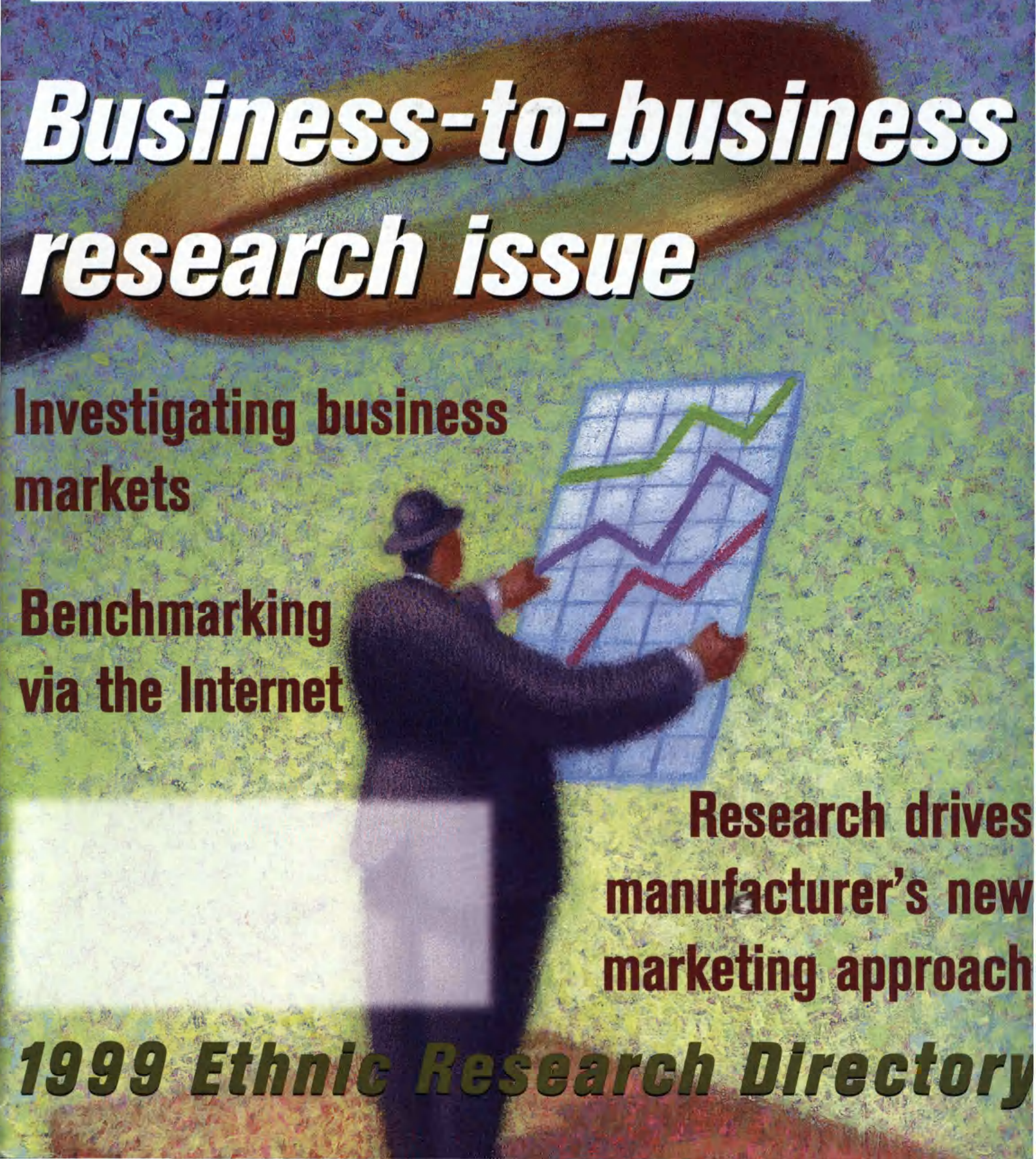
QUIRK'S Marketing Research Review

Volume XIII, Number 4 April 1999



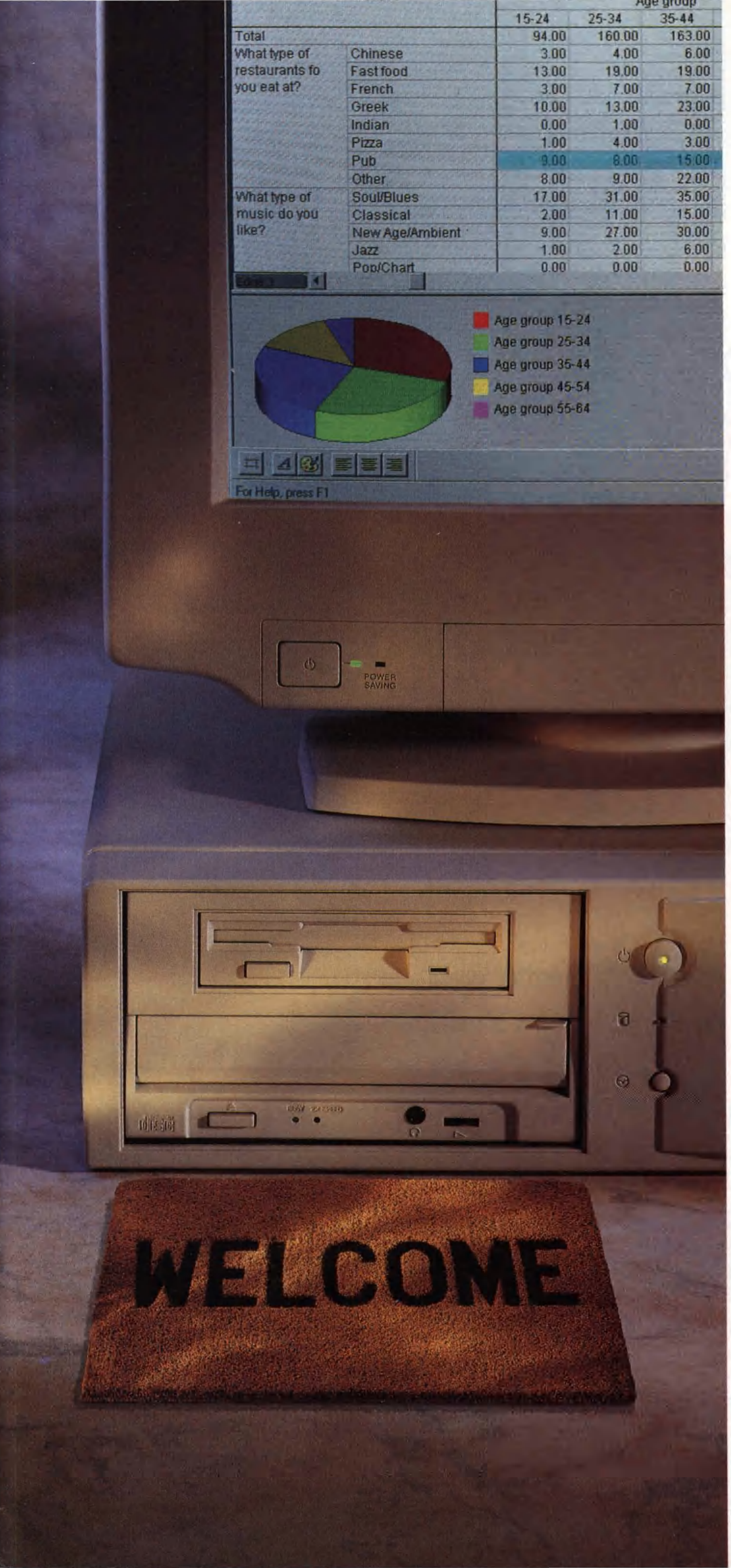
Business-to-business research issue

Investigating business markets

Benchmarking via the Internet

Research drives manufacturer's new marketing approach

1999 Ethnic Research Directory



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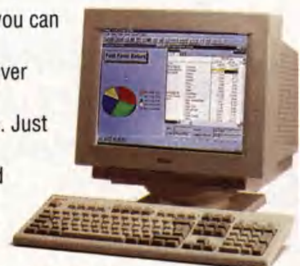

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QUIRK'S
Marketing Research Review

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Quirk's Marketing Research Review, (ISSN 08937451) is issued 11 times per year – Jan., Feb., Mar., Apr., May, June, July, Aug./Sep., Oct., Nov., Dec. – by Quirk Enterprises, Inc., 8030 Cedar Ave., Ste. 229, Bloomington, MN 55425. Mailing address: P.O. Box 23536, Minneapolis, MN 55423. Tel.: 612-854-5101; Fax: 612-854-8191; E-mail: quirk19@mail.idt.net; Web address: http://www.quirks.com. Periodicals postage paid at Minneapolis, MN and additional mailing offices.

Subscription Information: U.S. annual rate (11 issues) $70; Canada and Mexico rate $100 (U.S. funds); international rate $119 (U.S. funds). U.S. single copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change. **POSTMASTER**: Please send change of address to QMRR, P.O. Box 23536, Minneapolis, MN 55423.

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D E P A R T M E N T S

1999 will be a better year for biz-to-biz firms

When the economic outlook turns cloudy, many business-to-business companies grow overly cautious and cut back on their marketing efforts in an attempt to protect profits. With layoffs by several high-profile firms, economic problems overseas, and the uneven performance of the stock market, some caution is certainly called for. "However, a play-it-safe, try-not-to-lose strategy can backfire," says Ken Long, director of Penton Research Services. "If you expect the worst in business, as in life, you often get it." Cleveland-based Penton Research Services is the research arm of Penton Media, Inc., a business media company.

But for the foreseeable future, prospects look good for business-to-business firms. Here's a countdown of the top 10 reasons business marketers should look forward to the year ahead:

10. The U.S. economy remains fundamentally sound. The country is entering its ninth year of expansion. That's old by historical standards, but expansions don't die of old age. Real gross domestic product will climb 2.2 percent in 1999, according to Blue Chip Economic Indicators. Only 6 percent of the economists recently surveyed by Blue Chip expect the next recession to begin in 1999. Almost two-thirds (63 percent) expect growth to continue until at least 2001, making the current expansion the longest in American history.

9. Other countries are beginning to pull out of recession. One-fifth of the

continued on p. 56

Internet helps form brand opinions

More than a third (36 percent) of Internet users say that their opinions of one or more product brands has changed as a result of using the Internet, according to the report "Online Branding - The Internet's Impact on Branding," released by New York-based Cyber Dialogue. In addition, the report found that "brand impressionable" users are more likely to shop both on-line and off-line as a result of using the Internet.

"We found that the Internet is both color- , gender- , and age-blind, helping to neutralize obstacles some shoppers experience in the conventional marketplace," says Thomas E. Miller, Cyber Dialogue vice president and author of the report. "For example, women and ethnic minorities, while still under-represented on-line, are among those most likely to say the Internet helps them form brand opinions because they can get unbiased answers to their product questions."

The Internet can also influence store traffic, direct mail purchases, and even TV shopping, as well as drive on-line sales, according to Miller. "Brand managers must keep in mind that branding on the Internet is about much more than just capturing eyeballs," he says.

The report recommends that brand managers use mass media to create general brand impressions and drive motivated prospects to their Web sites, where the brand can foster deeper customer relationships. Citing recent survey data, the report shows that most on-line shoppers are destination shoppers who go directly to Web sites that interest them. Still, portals such as search engines and active Web sites in certain product categories like cars, airlines and financial services are clearly emerging as important hubs for directing shoppers in search of product and service information. The report makes specific marketing recommendations for the following industries: autos, airlines, household products, investment services, banking, insurance, and health/medicine.

The report is designed to provide in-depth understanding of how consumers perceive and use the Internet for shopping. It also helps brand managers identify and target on-line shoppers who are most brand impressionable. The report answers the following questions: Which segments of the Internet user population are most likely to change their brand impressions? Which search engines are used by brand impressionable Internet users? What three attributes leverage the interactive capabilities of the Web and lead to more favorable impressions of on-line brands? Where are Internet users most likely to notice on-line ads? How can brand managers improve their chances of creating positive brand impressions via on-line advertising?

The report uses data from the American Internet User Survey, a large telephone survey of Internet users and non-users. The Online Branding report is available at the Cyber Dialogue Web site at www.cyberdialogue.com/products/isg/branding_report.html.

Names of Note

Tony Soares, previously general manager of *Iowa Field Research*, Des Moines, Iowa, has joined the staff of *McGuire Research Services*, Denver, as an account executive.

Christina L. Meslener has been named the director of marketing for the *American Payroll Association* in the company's New York City office.

New York-based *Arbitron Company* has promoted **Bruce Supovitz** to the new position of vice president, national radio services.

The board of directors of *Opinion Research Corp.*, Princeton, N.J., has elected **John F. Short** chairman and chief executive officer. Short will retain his current title of president.

Johanna Strouss has been named director of marketing at *Strategy Research Corp.*, Miami.

Glen Allen, Va.-based auto superstore firm *CarMax* has hired **Philip Moore** to head its market research department. Moore comes to CarMax from *Market Decisions Corp.*, Portland, Ore.

Bonnie Breslauer has joined *TNS Intersearch* in the CSM Consulting Group as vice president, client services in Atlanta.

Deborah Stearns has been named marketing research director at *Essman/Associates* and will direct the Des Moines, Iowa, marketing firm's new research division, Essman/Research.

Stearns **Reimann**

Chris Reimann has been promoted to senior research associate at *Knowledge Systems & Research*, Syracuse, N.Y.

Tammy Bowen has been promoted to database administrator of the marketing research department for the *Maryland Pennysaver Group, Inc.*

Emily Holcomb has been named assistant research manager at *Porchey Research, Inc.*, St. Louis.

Cambridge Systematics, Inc., a Cambridge, Mass., strategic consulting firm, has added **John Iacoviello** as a principal, responsible for expanding services within the firm's market research practice.

Boise, Idaho-based *Clearwater Research* has announced the following promotions and additions at the Boise office: **Cindy Krieg Shute** has been named associate study director; **Brooke Pace** and **Sancha Gilbert** have been named research assistant; **Marcella Hurtado** has joined the staff as programmer, bilingual; **Cindy Greenfield** has been promoted to data collections project coordination manager. At the firm's Council, Idaho, office, **Christi Pollock** has been promoted to assistant supervisor.

Walter Lindenmann, senior vice president and director of research at *Ketchum* public relations, has been named chairman of the Institute for Public Relations' Commission on Public Relations Measurement and Evaluation. The role of the new body will be to help establish and promote standards for PR measurement and to provide counsel to those within the industry on tools and techniques to use when assessing PR activities. Other appointees from the research supplier sector are **Walter Barlow**, president, *Research Strategies Corp.*; **John Gilfeather**, managing partner, *Yankelovich Partners*; **Katharine Paine**, president, *The Delahaye Group Inc.*; and **Mark Weiner**, vice president-public relations research, *MediaLink*.

Victor Crain has joined *ICR/International Communications Research*, Media, Pa., as vice president of the technology research division.

Karl Irons has been named president of *NPD Online Research*, Port Washington, N.Y. **Clark Johnson** has been named vice president of NPD Home Trak, which provides point-of-sale tracking for housewares. **Arnie Schwartz** has been promoted to vice president for NPD's National Eating Trends Service. And **Peter Sterbenz** has been named vice president in the firm's Custom East business unit.

Product & Service Update

New CATI package from Analytical Group

The Analytical Group, Inc., Scottsdale, Ariz., has released WinQuery, a CATI software system designed to help users create and administer questionnaires, set up studies, and monitor data. Questionnaire creation uses the Windows point-and-click design for access to WinQuery's questionnaire capabilities, including automatic grids, conditional branching, randomization, rosters, and formulas. WinQuery assigns initial questionnaire logic and lets users make modifications, import questionnaire text, or use WinQuery to enter text. Users aren't required to write computer code or memorize commands or rules.

Operations such as setting up samples, setting up interviewers, and study setup all take advantage of Windows ease-of-use. WinQuery offers sample management, quota control, automatic call scheduling, automatic callback scheduling and routing of callbacks, automatic disposition tracking, detailed interviewer productivity reports, and up-to-the-minute dialable sample reports.

Users can output data for use in most any crosstab or statistical analysis software, including WinCross tabulation software. For more information visit the company's Web site at www.acsinfo.com or call 800-946-2767.

Three new offerings from SPSS

SPSS Inc., Chicago, has released Quanquest 2.1, which allows researchers to design and develop questionnaires that streamline data collection, interpretation and formatting, giving them control of how CATI, CAPI, Web and paper surveys are designed. New features include an enhanced user interface, facilities for tracking and multinational studies, and improved export capabilities.

SPSS is also shipping Neural Connection 2.1 software, which recognizes complex patterns and trends in data. New features include the ability to work with an unlimited number of cases when scoring new datasets, greater compatibility with SPSS files, and improved status information and enhanced data input tools.

In addition, SPSS is offering Surveys with Confidence, a three-part survey research software suite that walks users through the survey process from designing the survey to reporting findings. It features a computer-based training application called Survey Coach made up of five modules that address different parts of the survey process, including planning the survey, creating the questionnaire, collecting and entering data, generating reports and preparing a schedule and budget. Surveys with Confidence also includes Survey Builder for creating professional surveys and Survey Analyst for analyzing the collected survey data and presenting findings. For more information call 800-543-2185 or visit the company's Web site

Research Calendar

SENSORY EVALUATION WORKSHOP: As part of its workshop series "Issues in Sensory Evaluation," Tragon Corporation will hold a workshop entitled Descriptive Analysis on May 3-5 at the Sheraton Palo Alto, Palo Alto, Calif. The program will focus on development of a descriptive capability; subject selection and training, sensory language development; test design and analyses, comparison of QDA and other methods. For more information call 650-365-1833 or visit the company's Web site at www.tragon.com.

AAPOR ANNUAL CONFERENCE: The American Association for Public Opinion Research will hold its annual conference on May 13-16 at the Tradewinds Resort in St. Petersburg Beach, Fla. For more information visit the organization's Web site at www.aapor.org or call 734-764-1555.

RESEARCH AMERICAS CONFERENCE: The Canadian Advertising Research Foundation and the Advertising Research Foundation will co-sponsor the Research Americas Conference on May 16-18 at the Marriott Eaton Centre in Toronto. Among other topics, the conference will focus on "how much knowledge can and cannot be transferred within the Americas." For more information call 212-751-5656 or visit the ARF Web site at www.arfsite.org.

CLARITAS CONFERENCE: Claritas, Arlington, Va., will hold its annual Precision Marketing Conference, themed "Advancing the Science & Art of Marketing," from May 17-19 at the Fairmont Hotel in Chicago. Sessions will cover customer acquisition and retention, channel management, sales support, Internet marketing and business-to-business marketing. The conference will also feature a trade show and an interactive solutions lab. For more information call 800-678-8110 and press "4" or visit the company's Web site at www.claritas.com.

ENERGY MARKETING RESEARCH: The American Marketing Association will hold a conference on energy marketing research at Adam's Mark Hotel, San Antonio, Texas from May 23-26. For more information call 312-648-0536 or visit the organization's Web site at www.ama.org.

at www.spss.com.

Spatial Insights releases GDT Dynamap 2000 Extract

Spatial Insights, Inc., a Vienna, Va., geographic information services company, has developed a menu-driven application for extracting and appending GDT's Dynamap 2000 data to form user-defined, seamless mapping project areas. Using the application, GDT's Dynamap 2000 data are extracted directly from CD-ROM, and data for multiple themes covering multiple states, counties and/or census Metropolitan Statistical Areas (CMSAs, PMSAs, MSAs) are appended in one operation. The Dynamap Extract and Append application was developed in response to client-driven consulting projects that required the integration of Dynamap 2000 data covering multiple states or counties.

Over 30 specific themes, including census and postal geographic boundaries, roadway systems, and a comprehensive suite of infrastructure location and attribute data can be extracted and appended for any user-specified area. The application was developed using VisualBasic, and works with either MapInfo or ArcView format GDT Dynamap 2000 data. For more information call Don Segal at 703-827-7031 or visit the company's Web site at www.spatialinsights.com.

New Web-based market intelligence service

Active Research, a San Francisco provider of Web-based services for market research automation, has introduced a new market intelligence service, Active Research Advisor, which is designed to shorten the research and testing process and enable companies to get products to market faster. Active Research Advisor is an on-line market information service that leverages the Web for real-time research into changing market conditions. Subscribers log on to the service to access analyses via a point-and-click interface. Active Research Advisor enables manufacturers to test product concepts, spot trends, and run "what-if" scenarios. The service gathers insight from actual buyers directly at the point of shopping. For more information call Daniel Greenberg at 415-437-3100 ext. 236 or visit the company's Web site at www.activeresearch.com.

Site offers business protocol tips

Protocol Consultants International, formerly The Protocol School of Boston, has launched its Web site, www.protocolconsultants.com. Protocol Consultants offers etiquette and protocol consulting services and programs to companies and individu-

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Research Industry News

20/20 Research, Inc., Nashville, Tenn., has opened a focus group facility in Charlotte, N.C. For more information call Jim Bryson at 615-777-2020.

L.C. Williams & Associates, a Chicago public relations firm, has introduced Stratmap, a research/analysis program that paints a visual snapshot of multi-audience data.

Alternative Research Technologies, Inc., a Chicago firm founded by former VMI Communication and Learning Systems employee Randy Ries, has opened its doors and is offering VMI's PEAC System for market research and data collection. Following the August 1998 closing of VMI's Chicago office and its market research and copytesting division, Ries reorganized and is the exclusive U.S. supplier of the technology. For more information call 773-929-3670.

A new marketing research technology training program in New York City has graduated its first students. The program trains students at Baruch College in New York in marketing research questionnaire specification writing. The program is administered by the college through an arrangement with San Francisco-based survey software company **Computers for Marketing Corp.** (CfMC). The School for Spec Writers has been established to address the demand for trained questionnaire spec writers. The two graduates, trained by CfMC's Denise D'Andrea, are now ready for interviews by users of CfMC's SURVENT CATI system. The school consists of an intensive week-long training program conducted at Baruch, where SURVENT is used in the School of Public Affairs survey center. The college will offer the training program on an ongoing basis to students in its marketing research department. For more information call Richard Rands at 415-777-0470.

San Diego Surveys, Inc., San Diego, Calif., has opened a new regional mall office, "The Opinion Center." The office is located in the Chula Vista Center, which features four major department stores as anchors. The facility offers bilingual Hispanic services and houses three computer interviewing stations, a full kitchen, and display area for store simulation. For more information call 619-265-2361.

National Decision Systems has expanded its existing marketing partnership with **Qualitative Marketing Software**. The two companies have agreed to install hypertext links between their respective Web sites — www.sitereports.com and www.centrusonline.com.

VentureDirect Worldwide, a New York direct marketing and media company, has selected @plan to provide market research data for its online media planning and buying division. @plan collects and analyzes data on active Internet users polled by the Gallup Organization to determine demographic information, brand and product preferences, and Web browsing habits from U.S. adults.

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View your Focus Groups on your home or office PC; live on the web

Focus groups are an excellent way to see what your clients think of your product or service. But to get the most benefit, you need to observe the group. All too often, schedule, budget, travel, or timing constraints can prevent you or others from seeing the groups firsthand. And while traditional videoconferencing allows you to observe the groups without going to the group facility, you may have to go to a videoconferencing location or use special hardware and phone lines to take advantage of it from your office, and still pay a fee for the actual viewing time.

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War Stories

True-life tales in marketing research

By Art Shulman

Editor's note: "War Stories" is a regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. He can be reached at 818-782-4252 or at artshulman@aol.com.

Barbara Gural of CTAM previously worked at another company, where she moderated focus groups. One of her groups was conducted among people who served as caregivers to their family members with Alzheimer's.

At the start of the group, one particular respondent, a woman in her 40s, behaved normally. But later she acted as if she were deaf, and after that she became a little child speaking of her daddy. Some respondents shifted in their seats, those closest to her actually easing their chairs as far away as they politely could from the woman.

It turns out that the respondent had a multiple personality disorder.

After the group was over, the woman refused to accept her cooperation incentive, stating she hadn't participated in the group. Moreover, when Gural offered to take her outside to her car, she informed Gural that she didn't know who Gural was and wasn't going.

