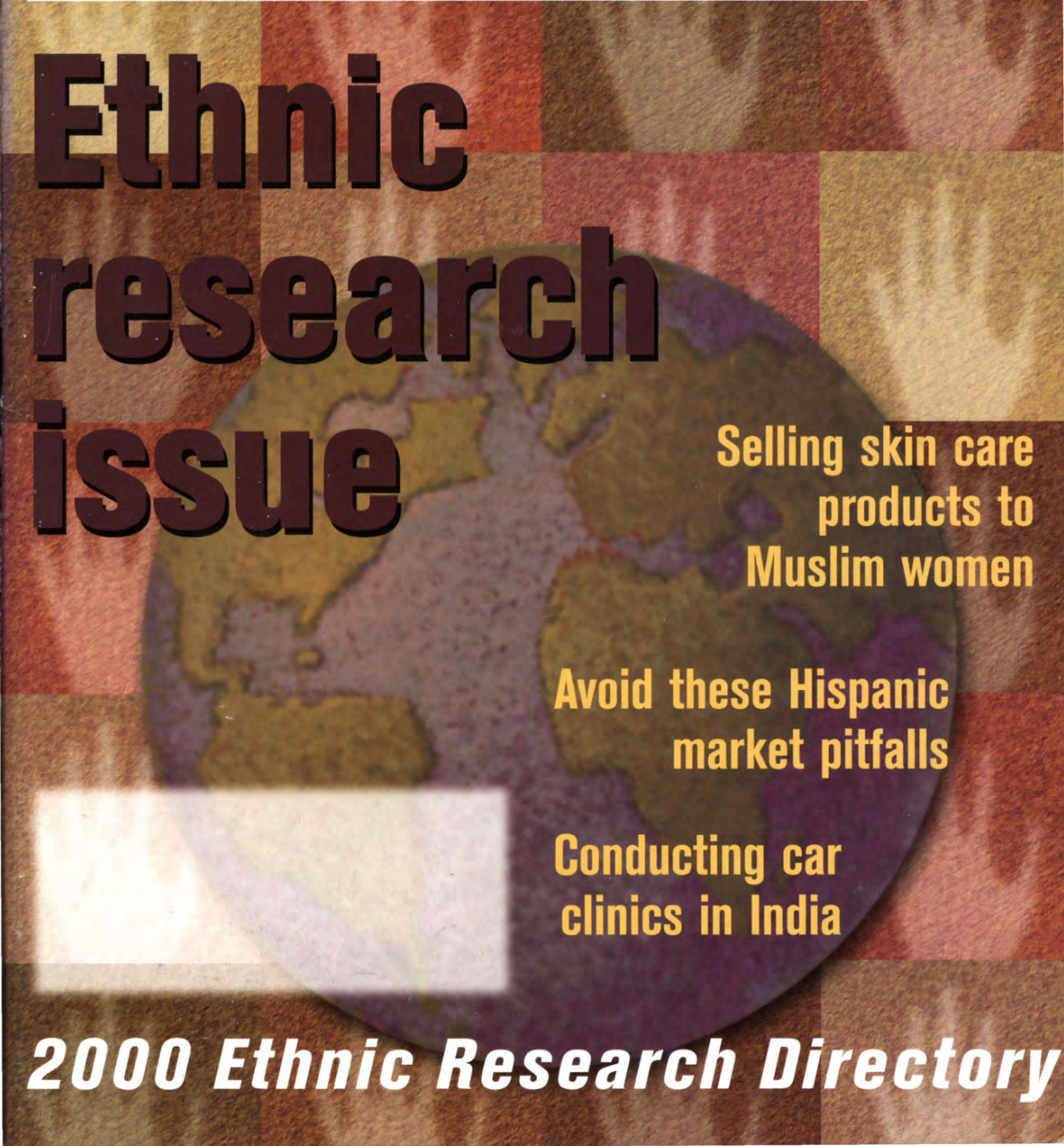
QUIRK'S
Marketing Research Review

www.quirks.com

April 2000



Ethnic research issue

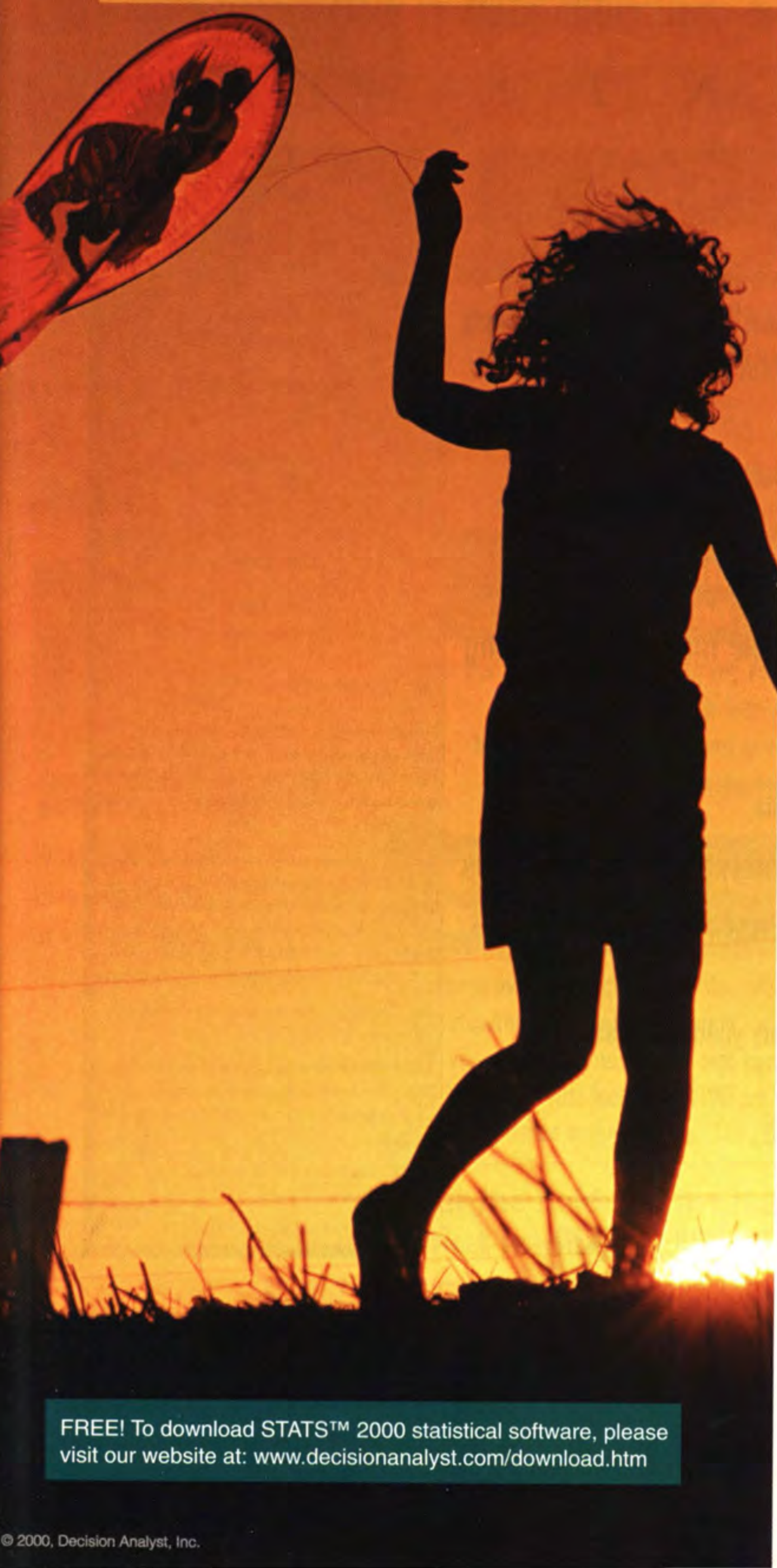
Selling skin care products to Muslim women

Avoid these Hispanic market pitfalls

Conducting car clinics in India

2000 Ethnic Research Directory

Will your NEW PRODUCT idea fly?



FREE! To download STATS™ 2000 statistical software, please visit our website at: www.decisionanalyst.com/download.htm

Will consumers try it?

What price are they willing to pay?

We can answer these questions and more with **Conceptor**,™ our industry-leading, Internet-based concept testing system. Our SuccessScore™ mathematical model predicts the probability of new product success. We have over 1,000,000 consumers in our worldwide Internet panel ready to evaluate your new product ideas. Let us help you exploit the potential of the Internet to accelerate your new product research processes.

Call 1-800-ANALYSIS
for more information,
or visit our website at:
www.decisionanalyst.com

Decision Analyst, Inc.

A global leader in Internet research systems

QUIRK'S Marketing Research Review

Volume XIV, Number 4 April 2000

C O N T E N T S

F E A T U R E S

Case Histories

18 The value of 'practiced ignorance' in cultural research
Positioning a cosmetics brand for Muslim women in Indonesia

20 The world is not enough
Multi-country research aids Cartoon Network's quest for world 'toonification'

Techniques

22 Unleash the power of the Hispanic market by avoiding these pitfalls

28 A world of unique challenges
Conducting automotive research in India

32 Panel data identifies Hispanic marketing opportunities

36 Go in-depth with depth interviews

42 Half-empty or half-full?
Results of respondent cooperation study yield optimism and pessimism

46 The power of on-line research
We ain't seen nothin' yet

50 Measuring response rates in on-line surveys

Publisher
Tom Quirk

Associate Publisher
Evan Tweed

Editor
Joseph Rydholm

Production Manager
James Quirk

Directory Manager
Steve Quirk

Marketing Manager
Dan Quirk

Business Manager
Marlene Flohr

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.: 952-854-5101; Fax: 952-854-8191; E-mail: info@quirks.com; Web address: 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.

Quirk's Marketing Research Review is not responsible for claims made in advertisements.

Editorial policy: We invite submission of manuscripts from outside sources. Write or call for guidelines. Send press releases and other editorial material to Joseph Rydholm, editor (joe@quirks.com). We reserve the right to edit any manuscript.

Reprints: For information on article reprints, please call Reprint Management Services at 717-399-1900.

D E P A R T M E N T S

8 Survey Monitor
10 Names of Note
12 Product & Service Update
14 Research Industry News
16 Data Use
79 Moderator MarketPlace
86 2000 Ethnic Research Directory
103 Classified Ads/Sales Offices
104 Index of Advertisers
106 Trade Talk

e out of your focus group research.

New FocusVision Internet and Videoconferencing services both offer a great viewing experience without the wear & tear and time it takes to travel.

1. *You'll get a superb viewing experience. Our exclusive two-camera system and special software faithfully capture the dynamic of the focus group experience. New picture-in-picture technology lets you zero in for close-ups of packaging, ads or visual material while you see how the whole group reacts (often better than being there behind the one-way mirror!).*

2. *You'll get higher level exposure for your research, if you wish, and quicker buy-in because you can involve many more colleagues who can't afford travel for days at a time.*

3. *You'll get to choose from the largest network of focus facilities, all with excellent recruiting and all top-rated by moderators (see list below).*

4. *You'll get end-to-end service and technical support—just make one call to FocusVision and we'll take care of the rest. You'll also have the flexibility to combine Internet service with videoconferencing, or to use them separately. FocusVision Online also lets you archive your focus group for PC viewing at a later time if it's more convenient.*

5. *Finally, you'll have a life—or at least a better balanced life—since you can contribute more than ever without being on the road all the time.*

These are some of the reasons 302 major marketing companies use FocusVision to get more out of their qualitative research. Call (800) 433-8128 or visit www.focusvision.com to find out more.

FocusVision Online™ **FocusVision Videoconferencing**

FocusVision Online's advanced picture-in-picture technology allows you to view extreme closeups from the convenience of your PC, while seeing how the whole group reacts. Clients say the viewing experience is often better than being behind the mirror.

FocusVision™

The best way to view live focus groups.

★ SMITH RESEARCH

INDIANA
Indianapolis
★ HERRON ASSOCIATES, INC.–GroupNet™

KANSAS
Kansas City
THE FIELD HOUSE
QUALITY CONTROLLED SERVICES

MASSACHUSETTS
Boston
★ BERNETT RESEARCH
★ BOSTON FIELD & FOCUS PERFORMANCE PLUS–GroupNet™
FIELDWORK BOSTON
FOCUS ON BOSTON
FOCUS POINTE BOSTON

MARYLAND
Baltimore
★ CHESAPEAKE SURVEYS, INC. –GroupNet™
★ HOUSE MARKET RESEARCH

MICHIGAN
Detroit
QUALITY CONTROLLED SERVICES

MINNESOTA
Minneapolis
FIELDWORK MINNEAPOLIS
★ FOCUS MARKET RESEARCH –GroupNet™

★ ORMAN GUIDANCE RSH.

MISSOURI
St. Louis
★ PETERS MARKETING RESEARCH, INC.
QUALITY CONTROLLED SERVICES

NEW JERSEY
FIELDWORK EAST, INC.
MEADOWLANDS CONSUMER CENTER, INC.
PETERS MARKETING RESEARCH, INC.
PLAZA PARAMUS
★ SCHLESINGER ASSOCIATES
★ TAI - NEW JERSEY, INC.

NEW YORK
New York City
FOCUS SUITES–NEW YORK
MURRAY HILL CENTER
NEW YORK FOCUS
★ SCHLESINGER ASSOC.
★ WAC OF NEW YORK, INC.–GroupNet™
New York-Suburban
FIELDWORK NY-WESTCHESTER

NORTH CAROLINA
Raleigh
★ L & E RESEARCH
Charlotte

★ LEIBOWITZ MARKET RESEARCH ASSOC., INC.–GroupNet™
20/20 RESEARCH

OHIO
Cincinnati
THE ANSWER GROUP
★ QFACT MARKETING RESEARCH, INC.–GroupNet™
Cleveland
★ PAT HENRY CLEVELAND
FOCUS GROUPS OF CLEVELAND
SURVEY CENTER
Columbus
QUALITY CONTROLLED SERVICES

PENNSYLVANIA
PHILADELPHIA- Downtown
★ GROUP DYNAMIICS IN FOCUS, INC. –GroupNet™
★ JRA
Philadelphia–Suburban
FOCUS POINTE-BALA CYNWYD
FOCUS SUITES OF PHILADELPHIA
FOCUS POINTE
★ GROUP DYNAMIICS-CHERRY HILL, INC.–GroupNet™
★ PLAZA MARLTON
QUALITY CONTROLLED SERVICES

RHODE ISLAND
Providence

★ BOSTON FIELD & FOCUS PERFORMANCE PLUS–GroupNet™

TEXAS
Dallas
★ CONSUMER RESEARCH ASSOC./SUPEROOMS
FIELDWORK DALLAS
★ FOCUS ON DALLAS, INC.–GroupNet™
PLAZA RESEARCH DALLAS
★ QUALITY CONTROLLED SERVICES
SAVITZ RESEARCH CENTER
Houston
★ CQS RESEARCH, INC.
★ OPINIONS UNLIMITED
PLAZA RESEARCH

WASHINGTON
Seattle
★ CONSUMER OPINION SERVICES, INC. –GroupNet™
GILMORE RESEARCH GROUP
FIELDWORK SEATTLE

WASHINGTON DC
★ HOUSE MARKET RESEARCH
★ SHUGOLL RESEARCH, INC. –GroupNet™

CANADA
Toronto
FOCUS FIRST
TORONTO FOCUS

• Fax (203) 961-0193 • E-mail: info@focusvision.com • Web Site: www.focusvision.com

Survey Monitor

While digital gap remains, 4.9 million African-Americans now on-line

African-Americans constitute the largest ethnic minority group on-line, with 4.9 million users, according to research reported by Cyber Dialogue, a New York research firm. Just over one-quarter (28 percent) of U.S. adult African-Americans are on-line; 28 percent of adult Hispanics are also on-line. Cyber Dialogue's data also reveals that the digital gap between whites and ethnic minorities remains. Currently in the U.S., only 31 percent of the total adult ethnic minority population is on-line, compared to 37 percent of the total adult white population.

Notable among the findings is that African-Americans on-line are younger, wealthier, and more educated than their counterparts who are still off-line. For instance, Cyber Dialogue found that nearly 49 percent of on-line adult African-Americans are under age 30, versus 23 percent for their non-user counterparts. The average income of on-line African-Americans is $58,300, and 18 percent have incomes of $75,000 or more, compared to only 1 percent of African-American non-users. In the education category, more than one-third of those on-line have graduated from college, while the non-user number is less than 10 percent.

Similar to the general on-line population, African-Americans users are most likely to use news and travel content. But this group is also significantly more likely than the general on-line population to use entertainment (music and gaming, in particular) content and parenting or job search sites. African-Americans who are on-line also exhibit shopping habits

continued on p. 58

No name-selling, please

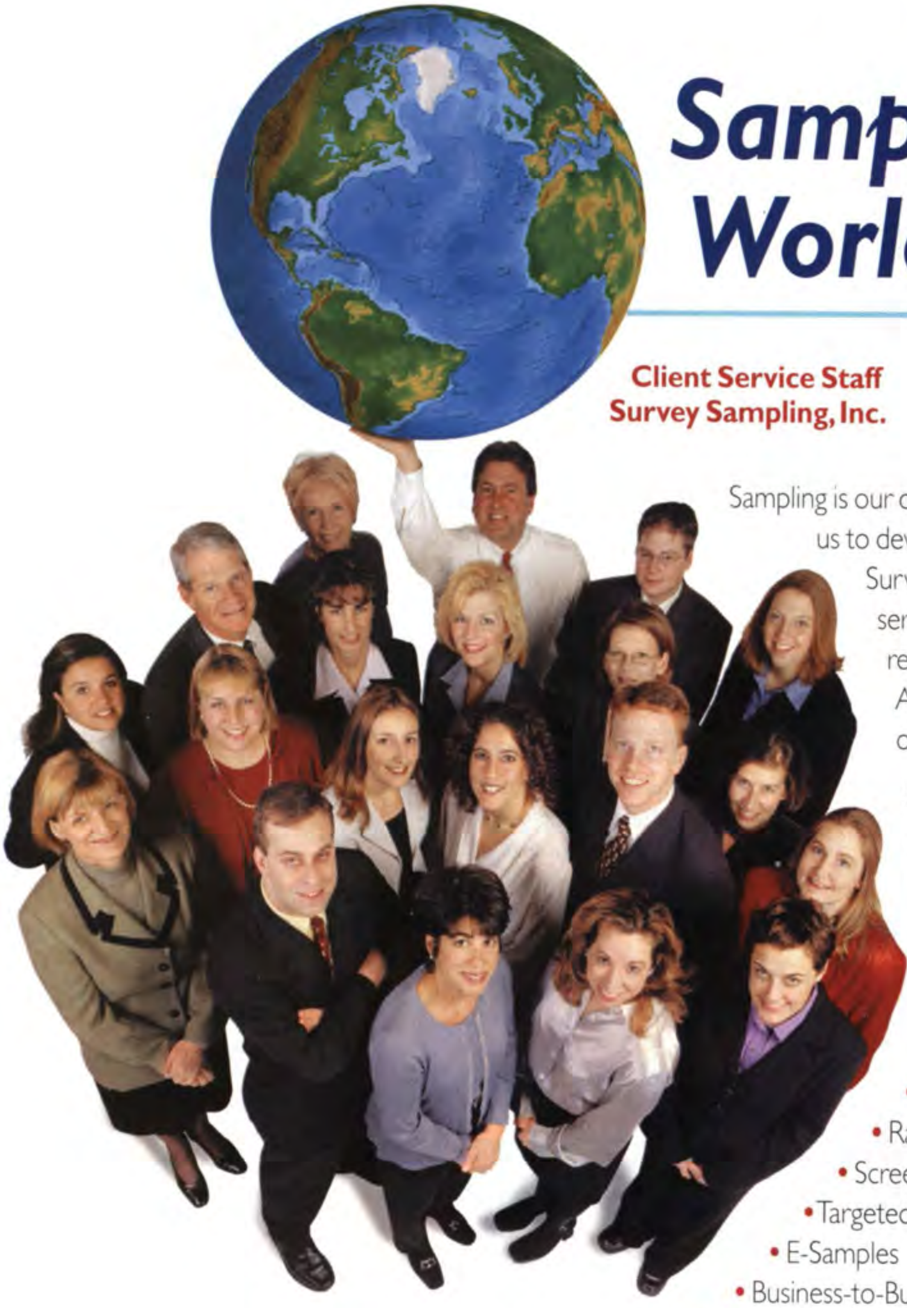
An overwhelming majority of consumers find it unacceptable for a financial institution to sell information about their customers for marketing purposes, according to a recent research study by Atlanta-based Synergistics Research Corp. entitled, "The Future of Direct Mail and Telemarketing of Financial Services." More than eight in 10 consumers with household income of $25K or more say it is unacceptable for a financial institution to sell their customers' names and telephone numbers to marketers. This is particularly unacceptable to those age 65 or older, being reported by more than nine in 10 of this group. In addition, survey results show more than half of consumers have asked to be removed from mailing lists, and an almost equal number have asked to be removed from telemarketing lists. For more information call 800-423-4229.

Decision-makers act on ads

Businesspeople rely on advertising to get information they need to do their job. Almost all (95.7 percent) of the executives, managers, and other purchase decision-makers surveyed by Penton Research Services, Cleveland, said they read advertising to learn about new technologies, products, or equipment. Four out of five read advertising to learn about new suppliers in the market (84.6 percent) and to stay current with suppliers (80.7 percent).

Penton Research Services asked respondents how many times in the past year they had taken such actions as visiting an advertiser's Web site, calling an advertiser for more information, sending in a coupon, and so on. When the researchers added everything up, they found that buyers took an average of 272 actions over the past year to obtain information from advertisers.

This information is taken from a telephone survey of executives, managers, purchasing agents, engineers, and other decision-makers in the U.S. A total of 1,200 interviews were completed with respondents in a broad range of industries, including manufacturing, services, transportation, utilities, wholesale trade, and construction. These and other research findings are outlined in a series of 100 PRO (Penton Research Overview) Reports. For more information call 800-736-8660 or e-mail research@penton.com.



Names of Note

Boise, Idaho-based *Clearwater Research* has announced a number of staff additions and promotions. At the Boise office, **Andrea Hansen** and **Nanette Wilson** have joined the staff as research analysts, and **Kathy Boyer** has been named transcriptionist. Promotions: **Pamela Piirto** to data collection supervisor (evening); **Tara Green** to project technical assistant; **Rhonda Merritt to** assistant supervisor – transcription; **Kenny Shumard** to part-time data collection supervisor (evening/weekend); and **Willie Montgomery** and **Sarah Messinger** to data collection helpers. At the Boise Human Factors office, **Don Carroll** has been named usability specialist and **Barbara Bullock** has been promoted to recruiter. At the firm's Council, Idaho, office, **Leola Rice** and **Janette Schill** have been promoted to data collection supervisor.

New York-based *Media Metrix, Inc.*, an Internet and digital media measurement firm, has appointed **Jonathan Jephcott** director of research of its Pacific Rim operations.

Steve Diller has been named partner in charge of e-business and media strategy at *Cheskin Research*, Redwood Shores, Calif.

Diller

William Bluestein has been named to the newly created position of president and chief operating officer of *Forrester Research*, Cambridge, Mass. He will report to George Colony, who will continue as chairman and chief executive officer. Bluestein also has been elected to Forrester's board of directors, increasing the number of directors on Forrester's board to six.

Anna Ritchey has joined *Northwest Research Group*, Boise, Idaho, as project manager.

Michael Griego has joined *Active Research*, Burlingame, Calif., as vice president of sales.

O.J. Harris has joined *Eagle Research*-Atlanta as a supervisor in the qualitative research department.

Bruce Blakeman has been named team leader of the Grand Rapids, Mich., office of *Wirthlin Worldwide*, a McLean, Ga., research and consulting firm.

Marketing Systems Group, Fort Washington, Pa., has named **Joe Jennings** vice president – sales. In addition, **Karen Flannery** has been named account executive.

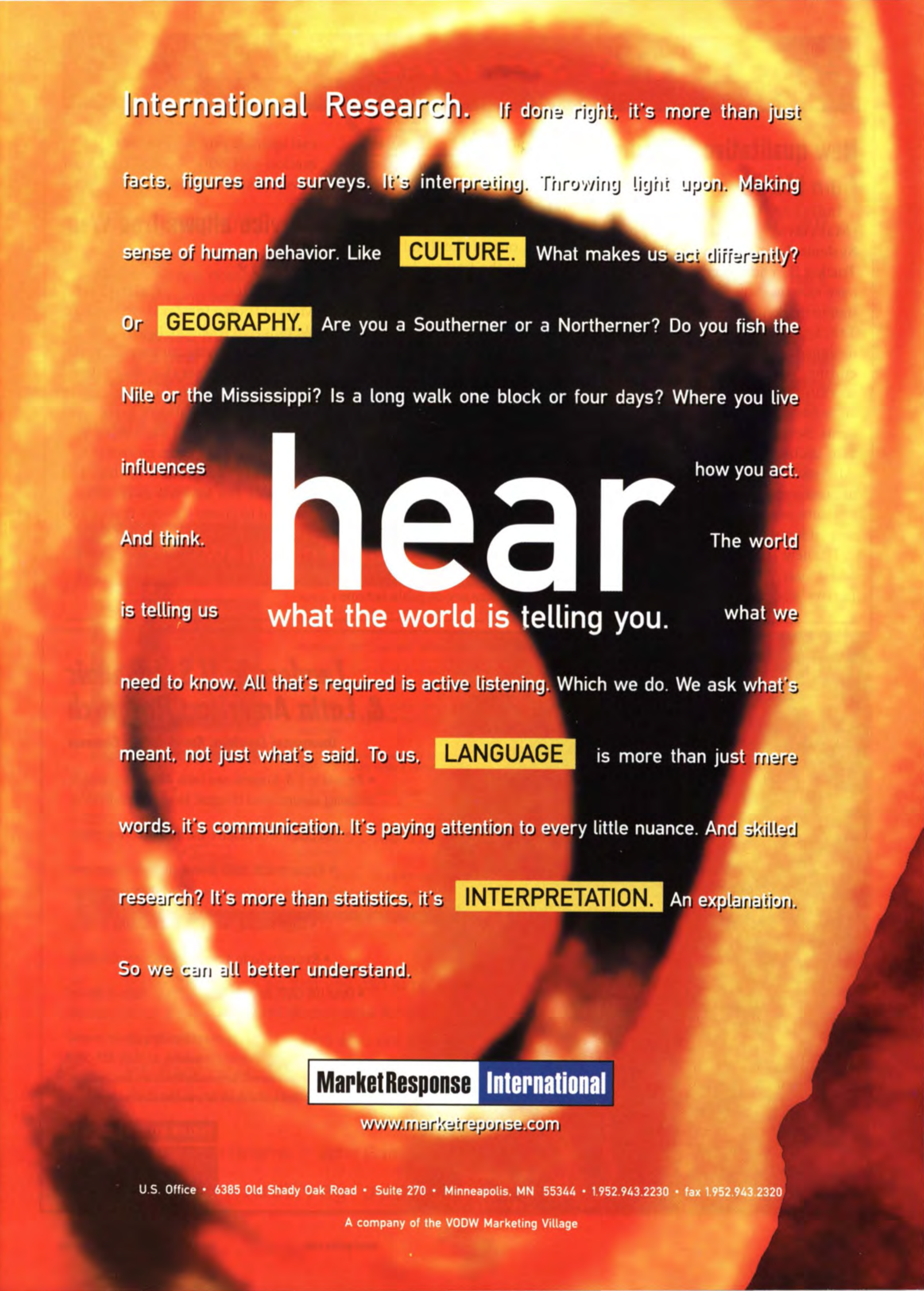
AZG Research, Bowling Green, Ohio, has promoted **Stephanie Schwaegerle** to vice president.

Answers Research, Inc., Solana Beach, Calif., has named **Lester Greenberg** director of international data collection and Web panel management.

Jeff Shusterman has been promoted to vice president at *The Marketing Workshop, Inc.*, an Atlanta research firm.

Dan Fitzgerald has joined *InterSurvey*, Menlo Park, Calif., as senior vice president, client development. In addition, **Denise Stella** has been named vice president and managing director in charge of the consumer packaged goods practice on the East Coast. Both are based in the firm's recently opened New York office.

CORRECTION: In the March issue, **Wayne Serie** was incorrectly listed as the newly-named vice president and chief financial officer at Minneapolis-based Satisfaction Management Systems. He is president and chief financial officer.


International Research. If done right, it's more than just facts, figures and surveys. It's interpreting. Throwing light upon. Making sense of human behavior. Like CULTURE. What makes us act differently? Or GEOGRAPHY. Are you a Southerner or a Northerner? Do you fish the Nile or the Mississippi? Is a long walk one block or four days? Where you live influences how you act. And think. The world is telling us what we need to know. All that's required is active listening. Which we do. We ask what's meant, not just what's said. To us, LANGUAGE is more than just mere words, it's communication. It's paying attention to every little nuance. And skilled research? It's more than statistics, it's INTERPRETATION. An explanation. So we can all better understand.
hear
what the world is telling you.
MarketResponse International
www.marketreponse.com
U.S. Office • 6385 Old Shady Oak Road • Suite 270 • Minneapolis, MN 55344 • 1.952.943.2230 • fax 1.952.943.2320
A company of the VODW Marketing Village

Product & Service Update

New qualitative software from MDSS

Indianapolis-based MDSS (Marketing Decision Support Systems, Inc.) has released Research Tracker II, a new version of its database management software for qualitative marketing research. Research Tracker II offers new features designed to streamline data entry and editing, improve the querying and recruiting process, and collect and store more information about respondents. Several time-saving reports are also included in the new package. Also included in Research Tracker II are features to help facilities manage cheaters, repeaters and other problem respondents.

The new Total Tracking component of Research Tracker II allows each person who comes in contact with respondents — data entry personnel, recruiters, hostesses, and moderators — to view and update information about respondents regarding questionable or suspected activities. For example, one of the Total Tracking reports lets the hostess know when additional identification or signature verification is needed. At job completion, respondents can be flagged as ineligible for future studies based on any number of customer-defined criteria. The Total Tracking component also includes a file import and export option. Client lists can be imported for one-time recruiting, then purged when the study is complete. Validation files can also be generated automatically. MDSS developed Research Tracker II in Microsoft Access 97. An Access 2000 version will also be available. Research Tracker 97 users are eligible for special upgrade pricing. For more information call 800-870-6377 or visit www.mdssworld.com.

Service allows free Web surveys

Sausalito, Calif.-based MarketTools, Inc., a developer of Web-hosted research, has introduced Zoomerang (www.zoomerang.com), a free Internet service that allows small businesses and individuals to conduct Internet surveys using templates to create and customize surveys on anything from customer satisfaction to new product testing. The templates can be used as is, or customized to create surveys that can be posed to any list of customers, prospects or other audiences over the

continued on p. 53

Research Industry News

Research Calendar

SPSS MR SEMINARS: SPSS MR is offering an ongoing seminar series at its New York offices on the second and fourth Wednesday of each month. Mornings will showcase designing and running Web surveys; afternoons will outline advanced tabulation and interactive analysis options. For more information call 212-447-5300 or visit www.spss.com/spssmr.

