the new manufacturing process. For those customers who have switched to the new process, the supplier is in a position to market the relative advantages of its product in regard to this new process.

In summary, business-to-business markets can be quite complex. The classic needs-based segmentation approach, by itself, may simply not be able to capture all of the important characteristics of a market that need to be considered in a strategic marketing plan. Rather, a needs-based segmentation strategy often needs to be augmented with alternative market segmentation schemes that, when integrated, form the basis for a strategic planning initiative. As discussed above, this company integrated three different segmentation perspectives on a market. The segmentation schemes were integrated in a hierarchical fashion as shown in the following figure.



The manufacturing process segmentation scheme cuts across all industries. The variables that describe different manufacturing processes are the same regardless of industry type. The industry segmentation scheme produces profiles that are specific to each industry. Because each industry's products are different, product quantity and performance requirements in each industry differ as well. Finally, the needs-based segmentation scheme can be used to classify specific accounts into homogeneous segments. Such a segmentation scheme helps the supplier define a marketing strategy by account type. Thus, for this manufacturer, augmenting the classic needs-based segmentation scheme with manufacturing process segments and industry-specific profiles, produced a foundation for its strategic planning process. ❑

Trade Talk

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• Build-to-order (BTO) and in-store brands proliferate. Consumers willing to buy BTO systems from second-tier vendors like Proteva and CTX can save hundreds of dollars. Computer retailer MicroCenter currently offers its own entry-level configuration for $499. Mainstream vendors like HP will hone manufacturing capabilities to create viable products at comparable price points.

• Excess capacity pushes component cost lower. The costs of memory, CD-ROM drives, and motherboards continue to drop as an overload of suppliers in the U.S. and Asia try to stay afloat by dropping prices. By next year, all but the cheapest PCs will offer 32MB of memory, 32x CD-ROM drives, and 56Kbps modems.

Cheap computers will change the market

Forrester predicted in October 1996 that PC penetration would reach 53 percent of U.S. households by 2001, but this forecast was based on the belief that sub-$1,000 systems would not shake up the market until 2001. Forrester now believes the market for cheap PCs will blossom during the next five years. The company estimate that by 2002, 17.5 million new systems will be sold to U.S. consumers. High-income consumers will buy an extra machine for the kids, while low-income families will finally take the plunge. The effect of this sales acceleration in low-cost systems will be:

• A faster increase in household penetration. Forrester estimates that 43 percent of U.S. households currently own a personal computer. By year-end 2002, it expects almost 60 percent of U.S. households to own one or more PCs.

• A closing of the information gap. Close to 40 percent of low-income homes and 62 percent of households earning from $25,000 to $49,999 per year will be equipped with a PC by 2002. The reduction in prices will unleash demand in cash-strapped institutions like schools, libraries, and senior centers.

Index of Advertisers

• A resurgence in first-time buyers. During the next five years, Forrester estimates that 21 million first-time buyers will come into the market, accounting for close to 30 percent of new purchases. This onslaught of first-time users will place new demands on PC makers, content providers, and software companies.

• Multiple-PC households gain ground. Forrester predict that one-fifth of U.S. households will have more than one computer by 2002. Parents will reserve one system for Quicken and holiday card creation, while the kids will use a machine for games and educational purposes. By this time, almost 40 percent of PC households will have more than one computer.

Far-reaching consequences

The ascendancy of cheap PCs will have far-reaching consequences for consumers, content and eCommerce players, and PC manufacturers.

As new buyers and multiple computer purchases dominate the PC market, the demands and buying habits of consumers will shift. Here's how:

• Consumers stop overbuying. People historically have bought high-end PCs to guard against premature obsolescence. But cheap PCs will run next year's software just fine. High-end models sporting fast processors and gargantuan drives will gather dust on retail shelves. Consumers won't need to replace systems every two years — PC lifespans will stretch to five years or more. Meanwhile, households will divert their PC savings to fund space-saving flat-screen monitors, photo-quality color printers, photo scanners, and additional software.

• Buying cycles shorten. As word of mouth and mainstream press reassure the public of the viability of cheap PCs, consumers will purchase more quickly. Instead of agonizing for weeks over possible price drops or impending obsolescence, consumers will buy on impulse for graduations or other family events.

• Brand loyalty dissipates. For PC vendors, getting top ratings in *Consumer Reports*' annual PC buying guide will be much more important in 1999 than being the first to offer a 300MHz CPU. Consumer choices will narrow to price and features, with a final decision determined by ease of setup, device ergonomics, service, and support.