Gural's clients were behind the mirror, and when the session was over she told them, "You said you wanted us to recruit a lot of different kinds of people!"

Speaking of folks who don't have it all together, Richard McCoy of Action Research has an example. His firm was recruiting people for a focus group. A man was disqualified toward the end of the screener, due to a lack of knowledge about the business being studied. But this was after being told about the $40 incentive.

The man became very irate and demanded $40 for his time. A supervisor spent half an hour on the phone politely explaining that he was disqualified and that the stipend was for actual participants.

The individual then stated he would visit Action Research headquarters in the morning to make sure it was a "legit" business.

The next morning, the man did show up, entered an employee's office, and refused to leave until he was paid $40.

The staff once again explained to the person he had been disqualified on the phone for the focus group and that he should leave. The man refused to leave and started shouting, and following staff around the building. The office manager called the police while staff attempted to reason with the man.

The police arrived and warned the man to leave the premises. He refused, instead choosing to head up the stairs, prepared to smash the windows. Needless to say, the police arrested the man and were forced to literally carry him away.

It was later learned that when the man appeared before a judge (he had to be carried in), he laid on the floor and refused to speak or enter a plea. The judge ordered him taken away for psychiatric evaluation . . . where he presently remains. It is assumed he is still demanding $40.

Of course, it's not only the public out there that is deemed nuts. Once I sent a speculative proposal to the market research department of the Carnation company suggesting they do a segmentation study among cows.

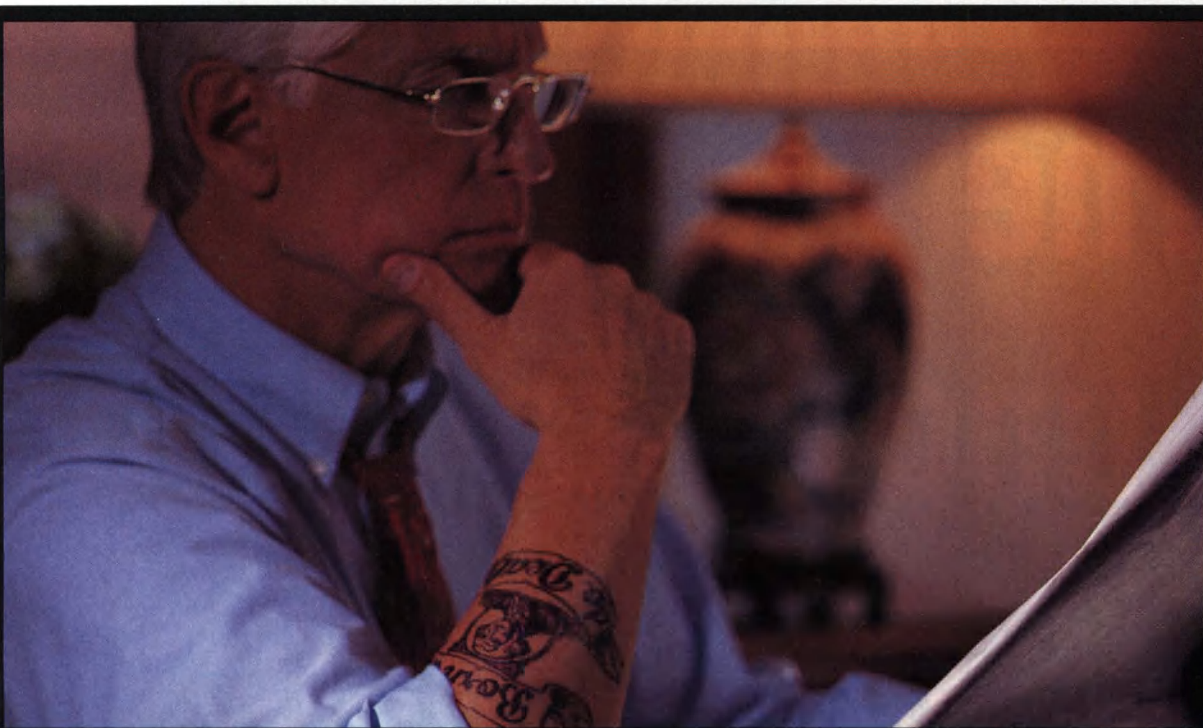
I received a reply letter from a senior executive which simply stated, "I think you are crazy."

That letter, which I had nicely framed, hangs proudly in my office, next to my framed degrees. I refer to it sometimes when things are hectic. It calms me to know that I am crazy. Makes me feel normal.

Doug Conwell of the *Tampa Tribune* tells about a recent opinion poll regarding the possible merger of two local municipalities. Respondents tended to be older retirees. The first night of interviewing, when a respondent was told the topic of the survey was the "merger," she replied — in horror — "Murder?"

Conwell and his group at first thought it was very funny. But when it started happening over and over again, they had to change the terminology.

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.



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The incidence of understanding incidence

Defining and calculating incidence

By Warren Pino

Editor's note: Warren Pino is president of Q & A Research, Inc., Novato, Calif. He can be reached at 415-883-1188.

One of the most critical yet often confusing measures in marketing research is incidence. What is it? How exactly do you calculate it? And what is the impact of it on overall project costs?

Incidence, as it is used in marketing research, quite generally means the percentage of a population that has or does something in common. For example, the incidence of being left-handed is roughly 10 percent, for being a female it is 51 percent. As multiple "qualifiers" are a part of most surveys, such as women who are left-handed, the incidence figures are simply multiplied together to yield the "net incidence," which in this case would be 5.1 percent (.10 X .51).

Well, that was simple enough, except when you get a dialing tally from a supplier on a telephone study with 20 or even 30 separate call classification categories. With all this information, how do you know which ones are included in the incidence calculation and which aren't? Let's say you get the following tally after the first night's dialing:

Category	#
No answer	20
Busy	10
Answering machine	15
Language barrier	10
Initial refusal	10
No woman in household	75
Not left-handed	210
Qualified terminates	5
Completed interviews	10

Okay, so what's the incidence? Remember our definition of incidence here: the percentage of the population that has something in common. This implies a fraction, doesn't it? We want to put in the numerator all "qualifiers" and in the denominator we'll put all contacts.

What's a contact? It is a person that we can put into one of two buckets: qualified or unqualified. Everyone else is excluded from the calculation because we really don't know which bucket to put them in. For example, where do you put a no-answer or a busy? We have no idea whether they qualify or not, so we'll exclude them. The same goes for answering machine, language barrier and initial refusal. "No woman in household" goes into the unqualified bucket, as does "not left-handed." Qualified terminates are those respondents who initially qualified, but for one reason or another elected not to complete the interview. Along with the completed interviews, they'll go into the qualified bucket.

Okay, back to our original question. What's the incidence? I've calculated it as follows:

$$\frac{5 + 10}{210 + 75 + 5 + 10} = 5\%$$

Impact of incidence on costs

After the first day or two of dialing, unless there are quotas to be concerned with, using this formula should make it relatively easy to calculate your incidence. But exactly how does this impact your costs if your original estimate is off?

Let's assume that you anticipated that the incidence of qualification for a given study is 50 percent. Initial dialing efforts reveal that your assumption was off. In fact, way off. It has been calculated at 25 percent. If your supplier is doing its job, you should be given options to stay on budget (reducing the number of surveys, relaxing qualifying criteria, etc.) or a quote for additional costs based on the new incidence figure.

In this particular case, assuming no other specification changes, you should anticipate the field or data collection portion of your project costs to double. Why? Because it is twice as hard to find qualifiers with an incidence at 25 percent than it would have been at 50 percent. Further, it is important to remember that it is the relative difference in percentages between anticipated and actual and not the percentage difference alone that counts.

For example, let's now assume that we expect an incidence of 15 percent. Let's further assume that our actual rate of incidence ends up at 5 percent. While that is a spread of only 10 percentage points, it would actually be three times as hard to find qualifiers. The data collection costs should then be expected to triple the amount originally quoted.

Clients and suppliers alike need to know and appreciate the role that incidence plays in project costs. It's always a pleasant surprise when incidence assumptions are underestimated, but when they are overestimated it is important that everyone knows their options. If clients and suppliers agree on how incidence is defined and calculated, and understand the cost implications of differences between estimated and actual incidence figures, there will be fewer surprises and better client-supplier relationships.

Real-time competitive benchmarking via the Internet

Software makers choose Web, e-mail to measure customer loyalty, satisfaction

By John Chisholm

Editor's note: John Chisholm is president of CustomerSat.com, a Menlo Park, Calif.-based customer satisfaction measurement and market research firm. He can be reached at 650-234-8000 or at jchisholm@CustomerSat.com.

In 1997, four companies in the customer relationship management (CRM) software industry wondered how their customer satisfaction and loyalty compared with that of their closest competitors. To answer that question, these companies — Aurum Software, Inc., Clarify Inc., Onyx Software Corporation, and The Vantive Corporation — engaged our firm to assess their customer satisfaction and loyalty relative to industry-wide benchmarks. Since the companies together represent a large share of the market, their own aggregate scores would be indicative of industry averages. And since the companies' customers are technology-savvy businesses, it made sense to use the Internet to gather the data. Ensuring the integrity and confidentiality of customer data collected for four direct competitors, and providing rapid feedback to an industry whose raison d'etre is enhancing responsiveness to customers was an opportunity and challenge that we could not pass up.

Customer relationship management software (also known as front-office systems, customer-interaction systems, or customer asset management systems) are enterprise-wide systems that manage the relationships between a company and its customers. These systems handle customer support automation, customer order tracking, sales force automation, customer problem tracking, and other sales, marketing, and support functions. CRM systems are typically used in call centers, where the software enables customer support and telesales representatives to access customer histories, access product, pricing, and problem resolution information, take orders, send messages to colleagues, respond to customer inquiries by e-mail, and resolve or escalate customer problems.

By working closely with the four software vendors over several months, we discovered they shared deep, corporate-wide commitments to customer satisfaction and loyalty.

The benchmark initiative had three parts: determining the appropriate performance metrics for the companies and composing survey questionnaires that reflected those metrics; securely deploying the surveys via e-mail and the Web; and promptly delivering confidential and actionable survey results to each vendor.

Performance metrics and questionnaires

CustomerSat.com conducted interviews with the four vendors' customers, managers, and call center service representatives to identify customer satisfaction and loyalty attributes to include in the questionnaires. To allow results to be aggregated, most questions were identical across the four questionnaires. The overall benchmark study, which is deployed on an ongoing basis, included:

1) Performance benchmarks: how customers rate their satisfaction with different attributes of their CRM vendors and software. Forty-five performance dimensions encompassed such areas as product quality, sales force knowledge and effectiveness, support quality and effectiveness, ease of doing business, and pricing.

2) Importance benchmarks: the importance of different attributes in determining customers' overall loyalty and satisfaction.

3) Market positioning: perceived positioning of each vendor and its competitors along multiple market dimensions, by both each vendor's customers and all of the vendors' customers in aggregate.

4) Demographics: the composition of each vendor's customers vs. the overall market, by industry segment, size of customer company, server platform, data base, size of installation, geographical region, and other dimensions.

Our goal was to ensure that the four vendors enjoyed not just operational advantages from the survey results, but strategic advantages through early insights into customer and market requirements and perceptions. The final Web questionnaires had approximately 150 questions each (Figure 1).

Figure 1: Customer satisfaction benchmark survey

Inviting respondents by e-mail

All of the vendors had customer databases that included e-mail addresses. (We encourage all companies, if they do not do so already, to ask for e-mail addresses when customer contact information is collected. Doing so quickly pays dividends as more and more customer communications – both research and direct marketing – can shift from conventional media to e-mail and the Web.) We worked with each vendor to select a representative sample of customer e-mail addresses.

We invited the respondents to the Web surveys by e-mail. The invitations are personalized (Mr. John Smith, ABC Company, Dear John Smith:) and contain the Uniform Resource Locator (URL) or address (a string of characters in the form http://www.something.com/xxx) of the Web survey page (Figure 2). To access the survey, responding customers either click on the address or copy and paste it into their Web browser, depending upon whether their e-mail software is Web-enabled or not. We have learned through experience that the e-mail invitation should come (or be made to appear to come) from the client, and

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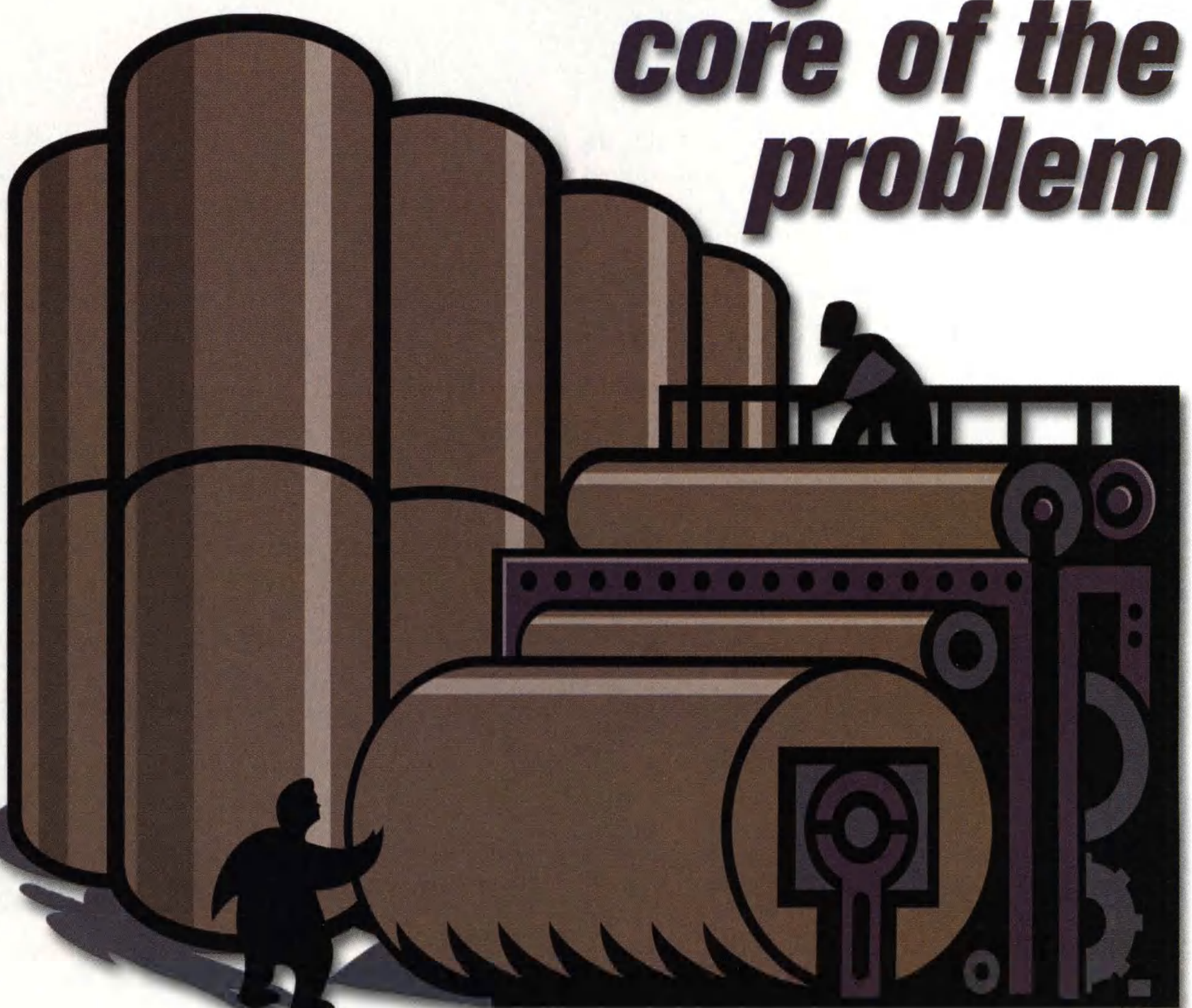
Case History

Getting to the core of the problem



Manufacturing firm turns to research and marketing to differentiate itself from competitors

By John Kavalkovich and Linda Kessel Roovers

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Neenah, Wis.-based Appleton Manufacturing Division (AMD) is a machinery builder specializing in semi-custom equipment for the paper, film, and foil converting industry. The converted materials are wrapped around cores of various densities and lengths, which are cut into specific sizes using machines called core cutters.

In the summer of 1997, AMD and its president Barry Hammerberg were becoming increasingly concerned that its dominance in the core-cutter market was eroding.

The arrival of new competitors and a series of mergers and acquisitions in the core-cutter market had left a host of companies — some with ties to AMD — fighting for the same business and offering similar products. Potential buyers were confused.

This was a case where differentiation was not just a marketing strategy. It was crucial to AMD's very survival. Hammerberg approached FH&K Ideas That Deliver, a Neenah, Wis., advertising and marketing communications firm, for help.

FH&K used a strategy it calls Roundhouse Marketing, a four-step, multidimensional approach. Step I is to get to know the client's business as well as they do — better if possible. Step II is to learn the client's company intimately, by listening to the client and by talking to third-party sources to get the objective opinions the client can't get alone.

Steps I and II can only be achieved through research. Using research as the foundation, FH&K aims to find the overwhelming selling point that will differentiate the client's brand, product or service from that of its competitors. This process leads to Step III of Roundhouse Marketing: creating a unique positioning.

Finally, in Step IV, FH&K develops a marketing communications strategic plan. With clear objectives set, each possible communications vehicle is analyzed for its ability to meet specific preset goals. Then FH&K develops an integrated plan to carefully time and execute a multilevel communications effort.

Applying Roundhouse Marketing to AMD

"We really had to address two problems with AMD," says John Kavalkovich, vice president and marketing/research director for FH&K. "The first was to differentiate the company from a competitor that was assuming its identity. And second, Appleton's current and potential customers saw AMD as a 'tired' company, an old company that may have had new ideas but wasn't presenting itself as an innovator with new ideas."

To differentiate AMD from its competitors, FH&K's first step was to undertake positioning research. Strategic positioning theory begins with the proposition: If a prospect believes that one company offers a meaningful and beneficial difference from its competition, that company will win more customers than it otherwise would.

"In today's business environment, prospects are constantly bombarded with thousands of selling messages," Kavalkovich says. "In order to stand out from this clutter and be remembered — to be intrusive in the minds of the customers and prospects — a message describing the company's meaningful difference has to be short and simple. It must use words that are easily understood by customers and prospects. The selection process is critical because the best positioning message contains only one or two ideas."

Two key objectives: differentiation and awareness

The purpose of the research, then, was to gain insight into the perspectives of AMD's current and potential customers. The focus was on determining what attributes customers and potential customers used to select a core-cutter manufacturer, as well as identifying those attributes AMD's management and staff felt were important in selling their products. The research also addressed customers' and prospects' awareness of AMD and how the company stacked up against the competition regarding the attributes identified. The overall goal was to discover a unique positioning for AMD which would be compelling to both current customers and prospects.

Appleton Manufacturing's A400 Automatic Core Cutter

Kavalkovich recommended the research be conducted in two phases. Throughout both phases, questions were disguised so AMD was not identified as initiating the research.

Phase I

Phase I was a qualitative stage consisting of unstructured interviewing, which was used to identify critical or important attributes used in selecting a core-cutter manufacturer. In this phase, primary emphasis was placed

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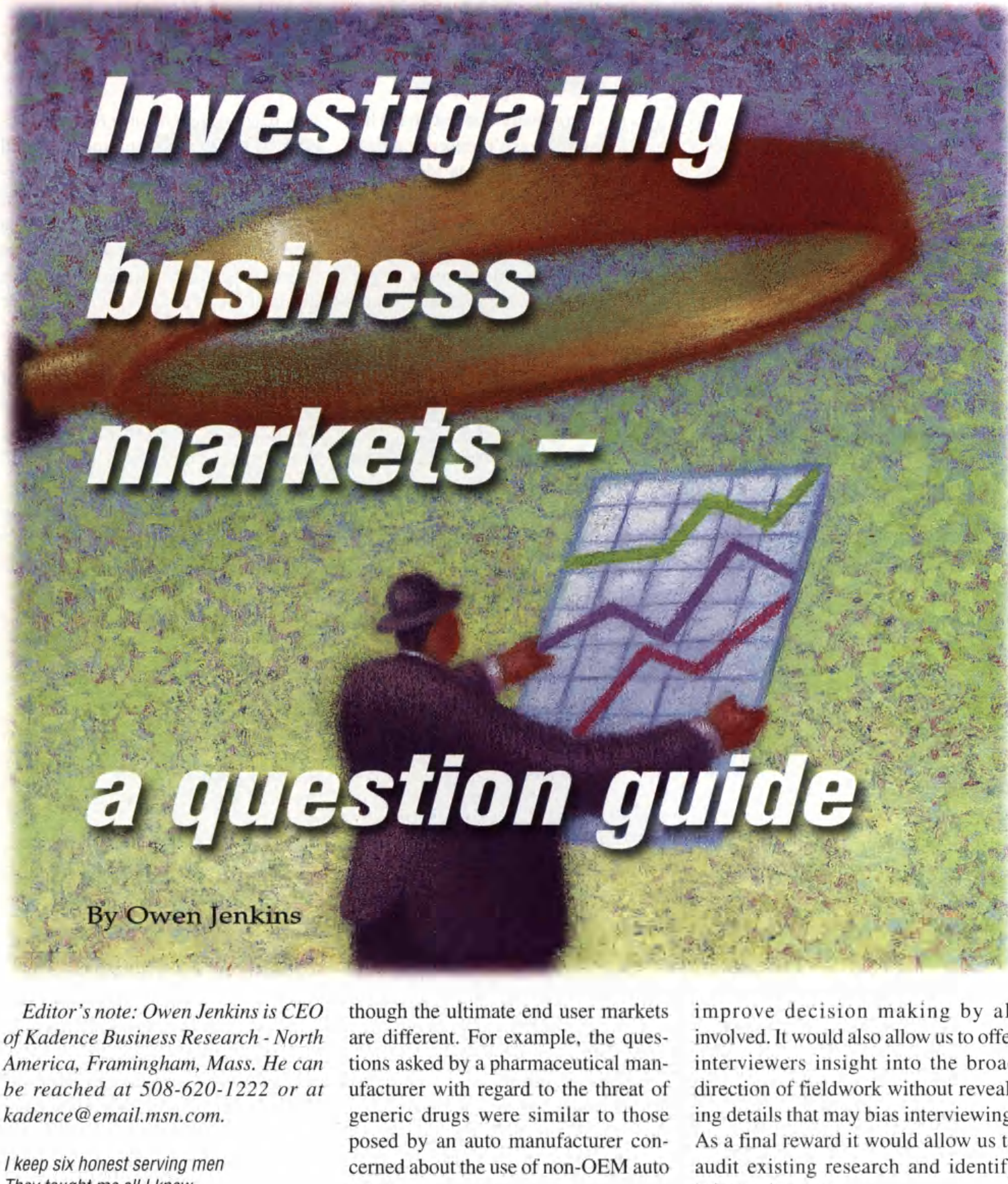


Investigating business markets – a question guide

By Owen Jenkins

Editor's note: Owen Jenkins is CEO of Kadence Business Research - North America, Framingham, Mass. He can be reached at 508-620-1222 or at kadence@email.msn.com.