SENSORY EVALUATION WORKSHOP SERIES: As part of its continuing workshop series "Issues in Sensory Evaluation," Tragon Corporation, Redwood City, Calif., will hold a workshop titled "Descriptive Analysis," on May 1-3 at the Sheraton Palo Alto, Calif. The program focuses 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 www.tragon.com.

WEB/ON-LINE SURVEY SEMINARS: The Institute for International Research will hold an installment of its Web-based Surveys and Online Research Seminar Series on May 4-5 at the Royal Sonesta Hotel in Boston. The seminar's four sessions are: Overview of Online Research, Qualitative Online Research, Quantitative Online Research, and

continued on p. 65

Beta Research Corporation, Syosset, N.Y., has formed BETARESEARCH.COM, a subsidiary that will provide on-line research services.

Discovery Research Group, Salt Lake City, and Quick Test/Heakin Research, Inc., Jupiter, Fla., have joined forces to form the OmniSource Group. The two firms will remain as standalone companies with the staff and management at both companies remaining in place. The focus will be on dedicated support, enhanced depth of coverage across multiple collection methodologies, and streamlined communications.

Heureka Research, Budapest, Hungary, has agreed to be acquired by Global Market Insite (GMI), Seattle, in a move to create the largest provider of Internet-based market research services in Central and Eastern Europe. The terms of the all-stock transaction call for Heureka to receive 1 percent of the outstanding equity of GMI in exchange for 100 percent of the equity of Heureka. Andras Vag, president of Heureka, will become vice president of GMI's Central & Eastern Europe division. Concurrent with the announcement of GMI's acquisition of Heureka, GMI has agreed to establish a new global technical center to be housed in the Computer & Automation Institute of the Hungarian Academy of Science (locally known as the MTA Staki). As part of the exclusive agreement, the Academy will dedicate several mathematicians and computer scientists to the development of next generation technology for use with GMI's on-line market research systems.

Harris Interactive, a Rochester, N.Y., Internet research provider, has announced that it will become a founding sponsor of OpenSurvey, making an initial contribution of $50,000 to foster OpenSurvey's work. OpenSurvey is a not-for-profit organization dedicated to the development, discussion and distribution of open source software and open standards for survey research. Leonard Bayer, executive vice president and chief scientist of Harris Interactive, will serve on OpenSurvey's technical council. Peter Milla, Harris Interactive's senior vice president and chief information officer, will work with Bayer in support of the OpenSurvey initiative.

Qualitative Insights, formerly Creative Data, has moved its focus group facility to a new location in Sherman Oaks, Calif. The new facility includes three focus suites and two one-on-one rooms. A "super suite" will accommodate up to 60 respondents classroom-style. For more information call 818-988-5411.

Menlo Park, Calif.-based **InterSurvey**, a Web-based survey provider has announced that CBS News, Intel, iVillage.com, Seagram and the *Washington Post* were among the clients the company signed during the fourth quarter 1999. Separately, the firm also announced that it has opened a New York office.

Marks & Spencer has selected New York-based MarketMAX products for its strategic merchandise planning project within its Foods Division. The new system will help Marks & Spencer plan its food layouts for the consumer based on the sales forecasts and local demographics for each store.

New York-based research firms **Consumer Outlook Inc.** and **Clarion Research Inc.** have formed a joint venture, **Clarion Consumer Outlook Inc.**, which melds Clarion's background in communications, technology and online research with Consumer Outlook's background in communications-related research and in the financial sector. The joint venture is based at 1776 Broadway, Suite 1000, New York, N.Y., 10019. Phone 212-664-1100. Web www.clarionresearch.com.

Customer relationship management firm **Sky Alland**, Columbia, Md., has changed its name to iSKY. The new corporate name reinforces the company's expanded Internet strategy, and better reflects its position as a provider of outsourced real-time customer care for e-commerce.

Redwood Shores, Calif.-based **Cheskin Research** has opened a new office at 965 Mission Street, Suite 300, San Francisco, Calif., 94103. Phone 650-802-2100.

Hewlett-Packard Company, Palo Alto, Calif., is spinning off DeepCanyon, its Web resource for researchers and marketers. HP will maintain an equity position in DeepCanyon.

Answers Research Inc., Solana Beach, Calif., has launched an enhanced Web site at www.answersresearch.com. The site will feature statistical research calculators to assist in computing response rates, incidence, significance and sample size. Visitors can also learn

continued on p. 63

Survey and sampling in an imperfect world: more second-best solutions

By Susie Sangren

Editor's note: Susie Sangren is president of Clearview Data Strategy, an Ithaca, N.Y., consulting firm. She can be reached at 607-256-3297 or at ss@clearviewdata.com.

My January 1999 Data Use article focused on the mechanics of calculating the sample size for a simple random sample survey at a prescribed level of precision, in an ideal state. But the world is not ideal: We rarely have the luxury of doing a true random (equal opportunity) sample survey, and we have to accommodate many conflicting demands. In this article, I address those external demands and their effects on your sample, and offer solutions. I then propose stratified random sampling as an alternative to help you achieve the same level of accuracy as computed on a simple random sample with a reduced sample size.

Compromise between practical constraints and technical elegance

When was the last time you actually knew the entire population before you took the survey, which is a pre-requisite for any random sampling to ensure that everyone in the population has an equal chance of being selected into your sample? In some cases, we might use a convenience sample, a judgement sample, or a quota sample (all of them non-probability sampling) without realizing that it isn't a random sample.

- A convenience sample is convenient to take for the surveyor. For example, a doctor may select the patients treated at his hospital for a clinical study.
- A judgement sample is one taken by an overeager expert believing that, with his intimate knowledge of the individuals in the sample, the sample must represent characteristics of the population. For example, the leader of a school board may choose four of his allies on the board to represent the opinion of all members.
- A quota sample is one in which the population is subdivided into several sub-populations or, strata; within each stratum the surveyor is free to select individuals in any manner he wishes, usually by way of a convenience sample or a judgement sample, until he reaches the specified number of individuals.

All of these samples share one thing in common: there is no knowledge of their representativeness (of any population) and their reliability because they are not random samples. Does this mean that we should abandon our efforts in calculating probability-based sample size for them, drawing statistical

continued on p. 66

Editor's note: Michael Sack is president of Image Engineering, Inc., a Goshen, Ky., research firm. He can be reached at 502-228-1858 or at imageeng@ntr.net.

When it comes to ethnic and cross-cultural research, there are plenty of "experts" who will tell you how difficult it is. They'll tell you that sample frames are harder to obtain. Respondents are more difficult to reach. Questions must be translated and back-translated to verify that their meaning is clear. Rating scales are subject to systematic, yet undefined, cultural biases. Responses must be interpreted in the proper cultural context.

But the situation isn't as tough as the experts make it out to be. In reality, it's probably worse! Because even when all those cultural issues are planned for and taken into account, significant problems can still remain.

1. Middle-class, white Americans will willingly tell you more than any other group. All other cultures and sub-cultures are less trusting, with good reason. For most, revealing true values and motives would give power and influence to those who have real potential to use the information against them.

Ethnic and cross-cultural audiences are particularly distrustful of those outside their community, and of those within their community working on behalf of outsiders. They know commercial enterprises don't just exist "to design products and services that better meet people's needs." They will participate in research projects, but they won't willingly tell you nearly as much as you would like to know.

2. Even when consumers are willing to reveal themselves, most are unable to communicate what we'd like to know in a form we can understand.

A large portion of consumer motivation exists beneath the conscious level, inaccessible to researchers regardless of their cultural knowledge

The value of 'practiced ignorance' in cultural research

Positioning a cosmetics brand for Muslim women in Indonesia

By Michael C. Sack

and sensitivity. In fact, when it comes to subconscious motives, those within a subgroup are often the least able to explain why people of that culture behave as they do. They are too enveloped by the culture to examine it clearly and objectively. (And often, they describe themselves as not the majority.) It's like asking a fish to describe the nature of water.

This brings us to a critical element of successful cultural-research: practiced ignorance.

A lack of knowledge about language and culture issues can be a real advantage when it comes to learning about people's values, motives and behavior. The process of practiced ignorance can be used effectively to research any culture, including your own!

Practicing ignorance effectively, however, demands skill. First, it requires data that is not dependent on language and/or cultural norms. Second, it requires providing respondents with the ability to accurately describe culturally bound relationships. Third, it requires a culturally neutral medium for effectively conveying the findings back to people living and working in the culture responsible for the development of marketing applications.

To illustrate each aspect of applied ignorance, I will refer to a consumer-products study focusing on Indonesia. If you know little or nothing about Indonesia, the case study will be perfect for you! If, by chance, you happen to know a lot about Indonesian culture, please stick with me — I'll need your help later.

The value of not knowing the language

Fluency in a language and familiarity with local idiom are obviously helpful in collecting research data. Nonetheless, complete reliance upon understanding of verbal communication suffers from the assumption that

continued on p. 70

The world is not enough

Multi-country research aids Cartoon Network's quest for world 'toonification'

CARTOON NETWORK™

By Joseph Rydholm
QMRR editor

The subject is cartoons, but this is serious business. For Turner Entertainment's Cartoon Network, nothing short of global "toonification" will do. The cable television network, which shows cartoons all day, every day to over 100 million people in more than 100 countries, has set its sights on becoming an expert on the worldwide kids market. Central to this effort is a wide-ranging marketing research process aimed at helping the network think globally and act locally.

"We pride ourselves on being the experts in the kids market and global research plays an integral role in that," says David Kudon, vice president of consumer insights and forecasting, Cartoon Network. "We try to get a big picture and look at the commonalities and the differences in our target consumers' minds around which we can standardize or, alternatively, customize effective and efficient marketing."

To do that, the Cartoon Network, with the help of San Diego-based Taylor Nelson Sofres Market Development Inc., conducts research with kids, teens and adults all over the world. The research process starts with brainstorming sessions with in-house client groups such as merchandising, programming, and sales, in the U.S., Asia-Pacific, European Union, and Latin America. "We have a plethora of clients and a plethora of interests that have to be sorted out and brainstorming helps us sort and categorize those interests and determine the direction the company wishes to go in with its research," Kudon says.

After priorities are determined via the brainstorming, most projects begin with a massive qualitative component, the results from which are used to construct large-scale quantitative studies that are generalizable and reliable. "We are extremely data-driven," Kudon says. "We are very interested in getting as close as we can to our consumer base, whether it's adults, teens, or 'tweens' or younger kids. They're all part of our audience and they all influence each other to some extent."

As part of a project involving more than 250 focus groups in more than 10 countries around the world, respondents were asked about the network's popular Johnny Bravo character. The groups yielded observations about the subtle differences in the way the character is viewed, information that could help with everything from developing future episodes to tailoring advertising and promotions that play off of each culture's perceptions of the character. "Based on those findings we were able to provide directional information on what makes the cartoon funny, and some elements for us to work with to make it funnier to watch and make it more appealing as branded merchandise," Kudon says.

The Cartoon Network also conducted hundreds of face-to-face interviews in Latin American countries with kids between six and 15 years old who had access to a color television and who were members of stipulated social classes. The study examined issues such as the main influences and sources of information in the kids' lives (parents and grandparents were No. 1 across the board), their aspirations, and also their pester power, i.e., their ability to persuade parents to purchase the products they want. (In the U.S, the top three items kids influence the purchase of are clothing, shoes and toys; in Latin America, it's clothing, shoes, and soda; in Asia-Pacific, it's school supplies, ice cream, and movies.) In addition, the study examined computer access and Internet usage because the network also has a Web site, the heavily-visited www.cartoonnetworkLA.com. In additional efforts to keep in touch with their consumer base, Cartoon Network also conducted similar surveys in the U.S. and with selected countries in the Asia-Pacific region.

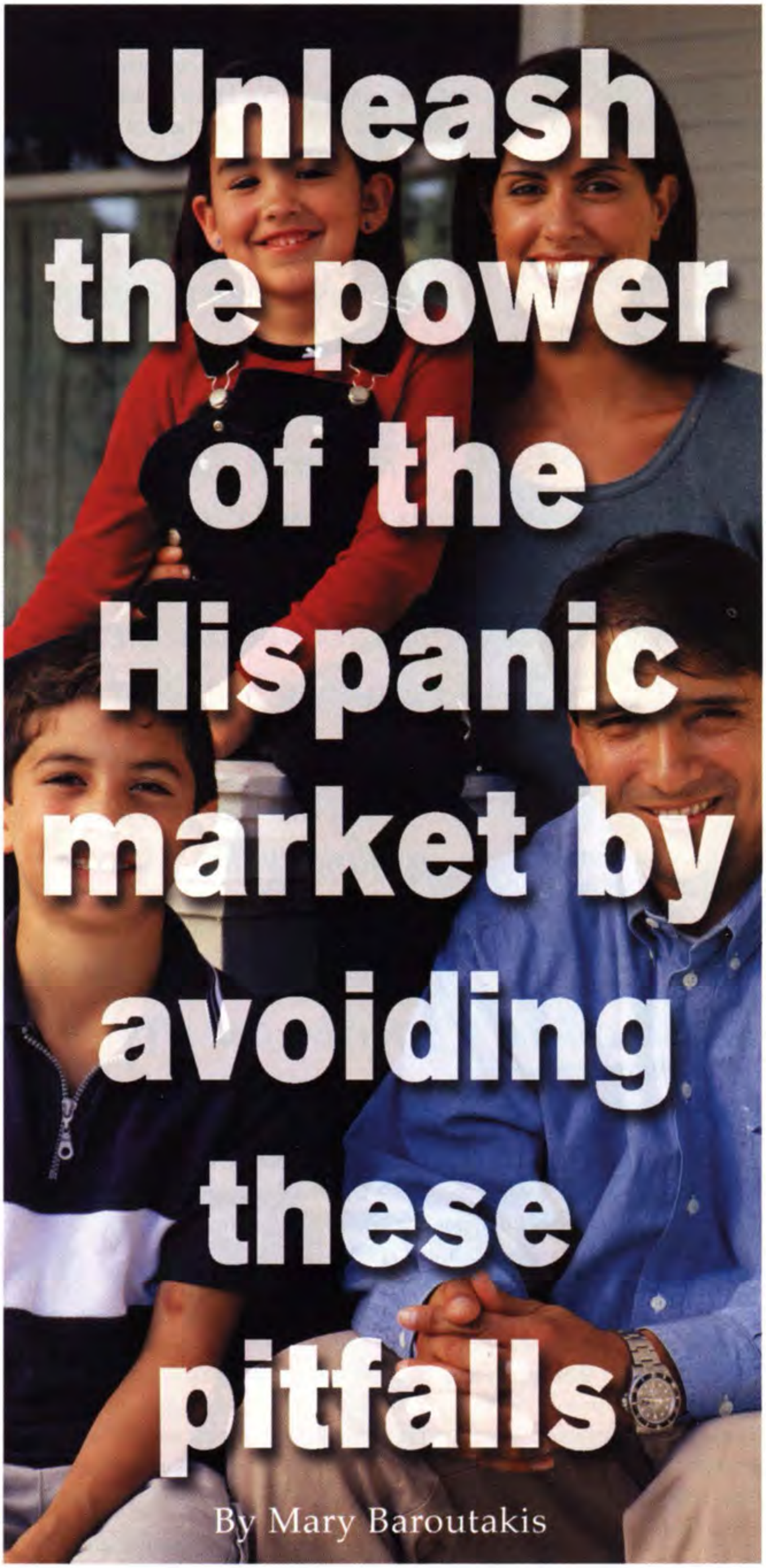
"We pride ourselves on being the experts in the kids market and global research plays an integral role in that. We try to get a big picture and look at the commonalities and the differences in our target consumers' minds around which we can standardize or, alternatively, customize effective and efficient marketing."

Actionable intelligence

The goal of all of the research is to end up with actionable intelligence that helps the network in its quest to be experts on kids and maintain the "think globally, act locally" approach.

But that's much easier said than done, especially when you're talking

continued on p. 76



Unleash the power of the Hispanic market by avoiding these pitfalls

By Mary Baroutakis

Editor's note: Mary Baroutakis is a Partner at MBC, a marketing research and consulting firm in New York City. She can be reached at 212-599-7400 or at mb@mbcresearch.com.

While writing this article, I tried to narrow down the number of pitfalls that marketers encounter when advertising to the Hispanic market. There are many, but for the sake of brevity, I will address the three that I come across most frequently:

• overusing Hispanic traits in ads;

• cloning a general market strategy for use in the Hispanic market;

• keeping Hispanic advertising less ambitious and far more conservative than that aimed at the general market.

Overusing Hispanic traits

We have all heard again and again that Hispanics are very family-oriented, that they are very close to their extended family, that they take care of their elders, that children tend to live at home after they reach 18. We've also heard that Hispanics tend to be emotional and sentimental. They listen to their hearts a lot and value relationships.

This brings me to the first common mistake: the overuse of the above traits in Hispanic advertising and how this can sometimes weaken or cloud a selling message.

A few years ago, a major telecommunications company aired a commercial introducing a new plan for international callers to Latin America. The commercial was absolutely beautiful. It was shot on location in many parts of Latin America and the scenery was breathtaking. It showed various vignettes of people abroad receiving calls from their family in the U.S. The background music score was very


1
ABC 2
DEF 3
GHI 4
JKL 5
MNO 6
PRS 7
TUV 8
WXY 9
*
OPER 0
#

nostalgic.

The research company that pre-tested this commercial uncovered very positive findings for the client. After a couple of months on the air, however, the amount of calls to the toll-free number in the commercial seeking more information was very disappointing. The client was perplexed. What happened? Why was there was so little interest?

The client contacted us because they wanted another firm to re-test the spot. We did so and found, to the client's and agency's amazement, that the first research company had misread the results. Even though the target audience understood the main message and liked the spot, all they retained were the bittersweet images of the people back home, the beautiful scenery and the feeling of nostalgia for their family and country. The execution had gone overboard using warm-and-fuzzy family scenes and nostalgia to sell its product. After people saw this commercial at home, they made a call — but not to the 800-number to inquire about the calling plan. Instead, they called their mother, or their grandmother or their sister in Latin America. They had been distracted by these warm scenes and completely forgot about the calling plan!

Our client decided to start from scratch. A new commercial was shot based on our findings and recommendations. In this new spot, the calling plan was "the hero" — not the family or the scenery. It was a happy commercial but also one that provided factual information about the calling plan. This new commercial broke all previous records in number of calls received and new subscribers to the plan.

Cloning the general market

The next pitfall is using a general market strategy for the Hispanic market. Generally, marketers like to do this because it keeps everything nice and organized. It is also the path of least resistance: upper management will buy into their plans faster and it's easier to deal with one strategy.

Using a general market strategy may be effective but this can only be determined after testing various options. I can't count the number of times that marketers have decided to use a general market approach before any testing has been conducted among the intended Hispanic target.

Before taking this step, advertisers must be sure that this will be the most compelling strategy. It isn't that the general market strategy is plain wrong, it's just not the one that will attract most Hispanic consumers. An even worse scenario is forcing the use of a general market commercial (re-shot with Hispanic actors) to target Hispanics.

Here's an example of both pitfalls. A while back, we tested a commercial for a drink that was being sold as "offbeat and wacky" in the general market. The client wanted to define the brand the same way in the Hispanic market, so a number of commercials were produced using this strategy. By the way, this was the first time this client had advertised to the Hispanic market and this was the first piece of Hispanic research it had ever conducted. In other words, without knowing if this wacky, offbeat personality would sell in the Hispanic market, the client and the agency had already produced five radio commercials which we were going to test.

The focus group participants rejected this strategy. Unfamiliar with this drink's general market spots, Hispanics had their own image of the product — they saw it as fun and friendly — and what was being presented went against that perception. They felt that this product, as presented in the radio executions, was for weird, confused people!

We also tested a commercial for an ice cream brand that was a word-for-word adaptation of the general market spot. In this case, the spot used humor to make its point — American humor translated into

Spanish.

The spot features a couple of vignettes. One tested well, the other did not. It shows a little boy telling his father that he's going to wash the family car. What he neglects to say is that he intends to use a scouring pad. When the father finds out, the announcer comes on and tells him "Relax, and enjoy some of our ice cream." No one saw the situation as funny. And, everyone agreed that this would not be the right time to enjoy this product.

Inordinate caution

Another mistake advertisers make quite frequently is "holding back their horses," in other words, running more "in-the-box," less ambitious advertising in the Hispanic market. Hispanic consumers complain about this phenomenon all the time.

Why does this happen? Many reasons are cited. The one we hear most often from Hispanic agencies is that Hispanic production budgets are much lower than those allocated for the general market. But we all know that big budgets don't always lead to great commercials nor do low budgets result in poor advertising.

There is another possible reason, however, for creating less-ambitious Hispanic ads — the idea that simplistic, innocuous commercials are good enough for the Hispanic market or even worse, that "out-of-the-box" commercials do not appeal or are not understood by Hispanic consumers.

How many times have we heard the phrase "Hispanics take everything literally"? This is generally true in instances where the audience is looking for concrete information. It should not be used as an excuse, however, to lower standards in the Hispanic market.

Less ambitious, more run-of-the-mill advertising falls short of achieving goals, especially with Hispanic teenagers and young adults who are bilingual and also watch American TV and tend to compare the Spanish with the English language ads.

For example, we tested some commercials for a sports drink that strongly appeals to Hispanic male teens and young adults. They complained that the Hispanic commercials for this product constantly show young males like themselves playing different sports (basketball, soccer, baseball) in different venues (the park, the beach, the gym). These commercials may be new but they always come across as old and tired. These consumers couldn't help comparing them with the general market commercials, which they described as cutting-edge. And the question remains: Why does a leading-edge product use tired, run-of-the-mill commercials to attract its Hispanic target?

Unfortunately, the root of many of these marketing mistakes is the result of preconceived notions or impressions about ethnic markets. When it comes to the general market, no client expects its agency or researchers to be experts on Americans and the American way of life. Think for example what you would say as an American if someone asked you "What are Americans like?" You probably wouldn't even know where to start or what to say. The American market is not a static market. New things happen all the time and that's why studies are conducted every day. You would never ask such a general question of your agency or researchers. Yet this question is asked every day of Hispanic agencies, consultants, and primary researchers. What is odd is that there are people who answer this question, ignoring the fact that things are constantly changing in the Hispanic market as well.

Recommendations

What can be done to correct these problems and avoid these pitfalls? Stick to a few basic principles:

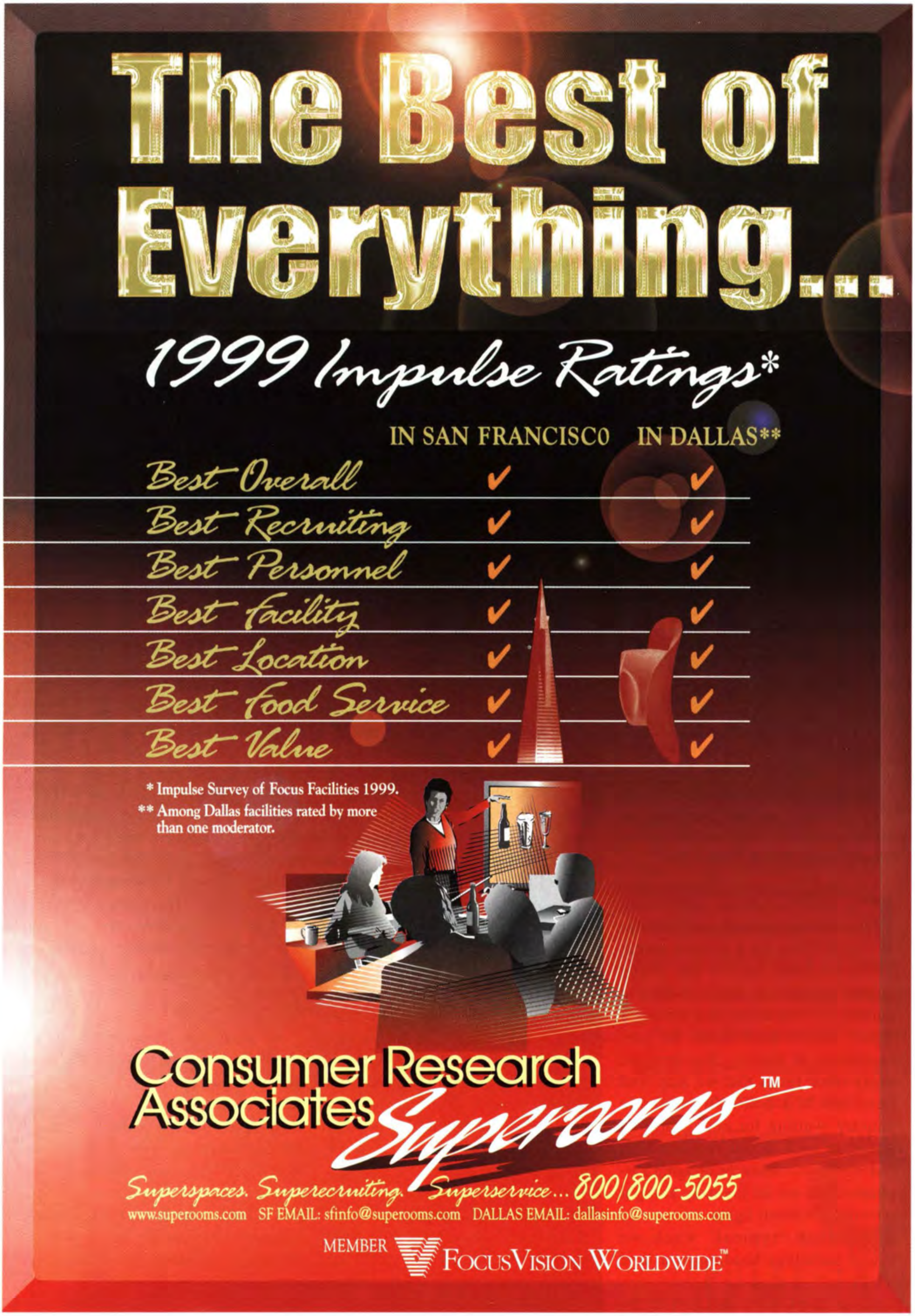
• Watch Hispanic TV once in a while. It's not enough to know what your competition is doing — you need to see what other advertisers are doing as well. For instance, if you see that too many commercials are similar in style to yours, then your commercial may not be working as hard for you as it should.

• Be bold in your Hispanic ads. Don't be afraid to try something new. Get out of that box!

• If possible, view some ads currently running in Latin America — any ads, not necessarily the ones for your category — and remember that these are the ads that the more recent immigrants have been accustomed to before coming to the U.S. You might be surprised!

• Be as demanding of your Hispanic agency/consultant as you are of your general market agency. Ask for evidence, not opinions.

• Finally, after you've worked with a Hispanic researcher, ask yourself: "Is this person or organization just as good as my favorite general market supplier?" If the answer is no, then you may be getting less than excellent work when you conduct Hispanic research.


The Best of Everything...
1999 Impulse Ratings*
IN SAN FRANCISCO IN DALLAS**
Best Overall ✓ ✓
Best Recruiting ✓ ✓
Best Personnel ✓ ✓
Best Facility ✓ ✓
Best Location ✓ ✓
Best Food Service ✓ ✓
Best Value ✓ ✓
* Impulse Survey of Focus Facilities 1999.
** Among Dallas facilities rated by more than one moderator.
Consumer Research Associates Superooms™
Superspaces. Superecruiting. Superservice... 800/800-5055
www.superooms.com SF EMAIL: sfinfo@superooms.com DALLAS EMAIL: dallasinfo@superooms.com
MEMBER FocusVision Worldwide™

A world of unique challenges

Conducting automotive research in India

By Donavan Klinger

Editor's note: Donavan Klinger is research consultant at MarketResponse International, a Minneapolis research firm. He can be reached at 952-943-2230.

For international marketing researchers, there really is no such thing as a typical week. There are times that we are sitting quietly behind our desks looking at numbers or transcripts and writing a report, with a lunch break the only excitement of the day. But there are many other times that we may find ourselves in a politically unstable country, waiting for bodyguards to escort us back to our research site, risking yellow fever, or dodging elephant riders on the highway at night who drive without lights.

One such "typical" week we found ourselves heading to a land and culture far from our native U.S.: India. Previous visitors reminded us that we would be experiencing a range of extremes — from abject poverty to incomparable beauty. In the end, despite the inherent challenges and rewards of the locale, we focused on our mission: to conduct marketing research on a new automobile concept!

After getting poked with more injections than a pincushion, and loading up on malaria tablets, we packed our bags and took off. It was an 18-hour flight (not counting our stop at Amsterdam Schiphol to stock up on Dutch stroopwafels, to which we had become addicted on previous visits to our Dutch office).

New car concept

Like many automakers worldwide, our client was considering introducing a low-priced car concept in the Indian market. Recent economic indications pointed to an expanding Indian middle-class. Were they ready for a low-priced import? Was this the one? We brought along a working prototype, which had to be transported with care as it was the only one, and although the mechanical engineers went along with us, if it dropped or broke completely, the entire research investment would have been lost.

We started our trip in Mumbai, formerly Bombay, and met with our local research partners based there. After adjusting a bit to the 10.5-hour time difference, we flew to Bangalore, on the bottom tip of India. Here we were faced with a smaller-than-expected venue, decorated like a bordello with heavy red curtains. But the cozy confines helped unify our team of researchers, clients, interpreters and

PULSAR 2. FLEXIBLE ENOUGH TO MAKE ANY KIND OF DATA FEEL AT HOME.

Some tabulation software is less than accommodating. Especially when you try to introduce external data.

Happily, Pulsar 2 is a lot more friendly. It's the exciting new upgrade of our highly successful Pulsar product.

As well as its own data format, Pulsar 2 is compatible with almost any relational database. So it gives you unparalleled access to all sorts of information – even data from other sources like Microsoft Access or Oracle.

And you can manipulate it in more ways, too.

Pulsar 2 is faster and more powerful, letting you rearrange tables, plot charts and generally present your material in more ways than ever.

What's more, you can use Pulsar 2 to deliver data to your clients. Just set up a survey and free them to easily explore their data in more detail.

Pulsar 2 is part of Pulse Train's integrated range of software for survey research. Our products cover the whole survey process from questionnaire design through to data analysis.

Isn't it time you opened the door to Pulsar 2?

Pulse Train Technology Ltd, 631 U.S. Hwy One, Suite 406, North Palm Beach, Florida, 33408.

Tel: (561) 842 4000. Fax: (561) 842 7280.

Email: Sales@PTTsystems.com

http://www.pulsetrain.com

PULSE·TRAIN
TECHNOLOGY·LTD

partners. Flexibility is extremely important, especially when conditions are less-than-perfect.

Comforts of home

Although we try to be flexible, there are certain times where we insist on the comforts of home, such as having fire extinguishers nearby. We took this luxury for granted until a small fire broke out while the local technicians were hooking up (overloading) the circuits with the audio-video equipment. After frantically looking for the closest extinguishers, we realized they were on a different floor of the hotel. After that incident, we made sure there were sufficient fire extinguishers in every research area and even took them to bed with us at night, just in case.