• High-bandwidth demands grow. As the PC becomes affordable for almost all households, speedy Internet access will be the new defining line between the haves and have-nots. Households with more disposable income will pour money into second and third phone lines, cable modems, and digital telephone lines.

On-line content and commerce expand

On-line content and transaction sites will benefit from the boost in penetration and diversification of PC households. For on-line business, this means:

• Mass market vendors find an audience. Last fall, Forrester found that 72 percent of on-line shoppers lived in households with an annual income that exceeds $40,000. But giant merchants like K-Mart, Wal-Mart, and QVC will find that cheap PCs bring more of their patrons on-line. Retailers should partner with PC vendors to include special links, incentives, and one-button access to their on-line stores.

• Tools for frugal shoppers take off. Convenience is the reason current on-line purchasers buy over the Web. But an increasing proportion of lower-income shoppers will look for opportunities to save money, opening up the market for services like Web coupons from the Interactive Coupon Network or SuperMarkets Online.

• Free on-line access opportunities heat up. Many lower-income families will balk at $20 per month pricing for unlimited on-line access. Free E-mail services like Juno will be joined by subsidized Web access opportunities from on-line shopping services like Peapod, which will provide Web access in return for guaranteed monthly minimum purchases.

• Home banking gets a boost. The jump in household penetration will benefit all on-line financial services sites, but the largest opportunity for growth lies in home banking. Families making $45,000 may not invest no matter how low commissions go, but they do need to know the status of their checking and savings accounts.

• Internet advertising jumps. The rise in PC shipments — especially the three million to four million per year by first-time buyers — will increase the number of eyeballs on the Web. America Online should benefit as its ease-of-use continues to attract on-line newcomers. As penetration climbs to over 50 percent of households in 2000, companies will pour more money into on-line marketing campaigns.

PC industry shakeout

The good news for the PC industry is that shipments will increase. Unfortunately for vendors and computer retailers, these systems will sell for under $1,000, leaving very little room for profit. The major effects of this change will be:

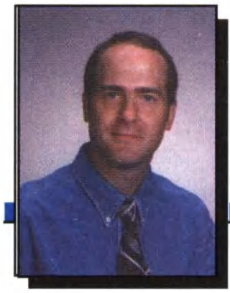
• Big problems for Intel. The giant still commands 80 percent of the cheap PC processor market, but PC vendors will only buy Intel when the price point competes with AMD and National Semiconductor. The heart of Intel's power — the x86 instruction set that runs all PCs — will become generic as new vendors like IDT enter the fray. To fight market share erosion, Intel must drop its price and quickly push high-end technology down to the low-end PC market. Profit margin will erode, forcing Intel to spin off investments in non-core technology like videoconferencing hardware and desktop management tools. The company will be forced to reinvest in Pentium-class technology as its expensive, next-generation processors are ignored by the booming consumer market.

• Big gains for Microsoft. Just as "IBM-compatible" became the term for all PCs in the mid-1980s, "Windows-compatible" will become the term for any Pentium-class processor that runs PC software. The "Intel Inside" campaign will lose steam as Microsoft and its Windows logo provides the guarantee that any new computer can run off-the-shelf software. Future innovations — whether enhanced graphics or voice input — will come from Redmond and top PC manufacturers. During Microsoft announcements, Intel will be forced to share the stage with AMD and National Semiconductor.

• Premium-priced vendors must sell at $999 or leave the market. Companies like Dell and Sony must ante up and begin selling $999 systems by the end of 1998 or lose ground. Companies like Apple and Toshiba that can't learn how to play profitably in the sub-$1,000 space will be forced from the market. By 2000, Forrester expects more PC casualties as companies like Gateway struggle to make ends meet.

• The network computer (NC) crowd must regroup. Consumer NCs won't be able to compete in price with PCs — why pay a hundred dollars less for a system that can't run Disney's *Ready to Read with Pooh*? NC players like Oracle should stop competing with PCs and focus instead on enhancing existing devices like phones. A simple, cheap screen phone that seamlessly links to the white pages and Cybermeal's take-out service will beat out PCs for kitchen space.