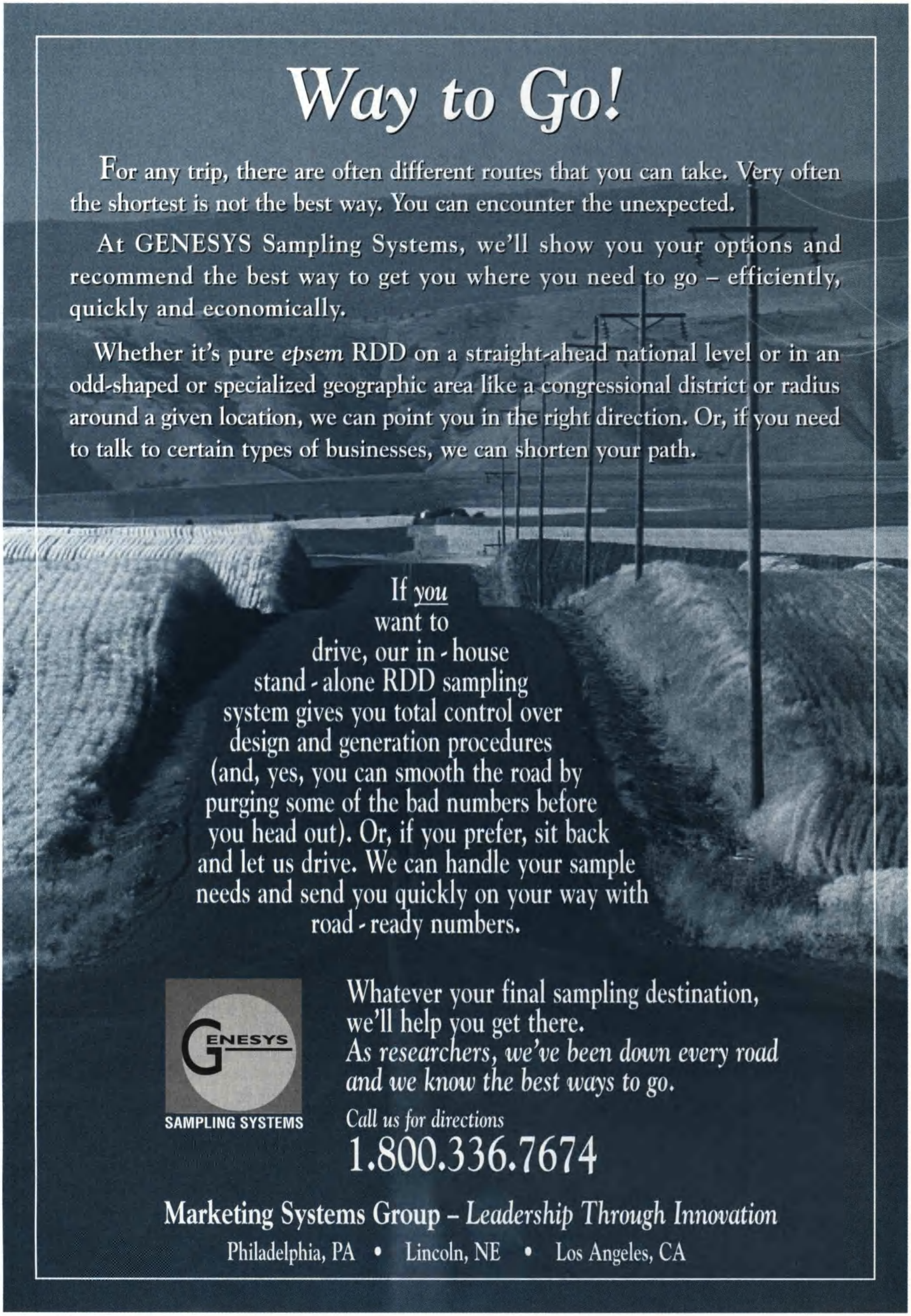
I keep six honest serving men
They taught me all I knew
Their names are What and Why and When
And How and Where and Who.

– Rudyard Kipling

The first part of any research project should be "What do I want to find out?" Working with many different businesses we have noticed that clients often ask similar questions even though the ultimate end user markets are different. For example, the questions asked by a pharmaceutical manufacturer with regard to the threat of generic drugs were similar to those posed by an auto manufacturer concerned about the use of non-OEM auto parts.

Having noticed this similarity we set about identifying the key questions that any client should ask of their market. This wasn't purely an academic exercise. We saw an opportunity to establish a frame of reference to guide all our business research projects. This in turn would help establish a focus for an individual research project and improve decision making by all involved. It would also allow us to offer interviewers insight into the broad direction of fieldwork without revealing details that may bias interviewing. As a final reward it would allow us to audit existing research and identify information gaps.

We arrived at six fundamental questions that should be asked of a market. We phrased them in the future tense (implying that research becomes before marketing activity) and used the term "product" to describe that which is marketed rather than the more cumbersome "product or service." We have also assumed that the client feels per-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sonal ownership for the product.

The six questions are:

1. Who will buy my product?
2. Why will they buy my product?
3. Where will they buy my product?
4. When will they buy my product?
5. How satisfied are they after buying my product?
6. What will they buy next year?

Who will buy my product?

Investigating this question requires unraveling two layers of the market: first, the type of organizations that buy the product and second, the specific individuals within the organization who are involved in the purchase.

Defining and quantifying at the organization level starts with secondary research. Organizations can be defined by size (employees or sales), market served (SIC), geographic location and possibly product usage. Primary research may uncover purchasing drivers that lead to need based segmentation.

The investigation of the decision-making process offers a wealth of opportunities for the skilled researcher to help a client. First he must identify all the individuals involved in the process. This may include among others, end users, line management, technical specifiers, designers, financial planners, purchasers and primary decision makers. Then he must understand the decision pathway and the relative roles of the individuals along the pathway.

He must also understand the things that are important to the individuals in the decision. That leads us to the next question.

Why will they buy my product?

All the rational and logical reasons for purchasing can be summarized in four words: quality, price, distribution and service. As a company we have undertaken research that investigated 13 aspects of service in ordering and delivering ceramic tile in one questionnaire.

The real breakthrough, however, comes from acknowledging that there is an equally strong emotional element in business purchasing. People buy something because they have a problem and they think that the product will alleviate the problem. In Chinese the same character signifies the words "crisis" and "opportunity."

Research into purchase drivers often centers on product features. These results can only be truly interpreted if you understand the relevant needs of the market. It is the debate of features versus benefits and, to a lesser extent, needs versus wants.

Overshadowing this entire process is the effect of the brand. Clients often include it as the fifth factor (along with quality, price, distribution and service) for rating purposes. Brand influence can be the sum of them all. It can deliver strong perceptions of price, quality distribution, and service as well as that quintessential element of emotional feeling.

Perhaps the value of a business brand has been underestimated in markets where the salesman is the brand. If more business purchasing moves toward impersonal channels such as the Internet the need for strong business brands increases.

Where will they buy the product?

Most companies rely on intermediaries to distribute or sell their product. Some of these distribution channels have enjoyed a type of limited monopoly through specialized knowledge or physical distribution. With today's "information age" and the growth of more efficient logistics, these limited monopolies are difficult to maintain and the search is on to differentiate themselves through adding value. Computer VARs (value added resellers) for example often sell basic computer equipment at cost, aiming to make money on installation, networking or warranties.

The objective of the researcher in this market is to understand the strategy of different resellers and identify those with similar goals to the client. One potential problem is that the margins on distribution are so tight that distribution channels are obsessed with price and can forget to develop a strategy based upon value. Many of our manufacturing clients are offering their own marketing expertise to their channel partners.

A second observation is that advanced logistics means that trading

The investigation of the decision-making process offers a wealth of opportunities for the skilled researcher to help a client. First he must identify all the individuals involved in the process. Then he must understand the decision pathway and the relative roles of the individuals along the pathway. He must also understand the things that are important to the individuals in the decision.

globally can be as easy as trading locally. This creates larger unified markets. Each geographic market can support a minimum of three and a maximum of six distributor channels for a type of product. Fifty years ago that market may have been a single city; 20 years ago that market was a single state; now that market is all 50 states; tomorrow that market is the world. The growth of category killers and the consolidation of smaller businesses into large groups continues. Perhaps all distribution channels will become global and dominated by a small number of large players. And how many of these will be American-owned?

And what of the role of the independents? We undertake a regular syndicated survey of independent retail pharmacies. It is true that the brand pharmaceuticals are more interested in distribution contracts with the major chains. However generic manufacturers continue to work hard to reduce their reliance on the central buyers. We have also seen the interest of home health care manufacturers in riding the trend toward home nursing.

The independents hold the singular advantage of the distribution channel. They have day-to-day contact with the customer. They conduct a customer satisfaction study every time they try to sell. They are also small and flexible. These are the tools that independents use to counter the buying power and marketing strength of the bigger competitor.

When do they buy?

This question is perhaps the least-researched of the six. It is more than recognizing the seasonal nature of cruise holidays. It is about understanding when a sale is made. That split second when a purchaser, sometimes with no further information, moves from consideration to decision — a time after which, any salesman will tell you, the sale is there to be lost not made.

There are underlying rhythms in business without which we could not use research to predict the future. This rhythm and timing can be also be tracked in a single sale. Those involved in larger business sales such as airplanes or printing presses understand the importance of timing. Sometimes a sale can seem to have a momentum of its own.

If you know the time of a sale then you can build a model of all the influencing factors and the individuals involved. With this information you can help a client design their sales strategy and supporting marketing communications.

How satisfied are they with my product after they buy?

With the cost of a new customer outweighing the cost of keeping an old one by a factor of five it is no wonder that so much money is spent on customer satisfaction research. Some statistics, however, indicate that 60 percent of defecting customers were either extremely or very satisfied according to customer satisfaction measures.

This is because satisfaction is a moving target and difficult to measure. It is heavily influenced by past experience and expectations. Also, once a product meets satisfaction, the level of required satisfaction is raised. Southwest Airlines regularly wins airline customer satisfaction awards because it manages customer expectations.

It is a scientific principle that by measuring something you change it. In all research the effect of the methodology must be taken into consideration when interpreting results. Nowhere is the effect more noticeable than in customer satisfaction. Can we separate the product experience into constituent parts? Further still can we then apply conjoint or trade-off analysis to measure importance and satisfaction with each part?

For a fuller discussion of measuring customer satisfaction I refer the reader to Terry Vavra's *Improving Your Measurement of Customer Satisfaction*. What I will say is that researchers can learn a lot by passive research, that is, watching and listening to customers and by talking to people in the organization who deal with customers on a daily basis.

What will they buy next year?

The answer lies in anticipating what problems our customers will have next year. The researcher should familiarize themselves with the manufacturing cycles within their industry and the dynamics of their customer market.

Overlaid onto these observations should be political, economic, social and technical influences. Some influences such as the Internet transcend all four. Others fit more easily into one, e.g., the aging Boomers, the eight-year economic expansion and globalization of trade. All, however, are interrelated.

Today's "growing problem" is tomorrow's business opportunity when coupled with a little lateral thinking. Does a gold rush mean a fortune from gold or the fortune Levi Strauss made from supplying denim? Does the IT age mean an increase in decentralized workplaces and telecommuting or does it signal the rebirth of large population centers where the density of businesses allows for optic fibers to be laid to every door?

It is a cliché to say that research is about asking the right questions. We hope that our questions can help frame others. If you have any suggestions or your own list of questions please send them to me (my only condition is that there must be more than three and less than 10!).

Clients for life

MONY still reaping rewards from mid-'90s African-American marketing initiative

In its 157-year history, Syracuse, N.Y.-based MONY, a provider of financial services, has always looked for long-term relationships with its customers. "Don't market a product, develop a relationship" is a key statement to MONY's approach to all its markets.

The MONY Group Inc. is the holding company for the member companies of The MONY Group, which provide financial protection and asset accumulation products and services. Its principal subsidiary, MONY Life Insurance Company, a stock life insurer founded in 1842 as the Mutual Life Insurance Company of New York, issued the first mutual life insurance policy in the United States in 1843.

To truly serve customers, you must know their needs, wants and desires, and address them above and beyond customers' expectations. This approach will lead to "clients for life."

In the mid-'90s, MONY began to extend this approach to various ethnic groups. After successfully reaching the Asian-American market, the company began an initiative aimed at the African-American market, including a two-pronged effort to recruit and hire more African-American agents and also to increase awareness of MONY among targeted groups in the African-American market.

"We looked at the data, and saw, for example, that over two million African-American adults lived in affluent households and 27 percent of the affluent households had incomes over $75,000," says Walter Bell, vice president, diversity, at The MONY Group. "That was a market that we had not penetrated. Further, we saw that African-Americans invested in savings accounts, CDs and real estate, and that meant there was a market for investments that provide excellent returns and diversification."

As it has entered different ethnic markets, the target markets have stayed the same, Bell says. "We are a very niche focused firm and we felt that we would not go outside of MONY's target groups for any initiative. We did not try to go after the entire marketplace or create new products specifically for those new markets."

In keeping with its Plan 90's marketing initiative — which targeted small-business owners and high net-worth individuals, pre-retirees and retirees — MONY sought to reach consumers in these same categories in the African-American market.

MONY began researching and assessing the financial needs of these consumer groups in October 1994 and implemented the marketing initiative in 1996.

MONY used a total quality management process which included the establishment and involvement of a cross-functional team of representatives from the field, management, home office sites, human resources and the firm's quality office (which managed the TQM initiative).

The team developed mission and vision statements. The mission statement: develop a comprehensive marketing plan to recruit and retain African-American field underwriters and increase MONY's presence in African-American Plan 90's markets. The vision statement: position MONY as the company of choice for African-American employees, field associates and clients by cultivating an environment that values diversity.

Assess markets, establish benchmarks

MONY undertook a market research program including gathering internal data, competitive data and national data from various primary and secondary sources to assess its target markets and establish benchmarks.

Some key findings:

- African-Americans' total income increased 600 percent between 1970 and 1994 (for a total household purchasing power of $278 billion).
- The number of businesses owned by African-Americans increased 37.6 percent over a five-year period.
- Thirty-eight MONY agencies were located in the top 10 states with the largest African-American population.
- Affluent African-Americans will respond to companies that affirm both their social status and heritage.
- African-Americans have strong affiliations with social organizations.
- African-American wealth is generally earned rather than inherited.

"For those within MONY who had little exposure to the African-American culture and market, our research provided the facts and strategy needed to support this initiative," Bell says.

Additional research showed potential clients felt they could more easily approach a member of their own ethnic group with questions and concerns about life insurance. Respondents said they felt that agents in their ethnic group were able to identify with the different needs and desires of ethnic communities and establish a comfort level with them.

Focus groups were conducted with African-American MONY employees to see how they, as financial services consumers, saw the company and its efforts to market to them. Employees had positive feelings toward the company but felt that MONY hadn't done an effective job of making sales calls on them.

Made an investment

On the strength of the research, MONY made an investment of per-

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Projective techniques: Do they work in the Hispanic market?

By Belkist Padilla

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I was talking with a young Mexican woman in a Los Angeles focus group about the importance of serving her family authentic Mexican meals. My client wanted to know how to position its canned and shelf-stable Mexican food product so that Mexican housewives like this woman would buy it. Sales of the Mexican line of products were dismal and we didn't understand why. Taste tests had been very positive. Through the use of collage building, this Mexican woman gave us the answer. The collage revealed her guilt at not having the time to make authentic, homemade Mexican dishes like her grandmother used to make. She pointed out the love in an older Native-American woman's eyes (used to represent a Mexican grandmother), with graying braids and a pleasing smile to show how Mexican food is about nostalgia, bringing a piece of the homeland to a faraway country, and giving your family a nutritious, great-tasting meal filled with love.

We came to understand that giving them a product they could "nuke" in two minutes and tasted great wasn't the answer. With the help of this woman's collage and others from the research the client was able to successfully reposition the product with a primary focus on the product's authentic, like-grandma-used-to-make-taste. The strategy was to use a Mexican grandmother personality, not unlike the one in the collage, to be the spokesperson for the line of Mexican products. This was to emphasize the product's homemade taste and address the issue of guilt at using ready-made products. The message of the new strategy was that "our" Mexican grandma makes the products so you don't have to.

Excellent tool

Projective techniques — the use of a picture, word, image or sentence to provide an environment that encourages the respondent to project his/her feelings and unconsciously express them in his or her response — are an excellent tool to use among Hispanics.

Less direct and more inclined to defer to others, Hispanics can be a difficult segment to interview. In the previous example, respondents all claimed they made their Mexican dishes from scratch. The collages revealed that while this was their desire, and what they felt they should do, they were falling short of their own expectations.

As a group, Hispanics value family unity and the sharing of common goals and ideas. We see less value placed on independence, self-

reliance, self-expression and singular thinking. How does one conduct qualitative research in this segment and make sure that one is getting at the "real" reasons behind certain opinions or beliefs? This, of course, is a concern for any qualitative researcher but should be of particular interest to anyone conducting research among Hispanics.

Below are a few mini-case studies that show how projective techniques can be used among consumers in this target. There are many projective techniques — these examples are but a few. The examples below are not based upon any one client or any proprietary information.

Case study: What is a healthy baby to a mom?

A baby products company wanted to understand what is of critical importance to mothers of young babies. After a series of focus groups we discovered, not surprisingly, that a baby's health is what is most important to a young mother. After many discussions we were perplexed with the questions, "What is a healthy baby?" Is a healthy baby the same for an Anglo mom vs. an Hispanic mom? What does a healthy baby look like and what does an unhealthy baby look like to Hispanic moms?

A study was designed for which we compiled video and static images of babies at different stages of development, at different levels of activity (sleeping, sitting, walking, running, crawling), in different moods and of different physiques (heavier babies and slimmer babies). Both Anglo moms and Hispanic moms viewed videos and stacks of baby pictures. They pointed out what healthy was and what healthy was not. The study revealed very interesting information: A healthy baby to an Anglo mother is not the same as a healthy baby for an Hispanic mom.

An Hispanic mom looks for a baby that is chubby, has rosy cheeks, looks into his mother's eyes and not the camera. What might be considered a fit, carefree baby for an American mother might be considered skinny and not well cared for by Hispanic moms. There were other bits of interesting information. Healthy Hispanic babies always wear shoes or at the very least socks – clean socks. Anglo moms thought that a barefoot baby was healthy, carefree and happy. Subsequent advertising development revealed that while the same strategy could be used for both Anglo and Hispanic moms, the execution of the strategy was going to be very different for each segment. Babies in the subsequent Hispanic ads looked at their moms, not at the camera. They were chubby, more traditionally dressed and wore socks or baby shoes. The Anglo ads showed babies who were not necessarily always looking at their mom, they were in a diaper or light cotton shirt and were not necessarily wearing socks or shoes. While both campaigns showed a healthy baby, they did so in a manner appropriate for each culture.

Case study: Do Hispanic women only drink "umbrella drinks"?

When I initially brought up the topic of liquor and its consumption in a focus group with Hispanic women I got nervous giggles. Initially, respondents lived up to the idea that women consume primarily soft spirits and only in the strictest moderation. They were very reserved in their responses and talked about having the occasional glass of wine or the infrequent mixed drink. Those who ventured to explain that they also like the occasional shot of whisky or tequila were met with exaggerated shock by the rest of the group. For the most part, they felt uncomfortable about admitting that after work they might join their husbands for a drink.

However, the story was somewhat more complete after a picture-sort exercise. Respondents were asked to sort pictures that they associated with the different types of liquor they mentioned consuming. Pictures of open spaces, blue skies and bright primary colors depicted the feeling of Mexican women when they let go of their inhibitions and drink a shot — or two — of tequila. Pictures of the color red and a man's smile depicted their husbands' reactions at seeing their wives "unrestrained." A picture of a couple laughing and snuggling in bed showed that drinking socially makes their husbands romantic and makes them feel sexy. Pictures with brown hues, textured fine fabrics, and people dressed formally depicted the aspirations of Cuban women when drinking a Scotch on the rocks. To our surprise, another woman explained after showing a picture of a beach umbrella and tropical fruit, "This is what we're always served . . . a piña colada or strawberry daiquiri. It's insulting really. For men it's a given that they'll have a Scotch on the rocks . . . we're not asked, we're given the 'umbrella drink!'"

Case study: What should a mall look like?

Each respondent was asked to build two collages. One to reflect how they currently view the mall, its merchandise mix and the kind of people who shop there. They were told to feel free to use any pictures and/or words that reflected their impression of the retail center — from pictures of the types of people who shop there, to pictures of the types of merchandise sold, to pictures that reflected the retail center's appearance. The second collage was to reflect their "ideal" mall (which would show what changes or improvements had to be considered to best attract the Hispanic consumer).

The results were very interesting. The first set of collages showed that the mall was seen as being an older mall — words like "old-fashioned" and "good standby" were written over the pictures. When probed on the pictures that represented the mall's merchandise, respondents agreed that there was nothing unusual or unique about the merchandise sold at the mall and that they would like to see more diverse, "interesting" merchandise. The second set of collages (which represented consumers' "ideal") provided a visual representation of what respondents meant by "more interesting merchandise."

This second set of collages also included pictures of families socializing together and with friends while taking a walk, or sitting at a café — signaling the importance of eateries, places to congregate and good landscaping at the mall. Mexicans said that when they go to the mall they go with the entire family and the mall should have stores and businesses that appeal to the whole family. The information gathered also helped the advertising agency pinpoint the types of images their target would find inspirational and motivational.

Case study: What do Hispanic teenagers have to say?

Teenagers of any origin are not the most talkative people in the world. But projective techniques can be used to allow them to laugh, let their guard down and reveal some of their opinions. Projective techniques can be used quite successfully to tackle issues such as teen smoking, abortion, safe sex, and gang violence. But they shouldn't be reserved to tackle sensitive topics and nothing else. I recently had Hispanic teens draw stick people as a way to find out how to reposition a fruit drink. Groups of teens were asked to make a stick person on each of two sheets of paper. They were given magic markers, glue, pictures and crayons to use. The first stick person was to show what they are like and what is important to them. The second stick person was to reveal what the fruit drink would be if it were a person.

The stick fruit-drink-person revealed that the fruit drink was like a friend one outgrows. It dressed in child's clothes and hadn't discovered the opposite sex. The stick-person of the teenager wore the "best" Nike shoes because it made them fast. They also drank sports drinks because it made them fast like the shoes. However, the pictures also revealed that they don't always have the money to buy expensive sports drinks so they drink water. When probed the teens explained that they wanted a drink that promised energy, strength and speed when playing any sport but that was also thirst-quenching when they were simply thirsty. It also revealed that fruit drinks are not "kids' stuff" but that an on-the-go smaller bottle that they could throw in their back packs or gym bags might increase consumption. These findings were key in developing advertising that repositioned the product for active, on-the-go teens.

Less-guarded answers

As with any consumer group, the moderator's ability to establish trust and a feeling of unconditional regard is key. But as with other segments of the population, projective techniques can be quite useful in obtaining less-guarded answers by allowing Hispanic respondents to disagree in a manner that is more consistent with their culture – in an indirect and non-confrontational fashion. It also allows us to understand what they really do versus what they say they do.

Designing marketing research for the Asian-American segment

By John McKay

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The research process is key to understanding Asian consumers. The tools for multicultural research are the same as those used in mainstream market research: focus groups, telephone surveys, one-on-one interviews, etc. However, adjustments are sometimes necessary in designing research for Asian-American markets. Research assumptions and techniques that work in researching the general public are not always applicable in the Asian-American market.

The best approach is to stick to the core strategy of understanding consumer needs, attitudes and behaviors, identifying the cultural hot buttons, and using the established research techniques that have proven successful in mainstream marketing. The key is in the research process: using good, fundamental research and intelligent, culturally sensitive people with insights into Asian culture to help interpret the findings.

This article will focus on several key aspects of designing market research for the Asian-American market, including:

- the impact of Asian culture on conducting market research;
- conducting quantitative research among Asian Americans;
- sampling issues in targeting Asian Americans.