In India we encountered two official languages, Hindi and English, and many times a third language, as was the case with Kannada in Bangalore. The respondents continuously switched back and forth and sometimes the interpreters were simply repeating in English what was said in English. But this was necessary, for at any moment, they could switch back to another language, even mid-phrase. It was also necessary to have English interpreters in India who could speak a neutral dialect of English we Westerners could understand, to smooth over the rough spots so we could glean every detail and nuance out of the groups.

Outside of our intense research schedule, we found it humorous and somehow fitting that although we were there for car research, we spent most of the time being transported around town by three-wheeled rickshaws. On several occasions we thought we were going to die in them, but for some odd reason at the time, we didn't care. We were there on a research mission, one which may lead to the demise of the rickshaw some day, which might mean safer Indian roads, and cleaner air. But the rides won't be as thrilling.

Our research endeavor also included a ride-and-drive of the prototype vehicle, which took place in an enclosed field in a semi-rural area outside of town to simulate a true Indian driving experience (except for having to dodge all the rickshaws).

Mixed emotions

When we finally boarded a KLM flight in New Delhi for our flight back to the U.S., we left India with mixed emotions. We were safe, relatively healthy, we had the findings we were after, and even the test vehicle survived the research. But we had to leave such a fascinating land, where everything was so intense, from the wide range of economic and social levels to the beautiful saris, smells of incense and curries, the noisy rickshaw traffic and the debilitating heat of the Northern India sun.

It was an intense experience, replete with vivid insights, which we included in our final reports and also filed away in our memories to relive for decades to come. And to think of where we might go as researchers next week!

Panel data identifies Hispanic marketing opportunities

By Jennifer Lynch and David Morse

Editor's note: Jennifer Lynch is director of marketing and new business development, and David Morse is chief operating officer, at Cultural Access Group, a Los Altos, Calif., research firm. They can be reached at 650-965-3859.

The U.S. Hispanic population is attracting a lot of attention from merchandisers and retailers in the U.S. With a purchasing power estimated at $383 billion, the Hispanic market is an attractive target for companies looking to expand their customer base.

Tapping into this market is a popular agenda item during company strategy meetings. Many companies realize that when it comes to targeting Hispanics, they lack a point of reference. They cannot draw directly from personal experience or look back to previous multicultural marketing efforts in order to make strategy decisions. Obtaining accurate and complete information on the purchasing patterns of this complex and diverse ethnic group is complicated by varying levels of language proficiency and acculturation. In addition, most syndicated data sources tend to under-represent Hispanic household purchasing power and only include acculturated households that speak English.

Two research firms — Schaumburg, Ill.-based ACNielsen and Los Altos, Calif.-based Cultural Access Group — formed a strategic relationship to develop and maintain the first Homescan Hispanic Consumer Panel. Los Angeles was selected as the initial location of the panel since it is the largest Hispanic market in the U.S. and represents 25 percent of the total U.S. Hispanic market.

The sample for the ACNielsen Homescan Hispanic Consumer Panel is demographically balanced and representative of all Hispanics in the market. Household demographics and acculturation variables are tracked and analyzed using a proprietary language segmentation model. The panel includes over 700 Hispanic households that mirror market population targets for language/acculturation and demographics. Household purchase data is collected for all UPC products that are purchased by these households.

The data shows that disparities exist between Hispanic and non-Hispanic shoppers. Likewise, within the Hispanic population, there are marked differences resulting from different levels of acculturation. These disparities can be attributed to a variety of variables including lifestyles, taste, diet, demographics, and brand preferences. The following examples look at these differences and the associated marketing implications.

We can get you richer data faster.

When FieldSource℠ does your data collection on the Internet, you gain access to our panel of over 1 million registered respondents. You'll get honest, uninhibited answers from robust samples of any demographic or lifestyle group you target, even those who are otherwise hard to research.

We've taken traditional, proven research methodologies and adapted them to the Internet.

Greenfield Online pioneered using the Internet for marketing research and has been collecting data online for more than 5 years.

Learn more about how you can get richer data, faster. Contact Keith Price at 203.846.5765 or kprice@greenfield.com.

POWERED BY GREENFIELD ONLINE

FIELDSOURCE℠

Your Online Outsource Resource

Lifestyles

Data collected from the panel shows that Hispanics have a low usage of prepared foods. Also, frozen foods have a low incidence among Hispanic shoppers. Why the difference? Cooking from scratch is a way of life for most Hispanic housewives. Packaged or frozen food would reflect badly on them as mothers. Conversely, certain food items are used extensively in Hispanic cuisine. These dishes are a staple of the household out of preference, habit, experience, and the need to maintain elements of the culture. For example, Hispanic households, primarily Spanish Dominant/Preferred, outspend the general market on tortillas 10 to 1 and on bouillon by 16 to 1 (refer to Graph A). Not surprisingly, they are buying fewer rice mixes (indexing at 22 percent) and less canned soup (indexing at 30 percent).

3/99 - 8/99
LA Market

ACNielsen Homescan™
Hispanic Consumer Panel
Hispanic Shopping Behavior
Hispanics have a low usage of Prepared Foods

Graph A

$ INDEX	NON-HISPANIC MARKET HOUSEHOLDS	TOTAL HISPANIC HOUSEHOLDS	LANGUAGE SEGMENTS: SPANISH ONLY/PREFERRED	BILINGUAL	ENGLISH ONLY/ PREFERRED
Prepared Foods-Ready-to-serve	100	88	62	99	117
Prepared Foods-Froz.	100	52	29	65	71
Mexican Tortillas	100	661	1003	500	297
Rice Mixes	100	42	22	49	66
Packaged/Bulk Rice	100	284	302	345	152
Canned Soup	100	51	30	57	82
Dry Soup	100	192	278	157	89
Bouillon	100	1060	1601	973	214
Vegetables-Froz.	100	66	60	61	85

©1999 ACNielsen

Based on the panel's data on prepared food, marketers may want to develop marketing communications emphasizing the quality of prepared products. Advertisers may want to develop creative campaigns that show images of mothers serving products with love and care.

Taste and diet

Hispanics tend to prefer sweet drinks. Data from the panel shows that Hispanics over-index on fruit juices and soft drinks (refer to Graph B). One cultural explanation is that soft drinks and juices are associated with family events and happy occasions. Also, diet drinks tend to index low given that low-calorie considerations are less important than in the general market. The result: sugar and sweet-tasting foods continue to drive the Hispanic palate, despite the general market obsession with low-calorie alternatives.

Results of the panel data in the beverage category may influence marketers to develop campaigns for diet products with images of family and friends at play. To promote diet soda, a brand manager may want to design an educational communications plan that informs Hispanics about the bad effects of excess sugar.

Demographics

Hispanic households are considerably larger than non-Hispanic house-

ACNielsen Homescan™ Hispanic Consumer Panel
Delivers Consumer Insights

Graph B

Hispanic Tastes
Hispanics prefer sweet drinks

$ INDEX	NON-HISPANIC MARKET HOUSEHOLDS	TOTAL HISPANIC HOUSEHOLDS	LANGUAGE SEGMENTS: SPANISH ONLY/PREFERRED	BILINGUAL	ENGLISH ONLY/PREFERRED
Juices	100	142	165	144	97
·Apple	100	267	362	261	106
·Grape	100	215	322	171	89
·Pineapple	100	249	250	264	223
·Nectars	100	270	369	276	79
Soft drinks	100	166	216	139	116
Soft drinks (low cal.)	100	51	31	55	80

ACNielsen ©1999 ACNielsen & Access Worldwide, Cultural Access Group ACCESS holds. In 1997, the size of non-Hispanic household was 3.2 while the average Hispanic family size was 4.17[1]. The size of a household corresponds to a greater demand for consumer product staples such as milk and toilet paper (refer to Graph C). The panel data for the dollar index for milk reflects demographics as well as acculturation. Since language is used as one indicator of acculturation, English Only/Preferred Hispanics are considered to be more acculturated. As Hispanics become more acculturated, their dollar index for certain categories comes close to mirroring that of the general market. For example, English Only/Preferred Hispanics have a milk dollar index of 96 percent.

As Hispanics become more acculturated, they are often captured by a general market advertising campaign if the correct mix of symbols and images are used.

ACNielsen Homescan™ Consumer Panel

Delivers Consumer Insights

Graph C

Hispanic Shopping Behavior

Hispanics have a low usage of Prepared Foods

$ INDEX	NON-HISPANIC MARKET HOUSEHOLDS	TOTAL HISPANIC HOUSEHOLDS	LANGUAGE SEGMENTS: SPANISH ONLY/PREFERRED	BILINGUAL	ENGLISH ONLY/PREFERRED
Milk	100	136	164	129	96
Toilet Tissue	100	138	165	124	114

ACNielsen ©1999 ACNielsen & Access Worldwide, Cultural Access Group ACCESS

Brand preference

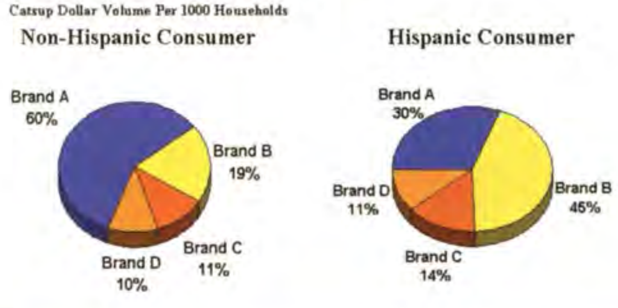
As illustrated by catsup, brand preference is very different between Hispanics and general market. For example, Brand A may capture 60 percent of the general market and only 30 percent of the Hispanic market (refer to Graph D). Conversely, Brand B is the leader in the Hispanic market. Among Hispanics, brand preference is often a carryover from the consumer's country of origin or "brand heritage."

Based on the differences in brand preference, companies may want to develop advertising campaigns with strong brand linkage. Advertising targeting Hispanics should include themes, images and symbols that are important to consumers and remind them of their heritage.

Graph D **Hispanics and Brands**

As illustrated by catsup, brand preference is very different between Hispanics and General Market

Catsup Dollar Volume Per 1000 Households

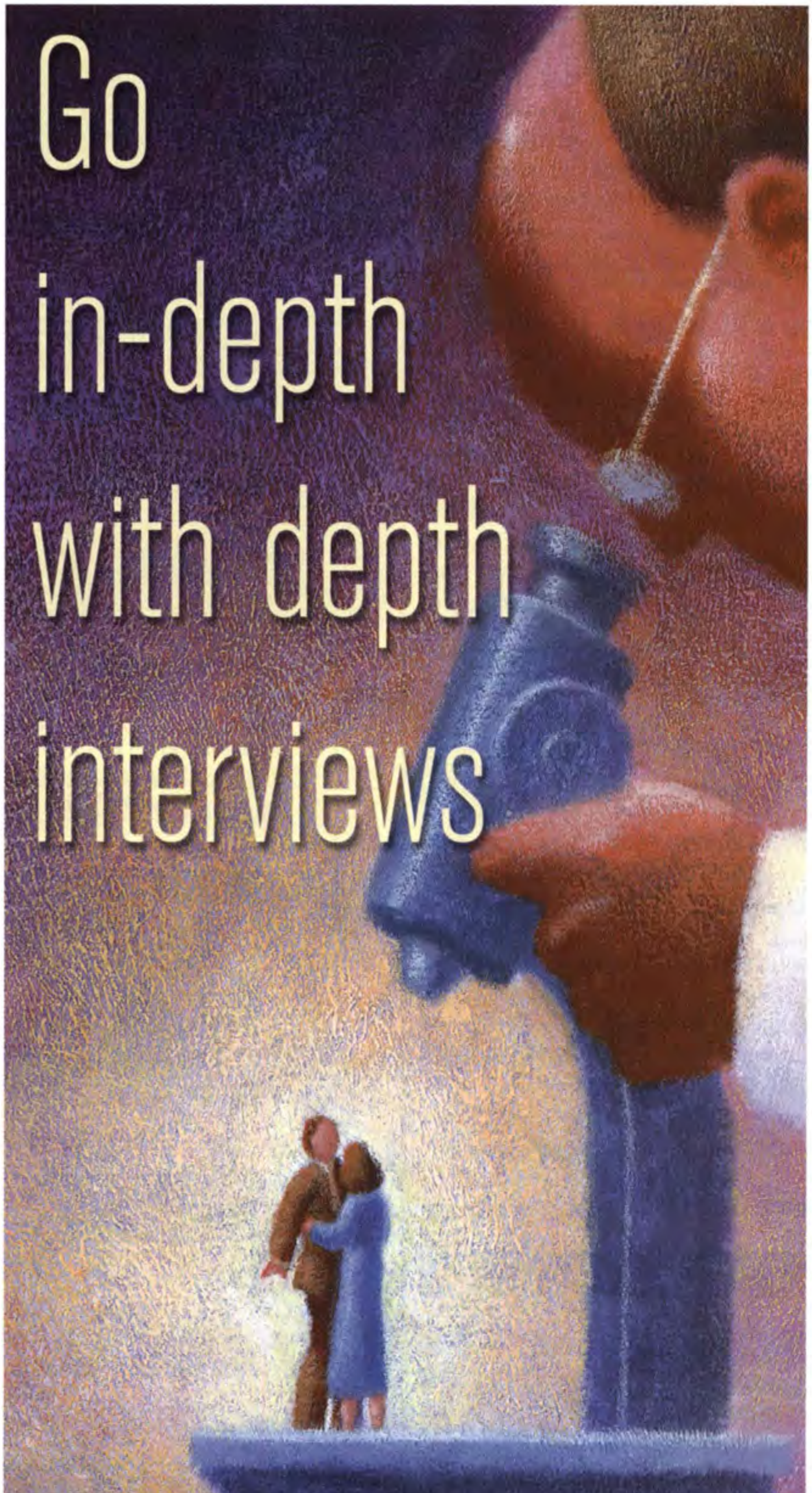


ACNielsen ©1999 ACNielsen & Access Worldwide, Cultural Access Group ACCESS

Useful tools

Panels such as the ACNielsen Homescan Hispanic Consumer Panel can be useful tools for understanding the purchasing behavior of U.S. Hispanics. They highlight marketing opportunities, product strengths and weaknesses, and often point the way to areas requiring additional market research.

1 Bryson, Ken and Lynne M. Casper, "Household and Family Characteristics: March 1997", Current Population Reports, U.S. Bureau of the Census, March 1997.



Go in-depth with depth interviews

By Brad Kates

Editor's note: Brad Kates is senior consultant at Opinion Dynamics Corp., Cambridge, Mass. He can be reached at 617-492-1400 or at bkates@opiniondynamics.com.

Market researchers have several methods at their disposal. They have quantitative surveys to get data on specific factors in the marketplace. They have focus groups to help them gain an understanding of key market issues and to help construct more quantitative surveys. And, of course, they have depth interviews. But when should researchers choose the depth interview as their preferred research method? Why should they choose it? And when is it most feasible to conduct such interviews? After all, depth interviews can be a high-cost proposition if they are used improperly.

We have conducted a variety of projects that have involved depth interviewing. Typically, these projects can be placed into one of three different categories:

1. Depth interviews that seek to gain insights from hard-to-reach groups. These help in the development of appropriate quantitative survey instruments, such as telephone or mail surveys.

2. Depth interviews that are the sole research method used.

3. Depth interviews that are used to gather customized information on a subject without being biased by the group dynamic that often occurs in a focus group setting.

Case 1: Hard-to-reach respondents

We recently worked on a business-to-business project in which we helped an energy provider collect information from owners of small commercial buildings regarding their use of lighting. Small commercial building owners are a difficult group to get into a focus group setting. They are typically busy, not prone to meet-

ing with others, and not, in this case, conveniently located (the target group of decision-makers was a cross section of business owners throughout New York state). After meeting with our client, we weren't sure which questions to ask of this constituency, but we knew they were large market players in the decision-making process for lighting. We decided to conduct depth interviews with small commercial building owners, in which we asked some general questions regarding how they purchase lighting for their facilities. (For example: What barriers exist to purchasing lighting? What selling points do they look for when purchasing lighting? And, what emphasis do their tenants place on installing appropriate lighting?) After gleaning this information, we used it to develop a tangible, targeted quantitative survey to gain statistically representative results that we could report to our client.

In this case, we used the depth interviews to provide background information to support the development of a quantitative survey instrument. The results of the depth interviews will rarely be the data we will analyze to provide recommendations to our client — the purpose is to support the development of an appropriate and targeted quantitative survey instrument.

Case 2: Sole research method

Suppose that you need to gather information from architects in New York State. You are looking not just for any architects, but only architects that specialize in — and have acute knowledge of — lighting design issues in small commercial buildings. How will you find these people and get this information? Developing an appropriate sampling method will be difficult, if not impossible, because these specific lighting-design-knowledgeable architects do not belong to an exclusive organization, or have their own SIC code. Trying to interview large quantities of these people would be both costly and time-consuming. Conducting a focus group would be nearly impossible because the architects are not centrally located, and they are competing with one another — they will not be open to sharing information freely with their competitors. The best method for obtaining information from this type of group is to conduct depth interviews with key market players.

Depth interviews can delve into important subjects, provide background data on the marketplace, and ensure that researchers speak with the appropriate experts. Depth interviews are also an excellent way to examine corporate buying center behavior within organizations. At the end of the interviewing process, researchers will have key information regarding the current state of the industry, future trends in the industry, and other market actors with whom they might wish to speak.

Of course, by using the depth interview as the sole research method, researchers cannot claim statistical significance in their findings.

However, they will be able to better understand the marketplace and make general decisions based on the interviews. Findings can, however, be projectable to a population if, say, six of 10 people have been interviewed. For example, in the case of a project that we recently conducted, we interviewed 200 respondents out of a census of 260 market members. In this case, we were able to project the findings of our study to the entire group of 260.

Case 3: Avoiding group dynamics

Let's take the case of the rollout of a new product. As part of the product testing, it is ideal for each respondent to touch, smell, and generally "kick the tires" and comment on their likes and dislikes. Conducting focus groups may be tempting. However, allowing a group of 10 people to look and comment on the product at the same time may skew your results to the first person's comments on the product, particularly if respondents are not passionate about the product in the first place. Depth interviewing enables researchers to talk to respondents one-on-one, eliminating the chance for respondents to be influenced by others as might occur in a group setting.

Conducting depth interviews

While it is important to understand which situations are best suited to depth interviewing, it is also important to think about how to conduct depth interviews.

Researchers can conduct depth interviews either in-person or via telephone. In-person interviews work well for testing new products that people need to see, when respondents are located reasonably close to each other geographically, and when respondents are being interviewed while working. In-person interviews can be conducted at the respondents' homes, their places of business, or at a central location. For example, we once conducted depth interviews in a limousine near a restaurant to test potential menu items among customers of that restaurant. Telephone interviews work well when interviewing busy executives, respondents from geographically dispersed areas, and when interviewing people for their knowledge (not for their reactions to a new product or service). We used telephone depth interviews for the architect example listed above.

For both telephone and in-person interviews, using a tape recorder is extremely useful. Tape-recording the interviews is especially useful when conducting depth interviews that are functioning as the sole research method (as in Case 2 above) because recording facilitates transcription of verbatim accounts of the interviews that researchers can use to interpret results. It also allows for capturing exact quotes from the conversations, something that makes any client report more impressive and factual.

Another important element to consider when using depth interviews is who should conduct the interviews. We have found that a variety of staff members could be appropriate depending on the level of knowledge that the interviewer needs.

A higher-level staff person should conduct the interviewing if:

• the client is the one being interviewed;

• the subject is very technical and lots of jargon is involved;

• it would encourage the respondent to want to participate.

A lower-level staff person should conduct the interviewing if:

• the subject is not technical;

• the budget is a concern;

• the topic is one with which the interviewer is familiar and comfortable.

Incentives

A final issue of concern is how much of an incentive, if any, to offer a respondent. We have offered respondents cooperation fees ("co-ops") ranging from nothing to a $10 gift certificate to more than $100. In situations where we are interviewing executives of organizations, we will often make a contribution to a charity of their choice if they agree to be interviewed. In some cases, high-level executives and other respondents that we interview while they are on the job are not allowed to take any form of co-op. It is important to know your desired sample group in order to make a decision about how much of a co-op to provide. Typically, if you are scheduling time to meet with these people either on the phone or in person, a co-op is appropriate. In cases where you are not formally setting up an appointment to speak with your respondents, the co-op can be lower.

Important place

While depth interviews do not allow for generalizations about a population — since most depth interview samples are not statistically randomized and sample sizes are not large enough — they do have an important place in market research. They allow researchers to more deeply explore issues and gain greater understanding in a less structured format than a quantitative survey provides.

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?

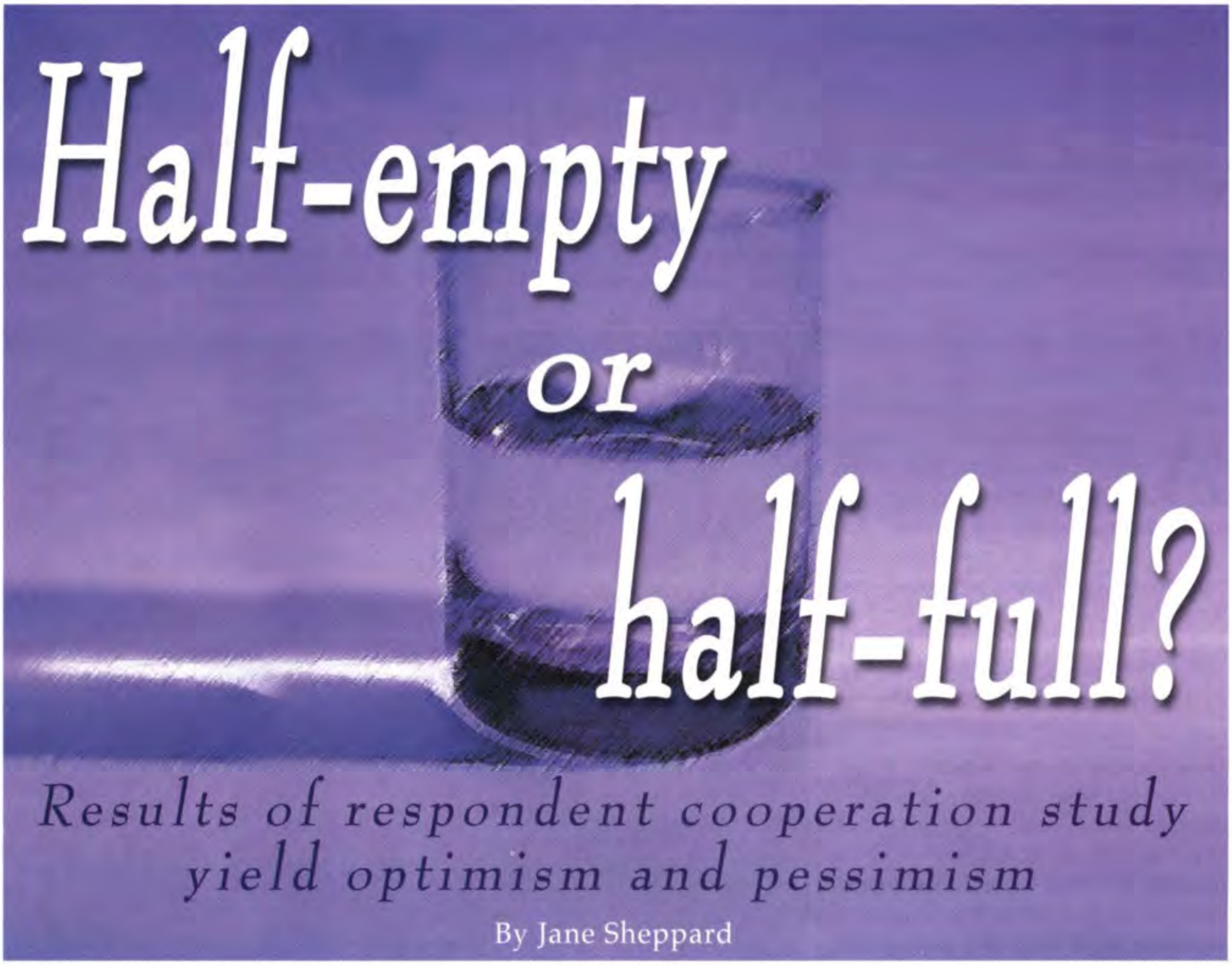
2) Who has that information?

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.* ■



Half-empty or half-full?

Results of respondent cooperation study yield optimism and pessimism

By Jane Sheppard

Editor's note: Jane Sheppard is director, respondent cooperation for the Council for Marketing and Opinion Research, Port Jefferson, N.Y. She can be reached at jsheppard@cmor.org.

The Council for Marketing and Opinion Research (CMOR) was formed in 1992 by the four major associations in the marketing and opinion research field: American Marketing Association (AMA), Advertising Research Foundation (ARF), Council of American Survey Research Organizations (CASRO), and Marketing Research Association (MRA). These associations have been joined by many corporations and organizations that conduct and/or use survey research. Together under the CMOR umbrella, these organizations are working to further the acceptance of survey research by the public and the government through education, lobbying, and providing legislative support to prevent abuses of the research process. CMOR also supports programs that ensure access to consumers, so that respondent cooperation in research remains vibrant and healthy.

To address this specific initiative, a Respondent Cooperation Committee was formed to achieve these goals: to evaluate the public's perceptions of the research process, to measure the effects of alternative methods of improving respondent cooperation, and to provide a foundation upon which to build an improved set of industry guidelines. It is the responsibility of the CMOR Respondent Cooperation Committee to oversee the organization's initiatives. Specifically, the mission of this committee is to lead the research industry to improve respondent cooperation by providing: 1) objective information about cooperation rates, consumer understanding of and concerns about research, and the ever-changing research environment, and 2) industry-accepted and supported solutions to improve respondent's willingness to cooperate.

As a step to achieving those goals, in 1999 CMOR conducted the Respondent Cooperation & Industry Image Study for the second time, using the same questionnaire as in 1995 with some minor revisions/updates. The study was an outgrowth of previous surveys on the public image of the survey research industry conducted by Walker

Research and therefore the findings are reflective of trends over time. The primary objectives of the study are to 1) serve as an industry benchmark for future measurement of cooperation levels, and to 2) generate data that might be used to formulate guidelines on best practices.

Methodology

A total of 1,001 computer-assisted telephone interviews were conducted among a random sample of adults nationwide from September 11 through October 12, 1999. Eleven research companies conducted the interviews (at no cost to CMOR): Coast-to-Coast Research, Elrick & Lavidge, FRC Research Corp., Maritz Marketing Research, Market Directions, Inc., NETWORK (Irwin Research, Luth Research, JRA, McMillion Research, Pat Henry Research), The NPD Group, Quick Test, Inc., Roper Starch Worldwide Inc., The Wats Room, and Western WATS Opinion Research Center. Affordable Samples, Inc., provided the RDD samples for each of these companies to use, also at no cost to CMOR. And, NETWORK provided the questionnaire programming, while Computers for Marketing Corporation tabulated the data also at no cost. The interview averaged 19.7 minutes in length.

Conclusions

Impact of the Internet - While not even on the radar screen during the 1995 CMOR survey, Internet surveys have shown substantial growth in the past few years. Nearly one-in-five individuals who have participated in a survey in the past year indicated that their last survey was conducted via the Internet. This approach is proving to be an acceptable (and in many instances desirable) alternative to other survey methods. The methodology currently most impacted by Internet surveys is mail. However, as the Internet achieves greater and greater household penetration, it should be expected that all methods will lose at least some share to it. On the positive side, however, is the evidence that Internet surveys can expand the use of survey research, and therefore the size of the market overall.

Internet focus groups have yet to achieve noticeable penetration. Most likely, the available technology limits the usefulness of this technique. However, as advances occur, this methodology may be used more widely and could be a significant threat to the current central location focus group methodology.

Threats to telephone surveys - A variety of factors are making it increasingly difficult to reach consumers for telephone surveys. As a result, the respondents who complete surveys don't constitute a random sample of the population of interest to the researcher.

The following factors also increase the cost of conducting telephone surveys:

• Answering machine ownership is high, and while most owners only screen a relatively small percent of their calls, the overall impact is that much more effort needs to be expended to reach these individuals.

• Call screening services, especially Caller ID, are gaining in acceptance and penetration.

• Telemarketing activity is so strong that consumers are feeling hounded. Attitudes towards telemarketing and receptiveness to these calls is declining. And, the level of sugging (selling under the guise of research) activity on the part of telemarketers continues unabated. This has led to an overall decline in attitudes toward unexpected calls in general, which dampens willingness to participate in surveys.

• There are some individuals who go particularly out of their way to make themselves inaccessible by having unlisted numbers and utilizing a variety of call screening methods.

Personal privacy concerns - There is a high awareness of privacy issues among the general public and a high level of concern for personal privacy.

Industry efforts and rules in this area are not being clearly communicated to and/or understood by the public.

Many participants do not recall being told that their answers will be treated confidentially and/or that no one will try to sell them anything as a result of participation. Whether they recall being told or not, a majority do not believe that the marketing research industry protects confidentiality and/or has privacy protection incorporated into the methods.

Attitudes and behaviors toward the survey research industry - Attitudes toward the marketing research industry, while still high on many issues, are showing a slow erosion over time. It appears that much of this can be attributed to the industry's decline in consideration for survey participants as well as a decline in standards.

Survey lengths increased to 14 minutes in 1999 from eight, 10, 12, and 13 minutes from 1988 through 1995, respectively.

The use of incentives is down considerably. When incentives are used, they are used primarily for focus groups, long interviews (over 20 minutes), and Internet surveys.

Participants perceive a decline in the professionalism and courtesy of interviewers and a decline in the professional appearance of self-administered surveys.

There is an increase in complaints among mail survey participants about not being given enough time to respond, and among telephone and in-person participants about being contacted at inconvenient times.

Political and issue polls appear to be even less well regarded than commercial surveys.

Refusal rates - The refusal rate continues a slow but steady upward climb. In most instances, refusals are circumstantial (i.e., inconvenient time, uninteresting or inappropriate topic) rather than a general reluctance to participate. Most refusals occur before the survey introduction. Very few terminate the survey once it's underway.

The 1999 survey included a statement in its introduction that a call may be monitored for quality purposes. By law in some states, research firms are now required to include this statement for RDD studies. The data do not show any detrimental effect from the inclusion of this statement.

While most individuals express willingness to participate in future surveys, this willingness is lukewarm and down from 1995. What is most likely being communicated is that actual behavior will be dependent on the circumstances.

To order a complete copy of the 1999 CMOR Respondent Cooperation Study, including all data tables, send $50 if CMOR member, and $150 for non-members to: CMOR, 170 North Country Road, Suite 4, Port Jefferson, NY 11777. Phone 631-928-6206. Fax 631-928-6041. E-mail info@cmor.org. Web site www.cmor.org.

The power of on-line research

We ain't seen nothin' yet

By Humphrey Taylor

Editor's note: Humphrey Taylor is chairman of The Harris Poll and a member of the executive committee at Harris Interactive, New York. He can be reached at 212-539-9600 or at htaylor@harrisinteractive.com.

History teaches us that new technologies are used, initially, to do old things better, or faster, or cheaper but that eventually they are used to do completely new things which nobody had ever thought of doing before — advertising on TV, driving to the beach on Saturday, watching Neil Armstrong's first step on the moon, traveling thousands of miles for a week's vacation or just calling home on Mother's Day.