• The interface opportunity. The PC platform has reached maturity as stable processors and operating systems slow down technology innovation. But one glaring hole remains — the interface. The basic windows metaphor is over 25 years old, and Microsoft is failing to advance the user interface. Vendors like Apple, MetaCreations, or America Online have the opportunity to graft distinct and consumer-focused interfaces on top of Windows. ❏



Trade Talk

By Joseph Rydholm/QMRR editor

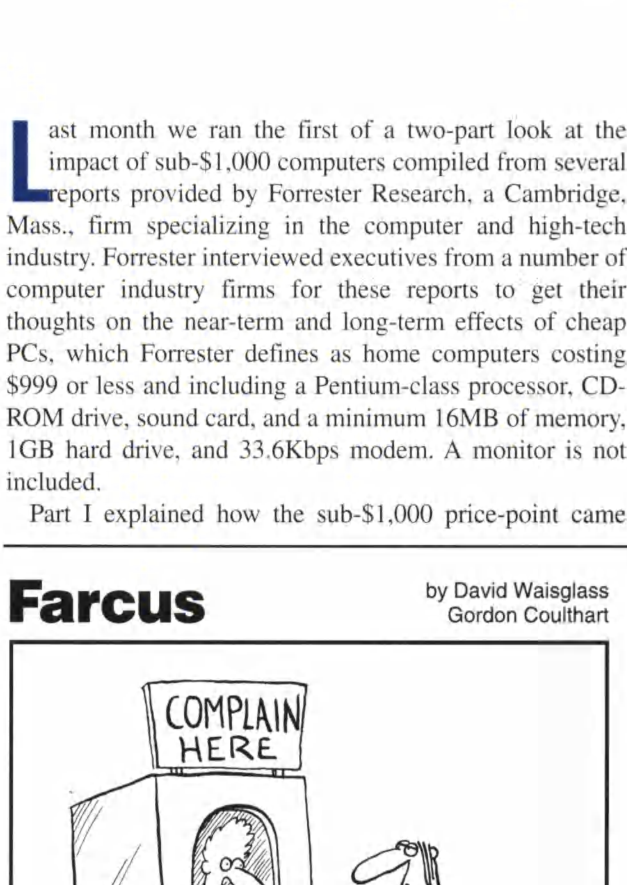
Cheap PCs part II: falling prices, rising expectations

Last month we ran the first of a two-part look at the impact of sub-$1,000 computers compiled from several reports provided by Forrester Research, a Cambridge, Mass., firm specializing in the computer and high-tech industry. Forrester interviewed executives from a number of computer industry firms for these reports to get their thoughts on the near-term and long-term effects of cheap PCs, which Forrester defines as home computers costing $999 or less and including a Pentium-class processor, CD-ROM drive, sound card, and a minimum 16MB of memory, 1GB hard drive, and 33.6Kbps modem. A monitor is not included.

Part I explained how the sub-$1,000 price-point came about and looked at who's buying the inexpensive PCs. This month we look at the implications for the computer industry and Internet marketing.

—Joseph Rydholm

Farcus by David Waisglass Gordon Coulthart



Will advances in technology make fools of consumers who buy $999 computers? After all, an outdated PC that can't run next holiday season's software is no bargain. But these new systems will be worthwhile investments. They easily:

• Handle the basics. Low-end systems already sport speedy CD-ROM drives, large hard disks, and fast processors required for contemporary software. Only high-end 3-D games do not run their best on these platforms, but in many cases the games can be played with lower image quality.

• Access the Internet as fast as possible. Modem speeds determine consumer satisfaction with Web surfing. Every low-end system now comes with at least a 33.6Kbps modem. Consequently, an entry-level Compaq Presario will download E-mail and display Web sites just as quickly as a fully loaded Dell Dimension. Next year, all models will ship with 56Kbps modems.

• Escape multimedia obsolescence. Despite the push from industry leaders like Intel, most consumers will not pay an extra $1,000 for CPU-intensive multimedia capabilities like DVD playback and digital imaging. DVD software will not reach critical mass until at least 1999. Mainstream consumers will not spend the time or money on tasks like photo editing.

Prices will keep falling

The sub-$1,000 PC is just the start. Forrester believes that by the end of 1998, entry-level systems from name-brand manufacturers will retail for as little as $599. Cheap PCs will build momentum, as:

• Processor clones drive chip prices down. AMD ships CPUs with Pentium performance but only charges 75 percent of Intel's price. National Semiconductor will reduce prices by integrating graphics and peripheral control into the silicon. With Compaq, IBM, and Acer already shipping clone-based CPUs, Intel will continue to cut its own prices — even on its high-end Pentium II line — to retain market share.

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