The impact of Asian culture on conducting market research

Asian cultures can have a significant impact on how marketing research is conducted within the Asian-American community in at least three key areas:

1) selecting appropriate research sample/respondents;

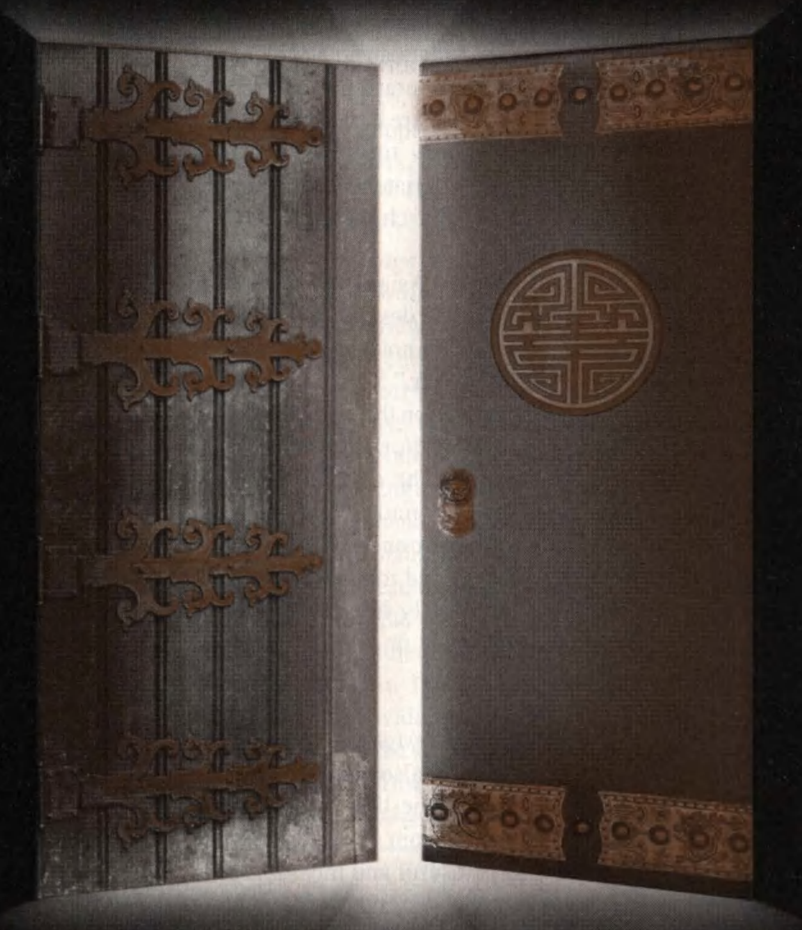
2) designing questions to effectively gather meaningful information; and

3) establishing a productive relationship between researcher and respondent.

U.S. researchers need to consider cultural subtleties or complexities in the Asian-American market that are not always evident in research conducted among the general market. To avoid mistakes that are commonly made by researchers unfamiliar with Asian cultures, it may be helpful to have a culturally sensitive researcher involved in the research planning stages.

1. Respondent selection

Determining the most appropriate respondent for an Asian-American research project requires an awareness of the various roles, responsibilities and authority levels in an Asian-American family. A researcher needs to have an understanding of and sensitivity to the Asian family structure in order to design the proper framework for finding appropriate respondents. Without this knowledge, researchers risk gathering information from the "wrong" respondents and developing conclu-



sions based on invalid data.

It is therefore important for researchers to understand how Asian family relationships add complexity to the selection of research respondents. Most Asian-American households tend to be multi-generational as well as multi-family. There is an intricate web of Asian family ties which makes selecting appropriate research respondents especially challenging for the researcher.

In the typical Asian-American family structure, the designation "head of household" does not necessarily mean "decision maker." That designation clearly depends on the type of decision to be made and/or the topic under investigation. The context in which decisions are made for the Asian household influences whether the researcher should treat the occupants of a multi-family household as one extended family or as separate families.

2. Question design

Asian culture also affects the development of the questions used to gather information from Asian respondents that will be useful and meaningful to the researcher. For example, where a respondent might be asked to give a Very Good or Excellent rating in a survey designed for the general market, research shows that native or first-generation Asian respondents do not verbally understand such subtle distinctions that are more apparent in English, and are therefore more responsive to numeric scales.

Asians prefer to be noncommittal when asked pointed questions — and this lack of definitiveness can skew research. They frequently tell the interviewer what they believe he wants to hear rather than what they really think. When asking Asian respondents to answer a survey question using a rating scale, an even-numbered scale (four points, six points, 10 points) will encourage dichotomy and discourage their tendency to give noncommittal responses.

In some Asian cultures, people find it difficult or uncomfortable to demean a product or a company. If Asian respondents are presented with a top-box question on customer satisfaction using a scale ranging from Very Satisfied to Very Dissatisfied, Asian respondents will seldom give a response lower than Satisfied. It is therefore necessary to take a different approach with Asian respondents, even though the process is the same. This is where it is important to use the expertise of an Asian cultural expert.

If the researcher fails to provide a context for the question that Asian Americans recognize in terms of their own cultural reality, Asian-American respondents by either:

- redirecting the question,
- giving a noncommittal response, or
- creating a context in order to respond.

The danger in this process is that respondents may provide information that reflects issues other than those under investigation. To avoid such cultural pitfalls, it is important to pre-test a survey prior to full-scale implementation to help the researcher understand word/concept interpretations and contextual clues.

3. Researcher-respondent relationship

The researcher-respondent relationship consists of the researcher's own assumptions and meanings; the respondent's perception of the researcher's expectations; and the rapport built between the two people. While this applies to all research, it is especially true in Asian marketing research. Establishing a good rapport with Asian-American respondents is crucial to successful Asian market research. The researcher needs to demonstrate a sincere desire to understand the respondents' values and opinions, so the respondents can teach the researcher about important dimensions of their world.

If it is obvious to an Asian person that the researcher cannot relate to or is critical of the respondent's world view, the respondent often will answer briefly with a response most likely to terminate the questioning. An Asian respondent who senses that the researcher is sincerely open to learning about the complexities and nuances of his or her world is more likely to provide a more complete, valid and useful response to a question.

Quantitative research

There are four key aspects of designing quantitative market research studies in the Asian-American market:

- project timelines;
- Asian language versus English-language interviewing;
- translation;
- survey design.

1. Project timelines

First and foremost, dealing with multiple Asian cultures in a study takes more time than a general market study. Clients should know this so that they can adjust their expectations and marketing accordingly. A quantitative study with several ethnic groups and languages usually requires multiple pilot tests to examine length, flow, and comprehension. In a general market English-language study, the researcher typically is dealing with one questionnaire, one set of crosstabs, and one analysis. In a study among 800 Asian consumers, for example, the researcher might be dealing with 200 interviews in each of four (or more) languages. This can mean almost four times the analytical work, along with managing multiple questionnaires, multiple sets of crosstabs, and multiple teams of in-language interviewers, translators, and supervisors.

2. Asian-language versus English-language interviewing

Telephone interviews conducted with Asian-Americans should generally be conducted in the native language of the respondent, because, unless noted otherwise, it is their preference. However, using bilingual (English/Asian) interviewers is recommended, as many second-generation Asians primarily speak English. For best results, the respondent should be given the choice of being interviewed in either English or the respective Asian language. This approach will provide the most representative data for the targeted segment. The researcher will then be able to track any differences in responses from foreign-born versus U.S.-born Asians, and English-dominant versus Asian language-dominant Asians.

3. Translation issues

Translation of the survey document is a vital factor in the success of the study execution and data analysis. It is therefore critical to give plenty of time and attention to this stage of the research, so that the effectiveness of the translation does not become a victim of project deadlines. Too many researchers are in such a hurry to rush a project into the field that they do not allow enough time for this important stage in the project schedule.

The more people involved in the translation, the better. The translator and the researcher must review the survey question-by-question so the translator understands the concepts and the intent of the questions, not just the words. People involved in the translation must be close to the market and understand how the concepts are articulated in the marketplace. One person who understands the purpose and meaning of the English survey should be responsible for guiding all language translations to ensure consistency.

It is very important to pre-test the in-language versions of the survey with actual respondents to make sure the wording is easy and comfortable for the interviewer to articulate, and the concepts and intent of each question are phrased in a way that is easily understood by and meaningful to the respondents.

Some multicultural researchers insist that a back translation be performed on the survey by a different translator once it has been translated into the Asian language. Their reasoning is that the client will be able to use the English back translation to determine whether the Asian language translation has been done correctly. The fallacy in this logic is that translation is not an exact science. No two translators will always use the same word or phrase to interpret the same concept. The Asian translation may be perfectly accurate, but the translator performing the back translation into English may not understand the context of the questions or may interpret the Asian concepts slightly differently and thus choose a different English word or phrase than what was used in the original English version. In addition, the time and money spent in performing the back translation is not always worth the effort and delay in fielding the study. Rather than waste time and money with back translations, it is more valuable to follow the two steps outlined below, which have already been discussed:

• have the researcher or client's Asian staff review the translation;

• pre-test the translated survey with actual respondents.

4. Survey design issues

Researchers need to be aware that most new Asian immigrants are not accustomed to telephone research. In their native countries, the predominant method of data collection is in-person interviews, as the penetration of telephones in consumer households is far lower than in the U.S. The in-person method lets the interviewer develop a level of rapport and personal trust with the respondent which is not as easily accomplished over the telephone. Asian consumers are not accustomed to being asked to give their individual, honest opinions, and this lack of familiarity with research methods can impact data collection.

Because of the nature of the political regimes in many Asian countries, a telephone call from an unfamiliar voice (even an Asian one) asking for opinions may often be met with a high level of suspicion. It is therefore very important that the wording of the initial contact with the respondent be deferential and polite while briefly explaining the purpose of the call.

It is important to note that Asian-Americans typically have a lower survey refusal rate than the general public — about half of the national average of 45 percent. This lower rate of survey refusals demonstrates an eagerness on the part of Asian-Americans to have their opinions heard. It may also be a reflection of the politeness of the Asian cultures and a reluctance to say no. Researchers should be careful not to take advantage of these factors by keeping the respondent on the phone for 30 minutes or longer. A maximum of 20 minutes is recommended for Asian telephone surveys, with a 10 to 15 minutes preferred.

For cost and timing estimation purposes, it is important to know that in-language interviewing typically takes about 20 percent longer to conduct than the same interview in English. If an English language version of the survey takes an average of 15 minutes to conduct, then the Asian-language version of the same survey will probably take an average of about 18 minutes to conduct. This is because it takes longer to describe the same concept in Asian languages than it does in English. The degree of formality and politeness required in the phrases used by the interviewer when speaking with Asian respondents also requires extra time.

Sampling issues

By merely using a random digit dialing approach, it is very difficult and very costly to find the small segment of the U.S. population who claim Asian ethnic heritage. Therefore, it is necessary to create more efficient and cost-effective methods to find these customers.

While there is currently an indicator available for listed telephone sample that identifies Asian-American households, the indicator does not identify households by subsegment (i.e., Chinese, Japanese, Korean, etc.). For any studies that require quotas by subsegment, this indicator provides little help to the researcher. The indicator might be useful if the telephone surveys will only be conducted in English and there are no subquotas by ethnic segment. Without having any clue about a potential respondent's language preference, the data collection vendor will not know how to manage its interviewers or its subsegment quotas.

If the study is designed to offer the respondent a choice of languages in which to be interviewed, or if the client requires certain quotas by subsegment, then employing a surname sampling methodology is critical. The surname sample can be generated by ethnic group, so that bilingual Japanese interviewers, for example, will only be given sample targeted to people with Japanese surnames. The surname sampling method helps improve interviewing efficiency in that the data collection vendor can schedule interviewers based on the amount of sample per language and the quotas required per language group. If a Chinese interviewer discovers any Korean respondents (for example) in the Chinese sample, these names and phone numbers can be passed along to a Korean interviewer for re-contacting.

In order to increase the incidence of finding Asian-American households within a surname sample, a supplemental census tract approach is recommended. With this method, the sample supplier can identify census tracts within the targeted geographic markets that have some minimum incidence of Asian-American households — for example, 35 percent — as decided by the researcher. The sample supplier would then pull random listed sample from all census tracts that meet the minimum threshold, distributed between the geographic markets according to the preferences of the client.

The higher the threshold of Asian household penetration within a census tract, however, the less representative that census tract will be of all Asian households within that geographic target. The trick is to find a threshold that is high enough to increase the incidence of finding Asian households and yet still have a relatively high degree of representation of all Asian households in that market. It may be easier to pull sample only from census tracts that are 100 percent Asian, but census tracts with 100 percent penetration of Asian households are usually representative of only a very small percentage of all Asian households in that particular market. Chances are the study results would be skewed because the sample is not representative of the majority of Asian households in that market. The best option is to decide on a penetration threshold that is high enough to find concentrations of Asian households while remaining representative of at least 50 percent of all Asian households in that market. The sample supplier can calculate this incidence for the researcher.

Limitations of surname sampling methodology

One limitation to this method is the fact that surname sampling does not provide a perfect match. For example, some common Asian surnames — such as Lee (Chinese) and Park (Korean) — are also common surnames among other Asian groups or among the general American population. Many Filipino surnames are of Hispanic origin, which makes surname sampling for Filipino populations very problematic.

For the Filipino market, the best sampling strategy may be to avoid the surname sample methodology and focus on the census tract technique. The researcher and the sample supplier can identify geographic areas with high concentrations of Filipino households. Then, rather than a surname sample database, the sample supplier can use the Asian household sample indicator to target Asian households in those census tracts, as Filipinos are counted as Asian in the census database. While some non-Filipino Asians are likely to be included in the sample, the benefit is that nearly all of the Hispanic households (as well as African-American and Caucasian) will be filtered out.

Another limitation of this method is that households with unlisted telephone numbers and households without telephones are not represented in the sample. The surname sample only works with listed sample, as unlisted sample purchased from an independent supplier does not include surnames. However, the benefit of using a targeted surname approach is to provide a very cost-effective and highly representative solution to identifying and interviewing the particular Asian segment.

Because few marketers have tried to reach the Asian market, lists are scarce. In fact, all of the available Asian targeted lists are surname lists. Asian surnames are matched against various records to produce these lists. For companies who plan to use surname matching to find possible Asian customers in their own databases, it can sometimes be helpful to run a second sort on first name matches, too — if a list of Asian first names can be found or compiled. There has been an attempt to create lists for each of the major Asian segments that incorporate both surnames and first names, but such lists are not widely available in market research circles.

Since making assumptions based on surnames can be tricky — due to marriage, immigrants who "Americanize" their last names, and names that may be similar in certain cultures — this additional criterion can help reduce the risks of finding non-Asians in the database. However, this method is not fool-proof either, as many Asians have Americanized their first names. Neither of these methods is helpful in finding households where an Asian woman has married a non-Asian and Americanized her first name as well.

The new cultural mix

Life stages, lifestyles and ethnic background

By Susan Saurage-Altenloh

Editor's note: Susan Saurage-Altenloh is president of Saurage-Thibodeaux Research Inc., Sugar Land, Texas. She can be reached at 800-828-2943 or at ssaurage@saurage-research.com.

Segmenting is more than slicing a market into age-defined consumer groups. Much more. There was a time, not too long ago, that this worked. Family units were stable, geographic data held more water and lifestyle did not take into account sexual preference or country of origin. Today's game is much different. You have a multitude of life stages, lifestyles and ethnic backgrounds to consider.

The major change in defining consumer groups is the switch from chronological age to life stage. Life-changing events — marriage, divorce, death, children, returning to school, new job, job relocation, retirement — drive consumers to reevaluate their priorities, product needs and brand preferences. For example, the needs of a 50-year-old working mother of a young teenager are much different from those of a 50-year-old retired mother whose youngest child is long gone from the nest.

Other changes in our culture affecting segmentation include the expansion of women's presence in the workplace, an increasing ethnic population and more relaxed views on gay and lesbian issues.

Below are four age group segments and three buying power markets shaping today's product demand.

Age group segments

While chronological age is only a fraction of the formula, you still rely on this characteristic to help define segments. Age provides a broad idea of the economic, political and family unit conditions to which a person has been exposed and the attitudes they may have adopted.

What we call the Mature Market, those age 53 and older, makes up 26 percent of our population. The financially well-off grandparents within this group live better than their adult children and subsidize their grandchildren's lifestyles with their senior citizen discounts. This group is living longer than

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31-00 47th Avenue, Long Island City, New York 11101 • Phone 718-729-2OAC or toll free 888-489-DATA • www.opinionaccess.com in prior years and claims to feel and act 10 to 15 years younger than their actual age.

• The Mature Market is health-conscious and considers 50 the midpoint of life, not the endpoint. This is a time when they reevaluate their wants, needs, goals and roles on personal and consumer levels. According to a study conducted by Roper Starch Worldwide for the American Association of Retired Persons (AARP), consumer profiles based on these factors include:

1) Continuing Caregivers (median age 55) — These 13 million individuals are responsible for their parents, grandchildren or adult children.

2) New Me (median age 55) — These people have gone through a compelling personal change such as a mid-life crisis, major career change or menopause.

3) Free Birds (median age 69) — These individuals are retired, self-focused and free of family obligations.

• The influential Baby Boomers, currently 77 million strong, are the most lucrative segment in the nation. These individuals, between 34 and 52 years of age, are known for changing every institution they encounter. Prime examples are the classrooms of the '50s and the boardrooms of the '90s.

Members of this well-educated, sophisticated, demanding, individualistic, independent, and self-indulgent group have less leisure time than their parents did. Older individuals in this segment are just beginning the battle against aging. Sales of skin cream, suntan lotions, hair coloring, cosmetics, vitamins and nutritional supplements are surging. Spirituality is seeing a rebirth as maturing Boomers search for the meaning of life.

Boomers maintain the attitude that they can always take care of themselves. They have become high-tech consumers because they can afford it, not because they are more proficient.

Memory and nostalgia are useful tools to appeal to Boomers' need for security, but it must be the real thing. In recent years, television advertisements for the Nissan 200SX showed the car zipping down the road to the theme from the old Batman television show. It is important to recognize that Nissan used the real theme and not a jazzed up remake of this tune. Other examples are Mercedes ads layered with Janis Joplin's ode to the Mercedes-Benz and Maxwell House's use of "Wild Thing."

• Generation X, the next age group segment, comprises 17 percent of our population. The lives of these 21-to-33-year-olds are defined by education, insecurity, informality and a slow transition to adulthood.

Generations Xers can be divided into four primary attitude groups:

1) Cynical Disdainers — are primarily pessimistic about life.

2) Traditional Materialists — are like Boomers and seek the American dream.

3) Hippies Revisited — express themselves through music and spirituality.

4) Fifties Macho — are young Republicans.

The youngest Generation Xers are career-minded hard workers. They want a good job and an exciting career, but are afraid they will not find this. On the whole, Generation Xers question the price of Boomers' achievements and refuse to adopt the 14-hour-day work ethic.

Many of the 46 million Generation Xers are from fragmented families; 40 percent spent some time in a single-parent household by age 16. This was the first generation to fully experience the new extended family of step-parents and half-siblings. One-fifth of Generation Xers live at home.

This group values leisure activities, family entertainment, economical and functional clothing, quality day care and home offices. They are happy with smaller homes, economical furnishings and family-priced cars. They value today's technology — cellular telephone, pager, fax — which allows them to stay in touch and in control.

When it comes to reaching Generation Xers, remember that they dislike advertising hype, overstatement, self-importance, hypocrisy, and personal sales at home. Generation Xers are better moved by visual images than the written word and have very few role models. They are more likely than other generations to seek out local, specialized products such as microbrews and out-of-the-mainstream vacation places.

• Echo Boomers is the label most often used to describe the next youngest

age group segment. These individuals, born between 1977 and 1994, make up 27.5 percent of our population. Also known as Generation Y or the Millennium Generation, these kids are described as more competent, confident and wary than their parents.

The 72 million Echo Boomers are diverse in race, living arrangement and socio-economic class. For example, two-thirds are white and one in 35 is mixed race; 23 percent live in poverty and 27 percent have only one parent. They are the first generation to seriously question all traditional racial categories.

The teens (age 12 to 19) in this group are very knowledgeable about music, entertainment, fashion and personal care products. They influence the spending of $100 billion per year; $63 billion is their own money. The number of teens in this age range is expected to grow two times the rate of the total population during next 10 years.

Echo Boomers are the most media-savvy generation so far. Using celebrities to sell a brand is only marginally effective with this generation. These kids may reject promotions that sell a product or service to a specific gender. Appeals to this group should be designed with the knowledge that teens spend money to have fun — shopping is an experience rather than an errand. These teens understand and value quality; quality is considered the essence of cool.

Evolving buying power markets

A buying power market is defined as a homogeneous group exhibiting increasingly defined needs and demands along with growing purchasing power. The group must be large enough to capture the attention of marketers, retailers and advertisers, and often has influence over or within generational markets.

The most significant of the evolving markets is women (females over age 18) with their household purchasing power towering over other groups at $3.4 trillion. While women make significantly less than half of all household income, they influence over 80 percent of dollars spent. They make more decisions than men do about cars, tires, financial services and personal computers. As buyers, they pay more than men and are less likely to haggle over price.

Women currently make up 45 percent of the total workforce; 62 percent work at least part-time. Over the next 10 years, the percentage of women who work will increase by 16 percent, while representation by their male counterparts will increase only eight percent.

Women, as entrepreneurs, are gaining more power in the business world. There are 7.7 million women-owned firms (up 43 percent from 1990) in the United States. This 30 percent of all businesses contributes $1 trillion to the U.S. economy each year.

We are seeing some changes in the conventional male/female roles. Traditionally, men have been rather hedonistic; now we find women toying with this attitude. Having suppressed their individualistic natures as they raised children, these women are now spending money on themselves. How are men changing? They are experimenting with becoming SNAGS (sensitive new-age guys).

Ethnic markets are currently concentrated with persons of Asian, Hispanic or black heritage. In 1980, one in five Americans was considered a minority. Today the ratio has jumped to one in four. This growth is concentrated in our children where one-third are black, Hispanic, or Asian.

The traditional five P's of marketing are product, price, promotion, placement and profit. However, to attract consumers of color, replace these with passion, preparation, perseverance, recognition, relevance, respect and relationships.

The following outlines the presence and expected changes in black, Hispanic and Asian populations in the U.S.

Black

• Currently 34 million; 12.6 percent of all Americans.

• $500 billion purchasing power.

• Grew by 13 percent in last decade alone.

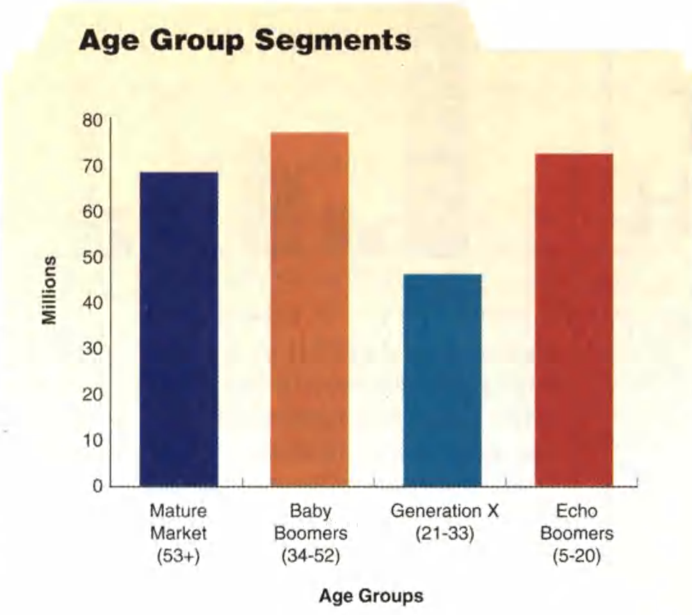
• Southern U.S. states are home to more than one-half of all blacks as compared to 90 percent in the year 1900.

• The term "African-American" is preferred over "black" slightly, but only three percent are offended either way.

- Average household income is $14,000; households with annual incomes above $60,000 are the fastest growing income segment for blacks.

Hispanic

- Currently 30 million; 11 percent of all Americans.
- $350 billion purchasing power.
- Hispanics increased from 22 million in 1990 to 26 million in 1995.
- Their presence in the workforce will increase 36 percent in the next 10 years compared to a increase in the national workforce of 12 percent.
- The U.S. Hispanic Market Study shows that television is the medium of choice.
- Hispanics prefer their media in the first language they learned to speak. However, 75 percent of Hispanics speak Spanish at home. Only 40 percent feel conversant in English.
- Second- and third-generation Hispanics have strong cultural ties. Selling to their community is more effective than selling to their individual household.

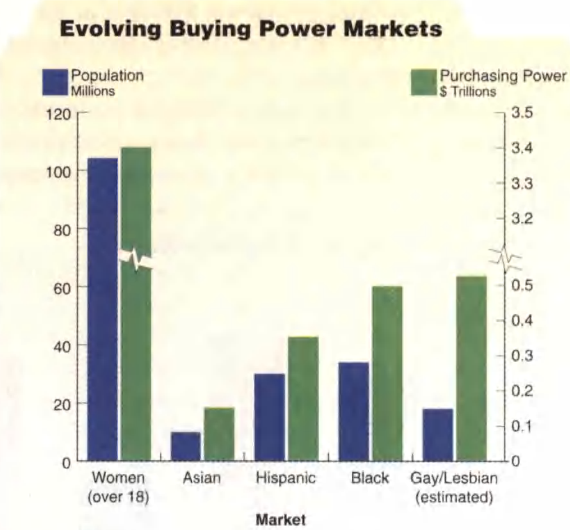


Asian

- Currently 10 million; less than four percent of all Americans.
- $150 billion purchasing power.
- Their presence in the workforce will increase 39 percent in the next 10 years compared to a national increase in the workforce of 12 percent.
- The Asian population has doubled since 1980. They are the fastest growing, most diverse and most affluent minority group. Their median household income is $36,000.
- Asians are usually found in high-tech or agricultural careers.