When new technologies are available, human ingenuity, greed and creativity find a thousand new ways to use them. So it is with the Internet.

Much of the buzz, and discussion, about on-line research has missed the most exciting thing about how the research industry will use the Internet. Of course, it will replace (and is already replacing) some traditional quantitative and qualitative research methodologies. But, it is much, much more than just a faster, more cost-effective way of doing what we already do reasonably well on the telephone, in the mall or in people's homes. Its greatest potential, by far, is not as a replacement technology, but as an enabling technology that will allow us to do things we could hardly dream of doing before. After less than two years of conducting research on-line, and having conducted on-line research for 186 clients, we find that only about 20 percent is replacing traditional research methodologies. Fully 80 percent is work which would never have been conducted without the Internet. That is what is truly exciting!

There are several reasons why the Internet is such a powerful technology, enabling us to do so much exciting new research:

• We can survey humungous samples. Some on-line surveys have samples of over 100,000 people.

• We can screen for and survey substantial samples in tiny segments of the population. Some on-line surveys have been of segments of smaller than 1 percent of all adults, with samples of hundreds, and even thousands.

• We can survey very hard-to-find people. We have surveyed the very rich, people with unusual medical conditions, people who have traveled to out-of-the-way places or who have bought the most expensive cars — even divorced senior business executives.

• We can show them copy, products and packaging. We can test concepts, print ads and TV commercials. We can show and rotate different products and packages to test their appeal.

• On-line respondents speak eloquently to us in their own words. The quantity and quality of verbatim responses far exceeds what we obtain by telephone, or face-to-face — even when we record and transcribe their words.

• We can re-contact respondents or key sub-samples quickly and easily. It is much easier and faster to re-interview respondents multiple times on-line.

• Respondents critique our surveys. After many surveys, we invite respondents' comments and criticisms. Some of them are excellent critics, and have helped us to improve our questionnaires.

Reality is more exciting

All that sounds pretty good in theory, but the practical reality is even more exciting. These are just a few examples:

— A three-step experimental design involving 22,000 women. In the first stage, women were segmented into 16 personality types. In the second stage 24 different advertising options were tested, involving different media and different products, which were displayed online. The third stage involved the collection and segmentation by additional psychographic variables and Web security. In addition, data were collected about brand images and brand usage in 12 different product categories.

— Measuring corporate reputations. We are surveying very large samples of the public about corporate reputations with substantial subsamples of people who are familiar with the companies involved, consume their products, invest in and are employed by their industries. We are doing this both for specific industries and across all industries. We are also building dedicated panels and key stakeholder groups including money managers, IT decision-makers and health care professionals for these surveys.

Because of the speed of the Internet, we can measure, almost instantaneously, the impact of a crisis in a company's reputation, and track it thereafter.

— Strategic and segmentation advertising research with multiple market segments of investors. We recently surveyed 12,000 individual investors in 10 days to develop segmentation analysis so that our client's marketing and advertising could be targeted at multiple, diverse market segments.

— Concept testing with multiple market segments. We recently tested four different product concepts with 1,500 people who had recently bought a relatively unusual kind of product. Because we were on-line we could show pictures of four different products, each with a brief written description. The sample was large enough to look at multiple market segments. Data collection took five days.

— Banner advertising effectiveness research. A typical study involved screening our 5.3 million on-line panel to find people who had visited specific sites, and adding samples of registered visitors to our clients' Web sites to measure recall and advertising impact.

— New qualitative methodologies. While we are conducting traditional real-time focus groups on-line, we are finding that new, interactive qualitative methods may work better. Modified bulletin board and chat room techniques — well-moderated — can be used to develop powerful, new qualitative, research tools.

— Recruiting for clinical trials. We are using our on-line panel to recruit patients to participate in clinical trials for the pharmaceutical industry and academic medical centers. This will enable drug companies to get their drugs to market much faster, so they can enjoy a longer period of patent-protected life.

— Evaluating the impact of sports sponsorship. We are also finding and tracking large samples of people who closely follow specific sporting events and buy the sponsor's products (and the competitive products) to measure changes in buying behavior related to attending and/or viewing the sponsored events.

— Evaluating 275 e-commerce Web sites. By regularly surveying samples of over 100,000 people, we are measuring and analyzing on-line activities, user attitudes and both on-line and off-line buying behaviors. This service enables on-line retailers, e-commerce strategists, and financial analysts to determine which sites are drawing the most customers and why, and to profile visitors and buyers to uncover which sites have the best quality traffic. It helps sites and advertisers evaluate where they should invest their marketing and advertising dollars, and to determine why consumers leave a site dissatisfied and how customer experience can be improved.

— Survey of cancer patients who have participated in clinical trial. For a study to help understand why so few cancer patients participate in clinical trials, we are currently surveying cancer patients who have, and who have not, participated in clinical trials to find ways to increase recruitment into future trials.

— Survey of parents of children with a particular medical condition. Later this year, we expect to publish a survey of parents of children who were diagnosed with relatively rare medical condition to measure how appropriate and effective they believe the treatment was.

— Providing data for tomorrow's vital presentation. Several advertising agencies have called us up late in the afternoon asking for overnight research among consumers or purchasers of specific products, to use in tomorrow's pitch to a new client. We have been able to screen many thousands of households to find and survey the customers they need and deliver the data by 9:00 a.m. the next morning.

— Consumer products and services - customer loyalty and retention. For the first time it is economic to communicate regularly on-line with very large numbers of consumers to increase the likelihood that they will continue to buy and consume our clients' products. (But because this is a marketing service — to change consumer behavior — this service must be kept separate from research work.)

Exploded capacity

A year and a half ago, we had not thought of, and would not have predicted, most of these applications of on-line research. In another 18 months, the research industry will have exploded our capacity to do a thousand things nobody has yet thought of. We surely ain't seen nothin' yet!

Measuring response rates in on-line surveys

By Bill MacElroy

Editor's note: By Bill MacElroy is president, Socratic/Modalis, a San Francisco research firm. He can be reached at 415-430-2200.

Determining the response rates for on-line surveys (as opposed to traditional phone or mail studies) has been the recent topic of several research conferences and forums. Although response rates are easily calculated for some forms of on-line recruitment techniques, others are more difficult to monitor accurately.

In general, there are four main (ethical) recruitment techniques being used in Internet-based research. These include: off-line recruiting, pre-recruited panels, site intercept and customer database sample. I qualify these as ethical so as to distinguish these techniques from two forms that are generally considered to be rude (techno-culturally).

The first "bad" recruitment technique is broadcast, random e-mail and other forms of spam in which certain researchers have attempted to replicate the random digit dialing technique by purchasing e-mail lists. Not only is this considered rude, but it can also land you in deep trouble with your Internet service provider (most will disconnect your Internet access if people complain about you . . . and they will). If that weren't enough disincentive, the simple fact is that spam recruitment just doesn't work. Response rates to spam are reportedly extremely low, (e.g., 1 percent or less, even used in combination with a drawing) and of those who do respond, obvious and deliberate response sabotage is common.

The other "bad" sample acquisition/recruitment technique is the use of automated e-mail detection technologies (e.g., sniffers, Web crawlers or smart bots) to collect e-mail addresses surreptitiously from Web sites, bulletin boards and Usenet areas. Like spam, any form of recruitment that isn't preceded by some type of relationship and/or permission-based contact, won't work and will get you more grief than it's worth.

Worst to best

So what are the response rates (number attempting out of the number invited) of the acceptable recruitment techniques? Here are our estimates, ranging from the techniques with the worst response rates to the best.

The first category with the lowest overall response rate is off-line recruitment. This consists of using real-world techniques to direct people to a survey. Examples include putting ads in the newspaper, calling people on the phone, sending requests through the mail, etc. In general, we have found these to be the least effective methods of recruitment because of what we've come to refer to as the digital/analog divide. This is where it is more difficult to get people to do things on-line when using off-line techniques to drive them to the Web. The converse is also true; it's hard to get people to carry out off-line tasks (like keeping a paper-based diary) when using on-line means of communication.

Interview with a Vampire.

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

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

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

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

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

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

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

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

We're OAC—Opinion Access Corp.
We hear you.

Opinion Access Corp.

31-00 47th Avenue, Long Island City, New York 11101 • Phone 718-729-2OAC or toll free 888-489-DATA

If you are attempting to mail or advertise for a Web survey, expect a response rate of 1 to 3 percent of total contacts made. For telephone pre-recruit, expect a 50 percent to 60 percent on-line response from those who have agreed to participate and given a valid e-mail address (for a survey on a personally relevant and interesting topic for which they will receive an incentive). Also note that telephone pre-recruitment can cost up to 70 percent of the cost of doing the entire interview over the phone, so there has to be a very compelling reason to use the Internet if you must call ahead of time.

On the subject of incentives, most people find that cash (or on-line currency) is king. Three to five dollars is usually enough for most less-than-15-minute surveys. Prizes and drawings are able to elicit some response, but have to be fairly rich (e.g., more than $1,200) to reach a decent return. For technical audiences (without very strong affiliation with the survey sponsor), a per capita cash incentive of $25 is a minimum threshold for participation. Another thing to keep in mind is that any incentive payment that is more than $500 must be declared as income, and subsequently taxed. Some researchers have reported phenomenal response rates with no incentives — I've rarely witnessed it.

A technique analogous to mall intercept is site intercept. As the name implies, this technique seeks to get potential respondents' attention through the use of banners, buttons, badges, hypertext links and other Web site elements. This method is the most difficult to associate with a specific response rate, because the contact rate is hard to track. When we have used banner-tracking software to assess the number of "exposures" to a banner, the actual response rate is low. Although sites with a lot of traffic (over 5,000 hits per day) can still get a good number of completes in a relatively short period of time (i.e., 200 to 300 in less than a week).

An alternative method to passive intercept is the interstitial window recruit. These are the pop-up or "daughter" windows that open a new browser window and command attention. Using this technique, the intercept rate can be paced to display the invitation to every nth visitor. This cuts down somewhat on self-selection bias, but has also been reported to be somewhat annoying. The response rate from this more aggressive intercept is much higher (15 percent to 30 percent) than for banners and badges.

The next-best response category is a sample drawn from a customer registration database. These should be pre-collected e-mail addresses of people who have opted-in for future contact. Using these addresses, you can invite people to take part in a survey and link them directly to it. Response rates (number attempting out of number invited) range anywhere from 20 percent to 50 percent depending, once again, on relevance and interest in the topic. Beware, however, of purported opt-in lists that may be sold by some unscrupulous sources and represented as self-invited potential respondents.

Consider mid-terms

As we attempt to define on-line response rates precisely, we also need to consider mid-terms — people who drop out midway through the survey. Without a human interviewer urging the respondent to continue, on-line research tends to suffer more partial completes than phone (e.g., 20 percent to 30 percent). If you can track those respondents who have paused during a survey, however, the conversion rates of incompletes to completes is much higher than simply inviting new potential respondents. This is particularly true if they can pick up where they left off when they quit. Expect to convert up to 50 percent of on-line mid-terms to completes if you have an automatic pickup option.

The best response rates are from pre-recruited panels (either syndicated or custom-built). The pre-recruitment, which is done using all of the above-mentioned techniques, yields a ready-to-use database from which a random sample can be selected and invited. Although response rates will vary by topic and level of incentive, 40 percent to 50 percent participation levels are not uncommon. National panels (e.g., Greenfield Online, NFO, NPD, Harris Interactive, Socratic Forum) can be useful for obtaining non-customer respondents. A custom panel built from within a company's own client base creates affinity and boosts participation rates even higher.

Reality barometer

Finally, keep a reality barometer in mind. If you suspect that the sampling methodology could have biased sample selection in any way, take a look at known parameters about the populations you are researching. If a target audience that you are trying to reach is known to consist of 70 percent women and 30 percent men, and your survey results skew toward males, you might want to investigate the effect of sampling on your survey audience.

Product & Service Update

continued from p. 12

Internet. The results are captured and presented graphically in real-time. For more information visit the Web site or call 415-289-0238.

E-mail samples from Survey Sampling

Survey Sampling, Fairfield, Conn., is now offering e-mail samples. Over seven million e-mail addresses are available. Markets can be targeted by selecting e-mail addresses from documented lifestyle headings such as computers, communications, electronics, family, finance, Internet, medical, shopping, and travel. E-mail targets are drawn from a variety of reliable sources. For more information visit www.ssisamples.com.

Analysis and reporting software from SPSS

SPSS Inc., Chicago, has introduced Topliner and Quancept Analyzer, new analysis and reporting solutions that enable market researchers to get automatic, real-time reports of analyses or topline tabulations. The automated, Web reporting tools offer features including topline tables and graphics, ad hoc reporting, snapshot/real-time reporting with polling rates as low as one second, and automatic output formatting. The three levels of sophistication available are: Topliner for topline tables and reports on open-ends; Quancept Analyzer for more complex analyses and charts, including modeling and data mining using SPSS analytical tools; Quancept Analyzer with SmartViewer Web Server (SVWS) for sharing; Quancept Analyzer results with clients or colleagues in an interactive format.

Topliner is a standalone utility that produces topline tables and a report on open-ended questions automatically from a Quancept Web survey. Launched from an active server page, the utility creates a series of HTML tables that are viewed through a standard browser. Topliner provides users with immediate access to formatted, real-time results on-line as well as an easy-to-understand account of a survey's progression. Users can also generate reports on open-ends to examine verbatims while the survey is in progress.

Quancept Analyzer takes data from Quancept Web, CATI, or CAPI surveys and turns them into SPSS data files, which are automatically sent to SPSS server software for analysis. The analysis process is invisible to the user and results are delivered as a set of interactive tables or charts for SPSS SmartViewer or can be viewed in static form onscreen through a Web browser. Quancept Analyzer with SmartViewer Web Server (SVWS) offers the same analyses as Quancept Analyzer, with the added benefit of giving anybody with access to the Web the ability to interact with the report. The results, distributed in interactive OLAP report cubes, can be accessed remotely through a Web browser, enabling others to drill down into the data to discover hidden trends and actionable insights — all with no additional software requirements for individual computers. For more information visit www.spss.com.

ACNielsen, Market Facts team for segmentation service

Schaumburg, Ill.-based ACNielsen U.S., an operating unit of ACNielsen Corporation, and Market Facts, Inc., a subsidiary of AEGIS plc, have launched SEGWAY, a jointly-developed market research service designed to help marketers understand the relationship between consumers' attitudes and their behavior in the marketplace.

The first step in the SEGWAY process is a commitment-based segmentation of consumers. Commitment is a multi-dimensional measure of the psychological relationship between a consumer and each brand used. The stronger that relationship, the more likely a consumer is to stay with a brand and resist competitive marketing efforts. Each brand's non-customers are segmented by their "openness" to the brand. "Open" non-customers are good prospects for acquisition, while "Unavailables" have their minds closed to the brand.

The second step consists of linking the Conversion segments with the ACNielsen Homescan consumer panel. This enables each attitude segment to be viewed in terms of the dollar volume it represents. In the final step, SEGWAY enables marketers to measure their efforts at managing each segment. For more information visit http://acnielsen.com or www.marketfacts.com.

Giga partners with DeepCanyon

Seattle-based DeepCanyon and Cambridge, Mass.–based Giga Information Group have announced a strategic on-line content agreement under which select Giga research will be made available for sale through DeepCanyon (www.deepcanyon.com), a Web resource that offers marketers a variety of business resources in a single location. DeepCanyon will serve as a new distribution point for a select number of Giga's IdeaBytes — discussions of analyst ideas and recommendations on a particular topic. In addition, DeepCanyon will have a number of Giga Planning Assumptions, research that provides more detailed analysis of topics. Giga's research content, which focuses on the role of technology in e-business, historically has been available only to its subscribers, typically larger corporations with dedicated budgets for market research.

Web site usability tools from NetRaker

NetRaker Corporation, Sunnyvale, Calif., has introduced an integrated suite of patent-pending Web site usability and market research tools. Designed to measure Web site impact from the customer's perspective, NetRaker offers companies doing business on the Web intelligence tools to track Web site marketing, usability and performance. Providing both free and paid tools, the entire NetRaker Suite of tools is available via free trial at www.netraker.com.

The NetRaker Suite includes customizable usability and market research templates that allow companies to collect user interface and demographic information. Usability research templates enable site managers to test task completion, browsing, searching and step-by-step purchasing performance with real users. Marketing research templates include brand value, message content, customer conversion and customer retention data gathering.

Also included in the NetRaker Suite is the SiteRaker Performance Tool, which tracks download times and network connections on a continual basis. NetRaker technology tools also include the NetRaker Index, which tracks sites from the customer perspective, including measurements of overall site rating, content, ease of use and site satisfaction. Each NetRaker measurement is developed from a battery of proprietary research designed to give users the ability to perform detailed analysis into the ratings and comparisons. NetRaker Index is a free tool that provides up-to-the-second tracking and analysis.

Available on a subscription basis, the NetRaker Suite is currently being offered on a free, introductory trial basis. To sign up for the free NetRaker Index or a free trial of the complete NetRaker Suite, visit www.netraker.com or call 408-530-8900.

Restaurant tracking service delivers data via the Net

The NPD Group, Port Washington, N.Y., is now tracking Americans' eating habits via the Web. Working with a prerecruited panel of individuals who have agreed to provide this information to NPD, the firm has begun continuous, daily collection of information from more than 3,000 consumers including a subset of teens each day. Data will be used to develop next-generation industry tracking products for the firm's Foodservice Information Group, including CREST, which restaurant operators and suppliers use to track consumers' away-from-home eating patterns. The new methodology will allow NPD to deliver information in significantly less time than previously required. Beginning this spring, the CREST database will be updated monthly, with information available within days of the close of the reporting period.

On-line data collection will also allow NPD to improve quality of data and to add new predictive measures to the service. CREST subscribers will be able to supplement core reports with additional data on customer satisfaction and future intent.

All information will be delivered via a secure Web portal, NPDfoodworld.com, slated for launch this summer. The site will provide 24-hour access to integrated data from CREST and other NPD Foodservice Information Group databases, customized to each client's specifications. Other accessibles will include account information, tech support, and industry news.

Concurrent with the development of CREST's on-line tracking service, NPD also announced it will develop a suite of new products for food-service professionals. Syndicated surveys will be supplemented to incorporate proprietary tracking elements or ad hoc survey questions for individual clients. Additional capabilities will include advertising tracking, promotions tracking, concept testing and focus groups.

NPD has also introduced NPD DeckBuilder, proprietary software that helps restaurant chain operators and suppliers to retrieve data generated by the CREST service. With NPD DeckBuilder, subscribers can access information from the CREST database with charts to help assess competitive position and identify chain strengths and weaknesses. The software provides access to CREST data on eatings and eaters, reach and frequency of eatings components, incidence, meal periods, service sectors and demographic characteristics of eaters. DeckBuilder users can determine which chains and independent restaurants are most important to specific foods. NPD DeckBuilder also identifies key demographics and regional preferences. For more information contact Angelina Drnek at 847-692-1853 or at angelina_drnek@npd.com.

New West Africa omnibus studies

Lagos, Nigeria-based RMS Media Services has introduced a West Africa omnibus study. The first of the omnibus surveys was conducted in Cameroon in July 1999. The firm is also now offering an omnibus survey in Ghana. The objective is to provide subscribers with accurate market information, e.g., market size, brand shares, advertising awareness, etc. Each subscriber will determine the content of their section and the results will be exclusive. Results will be made available in computer-generated tables with the following variables serving as standard banners: sex, age, social class, urban/rural abode and country. The raw data can be provided in whatever format may be required, e.g., SPSS, ASCII, etc. For more information contact Margit Cleveland at rmsmedia@cyberspace.net.ng or visit www.internews.org/rmsmedia.

New suite of Web analysis tools

Vividence Corporation, a San Mateo, Calif.-based Web evaluation firm, has introduced a suite of customer-driven market intelligence solutions. For Internet-based businesses seeking an understanding of a customer's experience of their Web site, Vividence's Web-based services offer assessment by using live, scenario-based detailed feedback from their target customers. Vividence technology can be deployed against both a client's own site as well as competitors' sites. It enables Web businesses to track user intent, observe and record user behavior, measure performance versus goals and measure the impact of the whole Web site experience on a user's overall satisfaction, brand loyalty, propensity to buy, and likelihood to return.

Testers are recruited to the Vividence Tester Community, which is comprised of more than 85,000 members representative of the general on-line population. When testers sign up at www.vividence.com, they are asked for demographic and psychographic information. This enables Vividence to offer its customers the ability to run Web experience evaluations using their specific target customers. Customers can view detailed information such as aggregated results and user data by accessing Vividence's CustomerScope products via an extranet. They include a patent-pending set of Web-based reporting, query, and analysis tools to view and analyze the data and the Vividence ClickStreams tool, which shows the exact navigation path of testers in light of their intent. For more information visit www.vividence.com.

Survey Monitor

continued from p. 8

that differ markedly from the rest of the Internet population. In particular, on-line African-Americans are intensive Internet music shoppers, where they are more likely than the general on-line population to make purchases. Still, in several retailing categories, the number of African-Americans making transactions on-line is behind the total on-line population, particularly in the travel and clothing sectors.

"While we found that on-line African-Americans are more likely to state they intend to begin making on-line purchases than the total on-line adult population, the same group also expressed a higher degree of concern regarding security and privacy than the total on-line population," says Idil Cakim, an analyst for Cyber Dialogue. "These results reinforce the importance of recognizing how topics such as security and privacy can greatly impact the number of on-line transactions a site completes."

Other findings include:

• On-line African-Americans are more likely than others to go on-line from academic and public locations.

• On-line African-Americans are disproportionately more likely to register on Web sites than the total user population.

• Non-users among African-Americans are more likely than the typical non-user to be interested in learning more about the Internet.

These findings are from Cyber Dialogue's quarterly American Internet User Survey (AIUS), which consists of in-depth interviews with 1,000 Internet users and 1,000 nonusers. For more information visit www.cyberdialogue.com.

First-year NASCAR sponsorships work for Viagra, Lycos

According to a recent study by Performance Research, Newport, R.I., Lycos and Viagra gained consumer recognition with their new presence in NASCAR sponsorship. The press coverage of Lycos' last-minute signing of a sponsorship agreement with driver Johnny Benson the night before the Daytona 500 race combined with Benson's unexpectedly strong showing towards the end of the race boosted Lycos' exposure as evidenced by the 12 percent awareness among NASCAR fans, ranking it first among all other first-year Winston Cup sponsors. Boding well for Lycos is the fact that the study also found that Internet access among NASCAR fans has increased nearly 20 percentage points from 53 percent in July of 1998 to 70 percent in February of 2000.

Also getting a boost was Viagra, which had impressive consumer awareness without even qualifying for the Daytona 500. Viagra received 5 percent unaided sponsorship awareness in its first year as a Winston Cup sponsor, even though driver Jeff Fuller failed to qualify for the Daytona 500.

How important is this awareness? Past studies have shown that given the choice between two products of equal cost, 72 percent of NASCAR fans would almost always or frequently choose the brand they associate with NASCAR over one that is not associated with NASCAR. When there is a price differential, 46 percent mentioned that they would purchase a brand costing as much as 10 percent more if associated with NASCAR over a less expensive brand that is not associated with NASCAR.

In fact, 43 percent of NASCAR fans were influenced enough by NASCAR sponsorships to switch from their normal brand of a grocery store item to try a different brand. Tide came up as a beneficiary of this sentiment with 20 percent of all consumers questioned switching from their normal brand to try Tide. Among others mentioned most often were Kellogg's, Cheerios, Coca-Cola, M&M's and Budweiser.

The current demographics of NASCAR fans were recorded in this study as well. The typical fan was measured as male (68 percent), married (73 percent), a high-school graduate (97 percent) with a total household income of $50,000 or more (68 percent).

Two hundred telephone interviews were conducted with a random nationwide sample of NASCAR TV viewers 48 hours after the 2000 Daytona 500 had taken place. The margin of error is +5 percent. For more information call Bill Doyle at 401-848-0111.

What drives financial service choices for small businesses?

Personal, not business, relationships drive the process of choosing financial services for small businesses, according to a recent study. The study was carried out in support of the launch of "Perspectives on Small Business," a multi-study, multi-year research protocol designed for providers of financial services to small businesses, conducted by Brightwork Partners, an Old Greenwich, Conn.-based consulting firm, and Greenfield Online, a Wilton, Conn., research firm.

Some 487 owners or senior executives of companies with fewer than 100 people participated in the first of a series of research studies that will be conducted on-line to learn more about this segment of the American economy. The first in this series of studies focused on how decisions are made about financial services.

Small-business owners represented in this survey indicate that they chose business providers for investments, banking, property and casualty insurance, credit, disability insurance and legal services primarily because of an existing personal relationship.

Tax preparation and tax planning, however, together with retirement plans, and life and health insurance are typically selected based on a business relationship. "We've known for a long time that small-business owners tend to select the same providers for their business and personal needs," says Ronald L. Bush, a principal of Brightwork Partners, "but we've never been clear on which side of the relationship leads the selection process."

Among small businesses with 10 people or more, however, the overlap in provider usage is smaller and the weight of the business side greater in the provider selection process. The selection of a provider for life insurance, health insurance, credit products, retirement plans, tax planning and preparation and banking is based on the business relationship, not on the retail relationship.

"Financial services marketers targeting small businesses and small-business owners need to realize that there's no single magic formula for developing this market," Bush says. "The research shows that leveraging a retail base only works for some products and only up to a certain size of business, while leveraging an institutional relationship works only so far down the size continuum and only for certain products as well."

The study was fielded in November to a sample of small business owners drawn from Greenfield Online's research panel. For more information call Ron Bush at 203-637-1826.

Auto shoppers prefer e-mail contacts

Car shoppers who visit auto dealer Web sites prefer, by an overwhelming majority, to have dealers first interact with them by e-mail rather than phone, according to a study of on-line shoppers conducted by Friedman-Swift Associates, a Cincinnati automotive market research firm, and The Cobalt Group, a provider of business-to-business services to the automotive industry. The research study surveyed 934 consumers who visited Cobalt's DealerNet (www.dealernet.com) in November and December 1999. According to Judy George, senior vice president of Friedman-Swift and coordinator of the research study, 82 percent of those surveyed preferred an e-mail response to their initial on-line inquiries. While 10 percent expressed no preference, only 7 percent asked for a return phone call, and only one percent requested a fax. "Consumers are saying, loud and clear, 'Don't call us' — at least not at first," George says. "Undoubtedly, most on-line car shoppers will end up speaking by phone or in person with someone at a dealership before they buy a car. But they prefer that these spoken interactions come a little later in the buying process."

For auto dealers, this preference might signal a change in hiring practices. "Rather than relying solely on salespeople with strong verbal skills to build relationships with customers, dealers will also need to have salespeople with strong writing skills," George says. "To keep on-line shoppers interested, dealers must respond in a way that makes those shoppers feel comfortable — and do it in a timely fashion."

The research also showed that 82 percent of the respondents would like dealers to respond to their requests for information in one day or less. "About 55 percent of dealers responded in that time period," George says. "But 19 percent of dealers never responded to shoppers' inquiries at all. We expect these numbers to improve, however, as more dealers actively embrace Internet technology."

The individuals surveyed were serious shoppers. Of the total sample, 77 percent intended to purchase a vehicle in the next year and 40 percent planned a purchase in the next two months. Key findings from the research study are posted at www.friedmanswift.com. The research findings have a margin of error of ±3.2 percent.

Cinergy, CDNOW tops in on-line customer service

Findings from a global research study showed that two U.S. firms, Cinergy and CDNOW, scored a perfect 100 percent rating for providing exemplary e-service. The study, performed by Socratic/Modalis, a San Francisco research firm, featured more than 1,200 companies worldwide — including the U.S. Fortune 500, Germany's Die Welt 500 and the largest Internet firms in both regions. In the U.S., 551 companies were rated by professional usability specialists who judged Web sites on contact accessibility — the ease in locating and the quality of on-line information; response readiness and speed; and the quality of response provided. The two companies found to be "exemplary" in their Web site design and quick response to on-line inquiries each received perfect scores in all categories. CDNOW, www.cdnow.com, is an on-line music destination offering products, reviews, news, customized shopping features, and more. "This site includes quick and simple forms for communicating questions and includes a very thorough 'help desk' with well prepared and frequently asked questions," says Bill MacElroy, president of Socratic/Modalis. "Representatives reply to e-mail questions very quickly with personalized, detailed responses." Cinergy, www.cinergy.com, is a diversified energy company primarily serving Indiana, Ohio and Kentucky. "Examples of good on-line service can be found in almost every industry," says MacElroy. "Cinergy's site had unusually easy-to-use forms for questions and feedback. A manager in the company responded to a request before the end of the day in answer to our question about the company's fuel mix policies. The in-depth answer used our evaluator's name, provided additional links and closed with his own name and e-mail address for further follow-up. This type of response was both unexpected and way above the norm."

Eleven other U.S. companies received outstanding ratings of over 90 percent for overall successful on-line customer service systems. These included: AmeriSource Health (wholesalers) 93 percent; Ask Jeeves

(Internet search engine) 93 percent; Central & South West (utility provider) 93 percent; CVS (food and drug) 93 percent; Flowers Industries (food) 93 percent; International Paper (forest and paper) 93 percent; Reliance Group Holdings (insurance) 93 percent; American Electric Power (utility provider) 90 percent; AMP (electronics) 90 percent; Niagara Mohawk Power (utility provider) 90 percent; R.R. Donnelley & Sons (publishing) 90 percent. A copy of the full report, "E-mail E-conomy" can be downloaded from www.modalis.com.

Restaurant growth down, sales up

Restaurant unit growth was virtually nonexistent, up only 0.4 percent in 1999, compared to 1998's growth of 2.3 percent. However, this slowdown in unit expansion helped, not hindered, the industry, according to information released by the NPD Foodservice Information Group, a division of The NPD Group, Inc., Port Washington, N.Y. Despite flagging unit growth, sales were up 6 percent across all industry segments, the firm reports.

Unit growth for quick-service restaurants as a group was up just 1 percent, according to NPD ReCount. Starbucks, Papa John's, Burger King, Taco Bell and Quizno's added the most units during the year. Conversely, quick-service restaurants saw a 3.3 percent same-store sales increase for the year ending October 1999, compared to 1998's 2.4 percent same-store sales growth, according to SalesTrac Weekly, a product of the NPD Foodservice Information Group. Quick-service heavy hitters Dunkin' Donuts, KFC, Domino's and Subway all experienced much higher same-store sales growth than unit growth in 1999.

Unit growth for full-service restaurants was flat in 1999. Applebee's, Denny's, Waffle House, Outback Steakhouse and Ruby Tuesday's were the top 1999 unit gainers in the full-service category.

"The slowdown in unit development solidifies the healthy foundation that restaurant operators have built in the past two years. By focusing on building unit sales rather than unit expansion, operators are finding a way to increase income without increasing costs at the same time," says Bob O'Brien, president, NPD Foodservice Information Group.

While overall unit growth was stagnant, some concepts did buck the trend. Bagel shops boasted a 47 percent increase in unit growth, up from 16 percent in 1998. Bagels, gourmet coffee, bar and grill and juice/smoothie concepts grew fastest among restaurant concepts in 1999. Starbucks, with a unit gain of 474 stores in 1999 over 1998, topped the list of fastest growing major restaurant chains in unit terms. Other leaders included Papa John's Pizza, Outback Steakhouse and Schlotzky's Deli. Seafood, chicken and pizza restaurant concepts declined in unit count in 1999.