Gay/lesbian market

The gay/lesbian market comprises seven percent of our population. These exceptionally well-educated individuals have high levels of disposable income ($200 — $400 billion) and many have their own



business. They travel frequently; one-third have traveled overseas.

This market is geographically concentrated, with lesbians tending to settle in the suburbs and males choosing the inner-city life.

The gay/lesbian market votes with its pocketbook for advertisers who have the courage to market to them. These individuals tend to stick together, support and elect each other. A strong word-of-mouth network makes it easy for marketers to reach them. While this market is proud of its distinctiveness in areas including fashion, signs and symbols, it is also afraid of being branded as different.

Effects on research

How have these demographic and social changes affected market research? The segmentation process is more complex because research results are stratified in more ways than before. You no longer rely on gender or household income delineations alone. Now, a typical stratification looks more like "males in upscale families with young children" or "economically challenged urban families." It is critical to explore statistical correlations according to complex clusters.

You must now employ more demographic categories. For example, one person may be several races or two adults living in a household may have a relationship other than husband and wife.

Today, political correctness is important when wording survey questions. "Household" is preferred over "family." The word "family" implies that the people living in the house are related by blood or marriage.

The fracturing of our population means you must explore larger samples, especially in the bigger metropolitan markets, to complete enough surveys to permit statistical analysis of smaller or more complex subgroups. For example, a sample must be large enough to capture and compare middle-class whites with middle-class Hispanics and middle-class blacks all within one area.

Who you choose to research also shifts. It is obvious that women's purchasing influence makes them more appealing research subjects than in the past. Echo Boomers are more in demand than Generation Xers ever were. Why? Because there are more of them, they are sophisticated spenders and have significant spending authority within their families.

National Overview of the U.S. Population

Year	U.S. Population	Life Expectancy at Birth (Male/Female)	% White	% over 65 (Elderly)	% under 20 (Children)
1900	76 million	48/51 yrs.	88%	4%	44%
1950	151 million	66/71 yrs.	89%	7%	34%
1998	270 million	72/80 yrs.	73%	13%	29%
2050	383 million	82 yrs.	53%	20%	26%

Staying on top of these changing markets is no easy task. New segments emerge, existing influences shift and new consumer profiles surface within a market. As a researcher, your job is to help determine the beliefs, attitudes and behaviors of your client's customers. Keeping your finger on the pulse of the cultural mix is key to successfully reaching this goal.

Advertorial

In-store studies grow in importance

In the retail environment shoppers don't have to "remember," they're already there. The store shelf and shopping experience can be part of the stimulus.

By William J. Hruby

Editor's note: William Hruby is a market research and advertising consultant with nearly two decades of packaged goods marketing experience.

A quandary exists for packaged goods marketers: Consumers often think about crucial product or marketing issues only while they stand at the shelf. Yet research is most commonly conducted in malls, mail panels and other locations far removed from the point-of-sale. The fact that 100% of all buying decisions are ultimately made at the shelf favors the case for in-store research.

Go where the shoppers decide to buy. To capture those fleeting points which translate into product A being selected over product B, consumers must be intercepted in the store where top-of-mind issues are present. Meet that same consumer in a mall two weeks later, and, **IF** you can get them to speak with you at all, it is highly unlikely they can remember their purchase decisions, awareness of brand options, motivations for purchase, etc. And certainly not with the same degree of accuracy as an interview conducted at the point-of-purchase.

Participation is a major and growing problem for traditional research methods. Mall wave-off rates (shoppers who refuse to even be approached) hover around 90%, compared to in-store wave-offs which are more typically 30-50%.

In a recent issue of *Marketing Research* (Spring, 1998), authors Bearden, Madden and Uscategui summarized this point. In their report they emphasize that the pool of qualified respondents is drying up. Their concern: "Lack of representativeness resulting from refusals to participate . . . jeopardizes the accuracy of survey results. Evidence suggests that the *decline in participation rates is already occurring and may accelerate.*"

Three questions you should ask: Prior to going to field, cutting edge market researchers ask themselves three questions, according to Dr. Herb Sorensen of Sorensen Associates

1) What information is needed?

2) Who has that information?

3) Where are they; and are most capable of providing the information?

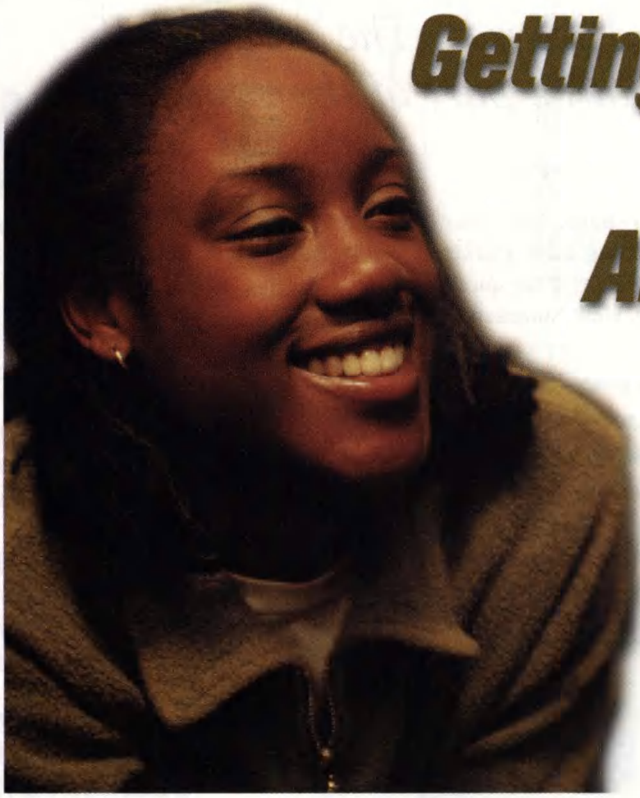
For packaged goods researchers involved in concept, prototype and related phases of product development who rely on Product Guidance Research, the answers often point to in-store research.

Sorensen Associates has available over 40,000 retail locations in the U.S., and the technology to execute fieldwork in a few days. This infrastructure is at the foundation of the firm's reputation for conducting demographically structured studies at the neighborhood level.

Researchers now have new and better options for collecting consumer information - *at the point of purchase.* ■

Purchase-intention surveys can take you only so far; marketers would also do well to observe consumers in real buying situations.

Harvard Business Review
May-June 1998



Getting the most from African-American respondents

By Pepper Miller

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Tom Burrell, chairman/CEO of Burrell Communications, once said "African-Americans are not dark-skinned white people." I heard Mr. Burrell's statement more than 15 years ago. His aim was to show marketers that cultural differences require different advertising messages for African-Americans versus the general population. The same idea also applies to marketing research.

For years, when conducting research among the African-American segment, my firm has used traditional designs and methods, carefully noting along the way what works and what doesn't. Today, we share our lessons, experiences, and advice with clients to help them understand that in research, like advertising, cultural differences impact how African-Americans should be approached, recruited and interviewed.

Following are some illustrations of research projects that required a different approach to designing and executing research among the African-American segment.

I. Identifying the target and market

Compared to general market information, there continues to be limited quantitative information about African-American consumers outside of proprietary projects. Therefore, many marketers often shoot from the hip, particularly when identifying the target. For the less-savvy marketer, or those with little or no experience with African-Americans, we suggest the following checklist of options as a place to start.

1. Use Census data to help identify, define or create a rationale for your target, i.e., age (50 percent of African-American adults are aged 18-34) and income and residence (growing numbers of middle- to upper-income African-American households are located in the suburbs).

2. Brand and category development indices and other syndicated research information (e.g., Simmons, MRI) to identify brand and category usage.

3. Conduct quantitative research in areas of usage (including competitors), demographics, geography and attitudes.

4. Consider markets with high concentrations of African-American consumers and facilities that are experienced with and accessible to this target.

II. Modify "by-the-book" methods

• Relax the qualifiers. In many cases a general market study will precede an African-American study and is used as the model for the design of the African-American study. However, the general market specifications don't fit the real-world situations of the African-American target. Thus, the added demands for qualifying respondents make recruiting tough, send costs through the roof and increase the propensity for no-shows. The challenge is to incorporate quality and hands-on control while being flexible with the criteria. Following are a few of our experi-

ences that reflect this approach.

We recently completed a qualitative study for a major insurance carrier to better understand the preferences among African-American business owners for African-American versus non-African-American brokers. Previous general market research included conducting focus groups among brokers and business owners. The same criteria were requested for the African-American segment. After reviewing the specs, we alerted the client to major differences and requested that the qualifiers be relaxed to represent more relevant situations in the African-American community.

For example, the earnings and company size criteria for white brokers far exceeded the number of comparably structured businesses in the African-American community. We convinced the client to relax the qualifiers to include 1) businesses that are operating in the African-American community, and 2) African-American firms that are doing business with African-American insurance brokers.

• Relax the affinity clause: employ the buddy system (bring a friend). In December 1996, The Chisholm-Mingo Group was one of three African-American agency finalists for Denny's African-American ad business. On behalf of Chisholm-Mingo, we conducted research among younger, older, current and former users of Denny's.

Facing a quick turnaround and the challenge of locating qualified respondents (particularly from the user segments), recruiters were forced to use resources beyond their database of people with focus group experience. While many companies are conducting more research among the African-American segment than 15 years ago when Mr. Burrell was on his mission, we find many African-Americans — even the most sophisticated — haven't been exposed to the market research process. Moreover, those first-time "virgin respondents" often carry skepticism about the process.

Therefore, for Denny's we relaxed the affinity clause by allowing a few friends to participate in the same group, providing they met all other stipulated screening criteria. We noticed that as the comfort level increased, so did the flow of conversation and the amount of valuable information. As a result, we were able to identify three "mindset" segments which enabled Chisholm-Mingo to better address the issues at hand.

By the way, Chisholm-Mingo's awesome presentation won them the Denny's business.

• Change the environment – comfort level is key. Two doctors at Children's Memorial Hospital (CMH) in Chicago established a Safe Haven Program after observing that epidemic numbers of children (particularly from high-risk environments) were losing their lives to guns. Safe Haven was developed to help create private and public places were children can feel safe.

To better develop the Safe Haven Program, CMH requested focus groups among mothers residing in public housing developments. Instead of having respondents come to a downtown facility, where the environment might prohibit them from speaking honestly about guns in households, we persuaded CMH to execute the groups at the housing site – which in this case was Cabrini Green.

This idea required making modifications to the recruitment process and to the logistics for the groups. A typical facility relying on a database was unable to handle this special and delicate assignment. Understanding that many public housing developments have active groups of concerned residents, we enlisted the leader of one of the development's many programs to help recruit qualified respondents. The screener was modified to a simpler format and we dispatched a field person to work with the leader on recruitment, group coordination and set-up.

The groups were conducted in a vacant apartment. One room served as the group room where respondents were audio and videotaped. Another room was set-up for client viewing via a TV monitor.

The 95 percent show rate complemented the excellent discussions. Respondents indicated that they felt valued and were appreciative that we met with them on their turf.

III. Probe, probe, probe . . . without alienating

Previous research has shown that African-Americans have a tendency to highly rate issues, concepts, ideas and services that have a positive effect on the community. Such is the case with South Shore Bank.

South Shore Bank of Chicago (SSB), is a white-owned institution primarily serving the African-American community. SSB is a major player in African-American community development and has invested millions of dollars in property renovation, small business loans and is physically located in the communities which it serves.

Although SSB's persona as a good corporate citizen appeared to be intact, some issues surfaced regarding the overall quality of service to its retail customers. In response to what management was hearing from its customers, SSB requested a customer satisfaction survey to measure the effectiveness of its services among target customers.

Using a 10-point scale, where 10 is the highest rating, many African-Americans rated the bank's services with 9's and even perfect 10's — to the point where learning was limited.

This is not to say that African-Americans are not being honest, but a couple of things were going on here.

1. Compared to the general market, African-Americans feel that they are not often asked for their opinions. Therefore, it is not uncommon to see a trend of contrasting extremes especially with regard to issues and situations affecting the community. Many get inspired from being asked and, in their minds, use research to foster a change (or, in the case of situations they don't want to change, maintain the status quo).

2. There is a history and perception among African-Americans that "good things get taken away; bad things are here to stay." Therefore, our experience tells us that with SSB, African-Americans most likely wanted to ensure that the community programs were not taken away or changed for the worse.

To that end, depending on the client and situation, the researcher may want to include additional probes at the end of the questions. Be careful about appearing to change the participant's responses. Instead, summarize their responses and even revisit some questions if necessary to help the them think about a particular event or circumstance that might help them deliver a more thoughtful response.

Don't abandon tradition

We are not advocating abandoning traditional approaches. They have served us well over the years. But it is important that marketers and researchers understand that African-Americans respond to their environment and many situations emotionally. In most cases this is what clients want. However, the outcome of the research and your marketing project may depend on how you approach African-Americans and your success in getting them to be more thoughtful respondents.

Survey Monitor

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world (measured by GDP) was in recession last year, reports Zenith Media Worldwide, but only 6 percent will remain so in 1999. The World Bank is predicting that global GDP will increase 1.9 percent in 1999. An increase in overseas demand will help boost U.S. exports, which Standard & Poor's DRI is forecasting will rise a similar 1.8 percent this year.

8. Industrial production, which began to fall more than a year before the last recession officially started, continues to grow. Industrial output climbed 3.3 percent in 1998, and according to Blue Chip, will rise 1.9 percent this year. Two-thirds (68 percent) of the manufacturing purchasing executives surveyed by the National Association of Purchasing Management expect their company's 1999 revenues to be greater than in 1998, with a 5.2 percent net increase in overall revenues.

7. The U.S. has near-full employment. The unemployment rate hit a 29-year low of 4.5 percent in 1998. More than 2.8 million new jobs were created last year, and DRI is projecting that an additional 1.6 million jobs will be created in 1999.

6. Consumer confidence remains strong, and with increasing income levels, consumer spending will keep rising. Personal consumption expenditures, which grew 4.8 percent last year, are expected to increase 3.0 percent in 1999, according to Blue Chip.

5. Companies can borrow at favorable interest rates, allowing them to invest in their business to fuel future growth. The Federal Reserve Bank of Philadelphia's Livingston Survey is forecasting that the prime interest rate will edge down from 7.8 percent in December 1998 to 7.5 percent by the end of this year.

4. Business investment in durable equipment will continue to climb, rising 7.6 percent in real terms in 1999, according to DRI.

3. Despite high employment levels, inflation remains low. The GDP price index increased 1.0 percent in 1998, and Blue Chip predicts that it will climb only 1.5 percent this year.

2. Marketing communications spending by business-to-business companies is rising, which will help drive future sales — and growth. The investment bank Veronis, Suhler & Associates is predicting that advertising spending in business magazines will increase 9.0 percent in 1999, and trade show and exhibit expenditures will climb 10.2 percent. Forrester Research is forecasting that Internet ad spending by business-to-business firms will grow even faster, a whopping 58.6 percent, this year.

1. Great opportunities will remain even if the country does slide into recession sometime during 1999. During the last downturn, real gross domestic output only fell 2.0 percent, manufacturing output declined 6.2 percent, and business investment in equipment dropped 8.3 percent in real terms. Sales of some products and services fell 10 percent or more. Many firms focused on the drop in sales, seeing the glass as being 10 percent empty. Other companies saw that it remained 90 percent full and took market share — and profits — away from more conservative firms.

A study conducted by PricewaterhouseCoopers in conjunction with Business Science International found that businesses that maintained aggressive marketing programs during the 1990-91 recession outperformed companies that relied more on cost-cutting measures to cope with the downturn. In 1999, a firm will need to boost its communications budget just to maintain its current share of voice in the marketplace.

No one knows what kind of year 1999 will turn out to be for the U.S. economy, but key indicators remain positive. "History shows that even if economic conditions turn sour, business-to-business firms that have a solid marketing game plan — and stay with it — will have a good year," says Long.

Workers say no boundaries, no problem

Workers under the age of 40 are twice as likely as their older counterparts to see fewer problems and more benefits in boundaryless work arrangements, according to a national research study released by Ceridian Employer Services, Minneapolis. For purposes of this study, the boundaryless workforce was defined as work arrangements that include one of the following practices: telecommuting, virtual teams, flexible time and pay plans, and temporary, project-based professionals.

According to the study, younger workers are substantially more likely to believe boundaryless work is valuable for rewarding employees, beneficial for all types of work and a good way to increase job satisfaction.

These results on generational differences are just one of eight themes and findings identified in Ceridian's original research, "The Boundaryless Workforce." The study surveyed senior executives, human resource managers, boundaryless workers and their direct managers on the challenges and benefits of the new work arrangements.

"With 91 percent of companies using some form of boundaryless work practice and most planning on increasing their usage in the future, it's clear that boundaryless work is here to stay," says Robert Digby, senior vice president of marketing for Ceridian Employer Services. "The study shows that the successful use of these arrangements depends on the technology tools that are put in place and the overall planning related to the effort."

Some key themes and findings:

1. Current and future practices: Ninety-one percent of respondents currently are using boundaryless arrangements, and many plan to increase their usage in the next two years.

2. Technology tools and resources: Boundaryless workers and their managers are two to three times more likely than senior executives to endorse investing in technology tools and training to make boundaryless work arrangements successful.

Forty-seven percent of workers and 41 percent of managers support providing boundaryless workers with employee self-service software, compared to only 14 percent of senior executives. Self-service lets employees access personal information such as home addresses, benefits declarations and W-2 forms from remote locations by using the Internet or a company intranet.

3. Attracting and retaining workers: Half of respondents said boundaryless work arrangements are highly successful in attracting workers, and 60 percent said they are highly successful in retaining employees.

4. Generational differences: Younger workers are twice as likely as older workers to see more benefits and fewer problems with boundaryless work arrangements.

Thirty-one percent of workers and managers over the age of 50 believe boundaryless workers are less respected than their traditional counterparts, compared to 10 percent of workers and managers ages 19-29 and 13 percent of workers and managers ages 30-39.

5. Professional growth and work-life balance: Workers ages 30-39 are almost twice as likely as other age groups to say that boundaryless work arrangements contribute to greater job satisfaction and work-life balance.

6. Productivity: Approximately half of all respondents said that boundaryless work arrangements increase employee productivity. This contrasts sharply with the opinions of boundaryless workers and their managers — only 17 percent believe they are more productive than traditional workers.

7. Employee and job success factors: Twenty-four percent of managers believe boundaryless work has a negative impact on an employee's career, compared to only 10 percent of workers.

8. Company preferences: Larger companies and multi-site companies are more likely to use boundaryless work practices than smaller companies and single-site companies. Fifty-two percent of companies with more than 5,000 employees currently offer telecommuting, compared to 27 percent of companies with less than 100 employees.

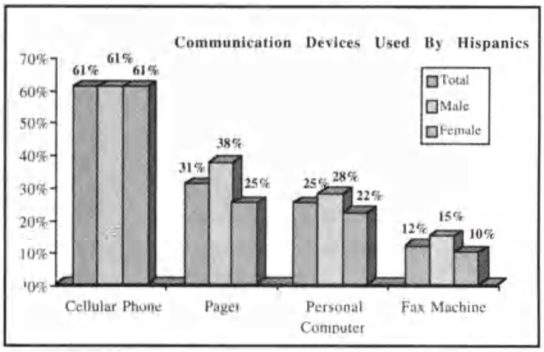
"The study shows that younger workers — the future of the workforce — believe they can use technology to maintain a strong connection with the office, regardless of where they are," Digby says. "With so many workers saying they are comfortable using resources like intranets, automated time and attendance, and employee self-service, boundaryless work will only become more important in the coming years. Companies that find the right ways to use boundaryless work today stand to gain a great competitive advantage in the future."

The study compared and contrasted the perceptions of 401 randomly selected senior executives, human resource managers, boundaryless workers and their direct managers on issues arising from the use of these arrangements. It also examined the current and projected use of boundaryless workforces, implementation challenges, effects on productivity and worker careers, and technology and resources needed to support these new work arrangements. An independent research firm conducted the survey in the third quarter of 1998. The sampling error is ±5 percentage points at the 95 percent confidence level.

The boundaryless workforce study booklet and detailed information on all findings can be accessed on the Ceridian Employer Services Web site at http://ces.ceridian.com.

Omnibus looks at Hispanic ownership of technology products

While most Hispanics (61 percent) own cellular telephones, Hispanic ownership of pagers, personal computers and faxes is much lower, reports Hispanic Express, Taylor Nelson Sofres Intersearch's (TNS Intersearch) monthly five-market omnibus survey



of 1,200 Hispanic consumers released in January. One-third of Hispanics (31 percent) have pagers, and one-fourth (25 percent) use personal computers at home. One-fourth (26 percent) do not use any of these.

Hispanic men are more likely than Hispanic women to have pagers, fax machines and personal computers. There is no significant difference between Hispanic men and Hispanic women owning cellular telephones.

Penetration for communications devices is highest among Miami Hispanics and lowest among Los

Communication Devices	Total %	Los Angeles %	New York %	Miami %	San Antonio %	Chicago %
Cellular phone	61	60	60	68	55	62
Pager	31	29	31	37	29	32
Personal computer	25	24	25	29	25	22
Fax machine	12	11	9	22	12	8
None	26	27	28	21	28	26

Angeles Hispanics. These products also display stronger penetration among younger and more acculturated Hispanics.

Only one-fourth of Hispanics use personal computers at home. Slightly more than one-tenth of Hispanics access e-mail (12 percent) or the Internet (11 percent) at home.

Miami Hispanics are slightly more likely than Hispanics in the other four markets to use a home PC, access e-mail or access the Internet.

Very few Hispanics who only speak Spanish use personal computers at home (3 percent). Hispanics who are English-dominant or speak English only are the most frequent users of per-

Base: Total Weighted Respondents	Total 1000 %	Los Angeles 200 %	New York 200 %	Miami 200 %	San Antonio 200 %	Chicago 200 %
Use Personal Computer At Home	25	24	25	29	25	22
Access E-mail At Home	12	9	10	16	15	11
Access Internet At Home	11	11	10	15	14	8

sonal computers at home (38 percent).

Each month Hispanic Express covers New York, Miami, Los Angeles, San Antonio and one additional market. Each sample contains an equal number of male and female respondents. Hispanic Express is a product of Taylor Nelson Sofres Intersearch, located in suburban Philadelphia. For more information contact Daniel Bloom at 215-442-9601 or at daniel.bloom@intersearch.tnsofres.com.

I am not a child

More than two thirds (68 percent) of eight-to-12-year-olds overwhelmingly prefer calling themselves "kids." There is no majority view among teenagers as to their favorite moniker, according to the 1998 Roper Youth Report, a syndicated annual report from New York-based Roper Starch Worldwide. Four in ten (40 percent) 13-to-17-year-olds refer to people their own age as "teenagers," but three in ten (29 percent) call them "teens." Next most popular is "kid" at 19 percent, followed by "person" at 15 percent.

Least popular among this age group is "child" (2 percent). Eight-to-12-year-olds choose "person" as a distant second (15 percent) to "kid," followed by "child" at 13 percent. Interestingly, 11 percent of this pre-teen age group vote for "teen." Bringing up the rear is "adolescent" (3 percent).

"It makes sense that the eight-to-12 group is more homogenous while the answer is a bit murkier for teens," says Joan Chiaramonte, vice president of Roper Starch Worldwide, who headed up the study. "Given their midway status between child and adulthood, teens have a hard time categorizing themselves because it's such a transitional age."

The 1998 Roper Youth Report is based on in-home face-to-face interviews with a nationwide cross-section of 1,189 children age six to 17. The study, conducted in April and May 1998, has a margin of sampling error of ±3 percent. For more information call 212-599-0700 or visit the company's Web site at www.roper.com.