The nation's mid-sized cities showed the fastest 1999 growth in number of restaurants. The Green Bay-Appleton, Wis., area was up 75 units from 1998's count of 1,501 restaurants, a 5 percent increase. Tulsa, Okla., and Chattanooga, Tenn., were up 4 percent each. Restaurant unit counts for major metropolitan areas Miami, Los Angeles, Chicago, and Philadelphia each decreased 2 percent in 1999.

Research Industry News

continued from p. 15

about recommended industry events and conferences in which Answers' executives will be participating.

Tustin, Calif.-based **Scantron SurveySolutions** has announced that its eListen electronic survey and data collection software system is now in use by drugstore.com, Hewlett-Packard, Marathon Technologies and iXL.

Gayle Ireland has founded **Ireland Consulting Group, Ltd.** in Charlotte, N.C. The full-service marketing research and consulting firm caters to the needs of the small business (or business unit) and the not-for-profit organization. For more information call 704-451-4706.

New York-based research firm **Cyber**

Earnings**Watch**

SPSS Inc., Chicago, announced results for the quarter and the year ended Dec. 31, 1999. For the quarter, net revenues were $40.7 million and diluted earnings per share (EPS) were $0.51. For the year, net revenues were $141.9 million and diluted EPS were $1.52. These results include revenues and charges related to the company's fourth quarter acquisitions of Vento Software Inc. and the VerbaSTAT market research product. Adjusted quarterly results, excluding acquisition and other nonrecurring charges, were net revenues of $40.1 million and diluted EPS of $0.66. For the year, similarly adjusted net revenues were $140.2 million and diluted EPS were $1.79.

Total Research Corporation, Princeton, N.J., announced second-quarter and six-month results for the periods ended December 31, 1999. For the second quarter, the firm reported revenues of $12,112,292, a 26 percent increase over the corresponding period of the previous year, and net income of $646,379, a 20 percent increase over the same period. Net income translated to $0.05 of diluted earnings per share compared with $0.04 of diluted earnings per share for the corresponding period in fiscal 1999. For the six months, revenues were $25,903,242, a 32 percent increase over the six-month figure from the previous year, and net income was $1,271,017, a 20 percent increase over the corresponding six-month period. Net income translated to $0.10 of diluted earnings per share compared with $0.08 of diluted earnings per share for the corresponding six-month period in fiscal 1999.

Greenwich, Conn.-based research firm **NFO Worldwide, Inc.**, reported results for the fourth quarter and year ended December 31, 1999. The actual results for the fourth quarter and full year are within the range of estimates provided by the company on December 20, 1999. Revenues for the fourth quarter increased 27 percent to $120.2 million from $94.6 million for the same period last year. During the quarter, the company recorded $21.7 million in pre-tax special charges, primarily to write-off the intangible assets associated with the company's financial services

continued on p. 64

businesses, which have been deemed to be permanently impaired. These special charges, which are primarily non-cash in nature, amounted to $17.8 million or ($0.80) per diluted share on an after-tax basis. As a result, the company reported a net loss of ($17.8) million or ($0.80) per diluted share for the fourth quarter, compared with net income of $5.1 million or $0.23 per diluted share in the year-ago quarter. Earnings per diluted share, before special charges, were $0.00 per share for the fourth quarter of 1999. For the year ended December 31, 1999, revenues increased 66 percent to $457.2 million from $275.4 million in the same period last year. Results for the year ended December 31, 1999, include the results of Infratest Burke, which was acquired on November 20, 1998. As a result of the aforementioned special charges, the company reported a loss of ($6.2) million or ($0.28) per diluted share, compared with net income of $14.5 million or $0.67 per diluted share for the 1998 year. Earnings per diluted share, before special charges, were $0.52 per share for the full year 1999, as compared with $0.67 in 1998.

Stamford, Conn.-based research firm **ACNielsen Corporation** reported record earnings for 1999, said it expects continued strong profit growth in 2000, and outlined a plan — Operation Leading Edge — to accelerate revenue growth and double earnings per share by 2002. In 1999, the company achieved a 34.8 percent increase in net income, to $77.2 million. Diluted earnings per share were up 34.4 percent, to $1.29, before the cumulative effect of an accounting change in the first quarter. EBITDA reached $204.9 million. Operation Leading Edge will result in a series of pre-tax charges, spread over three years, totaling approximately $180 million. The company estimates that $70 million will be incurred in 2000, $80 million in 2001, and the balance in 2002.

Opinion Research Corporation (ORC), Princeton, N.J., reported record results for the fourth quarter and the year ended December 31, 1999. For the year, revenues were a record $119 million, an increase of 62 percent compared to fiscal 1998 revenues of $73 million. Operating income for 1999 totaled $8.5 million, up 76 percent from $4.8 million in fiscal 1998. Diluted earnings per share were $0.58 for the year, up 61 percent compared to diluted earnings per share of $0.36 in 1998. Net income for the year just ended was $2.5 million, up 62 percent from net income of $1.6 million in 1998. For consistency, results presented throughout exclude a $2.5 million unusual charge in the fourth quarter of 1998 and extraordinary losses on debt refinancings of $150,000 in 1998 and $90,000 in 1999. For the fourth quarter, revenues were a quarterly record $38 million, an increase of 107 percent from $18 million in the comparable prior year period. Operating income in the fourth quarter was $2.4 million, an increase of 113 percent from $1.1 million a year ago while diluted earnings per share were $0.15 in 1999, an increase of 150 percent from $0.06 in the fourth quarter of 1998. Fourth-quarter net income was $673,000, an improvement of 155 percent compared to fourth quarter 1998 net income of $264,000. Revenues from Macro International, which ORC acquired on May 1, 1999, were $18 million for the quarter and $45 million for 1999. Since its acquisition, Macro has contributed operating income of $2.8 million, of which $1.4 million was in the fourth quarter. Operating income for the remainder of the company increased 17 percent in 1999 compared to 1998.

Dialogue Inc. has filed a registration statement with the Securities and Exchange Commission for an initial public offering of its common stock. All shares being offered will be sold by Cyber Dialogue. The offering will be managed by SG Cowen Securities Corporation, Banc of America Securities LLC and ING Barings LLC.

Watertown, Mass.-based **Primix Solutions Inc.**, a strategic Internet services (SIS) firm, has partnered with Greenfield Online, a Wilton, Conn., research firm, to create QuickTake.com, a new on-line do-it-yourself survey tool designed to capture immediate directional feedback from more than 60 percent of the Internet population. QuickTake lets businesses use a predefined or customized question template to create a survey, distribute it across the Internet, and manage and interpret incoming responses.

Lyra Research, Inc., a Newtonville, Mass., provider of research on the imaging industry, has appointed JDS Company Limited of Tokyo, Japan, as its new exclusive sales and marketing representative for Japan.

NextResearch.com has partnered with MarketResearch.com to offer a database of syndicated and secondary research reports.

Publications Resource Group, Inc., a North Adams, Mass., Web-based portal of market intelligence research reports, newsletters and directories, and CableTODAY.com, a Web site for video, voice, and data professionals, have formed a strategic partnership to

Research Calendar

continued from p. 14

Managing Online Projects. For more information call 888-670-8200 or visit www.iir-ny.com.

ENERGY RESEARCH CONFERENCE: The American Marketing Association will hold its Energy Marketing Research conference on May 7-10 at the TradeWinds Resort, St. Petersburg, Fla. For more information visit www.ama.org.

RESEARCH FUNDAMENTALS COURSE: On May 1, 8, 15 and 20 the Professional Marketing Research Society (PMRS), North York, Ontario, will hold a four-day course called "Fundamentals of Marketing Research." This course will be held at the Board of Trade in Toronto. For more information call 888-815-PMRS or visit www.pmrs-aprm.com.

ELECTRONIC/BROADCAST RESEARCH SYMPOSIUM: The European Society for Opinion and Marketing Research (ESOMAR) and the Advertising Research Foundation (ARF) are co-sponsoring the Worldwide Electronic and Broadcast Audience Research Symposium on May 7-9 in Miami. For more information visit the ESOMAR Web site at www.esomar.nl or the ARF site at www.arfsite.org.

MYSTERY SHOPPING CONFERENCE: The Mystery Shopping Providers Association (MSPA) will hold its annual conference on May 17-20 at the Wyndham Garden Hotel in Key Biscayne, Fla. The conference will include seminars, workshops and social activities. For more information call Kathleen McHugh at 847-375-4842 or visit www.mysteryshop.org.

AAPOR CONFERENCE: The American Association for Public Opinion Research (AAPOR) will hold its annual conference on May 18-21 in Portland, Ore. For more information visit www.aapor.org.

PMRS ANNUAL CONFERENCE: The Professional Marketing Research Society (PMRS), North York, Ontario, will hold its annual conference from June 5-9 at the Westin Harbour Castle Conference Centre, Toronto. For more information call 888-815-PMRS or visit www.pmrs-aprm.com.

MRA ANNUAL CONFERENCE: The Marketing Research Association (MRA) will hold its 42nd annual conference on June 7-9 at the Westin Hotel in Seattle. For more information visit www.mra-net.org.

ADVANCED TECHNIQUES FORUM: The American Marketing Association will hold its Advanced Research Techniques Forum (ART Forum) on June 4-7 at the Marriott Hotel in Monterey, Calif. For more information visit www.ama.org.

FROST & SULLIVAN CONFERENCE: Frost & Sullivan will hold its third annual Advanced Marketing Research Conference and Exhibition on June 5-8 at the Alexis Park Resort and Spa in Las Vegas. For more information call Bruce Hirsch at 212-964-7000 ext. 275 or visit www.frost.com/conferences/MRT.

WEB/ON-LINE SURVEY SEMINARS: The Institute for International Research will hold an installment of its Web-based Surveys and Online Research Seminar Series at the Hilton San Diego on June 12-14. Core issues such as reliability, validity, response rates, projectability and anonymity will be addressed. For more information call 888-670-8200 or visit www.iir-ny.com.

FOCUS GROUP BOOT CAMP: On June 16-17, the Greeley Institute will present the "Focus Group Boot Camp," a workshop for managers who use or authorize use of focus group research. For more information call 617-946-0755.

resell the PRGGuide.com assembly of research reports through the CableTODAY.com vertical industry site. Under the terms of the agreement, CableToday.com will market and sell PRGGuide.com's research reports within its industry-specific on-line community. In partnering with PRGGuide.com, CableTODAY.com will offer its cable industry customers the ability to retrieve comprehensive research offerings.

CUNA & Affiliates (CUNA), an organization of credit unions, and PSI Global, a Tampa, Fla., research firm, have formalized an agreement for consumer and business research and analytical resources. The relationship will allow CUNA to provide credit unions with an overview of consumer attitudes, behaviors and preferences related to financial services, as well as trends on a wide range of financial services topics.

Data Use

continued from p. 16

conclusion at the required level of precision and confidence intervals? Absolutely not. If we are doing something wrong, we might as well do it in the most effective way!

Statistics, though not applied optimally, can in so many ways dramatically improve operating efficiencies, cut costs and improve estimation for a survey. We should, however, be mindful that what we calculate are: approximately unbiased sample estimates and their precision, approximately valid confidence intervals; and sample sizes that are based on quantifiable statistics rather than some arbitrary industry standard.

Close substitutes for simple random sampling

• Systematic sampling is a probability-based sample design often used when a listing is available and can be ordered. You would select every kth element in the population, after a random start somewhere within the first k elements. For example, suppose you have a list of 5,000 households in a city, and you want to sample 100 households. Your interval, k, would be 50 (=5,000/100), or every 50th household. You would then select a random number between one and 50, say 13, and survey the houses numbered 13, 63 (=13+50), 113 (=63+50), 163 (=113+50), and so forth.

Systematic sampling is used more often in practice than simple random sampling because it is much easier and cheaper to do. It has two advantages:

1) You do not jump back and forth all over the list wherever your random number leads you, and you do not have to worry about duplication of a sample.

2) You can select a sample without a complete list of all households.

One major disadvantage with systematic sampling is "periodicity," where you may encounter cyclical patterns. For example, a sample of every, say, 50th business from a list in New York City turns out to be located on or near Fifth Avenue. When this happens, you must reorder the list and redo the sampling.

• Random-digit dialing has become an important probability sampling procedure with the rising popularity of telephone interviewing. In its purest form, this procedure calls for randomizing all seven digits of a telephone number. However, this is too costly and inefficient. What is more common in practice is that numbers are selected from a telephone directory by first using a systematic sampling procedure, and then the last one or two digits of the numbers are replaced with random numbers. This procedure gives a much higher percentage of usable telephone numbers, and also has the flavor of a true probability sample.

Myth and reality about sample size

The general public seems to believe that larger samples are necessarily better than smaller ones. It simply sounds more credible to say: "Based on a study of 3,000 people" than to say: "Based on a study of 250." This is partially true: What if only 8 percent of the 3,000 people responded, resulting in only 250 completes, whereas 100 percent of the 250 responded? You may only need 250 responses to attain the precision level for your estimate at a preset level of, say, within ±1 percent of error at the 95 percent confidence level. Remember that the sample size you need for computing precision is that of the survey "completes," not the survey "mail out." Once you take non-responses into consideration, a very small, well-executed sample may yield an estimate as accurate as that from a huge, sloppy sample.

I should also point out that the statistical precision requirement is only one of many considerations a researcher must face in choosing the sample size, and there is no one correct answer. Whatever his choice may be, the researcher should fully understand the consequence of the precision gain or loss due to his choice. Practical constraints, other than the precision requirement, affecting sample size decisions are:

• Time pressure. Often research results are needed "yesterday."

• Cost constraint. A limited amount of money is available for the study.

• Study objective. What is the purpose of the study? A decision that does not need great precision can make do with a very small sample size. A company may be happy to measure interest in its new product within 15 to 20 percent of precision. A political pollster can be off by less than 1 percent and fail to predict the election result.

• Data analysis procedures. Data analysis procedures have an impact on the sample-size decision. The sample-size and precision formulae I have proposed so far are premised upon you doing a basic, one-variable analysis of frequencies. When you start doing crosstabulations examining the relationship of two variables at a time, you may run into situations where some cell sizes are so small that the precision of estimates within cells becomes suspicious. A study doing only one-variable analysis may only require 200 completed responses, whereas a similar study doing two-variable analysis may require over 1,000 responses.

Stratified random sample survey

If the population is first grouped (or stratified) according to some criterion, then a simple random sample is selected for every stratum. This type of survey design is a stratified random sample.

Quota sampling, undoubtedly the most popular form of sampling used in the research industry, closely resembles stratified random sampling, and should follow formulae developed for the stratified sample to approximate its sample size and precision. If you use the simple random sample calculations for a quota sample, you would overstate the error of your estimate and the sample-size requirement.

If intelligently used, stratification nearly always results in a smaller sampling error than is given by a comparable-size simple random sample (That's why stratified sampling is statistically "more efficient.") It is not always true though — the key is in the careful selection of the stratification criterion. In constructing strata, you must always ask yourself: "What factor contributes most meaningfully to all the outcome variables I want to measure?"

As an example, suppose that you are asked to study personal income in some target population. The most important contributing factor to the differences in income may be education. Better-educated individuals earn more than less-educated ones. If you distinguish four levels of education (eight years or less in school, 12 years, 16 years, 17 or more years), you would have four different strata. In the "17 or more years" stratum, you may find most of the high-income earners. In the "eight years or less" stratum, you may find most of the low-income persons. The within-strata variability is much smaller than that across strata. Because you only need the within-strata variability to calculate the overall sampling error for a stratified sample, the advantages of a stratified design over simple random design become clear:

• For the same level of precision, you would need a smaller sample size in total, thus a lower cost.

• For the same total sample size, you would gain a greater precision for your estimate.

Conversely, if your stratification variable was so poorly chosen that the sample measurements are all over the place within a stratum, you lose all the advantages inherent in a stratified random sample. (You might as well do a simple random sample instead.)

There are two popular ways of assigning the sample size to the different strata, once the total sample size is determined:

equal allocation — taking the same sample size from each stratum; proportional allocation — taking the sample size from each stratum in proportion to the stratum population size. Other methods exist to achieve even smaller sampling errors and reliable estimates. But they are complex and beyond the scope of this article. In general, the larger the stratum, the larger the sample size should be; the greater variability within a stratum, the larger the sample size should be.

An example

Let's suppose a business has the following employee profile:

- 62 percent are skilled or unskilled males;
- 31percent are clerical females; and
- 7 percent are supervisors.

From a total sample of 400 employees (n=400), the firm wishes to estimate the "overall" proportion of employees who use certain on-site fitness facilities. Rough guesses are that the facilities are used by 40 to 50 percent of the males, 20 to 30 percent of the females, and 5 to 10 percent of the supervisors.

A) How would you allocate the sample among the three groups?

B) If the true proportions of users are 48 percent (males), 21 percent (females), and 4 percent (supervisors), respectively, what would be the sampling error of the "overall" estimated proportion ($P_{stratum}$) with stratification?

C) What would be the sampling error from a random sample (P_{simple}) without stratification with the same sample size of 400?

A) Using the proportional allocation, we would assign the three stratum sample sizes as:

$n_{stratum\ 1}$ = 400 x 62% = 248 to the male stratum
$n_{stratum\ 2}$ = 400 x 31% = 124 to the female stratum
$n_{stratum\ 3}$ = 400 x 7% = 28 to the supervisor stratum

B) If I guess $P_{stratum\ 1}$= 45 percent, $P_{stratum\ 2}$ = 25 percent, and $P_{stratum\ 3}$= 7.5 percent, then my overall proportion estimate is:

$P_{stratum}$ = (45% x 62%) + (25% x 31%) + (7.5% x 7%) = 36.2% (which is a weighted average of the within-strata proportions)

And, my sampling error for the overall proportion estimate is calculated as:

Sampling error ($P_{stratum}$) = square root of {Σ W_i^2 [$P_{stratum\ i}$ (1- $P_{stratum\ i}$) / $n_{stratum\ i}$]}
= square root of [(0.62 x 0.62 x 0.45 x 0.55) / 248) +
(0.31 x 0.31 x 0.25 x 0.75) / 124) +
(0.07 x 0.07 x 0.075 x 0.925) / 28]
= 0.02326 = 2.33%
where W_i is the weighting factor for a stratum, i.e., the size of the population within a stratum relative to the total population.

The 95-percent confidence interval (= two standard deviations) for a total sample size of 400 is:

36.2% ± [2 x (2.33%)], or 36.2% ± 4.66%, or [31.54%, 40.86%]
Note: The true estimate is 36.6% = (48% x 62%) + (21% x 31%) + (4% x 7%)

C) With a simple random sample, my overall proportion estimate, P_{simple}, is the same as that from a stratified sample, 36.2 percent. However, the sampling error for this estimate is larger:

Sampling error (P_{simple}) = square root of { [P_{simple} (1- P_{simple})] / n }
= square root of { [(36.2% x (1-36.2%)] / 400 }
= 0.02403 = 2.4%

The 95 percent confidence interval for a total sample size of 400 is:

36.2% ± [2 x (2.4%)], or 36.2% ± 4.8%, or [31.4%, 41%]

In this example, the improvement of sampling error from a simple random sample to a stratified random sample may not seem dramatic, from ±4.8 percent to ±4.66 percent. However, this difference amounts to a reduction of 25 interviews. (To achieve the same level of precision with a simple random sample, we would need 425 samples, an increase of 6.25 percent!)

n_{simple} = square of {square root of [P_{simple} (1- P_{simple})] / (E / Std. deviations) }
= square of {square root of [36.2% x (1-36.2%)] / (4.66% / 2) } = 425
where E = my desired level of precision, Std. deviation = expression equivalent to 95% confidence level

Finally, for a fixed total sample size, the gain in precision from stratified random over simple random sampling is the largest if the stratum proportion estimates vary greatly from stratum to stratum (i.e., great across-strata variability). I conclude with a table comparing the relative precision of stratified and simple random sampling for the above employee survey example with three strata and 400 samples, at various combinations of stratum proportion estimates:

Relative Precision of Stratified and Simple Random Sampling

Population Stratum Weight (1)	Stratum Proportion Estimate (2)	Overall Proportion Estimate (3)	Relative Precison of Overall Proportion Estimate for 400 Samples		
			Simple (4)	Stratified (5)	Relative Precision (%) = (4)/(5)
62%, 31%, 7%	40%, 50%, 60%	44.5%	2.48%	2.47%	100
62%, 31%, 7%	30%, 50%, 70%	39.0%	2.44%	2.36%	103
62%, 31%, 7%	20%, 50%, 80%	33.5%	2.36%	2.17%	109
62%, 31%, 7%	10%, 50%, 90%	28.0%	2.24%	1.87%	120

Four cases are presented in the table, the first having $P_{stratum\ 1}$ = 40 percent, $P_{stratum\ 2}$= 50 percent, and $P_{stratum\ 3}$= 60 percent, and the last having $P_{stratum\ 1}$= 10 percent, $P_{stratum\ 2}$= 50 percent, and $P_{stratum\ 3}$= 90 percent. Columns 4 and 5 give the standard errors of the overall estimated proportion. The last column gives the relative precision of stratified to simple random sampling. The gain in precision is large only in the last two cases.

If you are interested in obtaining a spreadsheet for stratified sampling error calculation and for contrasts with simple random sampling, please contact me at ss@clearviewdata.com or at 607-256-3297.

Indonesia

continued from p. 19

people can and will provide the information you need. Unfortunately, as noted earlier, they usually can't and often they just won't.

By the time we reach adulthood, we have spent most of our lives developing and exercising verbal defenses, enabling us to withhold information with a high degree of skill. Sure, we can sound forthcoming, but the bottom line is that revealing personal information is giving power to others. If this is a problem in cultures that value individualism and forthrightness (and it is), think of how it plays in a culture which values and demands consensus and social discretion (like that of Indonesian Muslims).

Finally, words are consciously-used symbols that flow from conscious thoughts. They are a poor tool to reflect our emotional reasoning and our unconscious needs and desires that impact much of our behavior — including our purchase behavior. Emotional reasoning is at its strongest when the topic is the most personal. If this creates problems in researching cultures that value introspection (like the U.S.), imagine how it affects research in cultures that de-emphasize public displays of emotion and recognition of personal identity (like Indonesian Muslims).

Thankfully, words are not the only symbols available to the researcher. Images are powerful symbols that overcome many of the weaknesses of words and effectively complement the information verbally obtainable. Further, literacy issues limit data collection among some groups, but visual literacy is nearly universal. Image-based research has even been used successfully within primitive tribal groups with less than 500-word vocabularies and no written language.

In verbal research there are usually at least 10,000 words that need to be understood and managed to achieve cultural knowledge, but a culture's visual language contains only about 200 active symbols on any particular topic. The visual language of a target culture on a given topic can easily be learned during the time frame of a normal project, unlike the spoken language.

Visual language is also a powerful collection tool. People rarely express themselves visually. This means their visual defenses are much less practiced than their verbal defenses. Therefore, people tend to be much more transparent when selecting images instead of words.

Also, because a single picture can contain dozens of visual symbols, people provide more information when selecting images. Therefore, patterns emerge with greater clarity (and with smaller samples!).

Moreover, because most visual images carry many symbols, they capture unconscious information in addition to conscious information. This allows access to needs and motives that are unavailable through words.

All these characteristics were both necessary and useful in efforts to do research to determine how to sell cosmetics (which tend to be associated with vanity and Western culture) to Indonesian Muslim women.

Because of the depth of information available through images, the Indonesian study, which was nationwide in scope, required only 150 respondents participating in 12 group interviews. Recruiting and moderating were done by native Indonesians (in the Bahasan language) who had completed a two-day training session in our company's visual research protocol.

Another advantage of visual research over verbal research is that it is far less demanding upon group moderators. For example, local school teachers are often recruited to facilitate when professionals are unavailable.

Each interview group completed 10 picture-sort tasks on average, answering questions by selecting pictures from a set of more than 10,000 magazine images collected from around the world. The tasks were crafted to elicit perceptions, values and motivations regarding skin care products. The resulting hybrid (verbal and visual) data set included more than 3,000 images (with many times more symbols) and a written description of each that form the data points used in analysis.

The value of not knowing the culture

In verbal research, cultural expertise is often used to bridge the gap between a statement and its underlying meaning or motivation. In visual research, the process is reversed. Visual research analysis begins by identifying consumers' values, motivations and needs. Then it works backward to better understand and/or contradict respondents' stated explanations. With the process flowing in reverse, the filter of cultural familiarity simply gets in the way, obscuring the identification of visual patterns and biasing their identification. The visual data analyst can best accomplish his or her task with a blank slate of absolute cultural ignorance!

Without cultural predisposition, the analyst is better able to see symbolic patterns emerging from the data. As shown in Chart 1, patterns can be classified into six categories: color, shape, function, relationship, context and the degree to which the symbol is animate. These symbols comprise the shared visual language of a culture or ethnic group. The analyst first applies known rules of symbolic communication and then searches for unique cultural expression of functional, relational and context associations in the group's visual dialect. Specifically, the analyst examines how respondents used that language to describe themselves and their relationships with products and services, and their preferences. This enables understanding of deep-seated values, motivations and needs — all without benefit of prior cultural

Chart One

Classes of Visual Data	Classes of Culturally-Specific/Sensitve Data
1) Color	NB: Shades, not primary colors, contain cultural bias
2) Shape	NB: Placement and movement of "shape" have cultural bias, not basic shapes
3) Function	1) Function
4) Relationship	2) Relationship
5) Context	3) Context
6) Animacy	NB: What is animated, but not the fact of "Animacy," contains cultural bias

Fig. 1: In the research, youthful health was associated with a strong human "fragrance" related to odor but totally consistent with a habit of smelling a child's head as a gesture of affection.

knowledge.

Having identified these base patterns, the analyst can now benefit from an informed local marketing and cultural perspective. Invariably, the cultural expert will confirm the findings as consistent with their knowledge about the culture. In addition, the research results frequently enable the cultural expert to make new connections and see previously hidden dimensions of culture — with important implications for marketing.

For example, in the Indonesian cosmetics study, nearly 80 percent of the images selected in answer to the

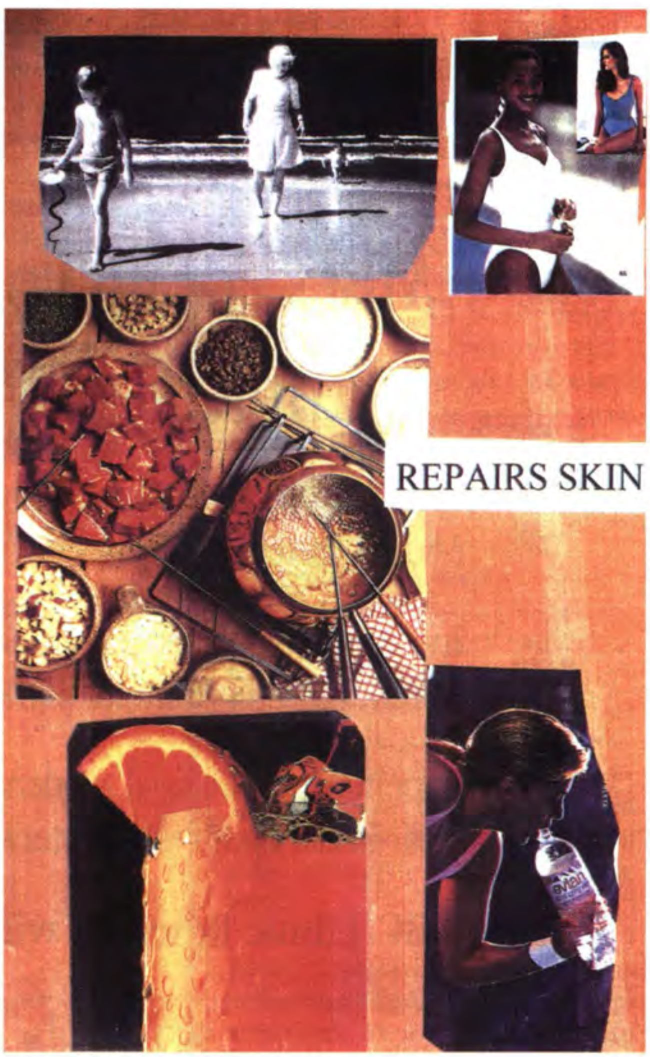


Fig. 2: Images selected to represent the concept of "repairs skin" were strongly associated with eating and drinking.

question "How would you most like to smell?" featured people, usually children. (By contrast, in the West, the most frequent image response would be flowers.) The interpretation was that the people being studied are comfortable with natural human odor as well as their general appearance. Further, it was seen that youthful health was associated with a strong human "fragrance" related to odor but totally consistent with a habit of smelling a child's head as a gesture of affection (Fig. 1).

Additional images selected to represent the concepts of "enhancing beauty" and "repairs skin" were strongly associated with healthy eating and drinking (Fig. 2). This result, and other responses, demonstrated that Indonesian women view beauty as primarily internal and spiritual. In addition, in its most positive light, external beauty is seen as a reflection of good internal, spiritual health and nurturing — that is, blessing. (By the way, in keeping with the spirit of the process, those of you familiar with Indonesian culture are welcome to write to me to confirm, clarify or expand on this description.)

Chart Two

Steps To Apply Visual Data

1) Define Product Use Relationships
- Consumer - Product
- Product - Service
- Brand - Competitive Set
- Consumer - Brand

2) Define Set of Consumer Needs
- Functions
- Services
- Relationships

3) Determine Product/Brand/Category Failures
- Functions
- Services
- Relationships

4) Identify What is Missing & Add New Value(s)

Add missing values consistent with brand values:
- Functions
- Services
- Relationships

Applying visual research: leaving ignorance behind

Once visual data patterns have been correctly gathered and interpreted, it is time to leave ignorance behind. Developing culturally appropriate marketing initiatives requires a thorough understanding of appropriate cultural values, messages and communication channels. When this knowledge is combined with the insight provided through visual research, marketing applications become fresh, engaging and effective. Without the perspective of visual research, targeted marketing applications are much more likely to settle for being safe and appropriate, and based on "traditional wisdom."

Applying this new form of data involves four familiar steps (see Chart 2). First, use research to describe key consumer relationships, including consumers' relationships with product/service benefits, with the product/service category, and with individual brands. Second, identify the most important relevant consumer need that relates to the category. Third, determine why existing consumer/product relationships have been insufficient to meet this need, i.e., define the obstacles to success and the reason for failure to dominate a market. Finally, identify the positive associations that can help convert negative or incomplete consumer relationships into positive, complete relationships, define "success" in terms of desired function, relationship and value. When this process is complete, the targeted associations should direct all aspects of the marketing mix.

Difficult sell

In Indonesia, the key relationships identified underscored why cosmetics were a difficult sell. Consumers set aside personal preferences in order to avoid the penalties associated with offending the public morality. Functionally, their issues and needs did not focus upon appearance and hygiene, and they placed great value on the traditional and the natural.

In terms of the most important relevant need, Indonesian women desired not to be seen as outwardly attractive but to be seen by others as inwardly beautiful, natural and spiritual. They also desired to see themselves in this same light. Meanwhile, they viewed cosmetics as immoral, unnatural and artificial. Cosmetics by nature emphasized the external over the internal and spiritual.

The brand commissioning the study was the category founder in Indonesia and had previously sustained a 75+ percent market share for many years. The company might have been tempted to view itself as an expert on Indonesia, except for the fact that the brand's share had recently and rapidly eroded to less than 50 percent.

In response to the image-based research, skin care offerings began to be promoted for their ability to build strength and protect health in consistency with religion and tradition. The message created permission for Indonesian women to enjoy external beauty as a secondary reflection of their inner wellness.

To add substance to this message, the company created added ingredients to existing products as well as a new product offering — a natural drink product designed to nourish and protect the skin. This "skin care to drink" reinforced the brand's primary goal of promoting internal health and beauty. As a result, the brand regained a 70 share. This success, which occurred in 1994, influenced a trend in "healthy cosmetics" that extended across dozens of countries and multiple continents.

The final word...er...picture

Many "experts" say that cultural research and understanding directly depend upon an insider's view. My experience suggests, however, that starting with a clean canvas (in combination with local input) can often yield a fresher, clearer portrait of your target audience. So don't be afraid to plead ignorance — and be willing to practice it.

Cartoon

continued from p. 21

about cross-cultural and cross-national research. One of the main issues to decide is how the global research effort is organized. Do you centralize it, and have all decisions emanate from one office? Or do you regionalize it, and let individual areas decide what to research themselves? "With a regionally driven approach, you miss standardizations, so comparison of results becomes very hard. There is less chance for economies of scale and the chance for comparing and enhancing ideas by sharing between regions becomes very limited and very different," Kudon says.

"On the other hand, if you have research aimed at the global market and controlled from central headquarters, that's great for the main office but it can hurt the local initiative because you have the tendency to become too centralized and miss the trees for the forest.

"The optimum, of course, is having the correct blend of both, the balance that is difficult to describe and achieve. Because when you coordinate overall research plans from a central location and have direct and immediate input from local entities, that's the best of both worlds. But it's a lot of work. You have to work as a team and as partners not only with the local entity but with the research firm and with management. When we do research, we involve the local people both on the research provider end and Cartoon Network's end to help design it. Central coordination is the 'think globally' part, while direct and immediate input from the local entities in a teamwork-partner fashion is the 'act locally' part."

Mix of concerns

With such a large organization and so many information needs, how do you determine who gets priority? That depends. "It's a mix of network concerns, merchandising concerns, and of our wish to be kids experts," Kudon says. "Which part gets priority depends on what is the item du jour. Sometimes we need some material for public relations, other times we need to solve network programming issues, and of course we want to examine potentials for branded product; so when we design the research we try to get a mix that will provide data for everyone."

The other vitally important question is how can you apply results from different countries and cultures across different markets? "The research can be used to confirm certain assumptions and refute others," says Everett Hernandez, senior vice president, director of corporate development, TNS Market Development. "It gives the marketer real knowledge of things that are similar across markets and those that are not. And it gives them information about new opportunities, things that may work only in one area or things that are omni-modal that work everywhere. For example, car owners may be car owners, no matter where you go. But they also may not be. This kind of research gives them insight into product development and

it makes them look at the world in terms of attitudes and attributes," Hernandez says.

"For example, in COMPASS, our firm's study of Latin America, we looked at the things respondents in the various countries have in common. There are things that cut across all the lines and I think that's how marketers are trying to approach things now. You start talking about global research or regional research and you really can't pick apart all the differences. Instead you need to look at what things they all have in common and that is where you start."

For many large companies or brands, the Cartoon Network's "think global, act local" approach is the way to go, Hernandez says. "With technology changing and increasing the pace of work and communication, companies will be forced to compete on a global scale. If they don't, they run the risk of being left behind by competitors."

Host of variables

Conducting research on such a global scale brings with it a host of variables: from mail systems which can hold up delivery of survey materials, to the variances of facilities (Kudon tells of conducing focus groups in India in which the interviews were conducted in respondents' living rooms as a video camera beamed the action back to those watching a monitor in the bedroom) and cost factors.

"In Latin America we did door-to-door research using a random sample and it was very cost effective. In the U.S., we'd spend much more money doing door-to-door," Kudon says.

Then there are the individual cultures and ethnicities themselves. "We learned very well that although we perceive that Mexico, Argentina and Chile *speak* the same language, when translating we find out that they don't all speak the same language," Kudon says. For example, "being an individual" means different things. To some it's "doing your own thing," to other nations it's "being independent" or "being your own person."

Though logistics may add an element of complexity to the research effort, in many cultures, consumers are open to the research process. As their markets open up and product selections expand, consumers in these countries are given more choices, and they are interested in having a role in expanding those choices, Hernandez says.

Active involvement

Kudon's start-to-finish involvement in the research process means a lot of phone calls at odd hours due to time-zone juggling and differing work schedules, but the end result is worth it. "It's a lot of work bringing these people together but when you are done, the research is a finer product and more salable within your company community," Kudon says.

"Our goal is to turn every research finding into an action item. Every finding that has any merit has an action item associated with it: 'Here's the finding, here's what you can do with it.' We also add in a market research point of view, because market research often thinks of itself as just handing off tabs and a long report. But we go beyond the findings. Because we sit through all those focus groups, we talk to the management, the country locals, and so we feel qualified to put in our point of view and we encourage our suppliers to do so as well."

This process is helped by the initial planning and brainstorming, which encourages buy-in from internal clients when the results are distributed. "For one project, before the research even started, we prepared a dummy presentation of exactly what they could expect. They knew the risks and the rewards. We showed them what the data could look like and what we expected to learn and so we had buy-in. There was lot of positive news from the research and in areas where there wasn't, we had buy-in because of the team approach," Kudon says.

Moderator MarketPlace™

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

ActiveFocus
P.O. Box 10274
Pittsburgh, PA 10274
Ph. 412-683-5975
Fax 412-681-7975
E-mail: cjrobbins@activefocus.com
www.activefocus.com
Contact: Carole J. Robbins
Meeting Your Business Goals With Focused Yet Flexible Designs, Insightful Probing & Concise Reports.

Alexander + Parker
30 Almaden Ct.
San Francisco, CA 94118
Ph. 415-751-0613
Fax 415-751-3620
E-mail: alexpark@compuserve.com
www.alexpark.com
Contact: Sherry Parker
Full-Service Qualitative. Most Industries.

Jeff Anderson Consulting

Jeff Anderson Consulting, Inc.
1545 Hotel Circle S., Ste. 275
San Diego, CA 92108
Ph. 619-682-7272
Fax 619-682-7277
E-mail: JAMRC@aol.com
Contact: Jeff Anderson, CPCM, MBA
"Blending Art With Science." Member QRCA/AMA.

AnswerSearch, Inc.
8745 Belter Dr.
Orlando, FL 32817
Ph. 407-677-5939
Fax 407-677-4991
E-mail: answrsrch@aol.com
Contact: Catherine Giordano
Full-Service Qual. & Quant. Consumer/Business-to-Business.

Cheskin Research

Asian Marketing Communication Research
See Cheskin Research

AutoPacific, Inc.
2991 Dow Ave.
Tustin, CA 92780
Ph. 714-838-4234
Fax 714-838-4260
E-mail: gpeterson@autopacific.com
www.autopacific.com
Contact: George Peterson
Auto Marketing & Product Experts. 1,300 Groups Moderate & Recruit.

BAIGLOBAL

BAIGlobal Inc.
580 White Plains Rd.
Tarrytown, NY 10591
Ph. 914-332-5300
Fax 914-631-8300
E-mail: kpermut@baiglobal.com
Contact: Kate Permut
Maximize The Power Of Your Qualitative And Get The Clear, Concise Results You Need For Real Business Decision-Making.

B•M•R•C

Balaban Market Research Consulting
3133 E. Calaveros Dr.
Phoenix, AZ 85028
Ph. 602-765-2172
Fax 602-765-1873
E-mail: ReprtWrite@aol.com
Contact: Caryn Balaban, M.P.H.
Health, Medical & Pharmaceutical. Products. Services. Positioning. Advtg. Superb Moderating. Exc. Reporting.

Behavior Research Center, Inc.
1101 N. First St.
P.O. Box 13178
Phoenix, AZ 85002-3178
Ph. 602-258-4554
Fax 602-252-2729
E-mail: info@brc-field.com
www.brc-field.com
Contact: Earl de Berge
Contact: Luis N. Ortiz
Bilingual; U.S./Latin Amer.; 35+ Yrs. Exp.; All Subjects.

BG
The Blackstone Group

The Blackstone Group
360 N. Michigan Ave.
Chicago, IL 60601
Ph. 312-419-0400
Fax 312-419-8419
E-mail: vmadden@bgchicago.com
Contact: Vecia Madden
Contact: Kathi Rose
Creative Methods For Fast Food, POP, Kids, Health, Transportation, Utility, Branding, Positioning, Ethnic, Int'l. Research. Dual Language Facility.

Burr Research/Reinvention Prevention
4760 Fremont Ave.
Bellingham, WA 98226
Ph. 360-671-7813
Fax 360-671-7813
E-mail: BURRRESEAR@aol.com
Contact: Robert L. Burr, FLMI, CLU
Providing Answers Via Actionable Survey, Focus Group, And 1-on-1 Research. Financial Services Specialty. 30+ Yrs. Experience.

C&R RESEARCH

C&R 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
Contact: Megan Burdick
Leading Supplier Of Qual. Rsch. In The U.S. With Over 30 Yrs. of Experience.

Cambridge Associates, Ltd.
2315 Fairway Ln.
Greeley, CO 80634
Ph. 800-934-8125
Fax 970-339-8313
E-mail: waltkendall@home.com
www.focusgroupguru.com
Contact: Walt Kendall
Finest In Focus Grp. Prep., Mod. & Analysis. Call To Discover The Difference.

Cambridge Research, Inc.
3521 W. 24th St.
Minneapolis, MN 55416
Ph. 612-525-2011
E-mail: CamResInc@aol.com
Contact: Dale Longfellow
High Tech, Executives, Bus.-To-Bus., Ag., Specifying Engineers.

CAMPOS
MARKET RESEARCH, INC.

Campos Market Research, Inc.
216 Blvd. of the Allies
Pittsburgh, PA 15222
Ph. 412-471-8484
Fax 412-471-8497
E-mail: campos@campos.com
Contact: R. Yvonne Campos
Full-Service Market Research Firm Offering Proven Expertise In Customized Qualitative and Quantitative Research Design and Analysis.

Catalyst Research Network
P.O. Box 19599
Seattle, WA 98109
Ph. 800-918-9301
Fax 206-281-8297
E-mail: info@crni.com
www.crni.com
Contact: Evan Riley
Internet Survey & Interactive Voice Response/IVR Systems.

Chalfont Healthcare Research, Inc.
4275 County Line Rd., #112
Chalfont, PA 18914-2212
Ph. 215-412-2388
Fax 215-855-9993
E-mail: laura@chalfonthealth.com
www.chalfonthealth.com
Contact: Laura Swart
Full Service, Healthcare Specialization, Experience, References. Details at www.chalfonthealth.com.

Chamberlain Research Consultants, Inc.
710 John Nolen Dr.
Madison, WI 53713
Ph. 608-246-3010
Fax 608-246-3019
E-mail: crc@crcwis.com
www.crcwis.com
Contact: Sharon R. Chamberlain
Full-Service. Have Moderated Thousands of Groups. On-Line Exp.

Cheskin Research

Cheskin Research
255 Shoreline Dr., Ste. 100
Redwood Shores, CA 94065
Ph. 650-802-2100
Fax 650-593-1125
E-mail: info@cheskin.com
www.cheskin.com
Contact: Nancy Shimamoto
Leading Intercultural Mkt. Rsch. & Cnsltg. Firm. We Help Firms Compete In The New Global Internet Economy. Multilingual Staff/ Represent 20+ Cultures.

COMMON KNOWLEDGE
MARKETING INFORMATION FOR THE 21ST CENTURY BUSINESS

Common Knowledge Research Svcs.
16200 Dallas Pkwy., Ste. 140
Dallas, TX 75248
Ph. 800-710-9147 ext. 102
Fax 972-732-1447
E-mail: SRLavine@sprintmail.com
www.commonknowledge.com
Contact: Steven R. Lavine, President
Affordable, Flexible & Fast! 20 Yrs. Experience. Groups, Depth, Virtual-Online. Nationwide. References.

Cornerstone Research & Marketing, Inc.
1965 Sheridan Dr., Ste. 8A
Buffalo, NY 14223
Ph. 716-871-9123
Fax 716-447-1006
E-mail: GJR@pce.net
Contact: Rhonda Ried
Finest Conversation Skills - Unrivaled Group Control.

Moderator MarketPlace™

Creative Focus, Inc.
209 The South Chace
Atlanta, GA 30328
Ph. 404-256-7000
Fax 404-231-9989
E-mail: vardis@mindspring.com
www.creativefocus.net
Contact: Harry Vardis
Consumer Products, Bus.-to-Bus., Technology, Seniors, Brand Differentiation Sessions, Name Development.

Cunningham Research Associates
500 Ashwood Lane
Fairview, TX 75069
Ph. 972-529-4965
Fax 972-529-1285
E-mail: markc@craresearch.com
www.craresearch.com
Contact: Mark W. Cunningham
Qual. & Quant. Rsch., Consumer, Advg., Bus./Bus., Hi-Tech.

Daniel Associates
49 Hill Rd., Ste. 4
Belmont, MA 02478
Ph. 617-484-6225
Fax 800-243-3493
E-mail: sdaniel@earthlink.net
http://home.earthlink.net/~sdaniel/
Contact: Stephen Daniel
FOCUS/IT Understanding Technology Buying Processes.

Data & Management Counsel, Inc.
P.O. Box 1609 / 135 Commons Ct.
Chadds Ford, PA 19317
Ph. 610-459-4700
Fax 610-459-4825
E-mail: info@DMChome.com
www.DMChome.com
Contact: Bill Ziff-Levine
Extensive Experience In Domestic & International Qualitative Research.

Decision Drivers
197 Macy Rd.
Briarcliff, NY 10510-1017
Ph. 914-923-0266
Fax 914-923-3699
Contact: Sharon Driver
Actionable Results To Drive Your Market Decisions.

Directions Data Research
1111 Northshore Dr., Ste. 410N
Knoxville, TN 37919-4046
Ph. 423-588-9280
Fax 423-584-5960
E-mail: rbryant@directionsdata.com
Contact: Rebecca Bryant
Advanced RIVA-Trained Moderator/Focus Facility/Phonebank.

Dolobowsky Qualitative Services, Inc.
94 Lincoln St.
Waltham, MA 02451
Ph. 781-647-0872
Fax 781-647-0264
E-mail: reva@doloqual.com
www.doloqual.com
Contact: Reva Dolobowsky
Experts In Ideation & Focus Groups. For 20+ Years.

Elrick & Lavidge
1990 Lakeside Parkway
Tucker, GA 30084
Ph. 770-621-7600
Fax 770-621-7666
E-mail: skimbro@elavidge.com
www.elavidge.com
Contact: Susan Kimbro
Full-Service Qualitative. Four Full-Time Moderators.

Ergo Research Group, Inc.
83 East Ave., Ste. 208
Norwalk, CT 06851
Ph. 203-838-0500
Fax 203-853-0369
E-mail: peter@ergoresearchgroup.net
www.ergoresearchgroup.net
Contact: Peter Mitchell
Years of Experience; Quick Response & Turnaround.

Erlich Transcultural Consultants
21241 Ventura Blvd., Ste. 193
Woodland Hills, CA 91364
Ph. 818-226-1333
Fax 818-226-1338
E-mail: info@etcethnic.com
www.etcethnic.com
Contact: Andrew Erlich, Ph.D.
Full Svc. Latino, Asian, African-Amer., Amer. Indian Mktg. Rsch.

Essman/Research
100 E. Grand, Ste. 340
Des Moines, IA 50309-1800
Ph. 515-282-7145
Fax 515-282-4535
E-mail: mail@eassoc.com
www.eassoc.com
Contact: Deborah Stearns, Rsch. Dir.
Full-Svc. Qual. & Quant. Rsch./New Facilities/Moderators

Fader & Associates
372 Central Park W., Ste. 7N
New York, NY 10025
Ph. 212-749-3986
Fax 212-749-4087
Contact: Linda Hu
Exp. In Broad Range of Categories, New Products, Repositioning, Concept Dev., Creative Diag.

Findings International Corporation
9100 Coral Way, Ste. 6
Miami, FL 33165
Ph. 305-225-6517
Fax 305-225-6522
E-mail: findings@interfindings.com
Contact: Marta Bethart
Contact: Felisa Esquivel
Hispanic Specialists, Focus Groups, One-on-Ones.

First Market Research Corp.
656 Beacon St., 6th floor
Boston, MA 02215
Ph. 800-FIRST-11 (347-7811)
Fax 617-267-9080
E-mail: jmr10@ziplink.net
www.firstmarket.com
Contact: Jack M. Reynolds
Hospitals, Physicians, Bio-Tech, Advertising, Retail Chains.

First Market Research Corp.
2301 Hancock Drive
Austin, TX 78756
Ph. 800-FIRST-TX (347-7889)
Fax 512-451-5700
E-mail: jheiman@firstmarket.com
www.firstmarket.com
Contact: James R. Heiman
High Tech, Publishing, Bus.-To-Bus., Telecommunications.

Focus Plus, Inc.
79 5th Avenue
New York, NY 10003
Ph. 212-675-0142
Fax 212-645-3171
E-mail: focusplus@msn.com
Contact: John Markham
Innovative, Reliable Full-Service Qual. Research. On-line Access & Videoconferencing. Spacious Facility - 3 Suites. Impeccable Recruiting.

FOCUSED Marketing Research, Inc.
P.O. Box 290
Bedminster, PA 18910-0290
Ph. 215-795-9993
Fax 215-795-9992
E-mail: quirks@focused1.com
www.focused1.com
Contact: Vern Dougherty
Insightful Analysis & Actionable Reports. Consumer, B-to-B, Internet, Rx & Pets Products. Call Us Today!

GraffWorks Marketing Research
10178 Phaeton Dr.
Eden Prairie, MN 55347
Ph. 612-829-4640
Fax 612-829-4645
E-mail: cgraff@graffworks.com
www.graffworks.com
Contact: Carol Graff
"Carol Is Able To Get The Toughest Focus Group Participants To Share Their Thoughts... An Extraordinary Facilitator!"

The Pat Henry Group
Tower City Center
230 Huron Rd. N.W., Ste. 100.43
Cleveland, OH 44113
Ph. 800-229-5260
Fax 216-621-8455
E-mail: sstone@pathenry.com
www.thepathenrygroup.com
Contact: Susan Stone
Luxurious Facility. Expert Recruiting. Central Location.

Hispanic Marketing Communications Research
See Cheskin Research

Hispanic Research Inc.
45 Ireland Ave.
Edison, NJ 08837
Ph. 732-661-9298
Fax 732-661-1699
E-mail: info@hispanic-research.com
www.hispanic-research.com
Contact: Ricardo A. Lopez
Consulting Firm That Specializes In The U.S. Hispanic Market.

Horowitz Associates, Inc.
1971 Palmer Avenue
Larchmont, NY 10538
Ph. 914-834-5999
Fax 914-834-5998
E-mail: horoassoc@aol.com
www.horowitzassociates.com
Contact: Howard Horowitz
Cable/Video Marketing-Programming-Telecommunications-Internet.

Hypnosis Insights
555 University Ave., Ste. 275
Sacramento, CA 95825
Ph. 888-488-5008
Fax 888-453-1772
E-mail: info@hypnosisinsights.com
www.hypnosisinsights.com
Contact: William McDonald, Ph.D.
Hypnosis Focus Groups and Personal Interviews. Uncover Real Target Customer Motives and Emotions.

I+G Medical Research International
33 College Hill Rd., Bldg. 10C
Warwick, RI 02886
Ph. 401-823-4900
Fax 401-823-4903
E-mail: info@igmedresearch.com
www.igmedresearch.com
Contact: Monique Rinner
New Product Development, Health Care, QRCA Member.

insight europe gmbh
Turmstr. 5
60385 Frankfurt
Germany
Ph. +49-69-956366-0
Fax +49-69-956366-11
E-mail: eva@insighteurope.de
www.insighteurope.de
Contact: Eva Caspary
International Full-Service Institute, European Coordination, In-House German and French Moderators.

Irvine Consulting, Inc.
2207 Lakeside Drive
Bannockburn, IL 60015
Ph. 847-615-0040
Fax 847-615-0192
E-mail: IRVES224@msn.com
www.irvineconsulting.2e.com
Contact: Ronald J. Irvine
Pharm/Med: Custom Global Quan./Qual. Res. & Facility.

JRH Marketing Services, Inc.
29-27 41st Ave. (Penthouse)
New York, NY 11101
Ph. 718-786-9640
Fax 718-786-9642
E-mail: 72114.1500@compuserve.com
Contact: J. Robert Harris II
Founded 1975. Check Out The Rest But Use The Best!

JUST THE FACTS
YOUR INFORMATION SOURCE

Just The Facts, Inc.
P.O. Box 365
Mt. Prospect, IL 60056
Ph. 847-506-0033
Fax 847-506-0018
E-mail: facts2@interaccess.com
www.just-the-facts.com
Contact: Bruce Tincknell
Highly Skilled; Well Organized; Maintains Control, While Enabling Creative Flow; Strategic Moderating; Actionable Results; 25 Yrs. Experience.

Knowledge Systems & Research, Inc.
500 South Salina St., Ste. 900
Syracuse, NY 13202
Ph. 315-470-1350
Fax 315-471-0115
E-mail: HQ@krsinc.com
www.krsinc.com
Contact: Lynne Van Dyke
Full-Svce. All Expertise In-House. Strategic Foc. Bus. to Bus. All Inds.

Leflein Associates, Inc.
One Bridge Plaza
Ft. Lee, NJ 07024
Ph. 201-363-1661
Fax 201-363-1663
E-mail: bleflein@leflein.com
www.leflein.com
Contact: Barbara Leflein
Latest Techniques. Consumers, Business-to-Business, Doctors.

Lewis Consulting Inc.
2016 Cameron St.
Raleigh, NC 27605
Ph. 919-835-2044
Fax 919-835-2257
E-mail: jamesdlewis@mindspring.com
Contact: Jim Lewis
20+ Years Experience Across Many Markets.

Low + Associates, Inc.
5454 Wisconsin Ave., Ste. 1400
Chevy Chase, MD 20815
Ph. 301-951-9200
Fax 301-986-1641
E-mail: research@lowassociates.com
www.lowassociates.com
Contact: Nan Russell
Health/Fin./Cust. Sat. Upscale FG Facility. Recruit from MD, DC, N. VA.

Market Access Partners
25107 Genesee Trail Rd., Ste. 300
Golden, CO 80401
Ph. 303-526-1900
Fax 303-526-7920
E-mail: marygpatton@juno.com
Contact: Mary G. Patton
Research For Medical/Surgical and Pharmaceutical Products.

Market Navigation, Inc.
Teleconference Network Div.
2 Prel Plaza
Orangeburg, NY 10962
Ph. 914-365-0123
Fax 914-365-0122
E-mail: eve@mnav.com
E-mail: GRS@mnav.com
www.mnav.com
Contact: Eve Zukergood
Contact: George Silverman
Med., Bus.-to-Bus., Hi-Tech, Indust., Ideation, New Prod., Tel. Groups.

Marketing Advantage Rsch. Cnslts., Inc.
2349 N. Lafayette St.
Arlington Heights, IL 60004
Ph. 847-670-9602 or 800-935-4220
Fax 847-670-9629
E-mail: mjrichards@aol.com
Contact: Marilyn Richards
New Product Development/Hi-Tech/Multimedia/Telecomm.

Marketing Matrix, Inc.
2566 Overland Ave., Ste. 716
Los Angeles, CA 90064
Ph. 310-842-8310
Fax 310-842-7212
E-mail: mmatrix@primenet.com
Contact: Marcia Selz
Foc. Grps., In-Depth Intvs. & Surveys For Financial Svce. Companies.

MarketResponse International

MarketResponse International
6442 City West Pkwy., #305
Minneapolis, MN 55344
Ph. 612-943-2230
Fax 612-943-2320
E-mail: decide@marketresponse.com
www.marketresponse.com
Contact: Tom Pearson
Dynamic Groups & Powerful Reports That Clients Love! QRCA Member.

Mature
Marketing & Research

Mature Marketing and Research
85 E. India Row, Ste. 30A
Boston, MA 02110
Ph. 617-720-4158
Fax 617-723-1254
E-mail: MMRHarris@aol.com
www.maturemarketing.com
Contact: Howard Willens
Providing Insightful Information on the Attitudes & Motivations of Today's Mature Market. See Web Site.

MCC Qualitative Consulting
100 Plaza Dr.
Secaucus, NJ 07094
Ph. 201-865-4900 or 800-998-4777
Fax 201-865-0408
E-mail: meadowcc@aol.com
Contact: Andrea Schrager
Insightful, Innovative, Impactful, Action-Oriented Team Approach.

Meczka Marketing/Research/Cnsltg., Inc.
5757 W. Century Blvd., Lobby Level
Los Angeles, CA 90045
Ph. 310-670-4824
Fax 310-410-0780
E-mail: adiaz@mmrcinc.com
Contact: Anthony Diaz
Contact: Michael Meczka
Qual./Quant. Rsch. 25 Yrs. Exp. Recruit & Facility.

Medical Moderators, Inc.
1201 Melton Court
Raleigh, NC 27615
Ph. 919-848-3807
Fax 919-848-2465
E-mail: george@mmrx.com
www.medicalmoderators.com
Contact: George Matijow
Contact: Carol Welch
Contact: Kathleen Starr, Ph.D.
Moderate for Pharm., Med. Equip., Med. Device & Tech. Highly Experienced,. U.S./Int'l. Cost Competitive.

MedProbe™ Inc.
600 S. Hwy. 169, Ste. 1410
Minneapolis, MN 55426-1218
Ph. 612-540-0718
Fax 612-540-0721
E-mail: MedPr@aol.com
Contact: Asta Gersovitz, Pharm.D.
MedProbe™ Provides Full Qualitative & Advanced Quantitative Market Research Including SHARECAST℠ & SHAREMAP℠.

Michelson Associates, Inc.
Strategic Marketing Research

Michelson & Associates, Inc.
1900 The Exchange, Ste. 360
Atlanta, GA 30339
Ph. 770-955-5400
Fax 770-955-5040
E-mail: mark@michelson.com
www.michelson.com/research
Contact: Mark L. Michelson
Much More Than Moderation Nat'l. Full-Svc. Qual./Quant.

Francesca Moscatelli
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
Contact: Francesca Moscatelli
Latino Bi-Lingual/Bi-Cultural Groups; QRCA Member.

Cheskin Research

Multicultural Research Center℠
A Division of Cheskin Research
1540 E. First St., Ste. 200
Santa Ana, CA 92701
Ph. 714-560-1120
Fax 714-560-1121
E-mail: ResearchCenter@hamcr.com
www.hamcr.com
Contact: Ricardo Flores
Qual./Quant. Rsch. in Spanish, Portuguese, Asian Languages; Field Rsch. and Data Collection Svcs.: Focus Groups, CATI.

Opinions Unlimited, Inc.
Three Riverway, Ste. 250
Houston, TX 77056
Ph. 713-888-0202
Fax 713-960-1160
E-mail: amartin@opinionsunlimited.com
www.opinionsunlimited.com
Contact: Anndel Martin
Contact: Richard Fazio
Contact: Karin Plate
Qual. & Quant. Strategic Thinkers: Bus., Hi-Tech, Med., Cons.

Outsmart Marketing
2840 Xenwood Ave.
Minneapolis, MN 55416
Ph. 612-924-0053
Contact: Paul Tuchman
Ten Years of Full-Service Nationwide Research.

Perception Research Services, Inc.
One Executive Dr.
Ft. Lee, NJ 07024
Ph. 201-346-1600
Fax 201-346-1616
E-mail: jschurtz@prsresearch.com
www.prsresearch.com
Contact: Joe Schurtz
Expertise In Packaging, Merchandising, Advertising, Corporate Identity, Direct Marketing And Internet Marketing.

Performance Research
25 Mill St.
Newport, RI 02840
Ph. 401-848-0111
Fax 401-848-0110
E-mail: focus@performanceresearch.com
www.performanceresearch.com
Contact: William Doyle
Corporate Sponsorship Of Major Sports And Special Events.

Moderator MarketPlace™

Primary Insights, Inc.
801 Warrenville Rd., Ste. 185
Lisle, IL 60532
Ph. 630-963-8700
Fax 630-963-8756
E-mail: deb@primary-insights.com
Contact: Deb Parkerson
Sensitive Topics. Ideation. In-Depth Analysis. Action-Oriented Recommendations.

RESEARCH CONNECTIONS

Research Connections Talk City
414 Central Ave.
Westfield, NJ 07090
Ph. 908-232-2723
Fax 908-654-9364
E-mail: ayoffie@researchconnections.com
www.researchconnections.com
Contact: Amy J. Yoffie, President
Online Focus Groups. Nat'l./Int'l. Recruit By Web Intercept, Phone, Email, Internet Panel. Test Web Sites, Ads, Products, Concepts. E-Commerce Studies.

The Research Department
220 E. 73rd St., Ste. 7-D
New York, NY 10021
Ph. 212-717-6087
Fax 212-717-6382
E-mail: alexabsmith@earthlink.net
Contact: Alexa Smith
Experienced Specialist in Full-Svc. Qual. Rsch. - Focus Grps., Indiv. Depth Interviews, Mini Grps. Skilled High Quality Moderating. Over 25 Yrs. Exp.

Jay L. Roth & Associates, Inc.

Jay L. Roth & Associates, Inc.
27 First St.
Syosset, NY 11791-2504
Ph. 516-921-3311
Fax 516-921-3861
E-mail:JayLRothAssoc@compuserve.com
Contact: Jay L. Roth
Expert Moderator & Marketer Delivers on Promises! More Than 20 Years Experience! Great Groups, Insights & Reports!

SCHNELLER - Qualitative

Schneller - Qualitative
300 Bleecker St., 3rd fl.
New York, NY 10014
Ph. 212-675-1631
www.gis.net/~answers
Contact: Paul Schneller
Full Array: Ads/Pkg Gds/Rx/B-to-B/ Consumer (14+ Years).

SIL: Worldwide Marketing Services
413 N.E. 3rd St.
Delray Beach, FL 33483
Ph. 561-997-7270
Fax 561-997-5844
E-mail: sil@siltd.com
www.siltd.com
Contact: Timm Sweeney
Qualitative Specialists Since 1983. Business-to-Business & International.

Stellar Strategic Services
1475 Westwood Dr.
Norton Shores, MI 49441-5882
Ph. 616-799-0084
Fax 616-799-1079
E-mail: cdstellar@aol.com
Contact: Cheryl A. Dalisay
Consumer Packaged Goods, Retail, Advertising. Near Grand Rapids.