Benchmark

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that the Web survey should be hosted on the survey research provider's site. This combination helps assure the respondent that the survey is legitimate and that respondent confidentiality will be protected.

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John Smith
ABC Company

Dear John Smith:

Your satisfaction is important to XYZ. Would you please
take a few moments to give us some feedback and help us
improve the quality of our products and services?

Since this survey is based on a selected sample, your
response is very important and will make a difference.
The survey is being conducted for us by CustomerSat.com,
an independent survey research firm specializing in the
Internet, and all responses will be kept confidential.

To thank you, one respondent will be chosen at random
to receive a free 3Com PalmPilot personal organizer (a
$300 value). To go to the survey, please either click
on the address below, or copy and paste it into your
web browser:

http://www.CustomerSat.com/xyz.cgi?52Z87W52

If you have any questions about the survey, please send
e-mail to
expert@CustomerSat.com or call (650) 234-8000. Thank
you very much.

Yours truly,
Mary Brown
Vice President, Client Services
XYZ Company
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Figure 2: Personalized customer invitation sent by e-mail

Guarding against ballot-box stuffing

An issue for any self-administered survey is ensuring that only authorized respondents can respond and that they cannot respond more than once (i.e., no ballot-box stuffing). Addressing these concerns is especially important when direct competitors' surveys are being fielded – or in the case of Web-based research, "hosted" – at the same time. To address these concerns, the benchmark study required that we use new technology we developed last year called Positive Respondent Identification™ (PRI).

PRI ensures that stray Web surfers cannot access surveys and that authorized respondents can complete a survey only once. In each customer's e-mail invitation, a unique password is appended to the Web survey address ("52Z87W52" in Figure 2). On the Web server, a program reads the password and, through a database, confirms both that it is valid and that it has not previously been used. If the PRI code is valid, the survey is displayed in the customer's browser. If the PRI code is not valid, either the message "Sorry, we could not find you in our database" or "Sorry, your ID code has already been used" is displayed. After the respondent completes the survey, the database is updated to disallow use of the password again. Respondents have nothing to type in or remember with PRI, unlike conventional passwords, thereby increasing response rates.

First drafts of the HTML of the four

surveys were composed with Decisive Survey software from Decisive Technology. CustomerSat.com Web programmers then formatted the raw HTML into concise, attractive tables, attached program scripts for PRI and real-time generation of individual company and aggregate results, and posted the surveys in private locations on the Web (Figure 3).

Our goal was 100 completed responses for each vendor within 30 days. As incentives, we offered random drawings for the 3Com PalmPilot personal organizer, a popular device for business professionals that can be used by virtually anyone with a PC.

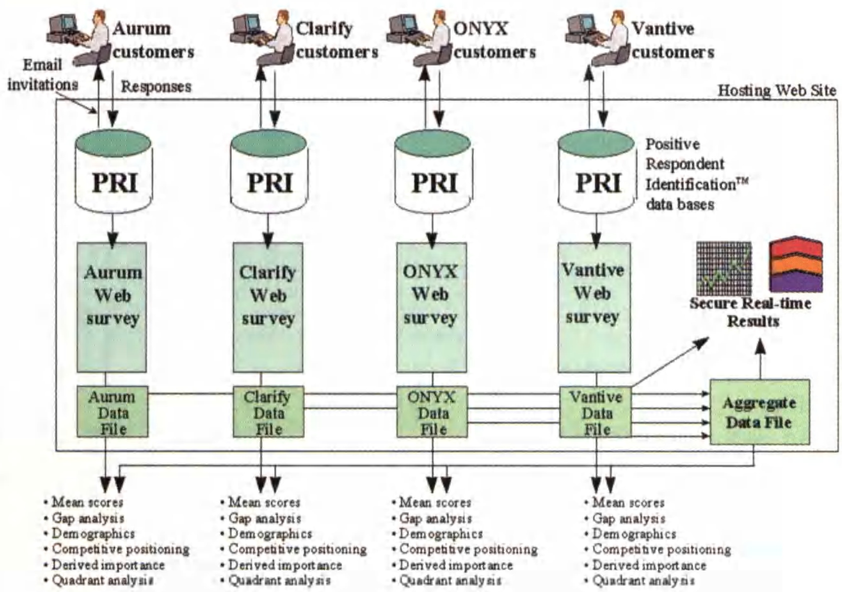

Figure 3: The survey process

The Web site hosted the four surveys, databases for PRI, and selected results generated in real-time. Other analyses and reports, shown at the bottom of figure, were generated by conventional means.

Over 400 companies respond

After e-mailing of invitations, approximately half of the responses to each survey arrived within 24-36 hours. To give all invited customers ample time to respond, the surveys were hosted for 30 days, with reminders e-mailed to non-respondents after approximately 10 days. Over 400 companies worldwide that are customers of the four vendors responded, yielding a 35-40 percent response rate for each vendor. The responding companies are estimated to represent over half of the worldwide users of enterprise CRM software.

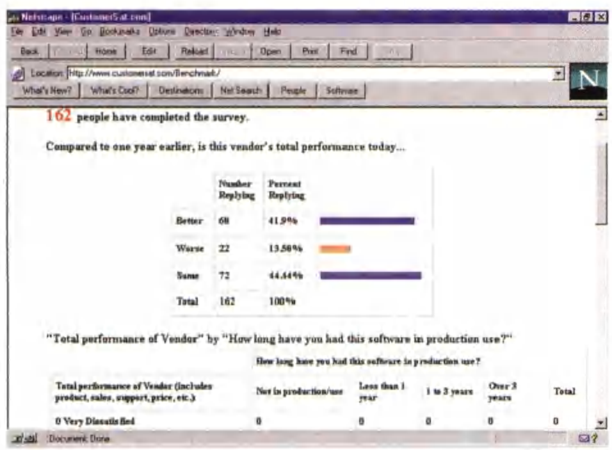

Figure 4: Real-time results — charts, frequency distributions, and crosstabs generated on password-protected Web pages

Respondents were enthusiastic about the process. According to John S. Townsend, senior director, Network Operations Support at Intermedia Communications Inc., and one of the customers who responded, "The Web survey was great. I was able to key in my answers and comments and then just click to send. No extra paper on my desk, no envelopes or stamps to worry about. A great time saver."

Real-time results

In the fast-paced CRM software industry, as increasingly in all sectors of the economy, vendors need to be able to react to customer feedback very quickly. To address this requirement, we offered the CRM software vendors the option of receiving their survey results in real-time: as customers completed the Web surveys, up-to-the-minute frequency distributions, selected crosstabs and verbatim open-ended responses appeared on password-protected Web pages. The results can be viewed from any Web browser, with no special software required (Figure 4).

Web-based results are a rapid and effective way to disseminate survey results throughout an enterprise. Anyone authorized to view the data may be provided the Web page addresses and password. Subsets of survey results may be published on different password-protected Web pages for different groups.

Conventional "off-line" methods were used for complete crosstabs and factor and regression analysis. Performance benchmarks and ratings for each vendor were determined for multiple demographic segments as well as for the market overall. Findings of the ongoing CRM software benchmark study are compiled for the vendors individually and in aggregate annually or semi-annually.

Vendor performance ratings are confidential to each vendor; aggregate benchmarks are shared by all of the vendors. Selected aggregate findings from the study have been published. For example, the customers most satisfied overall with their CRM systems and vendors were:

• between $100 million and $1 billion in revenue;

• in the telecommunications industry segment;

• in the eastern region of North America.

For more details on survey results, visit http://www.CustomerSat.com/pressrel980303.htm.

Benchmarking satisfaction with transactions

The real-time benchmarking initiative has now advanced in two directions. First, we have made real-time benchmarking services available to the CRM software vendors' customers. Users of CRM software can assess the satisfaction of their customers relative to comparable companies by industry, size, or geographical region. Second, satisfaction can now be measured in real-time not just with customer-vendor relationships, but with transactions as well. While relationship-oriented surveys measure customers' satisfaction over an extended period, transaction-oriented surveys measure satisfaction with the handling of specific sales or service events.

For real-time transaction-based benchmarking, CRM systems are linked to a secure CustomerSat.com Web site, which e-mails Web survey invitations to a sample of customers immediately after their transactions are recorded by the CRM software.

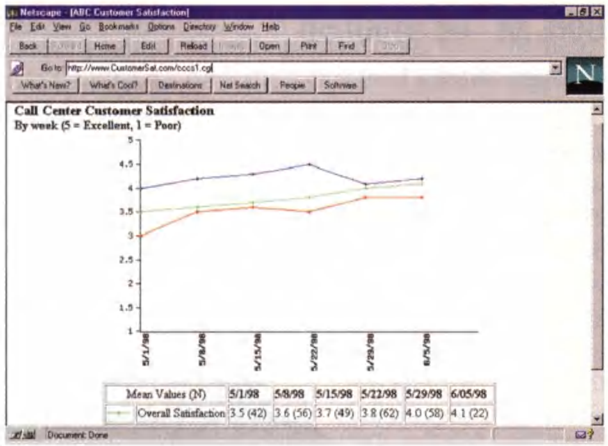

Figure 5: Real-time customer satisfaction trend lines via the Internet

Real-time survey results include trend lines that enable call center managers to track customer satisfaction by day, week or month, and by product line, geographical region, service rep, or any other variable (Figure 5).

E-mail alerts can be automatically generated to call center managers if average customer satisfaction falls below a specified level, or if customers request that someone contact them. As a result, call center managers can focus their efforts and resources to improve customer satisfaction and loyalty faster and more effectively than ever before.

In short, customer satisfaction measurement is increasingly becoming a proactive, real-time tool for management. Concluded an executive of one of the participating vendors, "Establishing benchmarks to raise quality and service standards benefits the entire CRM market, and helps us fulfill our corporate-wide commitment to customer satisfaction."

Core of the problem

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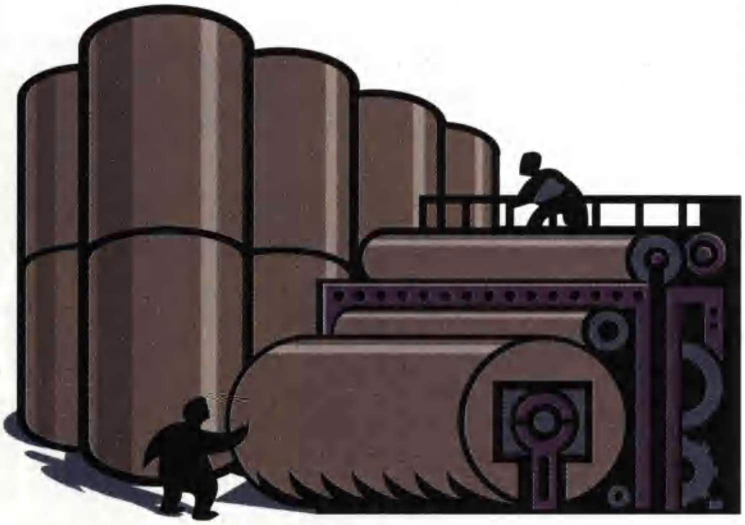
on gaining an understanding of consumers' perceptions of the attributes which impact their selection decision. The attributes identified by respondents in this phase were compared with a similar list identified by AMD's key people.

In order to develop the most comprehensive list of important attributes, telephone interviews were conducted among both AMD customers and prospects. For the greatest dispersion of opinions, participants were controlled to include equal numbers of customers and non-customers. Respondents in both groups were randomly selected from a list provided by AMD.



The goal of Phase I was to address the following issues in order to give direction to Phase II research:

• Identification of the specific attributes with which customers/potential customers associated the most value in selecting a company like AMD.

• Identification of the attributes which key people at AMD felt were most important to their customers/potential customers in selecting a company like AMD.

Twenty respondents — 10 customers and 10 non-customers — were randomly selected from a list supplied by AMD. Each was contacted and asked to identify the most important attributes considered in selecting a supplier of core-cutting equipment. The attributes identified by everyone interviewed, or by at least 90 percent of the respondents, were used in the next research phase.

"There were some attributes that AMD felt were important that the current clients or the potential clients didn't think were important, and those were eliminated," Kavalkovich says. "We basically tried to get agreement on the attributes from all three groups of respondents — the current customers, prospective customers and AMD."

The resulting attributes — derived by consensus — became the source of questions for Phase II of the research project.

Phase II

Phase II was a quantitative measurement of the attributes called out in the previous research phase. Phase II served to statistically quantify the information gained in Phase I, forming a reliable foundation for future decisions.

Using the attributes identified in Phase I of the research, a questionnaire was developed. From June to August 1997, FH&K conducted 97 telephone interviews, lasting an average of 15-20 minutes, with people who work at companies which utilize core-cutting machines. Selection of survey participants was controlled to include the primary person involved in choosing a supplier of core-cutting equipment for his or her company. Respondent anonymity was guaranteed to achieve the most honest response.

FH&K selected respondents at random from a list of companies supplied by AMD, controlling respondent selection to arrive at the following goals:

• 50 respondents in pulp and paper mills, core manufacturers and converting plants that were currently using Appleton machines, and

• 50 respondents in pulp and paper mills, core manufacturers and converting plants that were not currently using Appleton machines.

These groups were polled to give their insights on the following issues:

• aided/unaided awareness of AMD

and its competitors;

• what attributes are most important in choosing a supplier of core-cutting equipment, asking respondents to rate each attribute on a scale of 1 to 10;

• what consumers are looking for regarding each of these attributes;

• consumer perceptions of how well AMD delivers these attributes;

• identification of a positioning which could provide a meaningful difference between AMD and its competitors.

Step III: Results point to two differentiators

The positioning study revealed interesting and useful results. First, it showed that AMD had high awareness levels among customers, but had moderate unaided awareness and very low top-of-mind awareness with non-customers. This confirmed Hammerberg's initial suspicion that AMD's dominance in the market was eroding.

Second, it became apparent that there was a need for core-cutting machine manufacturers to differentiate themselves in order to build and maintain awareness with consumers. With companies attempting to communicate many attributes and telling the same story, it was obvious that none had been effective in setting themselves apart from the competition. Therefore, FH&K recommended that Appleton develop a multilevel communications program to increase its consumer awareness.

The study identified five key attributes, now considered proprietary, which were valued by customers and non-customers alike. In addition, the study found that none of the core-cutting manufacturers mentioned in the study — including AMD — were meeting respondents' expectations on these five key attributes. While the results indicate there was significant room for improvement at AMD and in the industry overall in reaching consumers' satisfaction, it also indicated that the opportunity existed for one company to set itself apart from others in meeting consumers' desires regarding at least one or two of these attributes. Therefore, FH&K suggested AMD focus its communications positioning on the top two of these five attributes.

Equally revealing, the study found that people involved in purchasing core-cutting machines do not appear to be looking for any additional ideas in the core cutting, finishing and handling arena. The findings point out that these individuals are not looking for manufacturers to try to sell them new ideas in core-cutting machines on an ongoing basis. Rather, they are looking for options that meet their needs when they are looking to purchase new equipment. This meant it was important that AMD have an ongoing communications program that focuses on the two key attributes discovered by the research.

The final step: strategic planning and implementation

With the research completed and the positioning determined, it was time to implement a change. AMD's reaction to the findings was like a researcher's dream come true, Kavalkovich says. "This was one research study where the client reacted the way you hoped they would when they got information they weren't expecting. We presented it to them. They looked at it. They talked about it. They asked some questions about it. And then they realized that maybe they do have a problem in terms of how they're seen in the marketplace, how they're positioned, and it forced them to realize they had to think differently if they were going to survive. AMD did what the research told them they had to do, which was completely opposite of what they had done before in their advertising."

For example, FH&K developed a new proposal pocket folder. Rather than showing machinery, as had been AMD's practice until then, the folder showed only cores in a very stylized manner with an unusual color background of red, magenta and purple. The folder contents, such as specification sheets developed by AMD, remained the same. The highly technical nature of the inserts was still appropriate for AMD's audience, which also was confirmed by the research.

New magazine advertisements were developed, again moving away from the focus on machinery. Instead, playing off the company name, the ads showed an apple with a paper core going through it.

Just as important as the ad content was the ad size. FH&K convinced AMD to move away from the quarter-page ads typical of the industry. Starting with full-page ads to introduce its new image, the company then went to two-thirds of a page.

An unexpected, but nevertheless promising, result was competitors' reaction to the new ads. Perhaps feeling unable to compete, it appears that most of AMD's competitors pulled out of magazine advertising altogether for a time.

AMD also modified its approach to trade shows. Previously, its participation focused on its staff members working the booth, answering questions and demonstrating equipment for those who happened to visit. Following the research results, AMD added enlarged images taken from the new proposal pocket folder to enhance the display. And rather than relying solely on machinery demonstrations, the company gave away small apple-shaped sponges to increase name recognition. The new approach instantly drew a positive response from both current AMD customers as well as prospects encountering AMD for the first time.

Positioning means more than just marketing

While differentiating product attributes is crucial to a successful marketing campaign, it is equally — if not more — important that AMD be capable of delivering those attributes if it is to capture and/or own the positioning. In this case, AMD was poised for success, Hammerberg says. "AMD has a variety of stripped-down pieces of equipment. Clients can select a model based on how many cores they need and if they want manual or automatic operation. Then the client can add various components depending on the company's own needs."

Time will tell

Hammerberg agrees that market reaction to AMD's new positioning and image has been very positive. But it may be too soon to tell about its impact on sales. The research conducted by FH&K also found that 62 percent of the respondents did not expect their companies to purchase core-cutting machines within the next two years. Only 15 percent of the sample indicated their companies would be purchasing this type of equipment in the next two years, and 23 percent were unsure. However, the good news is that more non-customers (20 percent) tended to feel their companies would purchase within the next two years as compared to current AMD customers. The true measure of success may be to see how many non-customers go with AMD for their next core-cutter purchase.

MONY

continued from p. 29

sonnel, operating expenses, sponsorship funds, and more. At the beginning of the initiative in 1996, Bell, then a successful MONY agent, was named national director of emerging markets and head of the African-American initiative.

As first steps to establishing credibility and confidence in the marketplace, MONY sought to build strong relationships with African-American communities.

One goal for recruiting efforts was to enhance existing relationships and/or establish a major presence with six specific African-American and related organizations (including involvement with the National Black MBA Association, The College Fund/UNCF and the Urban League).

MONY began a recruitment effort to expand its African-American field agent roster and added seven African-American assistant managing directors in its field agencies.

Concurrent with recruitment efforts was strategic involvement in local community activities and national organizations. The MONY Foundation Field Grants program, which focuses on "Meeting the Essential Needs of Minority Children," provided the vehicle for giving financial support to the African-American community and actively establishing MONY agents within various children's aid agencies as volunteers and fund-raisers.

"We've tried to build a marketing program that would affirm the social status and heritage of African-American employees by working with many different organizations that are predominantly African-American," Bell says.

The success of the initiative was evident in 1996 results:

• MONY exceeded its goal of African-American field agent hires by 20 percent;

• nine MONY-represented cities were targeted for heightened involvement in African-American communities, which resulted in the placement of agents on the boards of organizations such as the Urban League;

• grants totalling over $80,000 were given to various organizations and agents participated in volunteer activities.

Hiring continues

MONY continues as an active partner with the National Black MBA Association, The College Fund/UNCF, and historically Black colleges and universities. These relationships have been key to the recruitment strategy and have included conference and receptions sponsorships, value-added educational workshops, and career fairs.

Today, recruitment and hiring of African-American field agents continues. Hires of African-American field agents increased 50 percent from 1996 to 1997 and 137 percent from 1997 to 1998.

"One of our goals was to mirror the community, so when you look at MONY it's a reflection of our customers and the communities we serve," Bell says.

Research Industry News

continued from p. 12

DataStar, Inc., a Waltham, Mass., research firm, has updated its Web site at www.surveystar.com.

Burke Customer Satisfaction Associates (Burke CSA), Cincinnati, has opened an office in Charlotte, N.C., its second in the Southeast U.S. Dan Evarrs, a senior consultant with Burke CSA, heads the office, which is located at 304 W. 10th St., Charlotte, N.C., 28202. Phone 704-334-1582. Fax 704-334-1592.

Focus Market Research, Minneapolis, has opened a new qualitative facility featuring three qualitative suites in the Meridian Crossing building. Each suite has a client guest office with seating for 14 clients. The building is centrally located near the airport with covered parking and easy access. The firm's Edina, Minn., location will remain open. For more information call Judy Opstad at 612-881-3635.

Opinion Research Corporation, Princeton, N.J., announced its agreement to acquire **Macro International Inc.**, a research, consulting and technology company based in the Washington, D.C. area. The completion of the transaction, which is conditioned upon the signing of a definitive agreement, is expected during the first quarter of 1999. Upon completion of this transaction, the two firms will form a global marketing services company, with annual revenues in excess of $135 million worldwide.

In other news, Opinion Research reported revenues of $73.2 million, reflecting a growth of 29 percent over 1997 reported revenues of $56.7 million. Fourth quarter 1998 revenues were up 17 percent, to $18.3 million, from $15.6 million reported in the fourth quarter of 1997. As a result of a previously announced separation agreement with the company's chairman and CEO, the firm incurred an unusual charge in the fourth quarter of $2.5 million. Before the unusual charge and an extraordinary loss on debt restructuring, net earnings for the year would have been $1,551,000, as compared to $1,151,000 in 1997, and diluted earnings per share would have been $0.36 as compared to $0.28 in 1997. Due to the unusual charge, the Company reported a net loss for the quarter of $1,307,000 and for the year of $170,000, as compared to net earnings of $399,000 and $1,151,000 in 1997, respectively. Diluted earnings per share for the quarter and year were reported as ($0.31) and ($0.04), respectively.

The M/A/R/C Group, an Irving, Texas, market intelligence firm, announced net income of $104,000, or $0.02 per share on a diluted basis, for the 12-month period ended December 31, 1998, compared with $6,075,000, or $1.21 per share, for the comparable period last year. Revenues in 1998 were $88,911,000, compared with $96,709,000 last year. For the fourth quarter, the company reported a net loss of $513,000, or ($0.10) per share, compared with net income of $1,211,000, or $0.24 per share last year. Revenues for the fourth quarter were $21,270,000 this year, compared with $24,259,000 last year. The company's performance in the fourth quarter reflected losses in its M/A/R/C Research division driven by lower than expected revenues and increased operating expenses in the Company's Targetbase Marketing business.

Information Resources, Inc., Chicago, announced breakeven results for the fourth quarter 1998 compared to net earnings of $3.5 million, or $0.12 per diluted share, in the fourth quarter of 1997. For the year ended December 31, 1998, net earnings were $3.8 million or $0.13 per diluted share compared to $7.7 million or $0.26 per diluted share in 1997. For the quarter ended December 31, 1998, consolidated revenues were $137.4 million, an increase of 13 percent over the fourth quarter of 1997. Revenues from the company's U.S. businesses were $104.9 million, 9 percent higher than the corresponding 1997 quarter.

NameQuest, Inc., a Carefree, Ariz., name testing and development firm, has recently developed a new Web site at www.namequestusa.com.

STATISTICA, data analysis and graphing software from StatSoft, Inc., Tulsa, Okla., has been chosen as a standard statistical analysis software package to be used throughout the research & development community at BASF Corporation. The company will be using STATISTICA for design of experiments, statistical process control and various data analyses.

A new research firm, **Street Smart Research**, has opened at 7055 Riverside Dr., Atlanta, Ga. 30328. The firm focuses on bringing account planning skills to marketers or ad agencies. For more information contact Anthony Edwards at 770-352-0546 or at aredwards@earthlink.net.

Essman/Associates, Inc., a Des Moines, Iowa, marketing communications firm, has expanded its marketing research services by forming a new division, **Essman/Research**, which will be directed by Deborah Stearns.

Scotts Valley, Calif.-based OnRadio, an Internet radio network, will participate in the streaming media alliance of **Arbitron NewMedia**. Participating companies will cooperate with Arbitron in its effort to develop audience measurement services for broadcasters and other content providers that stream live audio and video content over the Internet. In other news Arbitron is considering a change in the way it reports simulcast radio stations and is seeking client comment on the change. The full text of the proposed policy is available at www.arbitron.com. The company is asking its subscribers to comment on the proposal by sending an e-mail to simulcast@arbitron.com. Clients are asked to include their name, title, station or agency and phone number in the text of their comments.