Strategic Focus, Inc.
6456 N. Magnolia Ave.
Chicago, IL 60626
Ph. 773-973-7573
Fax 773-973-0378
E-mail: DonaJ@aol.com
Contact: Dona Vitale
Brand & Organizational Development Strategy, Target Audience Analysis, Message Communication Research.

Strategy Research Corporation
100 N.W. 37 Avenue
Miami, FL 33125
Ph. 305-649-5400
Fax 305-643-5584
E-mail: bpadilla@marketfacts.com
www.strategyresearch.com
Contact: Belkist Padilla, V.P.
Contact: Vivian Hernandez
Contact: Gloria Conteñs
Multi-Country/Multi-Market Foc. Grp. Rsch. U.S./Latin Amer./Caribbean. Native Brazilian Moderator.

Sunbelt Research Associates
1001 N. U.S. One, Ste. 310
Jupiter, FL 33477
Ph. 561-744-5662
Contact: Barbara L. Allan
20+ Years Exp.; Business & Consumer Studies; Nat'l. & Int'l. Exp.

SuperDatos

SuperDatos de México
A wholly owned subsidiary of Cheskin Research
Ensenada 61, Colonia Hipódromo
México D.F., CP 06100
México
Ph. 650-595-5028 (U.S.)
Fax 650-595-5407 (U.S.)
E-mail: SuperDatos@hamcr.com
www.hamcr.com
Contact: Jennifer Mitchell
Full-Svc. Research to U.S. Standards Throughout Mexico. Focus Grps., In-depth Interviews, Intercepts. Luxury Facility.

Target Market Research Group, Inc.
4990 S.W. 72 Ave., Ste. 110
Miami, FL 33155-5524
Ph. 800-500-1492
Fax 305-661-9966
E-mail: martin_cerda@tmrgroup.com
www.tmrgroup.com
Contact: Martin Cerda
Hispanic Qual./Quant. Research-National Capability.

The TCI Group
3225 Hennepin Ave. S.
Minneapolis, MN 55408
Ph. 612-823-6214
Fax 612-823-6215
E-mail: TCIgroupbethfischer@netscape.net
Contact: Beth Fischer
Unique Fusion of Both Solid Systematic Research Techniques & The Imaginative Art of Creative Thinking Processes. Result - REAL TIME Experience.

View Finders Market Research
11 Sandra Lane
Pearl River, NY 10965
Ph. 914-735-7022
Fax 914-735-7256
E-mail: JGAINES246@aol.com
www.view-finders.com
Contact: Janet Gaines
Specializing in Advertising, Political, Consumer and Business-to-Business Research. Complete Project Management.

WB&A Market Research
2191 Defense Hwy., Ste. 401
Crofton, MD 21114
Ph. 410-721-0500
Fax 410-721-7571
E-mail: info@WBandA.com
www.WBandA.com
Contact: Steve Markenson
Two Mods. on Staff Spec. in Adv. Rsch., Health Care, Fin. Svcs., Tourism, Utilities

Weiss Marketing Research
27 Manor Hill Rd.
Summit, NJ 07901
Ph. 908-273-3497
Fax 908-273-1865
E-mail: WMR27@aol.com
Contact: Debra R. Weiss
Exp. in Health Care, HBA & Pharm. Cat.; All Ages/Seniors; Foc. Grps./In-Depths.

Wilson Qualitative Research Consultants
20 Boulevard de Courcelles
75017 Paris
France
Ph. +33-1-39-16-94-26
Fax +33-1-39-16-69-98
E-mail: jonwqrc@club-internet.fr
Contact: Jonathan Wilson
For A Full Qualitative Service and/or Moderation (French/English): New Tech., Auto, Bus.-to-Bus., Advg. Expertise.

Wolf/Altschul/Callahan, Inc.
60 Madison Ave.
New York, NY 10010
Ph. 212-725-8840
Fax 212-213-9247
WACInc@aol.com
www.wacresearch.com
Contact: Judi Lippert
Senior Moderators - 25 Years Experience.

Yarnell, Inc.
110 Sutter St., Ste. 811
San Francisco, CA 94104
Ph. 415-434-6622
Fax 415-434-0475
E-mail: SYarnell@Yarnell-Research.com
Contact: Steven M. Yarnell, Ph.D.
New Product Development & Positioning. HW/SW Companies.

Moderator MarketPlace™

GEOGRAPHIC CROSS-INDEX OF MODERATORS

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

Arizona
Balaban Market Research Consulting
Behavior Research Center, Inc.

California
Alexander + Parker
Jeff Anderson Consulting, Inc.
AutoPacific, Inc.
Cheskin Research
Erlich Transcultural Consultants
Hypnosis Insights
In Focus Consulting
Marketing Matrix, Inc.
Meczka Mktg./Rsch./Cnsltg., Inc.
Multicultural Research Center℠
Yarnell, Inc.

Colorado
Cambridge Associates, Ltd.
Market Access Partners

Connecticut
Ergo Research Group, Inc.

Florida
AnswerSearch, Inc.
Findings International Corporation
SIL: Worldwide Marketing Services
Strategy Research Corporation
Sunbelt Research Associates, Inc.
Target Market Research Group, Inc.

Georgia
Creative Focus, Inc.
Elrick & Lavidge
Michelson & Associates, Inc.

Illinois
The Blackstone Group
C&R Research Services, Inc.
Irvine Consulting, Inc.
Just The Facts, Inc.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Marketing Advantage Rsch. Cnslts.
Primary Insights, Inc.
Strategic Focus, Inc.

Iowa
Essman/Research

Maryland
Low + Associates, Inc.
WB&A Market Research

Massachusetts
Daniel Associates
Dolobowsky Qualitative Services, Inc.
First Market Research Corp. (Reynolds)
Mature Marketing and Research

Michigan
Stellar Strategic Services

Minnesota
Cambridge Research, Inc.
GraffWorks Marketing Research
MarketResponse International
MedProbe™ Inc.
Outsmart Marketing
The TCI Group

New Jersey
Hispanic Research Inc.
Leflein Associates, Inc.
MCC Qualitative Consulting
Perception Research Services, Inc.
Research Connections Talk City
Weiss Marketing Research

New York
BAIGlobal Inc.
Cornerstone Research & Marketing, Inc.
Decision Drivers
Fader & Associates
Focus Plus, Inc.
Horowitz Associates, Inc.
JRH Marketing Services, Inc.
Knowledge Systems & Research, Inc.
Market Navigation, Inc.
Francesca Moscatelli
The Research Department
Jay L. Roth & Associates, Inc.
Schneller - Qualitative
View Finders Market Research
Wolf/Altschul/Callahan, Inc.

North Carolina
Lewis Consulting Inc.
Medical Moderators, Inc.

Ohio
The Pat Henry Group

Pennsylvania
ActiveFocus
Campos Market Research, Inc.
Chalfont Healthcare Research, Inc.
Data & Management Counsel, Inc.
FOCUSED Marketing Research, Inc.

Rhode Island
I+G Medical Research International
Performance Research

Tennessee
Directions Data Research

Texas
Common Knowledge Research Svcs.
Cunningham Research Associates
Decision Analyst, Inc.
First Market Research Corp. (Heiman)
Opinions Unlimited, Inc.

Washington
Burr Research/Reinvention Prevention
Catalyst Research Network

Wisconsin
Chamberlain Research Consultants, Inc.

France
Wilson Qualitative Research Consultants

Germany
insight europe gmbh

Mexico
SuperDatos de México

SPECIALTY CROSS-INDEX OF MODERATORS

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

ADVERTISING
Jeff Anderson Consulting, Inc.
Balaban Market Research Consulting
The Blackstone Group
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Common Knowledge Rsch. Svcs.
Creative Focus, Inc.
Decision Drivers
Erlich Transcultural Consultants
Fader & Associates
First Market Research Corp. (Reynolds)
Hypnosis Insights
Outsmart Marketing
The Research Department
Jay L. Roth & Associates, Inc.
Schneller - Qualitative
Strategy Research Corporation
WB&A Market Research
Wolf/Altschul/Callahan, Inc.

AFRICAN-AMERICAN
The Blackstone Group
Erlich Transcultural Consultants
JRHMarketing Services, Inc.

AGRICULTURE
Cambridge Associates, Ltd.
Cambridge Research, Inc.
FOCUSED Marketing Research, Inc.
Lewis Consulting Inc.

ALCOHOLIC BEV.
C&R Research Services, Inc.
Strategy Research Corporation

ARTS & CULTURE
Strategic Focus, Inc.

ASIAN
Asian Perspective, Inc.
Cheskin Research
Data & Management Counsel, Inc.
Erlich Transcultural Consultants
Multicultural Research Center℠

ASSOCIATIONS
The Blackstone Group
Low + Associates, Inc.

AUTOMOTIVE
AutoPacific, Inc.
C&R Research Services, Inc.
Erlich Transcultural Consultants
MarketResponse International
Matrixx Marketing-Research Div.

BIO-TECH
Irvine Consulting, Inc.
Market Navigation, Inc.
MedProbe, Inc.

BRAND/CORPORATE IDENTITY
Perception Research Services, Inc.

BUS.-TO-BUS.
Access Research, Inc.
BAIGlobal Inc.
Behavior Research Center, Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Campos Market Research, Inc.
Common Knowledge Rsch. Svcs.
Creative Focus, Inc.
Data & Management Counsel, Inc.
Fader & Associates
First Market Research Corp. (Heiman)
FOCUSED Marketing Research, Inc.
The Pat Henry Group

Just The Facts, Inc.
Knowledge Systems & Research, Inc.
MarketResponse International
MCC Qualitative Consulting
The Research Department
Jay L. Roth & Associates, Inc.
Schneller - Qualitative
SuperDatos de México
Yarnell, Inc.

CABLE
C&R Research Services, Inc.
Horowitz Associates, Inc.

CHILDREN
The Blackstone Group
C&R Research Services, Inc.
Fader & Associates
Just The Facts, Inc.
Market Navigation, Inc.
Matrixx Marketing-Research Div.
Outsmart Marketing

COMMUNICATIONS RESEARCH
Access Research, Inc.
Cambridge Associates, Ltd.
Creative Focus, Inc.
MarketResponse International
Jay L. Roth & Associates, Inc.

COMPUTERS/MIS
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Catalyst Research Network
Daniel Associates
Fader & Associates
First Market Research Corp. (Heiman)
Marketing Advantage Rsch. Cnslts.
Yarnell, Inc.

CONSUMERS
Behavior Research Center, Inc.
C&R Research Services, Inc.
Cheskin Research
Common Knowledge Rsch. Svcs.
Decision Drivers
The Pat Henry Group
Just The Facts, Inc.
Knowledge Systems & Research, Inc.
Lewis Consulting Inc.
Marketing Advantage Rsch. Cnslts.
The Research Department
Jay L. Roth & Associates, Inc.

CORPORATE SPONSORSHIP
Performance Research

CUSTOMER SATISFACTION
BAIGlobal Inc.
The Blackstone Group
Common Knowledge Rsch. Svcs.
Elrick & Lavidge
Low + Associates, Inc.
SuperDatos de México

DIRECT MARKETING
BAIGlobal Inc.
Perception Research Services, Inc.

DISCRETE CHOICE/ CONJOINT
Yarnell, Inc.

DISTRIBUTION
Burr Research/Reinvention Prevention

E-COMMERCE
Directions Data Research

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

ELECTRONICS - CONSUMER
MarketResponse International

ETHNIC
The Blackstone Group
Cheskin Research
Multicultural Research Center℠

ETHNOGRAPHIC RESEARCH
ActiveFocus
Alexander + Parker
Cheskin Research

EXECUTIVES
BAIGlobal Inc.
C&R Research Services, Inc.
Common Knowledge Rsch. Svcs.
Decision Drivers
Fader & Associates
First Market Research Corp. (Heiman)
Marketing Advantage Rsch. Cnslts.
The Research Department
Jay L. Roth & Associates, Inc.
Schneller - Qualitative
Strategy Research Corporation

FINANCIAL SERVICES
Jeff Anderson Consulting, Inc.
BAIGlobal Inc.
The Blackstone Group
Burr Research/Reinvention Prevention
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Common Knowledge Rsch. Svcs.
Elrick & Lavidge
Fader & Associates
FOCUSED Marketing Research, Inc.
Low + Associates, Inc.
Marketing Matrix, Inc.
Matrixx Marketing-Research Div.
MCC Qualitative Consulting
The Research Department
Jay L. Roth & Associates, Inc.
WB&A Market Research

FOOD PRODUCTS/ NUTRITION
ActiveFocus
BAIGlobal Inc.
The Blackstone Group
C&R Research Services, Inc.
Common Knowledge Rsch. Svcs.
Just The Facts, Inc.
Outsmart Marketing
The Research Department
Jay L. Roth & Associates, Inc.
Schneller - Qualitative

FOOTWEAR
Best Practices Research

GENERATION X
Primary Insights, Inc.

HEALTH & BEAUTY PRODUCTS
BAIGlobal Inc.
Schneller - Qualitative
Weiss Marketing Research

HEALTH CARE
Alexander + Parker
Jeff Anderson Consulting, Inc.
Balaban Market Research Consulting
The Blackstone Group
Chalfont Healthcare Research, Inc.
Erlich Transcultural Consultants
First Market Research Corp. (Reynolds)
I+G Medical Research International
Irvine Consulting, Inc.
Knowledge Systems & Research, Inc.
Low + Associates, Inc.
Market Access Partners
Market Navigation, Inc.
MarketResponse International
Matrixx Marketing-Research Div.
Medical Moderators, Inc.
MedProbe™ Inc.
Strategy Research Corporation
WB&A Market Research
Weiss Marketing Research

HIGH-TECH
Jeff Anderson Consulting, Inc.
Cheskin Research
Common Knowledge Rsch. Svcs.
Ergo Research Group, Inc.
Market Navigation, Inc.
Research Connections Talk City
Jay L. Roth & Associates, Inc.
Perception Research Services, Inc.

HISPANIC
Behavior Research Center, Inc.
Cheskin Research
Data & Management Counsel, Inc.
Erlich Transcultural Consultants
Findings International Corporation
Hispanic Research Inc.
Francesca Moscatelli
Multicultural Research Center℠
Strategy Research Corporation
Target Market Research Group, Inc.

HOUSEHOLD PRODUCTS/CHORES
The Research Department
Schneller - Qualitative

HUMAN RESOURCES ORGANIZATIONAL DEV.
Primary Insights, Inc.

IDEA GENERATION
Analysis Research Ltd.
BAIGlobal Inc.
The Blackstone Group
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Creative Focus, Inc.
Elrick & Lavidge
Just The Facts, Inc.
Matrixx Marketing-Research Div.
Primary Insights, Inc.

IMAGE STUDIES
The Blackstone Group
Cambridge Associates, Ltd.
MarketResponse International

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

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

INTERACTIVE PROD./ SERVICES/RETAILING
Ergo Research Group, Inc.
Research Connections Talk City

INTERNATIONAL
The Blackstone Group

INTERNET
The Blackstone Group
Cheskin Research
Common Knowledge Rsch. Svcs.
Ergo Research Group, Inc.
First Market Research Corp. (Reynolds)
FOCUSED Marketing Research, Inc.
Horowitz Associates, Inc.
Knowledge Systems & Research, Inc.
Research Connections Talk City

Moderator MarketPlace™

INTERNET SITE CONTENT & DESIGN
FOCUSED Marketing Research, Inc.
Perception Research Services, Inc.

LATIN AMERICA
Best Practices Research
Cheskin Research
Strategy Research Corporation
SuperDatos de México

MEDICAL PROFESSION
Balaban Market Research Consulting
Cambridge Associates, Ltd.
Chalfont Healthcare Research, Inc.
FOCUSED Marketing Research, Inc.
The Pat Henry Group
I+G Medical Research International
Matrixx Marketing-Research Div.
Medical Moderators, Inc.
MedProbe™ Inc.
Schneller - Qualitative
Weiss Marketing Research

MODERATOR TRAINING
Cambridge Associates, Ltd.

MULTIMEDIA
Catalyst Research Network
Marketing Advantage Rsch. Cnslts.

NEW PRODUCT DEV.
ActiveFocus
BAIGlobal Inc.
The Blackstone Group
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Data & Management Counsel, Inc.
Elrick & Lavidge
Fader & Associates
First Market Research Corp. (Heiman)
Just The Facts, Inc.
Marketing Advantage Rsch. Cnslts.
Outsmart Marketing
Primary Insights, Inc.
The Research Department
Jay L. Roth & Associates, Inc.
Schneller - Qualitative
Weiss Marketing Research

NON-PROFIT
Strategic Focus, Inc.

OBSERVATIONAL
Alexander + Parker

ON-LINE FOCUS GROUPS
Catalyst Research Network
Common Knowledge Rsch. Svcs.
Research Connections Talk City

PACKAGED GOODS
ActiveFocus
BAIGlobal Inc.
C&R Research Services, Inc.
Just The Facts, Inc.
Jay L. Roth & Associates, Inc.

PACKAGE DESIGN RESEARCH
Alexander + Parker
Cheskin Research
Perception Research Services, Inc.
The Research Department
Weiss Marketing Research

PARENTS
Fader & Associates

PET PRODUCTS
Cambridge Research, Inc.
Common Knowledge Rsch. Svcs.
FOCUSED Marketing Research, Inc.
MarketResponse International
Primary Insights, Inc.

PHARMACEUTICALS
ActiveFocus
BAIGlobal Inc.
Balaban Market Research Consulting
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Chalfont Healthcare Research, Inc.
I+G Medical Research International
Irvine Consulting, Inc.
Lewis Consulting Inc.
Market Navigation, Inc.
MarketResponse International
MCC Qualitative Consulting
Medical Moderators, Inc.
MedProbe™ Inc.
Schneller - Qualitative
Weiss Marketing Research

POLITICAL/SOCIAL RESEARCH
Cambridge Associates, Ltd.
Francesca Moscatelli

POINT-OF-SALE MKTG.
The Blackstone Group
Perception Research Services, Inc.

POSITIONING RESEARCH
Schneller - Qualitative

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

PUBLISHING
Cambridge Associates, Ltd.
Cornerstone Research & Marketing
First Market Research Corp. (Heiman)
Marketing Advantage Rsch. Cnslts.

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

SENIORS
Fader & Associates
Mature Marketing and Research
Primary Insights, Inc.
Weiss Marketing Research

SMALL BUSINESS/ ENTREPRENEURS
The Blackstone Group
FOCUSED Marketing Research, Inc.
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
FOCUSED Marketing Research, Inc.
Performance Research

STRATEGY DEVELOPMENT
Schneller - Qualitative

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

TELECOMMUNICATIONS
BAIGlobal Inc.
The Blackstone Group
Catalyst Research Network
Creative Focus, Inc.
Daniel Associates
Elrick & Lavidge
Ergo Research Group, Inc.
Erlich Transcultural Consultants
First Market Research Corp. (Heiman)
Knowledge Systems & Research, Inc.
Horowitz Associates, Inc.
Marketing Advantage Rsch. Cnslts.
MarketResponse International
MCC Qualitative Consulting
The Research Department
Jay L. Roth & Associates, Inc.
Strategy Research Corporation

TELECONFERENCING
Cambridge Research, Inc.

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

TOURISM/HOSPITALITY
The Blackstone Group

TOYS/GAMES
Fader & Associates

TRANSPORTATION SERVICES
The Blackstone Group
Low + Associates, Inc.
Strategic Focus, Inc.

TRAVEL
Cambridge Associates, Ltd.

UTILITIES
The Blackstone Group
Cambridge Associates, Ltd.
Knowledge Systems & Research, Inc.

VETERINARY MEDICINE
Common Knowledge Rsch. Svcs.
FOCUSED Marketing Research, Inc.

WEALTHY
Strategy Research Corporation

YOUTH
Fader & Associates
MarketResponse International

2000 Directory of Ethnic Research Providers

ACCESS WORLDWIDE
CULTURAL ACCESS GROUP

Access Worldwide, Cultural Access Group (Formerly Hispanic Market Connections)
5150 El Camino Real, Ste. B-15
Los Altos, CA 94022-1527
Ph. 650-965-3859
Fax 650-965-3874
E-mail: info@accesscag.com
www.accesscag.com
J. Lynch, Dir. Mktg & New Bus. Dev.
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. 87)

*Adrian Information Strategies (AIS)
14675 Midway Rd., #200
Addison, TX 75001-3162
Ph. 972-980-0227
Fax 972-385-7745
E-mail: RCCDallas@aol.com
www.adrianreyesconsulting.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. 34)

AIM RESEARCH

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

Complete data collection service. Large focus group facility; audio, video equipment, viewing room, full kitchen, taste tests, product placements, pre-recruited studies, 28-line telephone bank, bilingual (Spanish-speaking) interviewers available.
(See advertisement on p. 86)

*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
Jaime Meddy, Field Director
Data collection/Field service
African-American, Hispanic

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

Asian Marketing Communication Research
See ***Cheskin Research***

*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

* Indicates minority-owned firm

Atkins Research Group
4929 Wilshire Blvd., Ste. 102
Los Angeles, CA 90010
Ph. 323-933-3816
Fax 323-933-3916
E-mail: atkins@atkinsresearch.com
www.atkinsresearch.com
Lynn Atkins, Owner
Full service, Data collection/Field service, Focus Group
African-American, Asian, Hispanic, Middle Eastern, Native American

Six new qualitative suites with state-of-the-art translation equipment, can seat any size group from one to 75. Located in the heart of Los Angeles and in the Inland Empire, expert recruiting brings you multicultural California at its finest. Let our 50 years of combined experience help you with your next focus group, in-depth interview, pre-recruit, in-store or pretest in Los Angeles, Riverside, San Bernardino, Ontario or Palm Springs.
(See advertisement on p. 88)

Barry Leeds & Associates, Inc.
38 E. 29th St.
New York, NY 10016-7911
Ph. 212-889-5941
Fax 212-889-6066
E-mail: info@barryleedsassoc.com
www.barryleedsassoc.com
Paul Lubin, President
Full service, Data collection/Field service
African-American, Asian, Hispanic

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: info@brc-field.com
www.brc-field.com
Earl de Berge, Research Director
Full service, Data collection/Field service, Data processing
Hispanic, Native American

*The Blackstone Group
360 N. Michigan Ave.
Chicago, IL 60601
Ph. 312-419-0400
Fax 312-419-8419
E-mail: info@bgchicago.com
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

* Indicates minority-owned firm

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
Megan Burdick, 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
www.castassoc.com
Enrique F. Castillo, Principal
Full service
Hispanic

Cheskin Research
255 Shoreline Dr., Ste. 100
Redwood Shores, CA 94065-1404
Ph. 650-802-2100
Fax 650-593-1125
E-mail: info@cheskin.com
www.cheskin.com
Nancy Shimamoto
Full service
Asian, Hispanic

Cheskin Research, a leading intercultural market research and consulting firm, helps companies compete in the new global Internet economy. Cheskin is recognized for contributing to competitive breakthroughs in product development, branding, positioning, packaging and media. With a diverse multilingual research staff representing over 20 countries and cultures. Cheskin helps clients gain intuitive and analytical understanding of customers in multicultural markets.
(See advertisement on p. 89)

Chicago Focus
The Focus Network
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

Consumer Research Associates/Superooms™
Park Central VII
12750 Merit Dr., 10th fl.
Dallas, TX 75251
Ph. 800-800-5055 or 972-386-5055
Fax 972-387-9915
E-mail: dallasinfo@superooms.com
www.superooms.com
Bob Nance
Focus Group
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

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, Data collection/Field service, Data processing
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
Full service
African-American, Asian, Hispanic, Middle Eastern

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

Davis & Davis Research, Inc.
8001 N. Dale Mabry Hwy., Ste. 401B
Tampa, FL 33614
Ph. 813-873-1908
Fax 813-935-5473
E-mail: davisanddavisres@yahoo.com
Irene Davis, President
Data collection/Field service, Focus Group
African-American, Asian, Hispanic

*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
Morris Davis, President
Full service, Data collection/Field service, Data processing
African-American

Direct Marketing Services Group, Inc.
413 Northeast Third St.
Delray Beach, FL 33483
Ph. 561-997-2324
Fax 561-997-5844
E-mail: DMSG@safari.net
www.siltd.com
Arnold Sheer, Managing Director
Full service, Data collection/Field service, Data processing
Asian, Hispanic, Middle Eastern

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. 90)

DMS
840 N. Larrabee St., Ste. 4209
Los Angeles, CA 90069
Ph. 888-214-2853 or 310-659-8732
Fax 310-657-0647
E-mail: DMSSOCAL@aol.com
www.dmsresearch.com
John Draper
Data collection/Field service
African-American, Asian, 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
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
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. 91)

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: info@etcethnic.com
www.etcethnic.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. 15)*

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. 1600
Atlanta, GA 30339
Ph. 770-988-0330
Fax 770-955-1555
E-mail: info@atlanta.fieldwork.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
Fax 773-282-8971
E-mail: info@chicago.fieldwork.com
www.fieldwork.com
Karen Borgardt or Judy Piechocki
Data collection/Field service
African-American, Hispanic

Fieldwork Chicago-O'Hare
8420 W. Bryn Mawr Ave., Ste. 650
Chicago, IL 60631
Ph. 773-714-8700
Fax 773-714-0737
E-mail: info@ohare.fieldwork.com
www.fieldwork.com
Pam White, President
Data collection/Field service
African-American, Asian, Hispanic, Middle Eastern

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

Fieldwork East, Inc.
2 Executive Dr., Ste. 800
Fort Lee, NJ 07024
Ph. 201-585-8200
Fax 201-585-0096
E-mail: info@ftlee.fieldwork.com
www.fieldwork.com
Sandy Starr or Barbara Meeks
Data collection/Field service
African-American, Hispanic

* Indicates minority-owned firm

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

Fieldwork Phone Center
6200 N. Hiawatha, Ste. 720
Chicago, IL 60646
Ph. 773-282-0203 or 888-TO-FIELD
Fax 773-282-6422
E-mail: info@phoneroom.fieldwork.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
Felisa Esquivel
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
African-American, Asian, Hispanic

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

Focus On Miami
8603 S. Dixie Hwy., Ste. 218
Miami, FL 33143
Ph. 305-661-8332
Fax 305-661-9686
E-mail: FocusOnMiami@hotmail.com
Lisa Switkes, President
Data collection/Field service
African-American, Hispanic

Focus on the Findings
9100 Coral Way, Ste. 7
Miami, FL 33165
Ph. 305-225-5563 or 305-225-5579
Fax 305-225-5592
E-mail: findings@interfindings.com
Focus Group
Hispanic

Focuscope, Inc.
1100 Lake St., Ste. 60
Oak Park, IL 60301
Ph. 708-386-5086
Fax 708-386-1207
E-mail: krooney@focuscope.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, Data Processing, Focus group
African-American, Hispanic

GENESYS Sampling Systems
565 Virginia Dr.
Fort Washington, PA 19034-2706
Ph. 800-336-7674
Fax 215-653-7115
E-mail: jjennings@m-s-g.com
www.genesys-sampling.com
Joe Jennings, V.P. Sales
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. 27)*

*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

*Henceforth, Inc.
3412 Hopkins Crossroad
Minnetonka, MN 55305-4305
Ph. 952-938-1948
Fax 952-938-2098
E-mail: hence4th@att.net
Judith Hence, President
Focus groups
African-American, Hispanic, Native American

*Hispanic Focus Unlimited
303 W. Park Ave.
Pharr, TX 78577
Ph. 956-797-4211
Fax 956-797-4244
E-mail: rubenc@hispanicfocusunltd.com
www.hispanicfocusunltd.com
Ruben Cuellar, President
Full service, Data collection/Field service
Hispanic

Hispanic Marketing Communication Research
*See **Cheskin Research***

Hispanic Research Inc.
45 Ireland Ave.
Edison, NJ 08837
Ph. 732-661-9298
Fax 732-661-1699
E-mail: info@hispanic-research.com
www.hispanic-research.com
Ricardo A. Lopez, President
Consulting
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

HOUSE OF MARKETING

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 multi-lingual focus group and fieldwork company in the Los Angeles area. Our language capabilities include: Spanish, Mandarin, Cantonese, Korean, Japanese. 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. 93)

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

* Indicates minority-owned firm

IMAGES Market Research
290 Fourteenth St.
Atlanta, GA 30318
Ph. 404-892-2931
Fax 404-892-8651
E-mail: research@imagesusa.net
Deborah White or John Lockyer
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. Ethnic focus group recruiting and moderating is our specialty; we also offer telephone/field and executive interviewing featuring a 20-station CATI system. Come visit our new Atlanta facility or one of our focus affiliates located throughout the country.
(See advertisement on p. 92)

In Focus Consulting
2327 Blueridge Ave.
Menlo Park, CA 94025-6709
Ph. 650-854-8462
Fax 650-854-4178
E-mail: infocuscon@cs.com
Elena Chardon-Pietri, Ph.D., President
Full service
Hispanic

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, Internet data collection, 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. 94)

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, Data processing
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. 95)

*JRH Marketing Services, Inc.
29-27 41st Ave., Penthouse
New York, NY 11101
Ph. 718-786-9640
Fax 718-786-9642
E-mail: 72114.1500@compuserve.com
J. Robert Harris, II, President
Full service
African-American, Asian, Hispanic, Middle Eastern, Native American

*Juarez & Associates
12139 National Blvd.
Los Angeles, CA 90064
Ph. 310-478-0826
Fax 310-479-1863
E-mail: juarezla@gte.net
www.juarezassociates.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

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
Stanford Klapper, CEO
Full service, Data collection/Field service, Data processing
Hispanic

L.A. Focus
The Focus Network
17337 Ventura Blvd., Ste. 301
Encino, CA 91316
Ph. 818-501-4794
Fax 818-907-8242
E-mail: wendyfein@aol.com
Lisa Balelo Wendy Feinberg, Partners
Full service
African-American, Hispanic

Lieberman Research Worldwide
1900 Avenue of the Stars, 15th fl.
Los Angeles, CA 90067
Ph. 310-553-0550
Fax 310-553-4607
E-mail: dsackman@lrw-la.com
www.lrwonline.com
Dave Sackman, President
Full service
Asian, Hispanic

Loretta Marketing Group

Loretta Marketing Group
13935 S.W. 102 Court
Miami, FL 33176
Ph. 305-232-5002
Fax 305-232-8010
E-mail: img8010@bellsouth.net
Jim Loretta, President
Full service
Hispanic

Loretta Marketing Group (LMG) is a marketing research and consulting firm with a mission of service to the marketing needs of clients seeking to understand the U.S. Hispanic and Latin American markets by conducting qualitative and quantitative research. Call Jim Loretta at 305-232-5002 (born in Mexico and educated in the U.S.A.) to begin the process of understanding the rich Hispanic culture on either side of the Rio Grande!
(See advertisement on p. 95)

M G Z Research
5715 Silent Brook Ln.
Rolling Meadows, IL 60008
Ph. 847-397-1513
Fax 847-397-9016
E-mail: MGZipper@aol.com
Martha Garma Zipper, President
Consulting
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

* Indicates minority-owned firm

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: jenniferchoate@mdaresearch.com
www.mdaresearch.com
Jennifer Choate, Vice President
Full service, Data collection/Field service, Data processing, Focus Group
African-American, Hispanic

MARKET FACTS

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, 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 TeleNación, 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. 30)