Thomson Financial Services has acquired SiX, a research and analytical subsidiary of Sedgwick Group plc, the U.K.-based insurance brokerage group. SiX collects financial data on approximately 4,000 insurance entities worldwide, and provides data and analytical services to participants in the insurance industry. SiX operations will be moved to TFS' European headquarters based in London. Terms of the agreement were not disclosed.

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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. Or visit www.quirks.com/media/moderator.html.

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Cultural Insights, Inc.
Doyle Research Associates
Strategic Focus, Inc.

OBSERVATIONAL
Alexander + Parker
Doyle Research Associates

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

PACKAGED GOODS
Advanced Insights
BAIGlobal Inc.
C&R Research Services, Inc.
Doyle Research Associates
Suzanne Higgins Associates
Just The Facts, Inc.
Jay L. Roth & Associates, Inc.
Thorne Creative Research

PACKAGE DESIGN RESEARCH
Alexander + Parker
Image Engineering, Inc.
Perception Research Services, Inc.
Treistman & Stark Marketing, Inc.

PARENTS
Fader & Associates

PET PRODUCTS
Cambridge Research, Inc.
Doane Marketing Research, Inc.
Primary Insights, Inc.

PHARMACEUTICALS
BAIGlobal Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Chalfont Healthcare Research, Inc.
D/R/S HealthCare Consultants
I+G Medical Research International
Irvine Consulting, Inc.
Lewis Consulting Inc.
Macro International
Market Navigation, Inc.
MCC Qualitative Consulting
MedProbe™ Inc.
Paul Schneller - Qualitative

POLITICAL/SOCIAL RESEARCH
Cambridge Associates, Ltd.
Cultural Insights, Inc.
Kiyomura-Ishimoto Associates
Francesca Moscatelli

POINT-OF-SALE MKTG.
Perception Research Services, Inc.

POSITIONING RESEARCH
Paul Schneller - Qualitative

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

PUBLISHING
Cambridge Associates, Ltd.
First Market Research Corp. (Heiman)
Langer Associates, Inc.
Market Connections, Inc.
Marketing Advantage Rsch. Cnslts.
James Spanier Associates

RETAIL
First Market Research Corp. (Reynolds)
Pat Henry Market Research, Inc.
Knowledge Systems & Research, Inc.
Market Directions, Inc.
MCC Qualitative Consulting
Rothenberg Consulting Group

SENIORS
Fader & Associates
Suzanne Higgins Associates
Primary Insights, Inc.

SERVICES
The Research Edge

SMALL BUSINESS/ ENTREPRENEURS
Linda Fitzpatrick Rsch. Svcs. Corp.
Kiyomura-Ishimoto Associates
Strategy Research Corporation
Yarnell, Inc.

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

SPORTS
Automotive Insights/Sports Insight
Performance Research

STRATEGY DEVELOPMENT
Paul Schneller - Qualitative

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

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

TELECONFERENCING
Cambridge Research, Inc.

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

TOURISM/HOSPITALITY
Rothenberg Consulting Group
Schwartz Consulting Partners

TOYS/GAMES
Fader & Associates

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

TRAVEL
Cambridge Associates, Ltd.
Rothenberg Consulting Group
James Spanier Associates

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

VIDEO CONFERENCING
Schwartz Consulting Partners

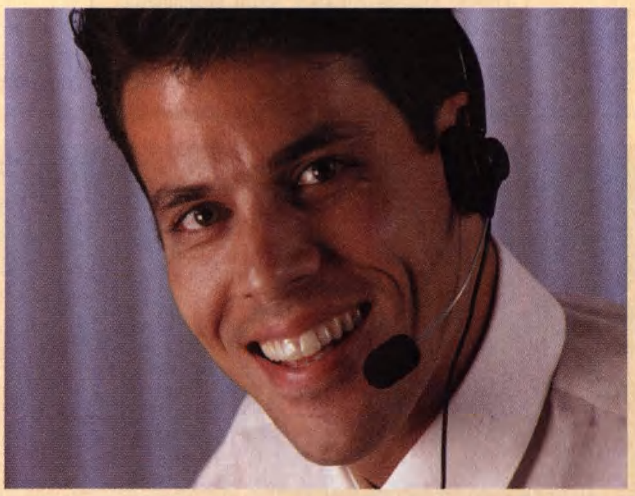
VETERINARY MEDICINE
Doane Marketing Research, Inc.

WEALTHY
Strategy Research Corporation

YOUTH
Fader & Associates
Macro International

Quirk's Marketing Research Review

1999 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.

ACCESS WORLDWIDE
CULTURAL ACCESS GROUP

Access Worldwide, Cultural Access Group
(Formerly Hispanic Market Connections)
5150 El Camino Real, Ste. D-11
Los Altos, CA 94022-1527
Ph. 650-965-3859
Fax 650-965-3874
E-mail: info@accesscag.com
www.accesscag.com
M. Isabel Valdes, President
Jennifer Lynch, Dir. Of Sales & Mktg.
Full service
African-American, Asian, Hispanic

Access Worldwide, Cultural Access Group is a multicultural, full-service marketing research and consulting firm. We provide timely intelligence about Hispanic, African-American and Asian consumers' perceptions, attitudes, lifestyles and behavior to companies and advertising agencies. We offer an array of qualitative and quantitative research services that are uniquely suited to multicultural markets, as well as strategic marketing consulting.
(See advertisement on p. 80)

*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
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. 46)

Aim Research
10456 Brian Mooney
El Paso, TX 79935
Ph. 915-591-4777
Fax 915-595-6305
E-mail: 76265.2167@compuserve.com
www.aimresearch.com
Linda Adams, Owner/Director
Data collection/Field service
Hispanic

*AIS Market Research
1320 E. Shaw, Ste. 100
Fresno, CA 93710
Ph. 800-627-8334 or 559-252-2727
Fax 559-252-8343
E-mail: aisres@psnw.com
Jennifer Nichols, Manager
Data collection/Field service, Data processing
African-American, Asian, Hispanic

*Almiron-Caban & Assoc. Bilingual Research, 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

* Indicates a firm owned by an ethnic minority

Answers, Inc.
109 Eighth St.
Augusta, GA 30901
Ph. 706-724-2679
Fax 706-724-1093
E-mail: mark@malison.com
Mark Alison, President
Full service
African-American

*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: AsianDiv@hamcr.com
www.hamcr.com
Sandra M.J. Wong, Ph.D., Research Director
Full service
Asian, Hispanic

AMCR is a full-service multicultural market research and strategic consulting firm specializing in U.S. Asian and Hispanic, Asia Pacific and Latin American markets. We offer qualitative and quantitative research in most Asian languages, Spanish and Portuguese. Using market research as a vehicle to cultural understanding, we offer strategic consulting to clients for positioning products and services in diverse markets.
(See advertisement on p. 37)

*ASPEN RESEARCH, inc.
401 Miracle Mile, Ste. 406
Coral Gables, FL 33134-4928
Ph. 305-444-9788
Fax 305-444-9670
E-mail: ASPENRES@aol.com
www.aspen-research.com
Margery Isis Schwartz, President
Full service
Hispanic

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
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 one 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. 81)

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
www.primenet.com/~brc/
Earl de Berge, Research Director
Full service, Data collection/Field service, Data processing
Hispanic, Native American

*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 group
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 773-933-0548
Fax 773-233-0484
E-mail: CRMS1@aol.com
www.crmarket.com
Cherlyn Robinson, Project Coordinator
Data collection/Field 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
www.cr-research.com
Jim Flannery, Dir. Business Development
Full service
Asian, Hispanic, Middle Eastern

C&R Research Services, Inc. is a full-service custom research and consulting company with 200+ 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. C&R Research has extensive Hispanic and Latin American market research experience. With offices in both the United States and Buenos Aires, C&R offers a wide variety of services to its clients, targeting the Spanish-speaking market in the U.S. as well as in Central America, South America, and Europe.
(See advertisement on the Back Cover)

Cambridge Focus
600 Memorial Dr.
Cambridge, MA 02139-4814
Ph. 617-494-0310
Fax 617-494-0910
E-mail: details@cambridgefocus.com
Lloyd Simon
Data collection/Field service, Focus group
African-American, Asian, 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
E-mail: chifocus@aol.com
www.thefocusnetwork.com
Focus group
African-American, Hispanic

Conway/Milliken & Associates/Research Int'l.
Marketing Research & Consulting
875 N. Michigan Ave.
Chicago, IL 60611
Ph. 312-787-4060
Fax 312-787-4156
E-mail: cma@cmamkting.com
www.cmamkting.com
Carlos Salazar-Velasquez, Ph.D., Vice President
Full service
Hispanic

CQS Research, Inc.
2500 West Loop S., Ste. 300
Houston, TX 77027
Ph. 713-783-9111 or 800-460-9111
Fax 713-789-2020
E-mail: CQSInc@aol.com
www.cqsinc.com
Noel Roulin, President
Data collection/Field service
African-American, Asian, Hispanic

Creative Data Qualitative Insights
7136 Haskell Ave., Ste. 100
Van Nuys, CA 91406
Ph. 818-988-5411
Fax 818-988-4057
E-mail: creativedata@earthlink.net
www.isacorp.com
Jennifer von Schneidau, Vice President
Full service, Data collection/Field service, Focus group
African-American, Asian, Hispanic, Middle Eastern

Cultural Access
(See Access Worldwide, Cultural Access Group)

Cultural Insights, Inc.
10510 Buckeye Trace
Goshen, KY 40026-9756
Ph. 502-228-3708
Fax 502-228-2829
E-mail: listening@culturalinsights.org
www.culturalinsights.org
Full service
African-American, Asian, Hispanic

Data & Management Counsel, Inc.
P.O. Box 1609
135 Commons Ct.
Chadds Ford, PA 19317-9724
Ph. 610-459-4700
Fax 610-459-4825
E-mail: Info@DMChome.com
www.DMChome.com
Bill Ziff-Levine, Managing Director
Branch office:
International Tower
5200 S. Yale Ave., Ste. 102
Tulsa, OK 74135
Ph. 918-492-6324
Fax 918-492-7147
E-mail: Info@DMChome.com
www.DMChome.com
John McKay, Vice President
Full service
African-American, Asian, Hispanic, Middle Eastern

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. 82)

* Indicates a firm owned by an ethnic minority

Data Research Services, Inc.
3323 Chamblee-Dunwoody Rd.
Chamblee, GA 30341
Ph. 770-455-0114
Fax 770-458-8926
E-mail: tab@dataservice.com
www.dataservice.com
Jon Mitchell, Exec. Vice President
Full service, Data collection/Field service, Data processing
African-American, Asian, Hispanic

DataDeeds, Inc.
P.O. Box 4617
Silver Springs, MD 20914
Ph. 301-879-1552
Fax 301-879-1553
E-mail: btidwell@erols.com
Dr. Billy Tidwell, President/CEO
Full service
African-American

Davis & Davis Research, Inc.
8001 N. Dale Mabry Hwy., Ste. 401B
Tampa, FL 33614
Ph. 813-873-1908
Fax 813-935-5473
Irene Davis, President
Data collection/Field service, Focus group
African-American

*M Davis & Co., Inc.
1520 Locust St., 3rd fl.
Philadelphia, PA 19102-4403
Ph. 215-790-8900
Fax 215-790-8930
E-mail: info@mdavisco.com
www.mdavisco.com
Full service, Data collection/Field service
African-American

Direct Marketing Services Group, Inc.
7601 N. Federal Hwy., Ste. 205-B
Boca Raton, FL 33487
Ph. 561-997-2324 or 561-997-7270
Fax 561-997-5844
E-mail: sil@siltd.com
www.siltd.com/dmsg.html
Full service
Asian, Hispanic, Middle Eastern

Experienced staff (senior management 30 years/4,500 projects) conducting all types of data collection projects. Highest standards. State-of-the-art CATI facility. Predictive dialing, sampling, international calling, translation, bilingual staff, telephone appending services, "Salebooster" relationship-building customer development program.
(See advertisement on p. 32)

DIR
DIRECTIONS IN RESEARCH
Full Service Marketing Research & Consulting

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
www.diresearch.com
David Phife
Full service, Data collection/Field service, Data processing
Hispanic

Established in 1985, Directions In Research is a young company employing motivated and experienced professionals dedicated to providing expert marketing research and consulting services. We are in the business of identifying, understanding and satisfying the needs of our clients. We not only answer those needs with honesty, integrity and complete confidentiality, but above all, with intelligence. The value of our services is measured by the satisfaction of our clients. For both quantitative and qualitative research - on the West Coast or nationwide - Directions in Research offers a complete package of services to help management, in both service and product industries, make informed decisions.
(See advertisement on p. 83)

DMS
840 N. Larrabee St., Ste. 4209
Los Angeles, CA 90069
Ph. 310-659-8732
Fax 310-657-0647
E-mail: DMSSOCAL@aol.com
John Draper
Data collection/Field service
African-American, Hispanic

Eastern Research Services
1001 Baltimore Pike, Ste. 208
Springfield, PA 19064
Ph. 610-543-0575
Fax 610-543-2577
E-mail: mail@easternresearch.com
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 or 718-320-3220
Fax 718-320-3996
E-mail: emr@interport.net
www.ebonymktg.com/
Bruce Kirkland, Vice President
Mourisha Cromwell, Project Coordinator
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. 84)

Elliott • Benson

Elliott Benson
1234 H St., Ste. 200
Sacramento, CA 95814
Ph. 916-325-1670
Fax 916-498-0394
E-mail: ebinfo@elliottbenson.com
www.elliottbenson.com
Jaclyn Benson, President
Data collection/Field service
African-American, Asian, Hispanic, Native American

Sacramento's newest, most luxurious focus facility! Ultra-modern office features two conference/viewing suites and computer-equipped client offices with closed-circuit viewing. Elliott Benson is a closely owner-operated company with outstanding personal service and an ideal downtown location. Complete data collection capabilities with guaranteed results!
(See advertisement on p. 24)

etc Erlich Transcultural Consultants

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
www.etctranscultural.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. 11)

Fieldwork, Inc.
6200 N. Hiawatha, Ste. 700
Chicago, IL 60646
Ph. 773-282-2911 or 888-to-FIELD
Fax 773-282-8971
E-mail: sandya@crresearch.com
www.fieldwork.com
Sandy Adams, President
Branch offices:

> Fieldwork Atlanta, Inc.
> 200 Galleria Pkwy., Ste. 1850
> Atlanta, GA 30339
> Ph. 770-988-0330
> Fax 770-955-1555
> E-mail: FIELDWORKA@aol.com
> www.fieldwork.com
> Bette Hayden
> Data collection/Field service
> African-American
>
> Fieldwork Chicago, Inc.
> 6200 N. Hiawatha, Ste. 720
> Chicago, IL 60646
> Ph. 773-282-2911 or 888-TO-FIELD
> Fax 773-282-8971
> E-mail: FDWCHICAGO@aol.com
> www.fieldwork.com
> Karen Borgardt or Judy Piechocki
> 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: fieldworkohare@ibm.com
> www.fieldwork.com
> Pam White, President
> Data collection/Field service
> African-American, Asian, Hispanic, Mid. Eastern

* Indicates a firm owned by an ethnic minority

Fieldwork Chicago-West
1450 E. American Ln., Ste. 1880
Schaumburg, IL 60173
Ph. 847-413-9040
Fax 847-413-9064
E-mail: fieldworkschaumburg@msn.net
www.fieldwork.com
Paul Scaletta
Data collection/Field service
African-American, Asian, Hispanic, Mid. Eastern

Fieldwork East, Inc.
2 Executive Dr., Ste. 800
Ft. Lee, NJ 07024
Ph. 201-585-8200
Fax 201-585-0096
E-mail: NJFWE@aol.com
www.fieldwork.com
Sandy Starr 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
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
www.fieldwork.com
Mary Pedersen
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 or 415-398-4140
Fax 415-989-4506
E-mail: ffr@ffrsf.com
www.ffrsf.com
Full service, Focus group
African-American, Asian, Hispanic

Opened June 1997 - focus group facility with three full-sized rooms and one mini room. Two oversized conference rooms at 22'x25' and one room at 19'x22'. All feature three-tiered seating for 15+ with adjoining client office, installed video cameras, central air, video conferencing, mini refrigerators, laptop and Internet/modem capabilities. Mini room seating six to eight provides identical amenities to above. All are two blocks from Union Square shopping, hotels and restaurants. Member FocusVision.
(See advertisement on p. 85)

Focus & Testing, Inc.
20847 Ventura Blvd.
Woodland Hills, CA 91364
Ph. 818-347-7077
Fax 818-347-7073
E-mail: focustest@earthlink.net
Spence Bilkiss, V.P. Operation
Data collection/Field service
African-American, Asian, Hispanic, Middle Eastern, Native American

With over 8,000 sq. ft., Focus & Testing, Inc. is LA's largest and most accommodating testing facility. Equipped with five spacious focus/observation rooms and a 1,200-sq.-ft. commercial test kitchen, clients continue to rave about their ethnic, and executive recruiting, attention to detail, and competitive prices.
(See advertisement on p. 86)

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
www.garciaresearch.com
Ted Dahl, Vice President
Full service, Data collection/Field service, Focus group
African-American, Hispanic

GENESYS Sampling Systems
565 Virginia Dr.
Ft. Washington, PA 19034-2706
Ph. 800-336-7674
Fax 215-653-7115
E-mail: jpalish@m-s-g.com
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. 23)

Greenfield Consulting Group, Inc.
274 Riverside Ave.
Westport, CT 06880-4807
Ph. 203-221-0411
Fax 203-221-0791
E-mail: info@greenfieldgroup.com
www.greenfieldgroup.com
Carol Farquhar, V.P. Business Development
Full service
African-American, Hispanic

*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, Consulting
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

*Hispanic Focus Unlimited
Rte. 1, Box 278
La Feria, TX 78559
Ph. 956-797-4211
Fax 956-797-4244
E-mail: hispfocs@gte.net
http://home1.gte.net/hispfocs/index.htm
Ruben Cuellar, President
Full service, Data collection/Field service
Hispanic

Hispanic Market Connections
(See Access Worldwide, Cultural Access Group)

HISPANIC & ASIAN
MARKETING COMMUNICATION
RESEARCH, INC.

***Hispanic 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
www.hamcr.com
Felipe Korzenny, Ph.D., President
Full service
Asian, Hispanic

HMCR is a full-service multicultural market research and strategic consulting firm specializing in U.S. Hispanic and Asian, Latin American and Asian Pacific markets. We offer qualitative and quantitative research in Spanish, Portuguese and most Asian languages. Using market research as a vehicle to cultural understanding, we offer strategic consulting to clients for positioning products and services in diverse markets.
(See advertisement on p. 37)

Holleran Consulting
2951 Whiteford Rd.
York, PA 17402
Ph. 717-757-2802 or 800-941-2168
Fax 717-755-7661
E-mail: info@holleranconsult.com
www.holleranconsult.com
Lynda P. Myers, Dir. of Field Services
Full service, Data collection/Field service, Data processing
African-American, Asian, Hispanic

Horowitz Associates, Inc.
1971 Palmer Ave.
Larchmont, NY 10538-2439
Ph. 914-834-5999
Fax 914-834-5998
E-mail: horoassoc@aol.com
www.horowitzassociates.com
Howard Horowitz, President
Full service
African-American, Asian, Hispanic, Middle Eastern, Native American

* Indicates a firm owned by an ethnic minority

House of Marketing
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, Focus group
African-American, Asian, Hispanic

House of Marketing is the largest multilingual focus group and fieldwork company in the Los Angeles area. Our language capabilities include: Spanish, Mandarin, Cantonese, Korean, Japanese, Tagalog. 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. 87)

*The Hunter-Miller Group
1507 E. 53rd St., Ste. 295
Chicago, IL 60615
Ph. 773-978-7245
Fax 773-978-7124
E-mail: PepMHMG1@aol.com
Pepper Miller, President
Full service
African-American, Hispanic

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

IMAGES Research is a full-service minority owned research firm providing turn-key, 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. 88)

In Focus Consulting
2327 Blueridge Ave.
Menlo Park, CA 94025-6709
Ph. 650-854-8462
Fax 650-854-4178
E-mail: echardon@compuserve.com
Full service
Hispanic

InGold Research Services, Inc.
17501 Janesville Rd.
Muskego, WI 53150
Ph. 414-679-2600
Fax 414-679-1445
E-mail: in-gold@execpc.com
Marguerite Ingold, President
Data collection/Field service
African-American, Middle Eastern

Interviewing Service of America, Inc.
15400 Sherman Way, Ste. 400
Van Nuys, CA 91406-4211
Ph. 818-989-1044
Fax 818-782-1309
E-mail: mhalberstam@isacorp.com
www.isacorp.com
Michael Halberstam, President
Full service, Data collection/Field service, Data processing
African-American, Asian, Hispanic, Middle Eastern

Interviewing Service of America, the West Coast's largest marketing research data collection company. 254 CATI stations at two Los Angeles facilities. State-of-the-art technology including DS3 fiber optics, predictive dialing, interactive voice response, Sound-Survent, Survent, Quancept, Quancept Web and bilingual capabilities in 61 different languages. Translations, data entry, coding and tabulation services also available. For more information call Michael Halberstam at 818-989-1044.
(See advertisement on p. 88)

IPC (International Point of Contact)
32 E. 31st St.
New York, NY 10016
Ph. 212-213-3303
Fax 212-213-3554
E-mail: RLBIPC@aol.com
Rhoda Brooks, Partner
Data collection/Field service
African-American, Asian, Hispanic, Middle Eastern

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. 89

*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

*Kiyomura-Ishimoto Associates
130 Bush St., 10th fl.
San Francisco, CA 94104-3826
Ph. 800-827-6909 or 415-984-5880
Fax 415-984-5888
E-mail: norm@kiassociates.com
www.kiassociates.com
Full service, Data collection/Field service
African-American, Asian, Hispanic

* Indicates a firm owned by an ethnic minority

Stanford Klapper Associates, Inc.
P.O. Box 361529
San Juan, PR 00936-1529
Ph. 787-753-9090
Fax 787-754-6590
E-mail: stanford.klapper@worldnet.att.net
Barbara Bargman, President
Full service, Data collection/Field service, Data processing
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
E-mail: dsackman@lrw-la.com
Dave Sackman, President
Full service
Asian, Hispanic

M G Z Research
5715 Silent Brook Ln.
Rolling Meadows, IL 60008
Ph. 847-397-1513
Fax 847-397-9016
Martha Garma Zipper, President
Consulting
Hispanic

MACRO Consulting, Inc.
2581 Leghorn St.
Mountain View, CA 94043
Ph. 650-964-9707
Fax 650-964-9949
E-mail: dick@macroinc.com
www.macroinc.com
P. Richard McCullough, President
Full service, Data collection/Field service, Data processing, Consulting
Asian, Hispanic

Mar's Surveys
1700 N. University Dr., Ste. 205
Coral Springs, FL 33071
Ph. 954-755-2805 or 800-923-MARS
Fax 954-755-3061
E-mail: eric@marsresearch.com
www.marsresearch.com
Eric Lipson, Vice President
Data collection/Field service
African-American, Hispanic

Mari Hispanic Research & Field Services
2030 E. Fourth St., Ste. 205
Santa Ana, CA 92705
Ph. 714-667-8282
Fax 714-667-8290
Mari R. Lindemann, President
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. 89)

Market Development Associates, Inc.
5050 Poplar Ave., Ste. 920
Memphis, TN 38157
Ph. 800-480-8334 or 901-682-1011
Fax 800-480-0861
E-mail: Mktdevlp@aol.com
www.MDARESEARCH.com
Jennifer Choate, Director of Marketing
Full service, Data collection/Field service, Data processing, Focus group
African-American, Hispanic

*Market Development, Inc.
600 B St., Ste. 1600
San Diego, CA 92101
Ph. 619-232-5628
Fax 619-232-0373
Roger S. Sennott, V.P./G.M.
Full service
Hispanic

Market Facts, Inc.
3040 W. Salt Creek Ln.
Arlington Heights, IL 60005
Ph. 847-590-7000
Fax 847-590-7010
www.marketfacts.com
Tom Payne, President
Full service, Data collection/Field service, Data processing, Consumer panel
Hispanic

Market Facts, a global marketing research firm, continues to expand its international presence. Market Facts is a leading provider of custom market research and consulting services, and has research capabilities in the U.S., Canada, Europe, Asia, Latin America and the Middle-East. Ethnic research services include TeleNacion, a monthly telephone omnibus that surveys the U.S. Hispanic population. Market Facts also offers TeleNation, a national omnibus telephone survey.
(See advertisement on p. 34)

*Market Segment Research
A div. of the Market Segment Group
201 Alhambra Circle, Ste. 804
Coral Gables, FL 33134
Ph. 305-669-3900
Fax 305-669-3901
E-mail: gberman@marketsegment.com
www.marketsegment.com
Gary L. Berman, CEO
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
Mariluz Florez, Office Manager
Full service, Data collection/Field service, Focus group
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 group
Hispanic

*Marketing World, Inc.
International Mktg. Rsch. Consultants
823 White Rock Dr.
St. Louis, MO 63131-0426
Ph. 314-965-0200
Fax 314-965-3901
E-mail: SAXENAMWI@aol.com
Swaran L. Saxena, President
Full service
Asian

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

*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
www.mktdev.com
Jose Suarez, Operations Manager
Data collection/Field service
Hispanic

MEADOWLANDS CONSUMER CENTER INC.
The Plaza at the Meadows
100 Plaza Dr., 1st fl.
Secaucus, NJ 07094
Ph. 201-865-4900 or 800-998-4777
Fax 201-865-0408
E-mail: Meadowcc@aol.com
Lauren Heger, Field Director
Focus group
African-American, Hispanic

*Meneses Research & Associates
1996 Frankfort St.
San Diego, CA 92110
Ph. 619-276-5335
Fax 619-276-7330
E-mail: wmeneses@aol.com
www.menesesresearch.com
Walter Meneses
Full service, Data collection/Field service
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
African-American, Hispanic

*MOI, Inc.
Global Strategic Intelligence
P.O. Box 1439
Princeton, NJ 08542
Ph. 609-730-8188
Fax 609-730-8111
E-mail: MOIINC@aol.com
http://members.aol.com/MOIINC/MOIInc.html
Mila Montemayor, President
Full service
Asian

Francesca Moscatelli, M.S.
506 Ft. Washington Ave., #3C
New York, NY 10033
Ph. 212-740-2754
Fax 212-923-7949
E-mail: francesca@bigplanet.com
http://dwp.bigplanet.com/qualitative
Francesca Moscatelli
Focus group
Hispanic

National Opinion Research Services

N O R S

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
www.nors.com
Daniel Clapp, President
Data collection/Field service
Hispanic

Offering a full line of quality field services with 65 CATI stations, beautiful newly remodeled focus group facilities (with wireless headphone system and state-of-the-art audio video services) and complete interviewing, recruiting, moderation and translation services. All services available in English and Spanish. Our friendly, well-trained, completely bilingual staff assures that your project will be conducted efficiently and accurately and delivered on time. Five minutes from the airport.
(See advertisement on p. 91)

NorTex Research Group/Dallas
8700 N. Stemmons Fwy., Ste. 190
Dallas, TX 75247-3715
Ph. 800-315-TEXX
Fax 214-630-6769
E-mail: tveliz@aol.com
Tony Veliz, 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

*OmniFacts, Inc.
5105 Overbrook Ave.
Philadelphia, PA 19131
Ph. 215-477-5069
E-mail: Jbaker8609@aol.com
John Baker, President
Full service
African-American

*OmniTrak Group, Inc.
725 Davies Pacific Center
841 Bishop St., Ste. 725
Honolulu, HI 96813
Ph. 808-528-4050
Fax 808-538-6227
E-mail: 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: omrdc2@aol.com
www.OMRdc.com
Jill L. Siegel, President
Data collection/Field service
African-American

* Indicates a firm owned by an ethnic minority

Opinion Access Corp.

***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: info@opinionaccess.com
www.opinionaccess.com
Joe Rafael, Chairman
Data collection/Field service, Data processing
African-American, Hispanic

Opinion Access Corp. provides market researchers with a one-stop shop for all telephone 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. 45)

*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
www.paradigmtek.com
Ravi Iyer, President
Full service, Data collection/Field service, Data processing
African-American, Asian, Hispanic, Middle Eastern

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

Phase III Market Research
777 N. First St., Ste. 600
San Jose, CA 95112
Ph. 408-947-8661
Fax 408-251-5093
E-mail: npphase3@jps.net
Nancy Pitta, President
Data collection/Field service
Asian, Hispanic

PhoneSolutions

PhoneSolutions, L.L.C.
1101 N. Wilmot Rd., Ste. 253
Tucson, AZ 85712
Ph. 520-296-1015
Fax 520-296-3393
E-mail: michael@phonesolutions.com
www.phonesolutions.com/solutions/index.html
Data collection/Field service, Data processing
Hispanic

Nationwide WATS house, 150-station CATI telephone centers using CfMC software in Tucson, Ariz., and Albany, N.Y. We want your difficult studies! Experience in business-to-business, pharmaceutical, consumer and public opinion studies, Spanish interviewing - paper or computer. In-house programming staff. Electronic data transmission. We provide impeccable survey results, on-time and at a competitive price.
(See advertisement on p. 58)

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Multi-Dimensional Intelligence

Polk Research Sampling Group
26955 Northwestern Hwy.
Southfield, MI 48034
Ph. 888-225-1434
E-mail: William_Reader@polk.com
www.polk.com
Bill Reader, Acct. Grp. Manager
Data collection/Field service, Data processing, Sampling
African-American, Asian, Hispanic, Middle Eastern, Native American

Polk's Research Sampling Group is recognized as a leading sampling supplier of database samples. We can locate low-incidence and hard-to-reach respondents quickly, easily and at competitive prices. Polk's Research Sampling Group specializes in the high-tech, health care, travel and automotive industries. For more information, call Polk's Research Sampling Group at 1-888-225-1434.
(See advertisement on p. 15)

Pope Qualitative Research, Inc.
209 Main St. N.E.
Minneapolis, MN 55413
Ph. 612-623-7972
Fax 612-623-3581
E-mail: popex006@tc.umn.edu
Louise Pope, Principal
Full service
African-American, Asian, Hispanic, Middle Eastern, Native American

Prange & O'Hearn/Insights, Inc.
Marketing & Research Group
43 E. Ocean Blvd.
Stuart, FL 34994
Ph. 561-223-9223
Fax 305-271-9448
E-mail: insights@gate.net
Randy Prange, CEO
Full service
African-American, Hispanic

QMark Research & Polling
Pacific Tower, 19th fl.
1001 Bishop St.
Honolulu, HI 96813
Ph. 808-524-5194
Fax 808-524-5487
E-mail: bankersmit@starrtech.com
www.starrtech.com
Barbara Ankersmit, President
Full service
Asian

QualiData Research, Inc.
170 Garfield Pl.
Brooklyn, NY 11215
Ph. 718-499-4690
Fax 718-499-0576
E-mail: info@qualidataresearch.com
Sharon Wolf, Principal
Full service
African-American, Asian, Hispanic, Middle Eastern, Native American

***Recruiting Resources Unlimited**
480 Court St.
Brooklyn, NY 11231
Ph. 718-222-5600
Fax 718-222-5689
E-mail: RRU131@aol.com
Connie Livia, President
Full service
African-American, Asian, Hispanic, Middle Eastern, Native American

New York's largest recruiting service for focus groups, mock juries and IDIs. Our specialties include: corporate executives; technical, medical, legal and financial professionals; millionaires; foreign language studies; ethnic markets - Asian, Middle Eastern, Russian, Polish, Black, Latino; and extraordinary consumers recruited throughout the entire tri-state area from our extensive computerized databank, or from the sample of your choice. Rush groups are our forte. RRU's professional staff of on-site recruiters can successfully recruit projects of any size or scope with attention to your specifications. We provide frequent computerized respondent profile updates. Call us and have an experienced team behind you.
(See advertisement on p. 93)

*Rife Market Research, Inc.
1111 Parkcentre Blvd., Ste. 111
Miami, FL 33169
Ph. 305-620-4244
Fax 305-621-3533
E-mail: RIFE A@aol.com
Mary Rife, President
Data collection/Field service
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
www.rinconassoc.com
Dr. Edward T. Rincon, President
Full service
African-American, Asian, Hispanic

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

San Diego Surveys, Inc.
4616 Mission Gorge Pl.
San Diego, CA 92120
Ph. 619-265-2361 or 800-895-1225
Fax 619-582-1562
E-mail: SDSURVEYS@aol.com
Jean Van Arsdale, President
Full service, Data collection/Field service, Data processing, Focus group
Hispanic

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

Quality sampling and expert advice since 1988. The best choice for random digit (RDD), demographically targeted RDD, listed, and business sampling. Lowest RDD prices - two cents to five cents per number, depending on volume. Fast turnaround. Any geography or sampling method (EPSEM, Type B, etc.). Disconnect screening, ethnic targeting, radius sampling, free business purging and record coding. Complete mapping and geo-demographic capabilities. On-line/in-house sampling system available.
(See advertisement on p. 65)

Segmentation America, Inc.
8351 Roswell Rd., Ste. 349
Atlanta, GA 30350
Ph. 770-591-7730
Fax 770-591-5209
E-mail: SegAmerica@aol.com
Full service
African-American, Asian, Hispanic

*Smithmark Corporation
200 S. Meridian, Ste. 260
Indianapolis, IN 46225
Ph. 317-822-0778
Fax 317-822-0970
E-mail: smcorpmail@aol.com
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
www.bja.com/spectrum
Linda DeCuir, Research Coordinator
Data collection/Field service
African-American, Asian, Hispanic

* Indicates a firm owned by an ethnic minority

*Strategic Directions Group, Inc.
The Brewer House
1029 Lombard Ave.
St. Paul, MN 55105
Ph. 651-228-7250
Fax 651-228-7260
E-mail: cmorgan@4growth.com
www.4growth.com
Carol Morgan, President
Full service
Hispanic

Strategy Research Corporation
100 N.W. 37th Ave., 3rd fl.
Miami, FL 33125
Ph. 305-649-5400
Fax 305-643-5584
E-mail: jstrouss@marketfacts.com
www.strategyresearch.com
Richard W. Tobin, President/CEO
Full service
Hispanic

Strategy Research Corporation, a Market Facts Company, has offered full-service marketing research throughout the Western Hemisphere since 1971. Extensive Hispanic research capabilities-custom qualitative and quantitative marketing research, market profiles and tracking studies. Expertise in conducting multi-country studies using SRC personnel in those countries. Authors of Latin American Market Planning Report and U.S. Hispanic Market study and conducts TeleNacion, a U.S. Hispanic telephone omnibus. (See advertisement on p. 34)

*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, Consulting
Asian

***SuperDatos de México**
a wholly-owned subsidiary of Hispanic & Asian Marketing Communication Research, Inc.
61 Ensenada
Colonia Hipodromo
Mexico D.F., CP 06100
Ph. 650-595-5028 (U.S.) or 52-5-553-2754 (Mex.)
Fax 650-595-5407 (U.S.)
E-mail: SuperDatos@hamcr.com
www.hamcr.com
Jennifer Mitchell
Full service
Hispanic

SuperDatos de México is a full-service research company, specializing in consumer and business-to-business focus groups, face-to-face interviews and telephone interviewing throughout Mexico. All research is conducted by native-speaking research professionals, adhering to strict international standards. Modern facilities are located in the heart of Mexico City. Owned and operated by Hispanic & Asian Marketing Communication Research, Inc. of Belmont, California. (See advertisement on p. 37)

Survey Sampling, Inc.
One Post Rd.
Fairfield, CT 06430
Ph. 203-255-4200
Fax 203-254-0372
E-mail: info@ssisamples.com
www.surveysampling.com
Christopher De Angelis, Nat'l. Sales Manager
Sampling
African-American, Asian, Hispanic

SSI provides a complete line of statistically accurate and cost-efficient samples for survey research. Order samples on-line with SSI-SNAP™ software. Samples available for 16 countries in North America and Europe. Targeted samples based on income, age, race/ethnic orgin. Target life styles, hobbies, products purchased with SSI-LITE™. Select business samples by SIC code, employee size, sales volume, other criteria. Partners with survey researchers since 1977. (See advertisements on pp. 12, 56, 92)

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

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

Full-service qualitative and quantitative research among U.S. Hispanics on a national level. Specializing in custom/proprietary marketing and creative strategy studies, exploratory/ideation research, concept/product research, advertising pre-testing/tracking and market segmentation studies. Emphasizing quality in project design, implementation and analysis. Approved supplier for leading advertisers according to gross Hispanic media expenditures. Brochure and references available upon request. Minority business enterprise (Hispanic).
(See advertisement on p. 94)

Taylor Nelson Sofres Intersearch
(Formerly SOFRES Intersearch)
410 Horsham Rd.
Horsham, PA 19044-0189
Ph. 215-442-9000
Fax 215-675-6795
E-mail: bruce.shandler@intersearch.tnsofres.com
www.intersearch.tnsofres.com
Bruce Shandler, President
Full service, Data collection/Field service, Data processing
Hispanic

Taylor Nelson Sofres Intersearch is a full-service, international survey firm, conducting custom market research in Latin America and among Hispanics in the United States. TNS Intersearch is a member of the Taylor Nelson Sofres group of companies. Taylor Nelson Sofres is one of the largest market research companies in the world, with offices in more than 30 countries.
(See advertisements on pp. 17, 39)

TRENDEX North America
3454 Oak Alley Ct., Ste. 302
Toledo, OH 43606
Ph. 419-531-1366
Fax 419-531-2323
E-mail: trendexna@ol.com
Randy Harris
Data collection/Field service
Hispanic

United Marketing Research
1516 53rd St.
Lubbock, TX 79412
Ph. 806-744-6740
Fax 806-744-0327
E-mail: UMR220@door.net
David McDonald, Sales/Marketing Dir.
Data collection/Field service
Hispanic

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

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From the Publisher

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ater style. This requires the group to turn and twist if they wish to speak to other participants but it also insures that Quinlan or Ayres are the focus of attention. Quinlan believes this atmosphere increases participation rather than diminishing it.

The length of each session is about two-and-a-half hours, considerably more than the one to two hours in a traditional focus group. Quinlan says time is not a problem because the size of the group, their bonding, their enthusiasm, and the empathy they have for one another keep the program moving along at a lively pace. It's not unusual for the group to want to continue after the program has been completed, she says.

Because of the logistics involved, two sessions are usually held each day. Locations include television studios, hotels and universities. Although Quinlan did not provide cost estimates she did acknowledge that the charge for the custom sessions is considerably higher than it would be for traditional focus groups. She feels the extra cost can be justified because clients are provided with better information than what has been garnered previously using the more conventional methods.

Will this work? Is the use of larger groups the start of a new trend? How likely is it that we will be seeing focus groups on prime-time television? After viewing clips of sessions I have no doubt Quinlan is a talented individual who should be able to manage and run a talk show. This lady is enthusiastic and relates well with the participants. I found the clips interesting viewing — certainly better than 90 percent of what is presently being shown on television.

But is it research? Not as most of us would define that term. Between 1970 and 1986, the year this publication was started, I conducted more than 500 focus group sessions. During that period I never recall being asked to eliminate anyone who might be shy or introverted. Those individuals were considered to be just as important to my clients as the extroverts. It was my job as the moderator/facilitator to make each participant feel comfortable about expressing their opinion and let them know that whatever they said would be accepted. I don't know if they considered me a friend but I tried to make sure they saw me as a non-judgmental listener who wanted to hear from them. My clients also expected that they would hear from each of the eight to 10 participants. Even in some two-hour sessions it was difficult to get the full participation of all attendees. To get each of 25 to 30 attendees to express themselves, even after adding an extra half hour to the program, would be nearly impossible. The results of my meetings may not have qualified for prime time but they usually did meet the objectives the clients set for the projects.

Having said the above, I still wish Quinlan success in finding a television home for her program. It would be more interesting than most of the talk shows on TV and far superior to the sitcoms.

Product & Service Update

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als worldwide. The Web site provides information on the recommended manner to address unique and everyday social and business situations. The types of programs available as well as a personalized question and answer service for unusual etiquette issues are offered free of charge. For more information contact Judith Bowman at 781-756-0848 or judith@protocolconsultants.com or visit the company's Web site.

Database mapping software from ESRI

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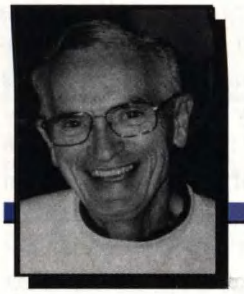
IRI releases ReviewNet 2.0

Information Resources, Inc., Chicago, has released ReviewNet 2.0, the next generation of its Internet information delivery software, which provides access to more detailed information in its InfoScan Reviews database. The Reviews contains detail on sales, market shares and pricing of more than 5,000 brands gathered from over 18,000 food, drug and mass merchandise stores across the U.S. ReviewNet 2.0 provides users with access to regional and market-level information, individual and combined outlet totals, department totals, current and historical trends and a brand search capability. For more information and a demonstration visit http://reviewnet.infores.com.



From the Publisher

By Tom Quirk/QMRR publisher

Is research ready for prime time?

On January 25th there was a story in Sally Beatty's advertising column in the *Wall Street Journal* concerning a new research program, "Just Ask a Woman," which Mary Lou Quinlan is launching. "Just Ask a Woman" is available for specific clients on a custom basis and is being positioned as the first "research" television talk show. Quinlan relinquished her position as CEO of N.W. Ayer, one of the country's largest advertising agencies, to start this venture.

The story captured my interest because Quinlan and co-host Ruth Ayres have a different philosophy about the methodology for collecting qualitative information.

In an interview last month, Quinlan told me she wants her groups not only to be spontaneous but also enthusiastic. She does not want to project herself as being dispassionate but rather would like the participants to view her as a "friend" who has empathy for them. Quinlan feels that women create a different audience when they are by themselves and more apt to express their true feelings when in a friendly environment.

The recruiters are told to look for extroverts and eliminate those who appear to be shy or introverted. Quinlan says the participants often get so enthused about what they have to say and how they want to express those feelings that they will take the microphone from her in order to have that moment of control. She wants the group to bond and believes one way is to have a larger number of participants, as many as 25-30. Because those invited tend to be outgoing, Quinlan encourages participation by arranging a studio-like setting with the cameras in full view. Rather than have the participants face each other as in a traditional focus group setting they are seated in rows of chairs, the-

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Dilbert

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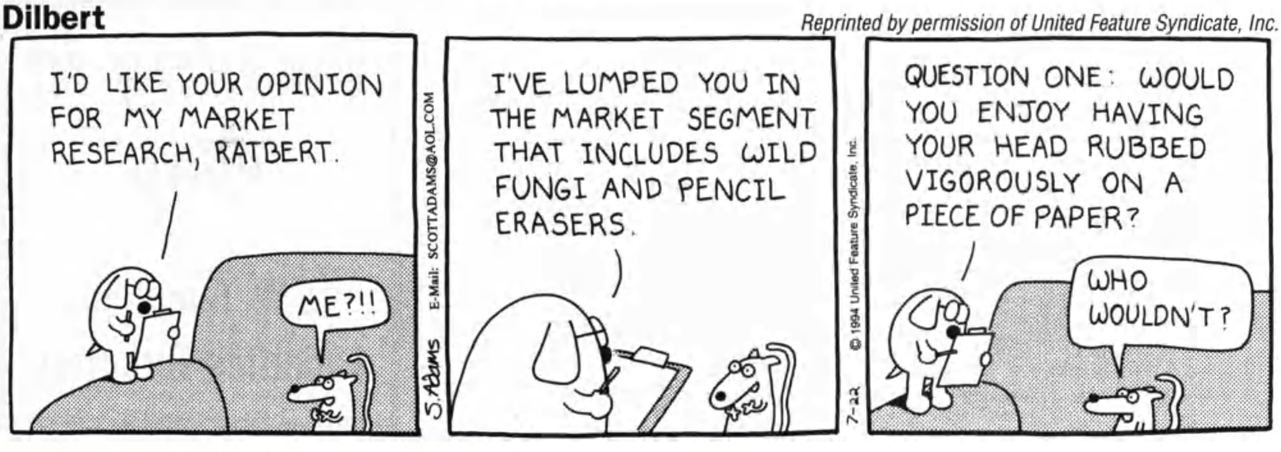

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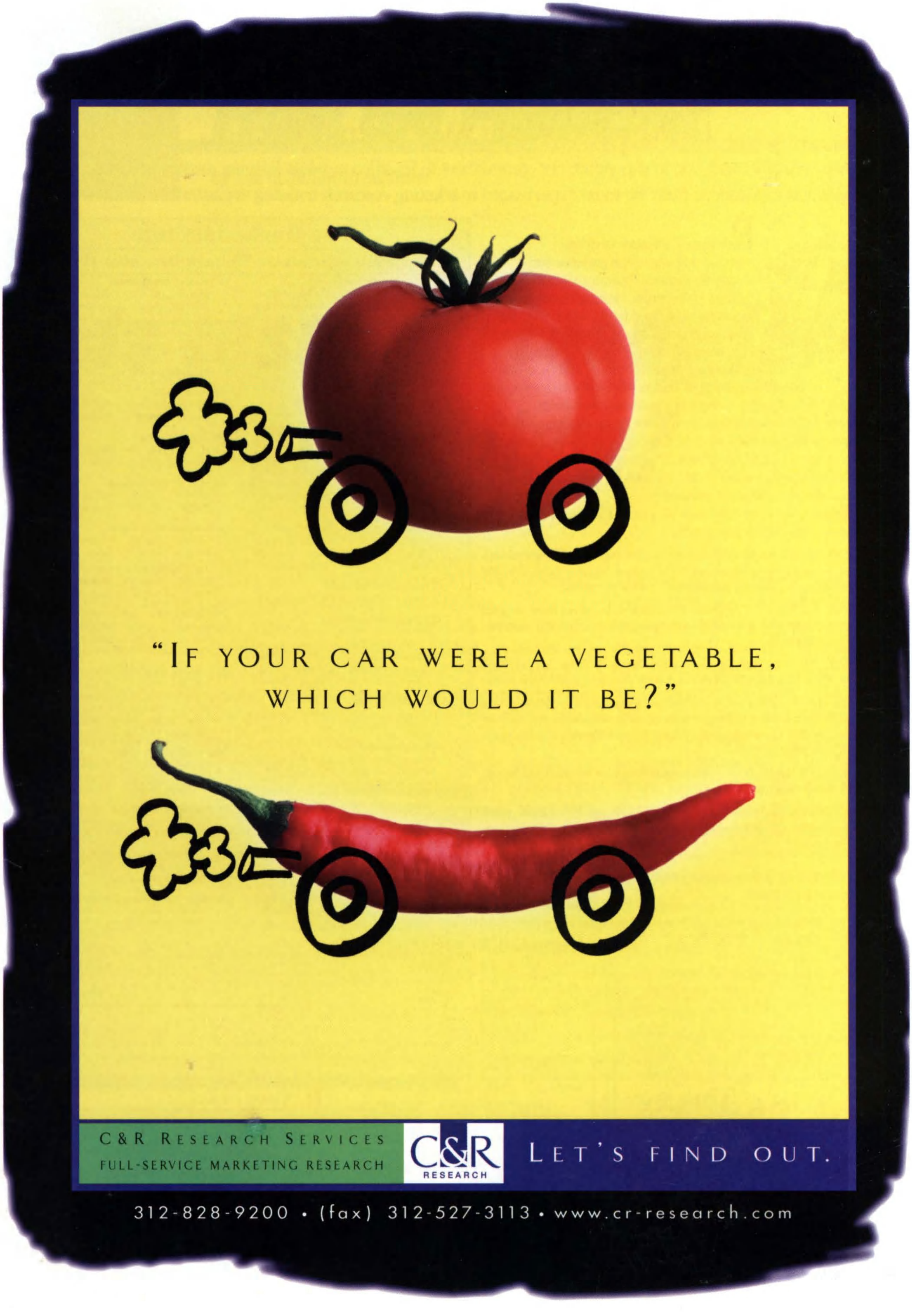
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