Market Intelligence
Customer Satisfaction Rsch. & Consulting
15421 Lake St. Ext.
Minnetonka, MN 55345-1914
Ph. 612-933-6825
Fax 612-962-5093
E-mail: ahmed@uswest.net
Full service
Middle Eastern

*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 713-952-2444
E-mail: marketstudy@pdq.net
Mariluz Florez, Office Manager
Full service, Data collection/Field service, Focus Group
Hispanic

*Market Trends Pacific, Inc.
1001 Bishop St., Ste. 505
Honolulu, HI 96813
Ph. 808-532-0733
Fax 808-532-0744
E-mail: mtp@lava.net
Wanda L. Kakugawa, President
Full service, Data collection/Field service, Data processing
Asian

*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

Mars Surveys
1700 N. University Dr., Ste. 205
Coral Springs, FL 33071
Ph. 954-755-2805 or 877-755-2805
Fax 954-755-3061
E-mail: info@marsresearch.com
www.marsresearch.com
Lois Stermer, Vice President
Data collection/Field service
Hispanic

MCB

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

Full-service research and consulting firm for all your needs in the general, ethnic and world markets. Advanced methodologies for quantitative, qualitative and on-line research. The most experienced moderators in English and over 20 foreign languages: Spanish, Mandarin, Cantonese, tagalog, Vietnamese, Thai, Russian, Polish, Portuguese, Arabic, all Western European, etc. State-of-the-art facility in New York City with U.N. style interpreter's booth.
See advertisement on p. 71)

MDI Interviewing Services, Inc.
1101 Bay Blvd., Ste. D
Chula Vista, CA 91911
Ph. 619-424-4550
Fax 619-424-4501
E-mail: jose.suarez@mktdev.tnsofres.com
www.mdiis.tnsofres.com
Jose Suarez, Operations Manager
Data collection/Field service
Hispanic

MDI Interviewing Services is a 100 CATI-station telephone data collection facility conducting research in the Latin American and U.S. Hispanic markets. With a full-time and part-time staff of nearly 200, MDIIS is one of the largest data collection facilities in the country and has conducted over 2,000 projects among Spanish-, Portuguese- and English-speaking respondents since the company opened its doors in 1990.
(See advertisement on p. 97)

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

* Indicates minority-owned firm

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

Established in January 1995, Meneses Research & Associates is a transcultural, full-service marketing research and consulting firm. Specialized in the Hispanic market in the U.S. and Latin America. We provide consumers' perceptions, lifestyles, attitudes and behavior to our clients. Data collection division with capability of person-to-person interviews across the U.S. and Latin America.
(See advertisement on p. 96)

*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

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 Groups
Hispanic

Cheskin Research

Multicultural Research Center℠
A Division of Cheskin Research
1540 E. First St., Ste. 200
Santa Ana, CA 92701
Ph. 714-560-1120
Fax 714-560-1121
E-mail: ResearchCenter@cheskin.com
www.cheskin.com or www.hamcr.com
Wendy Bryan, Facility Manager
Data collection/Field service, Data processing
Asian, Hispanic

Hispanic & Asian Marketing Communication Research, Inc. merged with Cheskin Research effective January 2000. With this merger we added to our deep understanding of culturally diverse markets and integrated market perspective and an outstanding record of market research and consulting in high-tech, e-commerce, branding and identity. MRC offers focus group facilities and a state-of-the-art CATI center for multilingual interviewing.
(See advertisement on p. 89)

National Opinion Research Services
NORS

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. 99)

New York Focus
The Focus Network
317 Madison Ave., 20th fl.
New York, NY 10017
Ph. 212-867-6700
Fax 212-867-9643
E-mail: NYFocus@aol.com
Nancy Opoczynski, President
Focus Group
African-American, Asian, Hispanic

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
Full service, 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
www.omnifacts.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: omr@OMRdc.com
www.OMRdc.com
Jill L. Siegel, President
Data collection/Field service
African-American

Opinion Access Corp.
31-00 47th Ave.
Long Island City, NY 11101
Ph. 718-729-2622 or 888-489-DATA
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. 51)*

*Paradigm Technologies Int'l.
391 Draco Rd.
Piscataway, NJ 08854
Ph. 732-248-7123
Fax 732-248-7125
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, Data collection/Field service, Data processing
African-American, Asian, Hispanic

Phase III Market Research
436-A Irving Ave.
San Jose, CA 95128
Ph. 408-947-8661
Fax 408-251-5093
E-mail: npphase3@jps.net
Martha Mogyorossy, Director Field Services
Data collection/Field service
Hispanic

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 stud-

ies! 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. 35)

Polk.
Multi-Dimensional Intelligence™

Polk
Research Sampling Group
26955 Northwestern Hwy.
Southfield, MI 48034
Ph. 888-225-1434
Fax 248-728-6843
E-mail: dawn_brown@polk.com
www.polk.com
Data collection/Field service, 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. 17)

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, Data collection/Field service, Data processing
Asian

Qualitative Insights
15060 Ventura Blvd., Ste. 125
Sherman Oaks, CA, CA 91403
Ph. 818-988-5411
Fax 818-988-4057
E-mail: qualitativeinsights@earthlink.net
www.q-insights.com
Jennifer von Schneidau, Vice President
Full service, Data collection/Field service, Focus Group
African-American, Asian, Hispanic, Middle Eastern

Quality Controlled Services
Your Single Source Data Solution

Quality Controlled Services
1355 N. Highway Dr.
Fenton, MO 63099
Ph. 800-325-3338 or 636-827-1773
Fax 636-827-3373
E-mail: postmaster@qcs.com
www.qcs.com
Data collection/Field service, Data processing
African-American, Asian, Hispanic, Middle Eastern, Native American

* Indicates minority-owned firm

Leading data collection firm. Nationwide services: telephone interviewing, project management, pre-recruits, focus groups, central location tests, taste tests, executive interviews, mail surveys, and in-home placement studies. Each QCS office is locally managed. Centralized controls ensure rigorous operating standards. Facilities in Chicago, Columbus, Dallas, Detroit, Overland Park, and St. Louis are also equipped with FocusVision, a teleconferencing service.
(See advertisement on p. 31)

*Recruiting Resources Unlimited
480 Court St.
Brooklyn, NY 11231
Ph. 718-222-5600
Fax 718-222-5689
E-mail: rru131@aol.com
www.recruitingresourcesllc.com
Connie Livia, President
Full service
African-American, Asian, Hispanic, Middle Eastern, Native American

Reyes Research
1013 Colina Vista
Ventura, CA 93701
Ph. 805-278-1444
Fax 805-278-1447
E-mail: arvind@reyesresearch.com
www.reyesresearch.com
Arvind Datta
Data collection/Field service
African-American, Hispanic

*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
African-American, Hispanic

*Rincon & Associates
6060 N. Central Expwy., Ste. 670
Dallas, TX 75206
Ph. 214-750-0102
Fax 214-750-1015
E-mail: info@rinconassoc.com
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, Transcriptions
African-American, Hispanic

Founded in 1969, SDS specializes in rendering professional services to clients. We enjoy a reputation for quality recruiting for focus groups, pre-recruited studies and one-on-one interviews with client viewing. We specialize in accurate data collection, health care/medical research, car clinics, mock jury trials, music tests, store audits, mall intercepts, CRT telephone interviewing, complete Hispanic services. Meeting the needs of our clients and good customer service is unsurpassed. Call us for your next bid. Two malls.
(See advertisement on p. 101)

Schlesinger Associates, Inc.
Executive Plaza, Ste. 400
10 Parsonage Rd.
Edison, NJ 08837
Ph. 732-906-1122
Fax 732-906-8792
E-mail: info@schlesingerassociates.com
www.schlesingerassociates.com
Steven Schlesinger, President
Data collection/Field service, Data processing
African-American, Hispanic

Scientific Telephone Samples
27121 Towne Centre Dr., Ste. 290
Foothill Ranch, CA 92610
Ph. 800-944-4787 or 949-461-5400
Fax 949-609-4577
E-mail: info@stssamples.com
www.stssamples.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. 45)

*Segmentation America, Inc.
8351 Roswell Rd., Ste. 349
Atlanta, GA 30350
Ph. 770-591-7730
Fax 770-591-5209
E-mail: SegAmerica@aol.com
Mario de la Guardia, President
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: staff@smithmark.com
www.smithmark.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@msn.com
www.southernspectrum.com
Linda DeCuir, Research Coordinator
Data collection/Field service
African-American, Asian, Hispanic

Southwest Planning & Marketing
903 W. Alameda, #206
Santa Fe, NM 87501
Ph. 505-989-8500 or 800-989-9275
Fax 505-984-1393
E-mail: swpm@prodigy.net
www.swplanning-marketing.com
Bruce Poster, President
Full service, Data collection/Field service, Data processing
Hispanic, Native American

*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. 100)*

*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

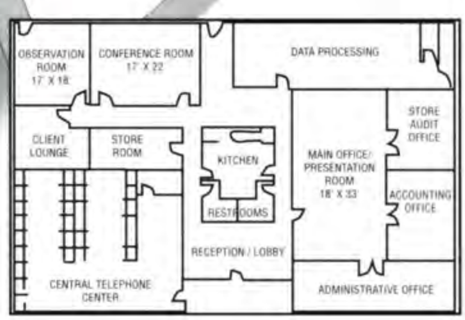
SuperDatos de México
a wholly-owned subsidiary of Cheskin Research
Ensenada 61
Colonia Hipodromo
Mexico City, DF, CP 06100
Ph. 650-595-5028 (U.S.) or 52-5-553-2754 (Mex.)
Fax 650-595-5407 (U.S.) or 52-5-553-2784 (Mex.)
E-mail: SuperDatos@cheskin.com
www.cheskin.com or www.hamcr.com
Jennifer Mitchell (U.S.)
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 Cheskin Research of Redwood Shores, California. *(See advertisement on p. 89)*

* Indicates minority-owned firm

Survey Sampling, Inc.
One Post Rd.
Fairfield, CT 06430
Ph. 203-255-4200
Fax 203-254-0372
E-mail: info@surveysampling.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 18 countries in North America and Europe. Targeted samples based on income, age, race/ethnic orgin. Target lifestyles, 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 advertisement on p. 9)*



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. 102)

TNS Market Development, Inc.
600 B St., Ste. 1600
San Diego, CA 92101
Ph. 619-232-5628
Fax 619-232-0373
E-mail: everett.hernandez@mktdev.tnsofres.com
www.mktdev.tnsofres.com
Everett Hernandez, Se. Vice President
Full service
Hispanic

20 years of expertise in the field of Latin American and U.S. Hispanic research. TNS MD's scope of syndicated and customized research services include: qualitative, focus groups, mini-groups, triads, in-depth interviews. Quantitative, strategic market and A&U studies, tracking surveys, omnibus services, Copy-TRAC and Quick-TRAC standardized copy-testing services. MDIIS has 100 Quancept CATI stations, state-of-the-art data collection facility. General market, U.S. Hispanics, Latin American and Portuguese interviewing.
(See advertisement on p. 12)

United Marketing Research
1516 53rd St.
Lubbock, TX 79412
Ph. 806-744-6740
Fax 806-744-0327
E-mail: UMR220@door.net
www.umspromo.com
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
Delphyne L. Lomax, Principal, Quant. Rsch.
Full service, Data collection/Field service, Focus Group
African-American, Asian, Hispanic, Middle Eastern, Native American

Varga Research
8403 S. Park Cir., Ste. 660
Orlando, FL 32819
Ph. 407-248-0777
Fax 407-248-7797
E-mail: rachelj@vargaresearch.com
www.vargaresearch.com
Rachel Jarrell, V.P. Marketing
Full service
African-American, Asian, Hispanic

Venture Marketing Associates, Inc.
6074 Apple Tree Dr., Ste. 9
P.O. Box 171392
Memphis, TN 38187
Ph. 901-795-6720
Fax 901-795-6763
E-mail: VMA3155@aol.com
Alex Klein, President
Full service, Data collection/Field service, Data processing
African-American, Hispanic

Worldbridge Language Services
1818 Thayer Ave., Ste. 203
Los Angeles, CA 90025
Ph. 310-474-1638
Fax 310-474-1638
Richard Satnick, Exec. Vice President
Survey Translation
Asian, Hispanic, Middle Eastern

Classified Ads

Sales Offices

Headquarters: Evan Tweed, Quirk's Marketing Research Review, 8030 Cedar Avenue South, Suite 229, Minneapolis, MN 55425. Phone 612-854-5101. Fax 612-854-8191. E-Mail: evanqmrr@mn.uswest.net.

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

Index of Advertisers

Access Worldwide, Cultural Access Group . . .87
Ph. 650-965-3859 • Fax 650-965-3874

ACNielsen Burke Institute . . .Inside Back Cover
Ph. 800-543-8635 • Fax 606-655-6064

ActiveGroup, Inc. 13
Ph. 770-449-6767 • Fax 770-449-6739

Affordable Samples, Inc. 34
Ph. 800-784-8016 • Fax 203-637-8569

Aim Research 86
Ph. 915-591-4777 • Fax 915-595-6305

Apian Software 66
Ph. 800-237-4565 • Fax 206-547-8493

Atkins Research Group .88
Ph. 323-933-3816 • Fax 323-933-3916

Burke Training & Development 54
Ph. 513-576-5700 • Fax 513-576-5777

Burke, Inc. 59
Ph. 513-576-5700 • Fax 513-576-5777

C&R Research Services, Inc. . . . . . .Back Cover
Ph. 312-828-9200 • Fax 312-527-3113

Chesapeake Surveys 73
Ph. 410-356-3566 • Fax 410-581-6700

Cheskin Research 89
Ph. 650-595-5028 • Fax 650-595-5407

Common Knowledge, Inc 67
Ph. 800-710-9147 • Fax 972-732-1447

Consumer Opinion Services, Inc. 62
Ph. 206-241-6050 • Fax 206-241-5213

Consumer Research Ascts./Superooms 27
Ph. 800-800-5055 • Fax 415-392-7141

Database Sciences, Inc. 75
Ph. 800-742-6035 • Fax 201-934-8509

DATAN, Inc. 53
Ph. 609-921-6098 • Fax 609-683-4324

Decision Analysts, Inc. .3
Ph. 817-640-6166 • Fax 817-640-6567

Delphi Market Research 39
Ph. 781-393-6600 • Fax 781-393-6666

Directions In Research 90
Ph. 800-676-5883 • Fax 619-299-5888

Discovery Research Group 76
Ph. 714-261-8353 • Fax 714-852-0110

Ebony Marketing Research, Inc. 91
Ph. 718-320-3220 • Fax 718-320-3996

Erlich Transcultural Consultants 15
Ph. 818-226-1333 • Fax 818-226-1338

FieldSource/Greenfield OnLine 33
Ph. 203-221-0789 • Fax 203-221-0783

FIND/SVP, Inc. 57
Ph. 212-645-4500 • Fax 212-645-7681

First Market Research Corp. 44
Ph. 800-347-7811 • Fax 617-267-9080

Focus Central 60
Ph. 212-647-7200 • Fax 212-647-7660

Focus Groups Of Cleveland Survey Ctr. 77
Ph. 800-950-9010 • Fax 216-901-8085

Focus Portland 10
Ph. 503-350-4829 • Fax 503-641-0771

FocusVision Network, Inc. 6-7
Ph. 203-961-1715 • Fax 203-961-0193

Greenfield On-Line 43
Ph. 203-834-8585 • Fax 203-834-8686

Group Dynamics In Focus, Inc. 63
Ph. 610-668-8535 • Fax 610-668-2072

GroupNet 74
Ph. 800-288-8226 • Fax 561-882-0162

GroupNet/FocusVision Worldwide 26
Ph. 800-288-8226 • Fax 561-882-0162

House Of Marketing 93
Ph. 626-793-9598 • Fax 626-793-9624

I/H/R Research Group .68
Ph. 702-734-0757 • Fax 702-734-6319

ICR/International Communications Rsch. . . .38
Ph. 610-565-9280 • Fax 610-565-2369

IMAGES Market Research 92
Ph. 404-892-2931 • Fax 404-892-8651

International Point Of Contact 95
Ph. 212-213-3303 • Fax 212-213-3554

Interviewing Service Of America 94
Ph. 818-989-1044 • Fax 818-782-1309

Loretta Marketing Group 95
Ph. 888-462-5002 • Fax 305-232-8010

Maritz Marketing Research. .Inside Front Cover
Ph. 800-446-1690 • Fax 636-827-8605

Market Facts, Inc. 30
Ph. 847-590-7000 • Fax 847-590-7010

MarketResponse International 11
Ph. 612-943-2230 • Fax 612-943-2320

MBC, Inc. 71
Ph. 212-599-7400 • Fax 212-599-7410

MDI Interviewing Services 97
Ph. 619-424-4550 • Fax 619-424-4501

Medical Marketing Service, Inc. 49
Ph. 800-633-5478 • Fax 630-350-1896

Meneses Research & Associates 96
Ph. 619-276-5335 • Fax 619-276-7330

Mercator Corporation .64
Ph. 978-463-4093 • Fax 978-463-9375

Message Media 61
Ph. 888-440-7550 • Fax 303-440-0303

NameQuest, Inc. 70
Ph. 480-488-9660 • Fax 800-962-9614

National Opinion Research Services 99
Ph. 800-940-9410 • Fax 305-553-8586

Opinion Access Corp. .51
Ph. 718-729-2622 • Fax 718-729-2444

Opinion Search, Inc. 5
Ph. 800-363-4229 • Fax 613-230-3793

PhoneSolutions, LLC. .35
Ph. 520-296-1015 • Fax 520-296-3393

Pine Company 56
Ph. 800-969-7463 • Fax 310-815-5799

Polk Research Sampling 17
Ph. 888-225-1434 • Fax 248-728-6843

Precision Research, Inc. 55, 57, 72
Ph. 847-390-8666 • Fax 847-390-8885

Pro T S Telephony Systems 23
Ph. 800-336-7674 • Fax 215-653-7115

Professional Marketing Rsch. Society. 78
Ph. 888-815-PMRS • Fax 416-491-1670

Pulse Train Technology, Ltd. 29
Ph. 561-842-4000 • Fax 561-842-7280

Quality Controlled Services 31
Ph. 800-325-3338 • Fax 636-827-3373

Research Connections/Talk City 47
Ph. 908-232-2723 • Fax 908-654-9364

RSVP Research Services 14
Ph. 215-969-8500 • Fax 215-969-3717

RTNielson Company 58
Ph. 801-359-1345 • Fax 801-355-6335

San Diego Surveys, Inc. 101
Ph. 619-265-2361 • Fax 619-582-1562

Sawtooth Software, Inc. 48
Ph. 360-681-2300 • Fax 360-681-2400

Sawtooth Technologies 70
Ph. 847-866-0870 • Fax 847-866-0876

Schwartz Research Services, Inc. 40
Ph. 813-207-0332 • Fax 813-207-0717

Scientific Telephone Samples 45
Ph. 800-944-4787 • Fax 949-609-4577

SIGMA: Research Management Group 24
Ph. 513-979-2160 • Fax 513-979-2166

Socratic Technologies, Inc. 37
Ph. 800-576-2728 • Fax 415-641-8205

Sorensen Associates .41
Ph. 800-542-4321 • Fax 503-666-5113

Strategy Research Corp. 100
Ph. 305-649-5400 • Fax 305-649-5584

Survey Sampling 9
Ph. 203-255-4200 • Fax 203-254-0372

Target Market Research Group 102
Ph. 800-500-1492 • Fax 305-661-9966

Taylor Nelson Sofres Intersearch 12
Ph. 215-442-9000 • Fax 215-442-9040

Taylor Research 25
Ph. 800-922-1545 • Fax 619-299-6370

Technical Analysis, Inc. 52
Ph. 201-836-1420 • Fax 201-836-7870

Venture Data 69
Ph. 800-486-7955 • Fax 888-522-5498

The Wats Room, Inc. 77
Ph. 201-845-3100 • Fax 201-845-3131

Trade Talk

continued from p. 106

part five used conjoint analysis to determine how factors such as control over information use, type of information requested, future mail volume, and shopping benefits affected their purchase intentions; part six collected demographic information from the respondents and also asked about at-home/from-home shopping purchases.

Despite the daunting 11-page survey (which made liberal use of white space to make the form seem less packed), the researchers earned a 55.6 percent completion rate (a $2 incentive was included with the survey).

Findings

Not unexpectedly, consumers were most willing to give marketers information on marital status, education, hobbies, and recent shopping purchases but grew nervous about divulging their phone number, Social Security number, income, and kinds of credit cards owned.

Despite all the bawling about being flooded with junk mail, 57 percent said they enjoy receiving catalogs and 40 percent said the catalogs and mailed advertising are helpful. Further, 40 percent said they would like to get more mail and catalogs about products and services of interest to them. Of course, nearly 90 percent said they would like to receive less mail about products and services they aren't interested in.

Consumers don't feel like direct marketers have their best interest in mind: 73.6 percent disagreed with the statement "Most catalog firms and other companies that sell products and services through the mail are concerned about consumers' privacy." And 62.4 percent feel that marketers know too much about consumers. But nearly half agreed that the more a company knows about a consumer the more useful their catalogs and mailings become.

Nearly 80 percent said it's not OK for a company to share its mailing list with other companies or organizations. And 85.6 percent said there should be limits on how much information businesses can collect about consumers.

Three-quarters of those responding to the survey wished they had more information about how to remove themselves from mailing lists and 84 percent felt that if they had more control over how companies used information about them they would be subject to less junk mail and fewer phone solicitations.

Implications

One of the most important findings is that the respondents who expressed the most concern about marketers' use of their personal information are frequent catalog and/or direct marketing buyers. So in addition to being a good idea from a PR standpoint, marketers might find it in their own best interest to hew to the five steps the authors provide to alleviate shoppers' privacy concerns:

Step 1: Make your information requests make sense. Shoppers said it's OK for a bank or insurance firm to ask for financial information but someone trying to sell them a sweater doesn't need detailed earnings data or a Social Security number.

Step 2: Give consumers some control over how their information is used. The conjoint portion of the study showed that doing so "has a relatively dramatic impact on consumers' purchase intentions." Respondents indicated they were more accepting of advertising offers they had a hand in initiating.

Steps 3 & 4: Send less junk mail and make the offerings you do send more relevant. A difficult task, to be sure, because the best way to target market is by gathering more information from shoppers!

Step 5: Self-regulate your use of personal information and make sure consumers know about your efforts. "Rather than simply calling attention to 'opt out' options," the authors conclude, "the results obtained here suggest such efforts should offer — and demonstrate — information control features that provide consumers with tangible value and utility, such as reductions in unwanted advertising mail."

Marketers' Information Practices and Privacy Concerns: How Willing Are Consumers to Provide Personal Information for Shopping Benefits? (Report No. 99-112) is available from the Marketing Science Institute, Cambridge, Mass. Phone 617-491-2060. E-mail pubs@msi.org. Web www.msi.org.

War Stories needs your help!

If you have a good research-related anecdote or know someone who does, contact War Stories compiler Art Shulman at 818-782-4252 or at artshulman@aol.com.

Trade Talk

By Joseph Rydholm, QMRR editor

Consumers open up about their privacy concerns

Our mail boxes are stuffed daily with catalogs and credit card come-ons. Our phones ring with calls from long-distance providers and carpet cleaners. Why won't these people leave us alone? Do they think we're interested in all this junk? Unfortunately, yes. And we've told them we are by sending back those credit card applications, signing up for that new calling plan, or ordering a pair of chinos from that snazzy catalog.

In other words, direct marketing works. But consumers are becoming more and more fed up with the deluge of sales pitches they receive. And they're growing stingier with the amount of data they'll share with marketers. For the most part, that information is used for legitimate purposes, and it has allowed people to receive pitches that better suit their interests, but the public is understandably wary about where all this is leading.

In their Marketing Science Institute working paper *Marketers' Information Practices and Privacy Concerns: How Willing Are Consumers to Provide Personal Information for Shopping Benefits?* authors Joseph Phelps, Glen Nowak and Elizabeth Ferrell use findings from a mail survey to explore consumer privacy concerns and their implications for marketers.

The authors sought to identify 1) the kind of personal information people are most and least willing to give to direct marketers and other retailers; 2) consumers' feelings regarding the benefits of providing personal data to these merchants; 3) specific factors that affect consumers' willingness to provide personal information; 4) the trade-offs consumers are most and least willing to make in exchange for providing personal information.

The mail survey was a six-part booklet which was sent to samples from two databases, one a list of known and recent catalog shoppers and the other a general database of residential addresses. Part one of the survey assessed general catalog purchasing habits; part two gauged perceptions of catalog and advertising mail volume; part three looked at specific kinds of personal information and how willing respondents were to provide that information at the time of purchase; part four focused on their opinions of how business use of consumer information should be controlled;

continued on p. 105

Non Sequitur

The largest marketing research company in the world plus
The most experienced marketing research training organization in the world equals...

ACNielsen Burke Institute

Formerly The Burke Institute

We cordially invite you to experience our unequalled commitment to excellence.

http://www.BurkeInstitute.com

Seminar Dates, Locations and Fees for North America through December 2000

101. Practical Marketing Research
- Dallas ... Mar 22-24
- San Francisco ... Apr 10-12
- Chicago ... May 8-10
- Raleigh ... June 7-9
- New York ... June 26-28
- Cincinnati ... July 19-21
- Baltimore ... Aug 14-16
- Toronto ... Sep 11-13
- Chicago ... Oct 2-4
- San Francisco ... Oct 23-25
- Miami ... Nov 27-29
- New Orleans ... Dec 18-20

104. Questionnaire Construction Workshop
- Cincinnati ... Mar 6-8
- Los Angeles ... April 10-12
- Atlanta ... May 15-17
- Chicago ... Jun 19-21
- Baltimore ... Jul 31 - Aug 2
- New York ... Sep 18-20
- San Francisco ... Oct 30 - Nov 1
- New Orleans ... Dec 4-6

105. Designing Questionnaires for Specific Marketing Research Applications
- Cincinnati ... Mar 9-10
- Los Angeles ... April 13-14
- Atlanta ... May 18-19
- Chicago ... Jun 22-23
- Baltimore ... Aug 3-4
- New York ... Sep 21-22
- San Francisco ... Nov 2-3
- New Orleans ... Dec 7-8

106. Online/Internet Research
- San Francisco ... May 30-31
- Toronto ... Sep 14-15
- Miami ... Nov 30-Dec 1

201. Qualitative Research Methods
- Cincinnati ... Mar 16-17
- San Francisco ... Jun 1-2
- New York ... Nov 9-10

202. Focus Group Moderator Training
- Cincinnati ... Apr 4-7
- Cincinnati ... May 9-12
- Cincinnati ... June 13-16
- Cincinnati ... July 24-27
- Cincinnati ... Aug 29 - Sep 1
- Cincinnati ... Oct 10-13
- Cincinnati ... Nov 7-10
- Cincinnati ... Dec 12-15

203. Focus Group Applications
- Cincinnati ... Feb 28 - Mar 1
- Cincinnati ... June 19-21
- Cincinnati ... Oct 16-18

204. Qualitative Research Reports
- Cincinnati ... Mar 2-3
- Cincinnati ... June 22-23
- Cincinnati ... Oct 19-20

205. Qualitative Research with Children
- New York ... Mar 31
- Cincinnati ... July 28
- Chicago ... Oct 5

301. Writing Actionable Marketing Research Reports
- Cincinnati ... Mar 20-22
- San Francisco ... May 1-3
- Atlanta ... Jun 14-16
- New York ... July 10-12
- Denver ... Aug 16-18
- Chicago ... Sep 25-27
- Boston ... Nov 13-15

302. Stand-up Presentation of Marketing Information
- San Francisco ... May 4-5
- Chicago ... Sep 28-29

401. Managing Marketing Research
- Cincinnati ... Mar 23-24
- New York ... July 13-14
- Boston ... Nov 16-17

402. Increasing the ROI from Marketing Research
- New York ... Mar 31
- Chicago ... Jul 27
- Cincinnati ... Dec 15

501. Applications of Marketing Research
- Cincinnati ... Mar 2-3
- Chicago ... May 11-12
- New York ... June 29-30
- Baltimore ... Aug 17-18
- San Francisco ... Oct 26-27
- New Orleans ... Dec 21-22

502. Product Research
- New York ... Mar 6-7
- Atlanta ... May 22-23
- San Francisco ... Aug 22-23
- Cincinnati ... Nov 14-15

504. Advertising Research
- New York ... May 1-2
- Cincinnati ... July 31 - Aug 1
- Atlanta ... Dec 4-5

505. Market Segmentation Research
- New York ... May 3-4
- San Francisco ... June 19-20
- Cincinnati ... Aug 2-3
- Atlanta ... Dec 6-7

506. Customer Satisfaction Research
- New York ... May 16-17
- San Francisco ... June 12-13
- Chicago ... Aug 8-9
- Cincinnati ... Oct 31 - Nov 1

507. Analysis & Interpretation of Customer Satisfaction Data
- New York ... May 18-19
- San Francisco ... June 14-15
- Chicago ... Aug 10-11
- Cincinnati ... Nov 2-3

508. Positioning Research
- New York ... May 5
- San Francisco ... June 21
- Cincinnati ... Aug 4
- Atlanta ... Dec 8

509. Pricing Research
- Atlanta ... May 24
- San Francisco ... Aug 25
- Cincinnati ... Nov 16

601. Data Analysis for Marketing Research: The Fundamentals
- Cincinnati ... Mar 14-15
- Atlanta ... Jun 12-13
- Denver ... Aug 14-15
- Chicago ... Oct 5-6
- New York ... Nov 7-8

602. Tools & Techniques of Data Analysis
- Atlanta ... Feb 29-Mar 3
- New York ... Apr 25-28
- Las Vegas ... May 30 - June 2
- Chicago ... Jul 18-21
- Cincinnati ... Aug 29 - Sep 1
- New York ... Oct 3-6
- Los Angeles ... Nov 7-10
- Raleigh ... Dec 12-15

603. Practical Multivariate Analysis
- Cincinnati ... Mar 21-24
- Las Vegas ... June 6-9
- Chicago ... Jul 25-28
- New York ... Oct 10-13
- Atlanta ... Nov 28 - Dec 1

604. Data Analysis: A Comprehensive Hands-on PC Based Workshop
- Cincinnati ... Mar 29-31
- Cincinnati ... June 14-16
- Cincinnati ... Aug 16-18
- Cincinnati ... Oct 18-20
- Cincinnati ... Dec 6-8

605. Practical Conjoint Analysis & Discrete Choice Modeling
- San Francisco ... Apr 17-18
- New York ... July 11-12
- Atlanta ... Oct 24-25

606. Data Mining Tools & Applications
- San Francisco ... Apr 19-20
- New York ... July 13-14
- Atlanta ... Oct 26-27

701. International Marketing Research
- Chicago ... Jun 28-29
- San Francisco ... Aug 8-9
- New York ... Oct 25-26

801. Using Marketing Information for Better Decision Making
- New York ... Mar 29-30
- Chicago ... Jul 25-26
- Cincinnati ... Dec 13-14

901. STORWARS—Business Simulation Strategy Seminar
- new New York ... April 25-28

Certificate seminars may be taken back-to-back during scheduled dates or in various cities over an extended period of time.

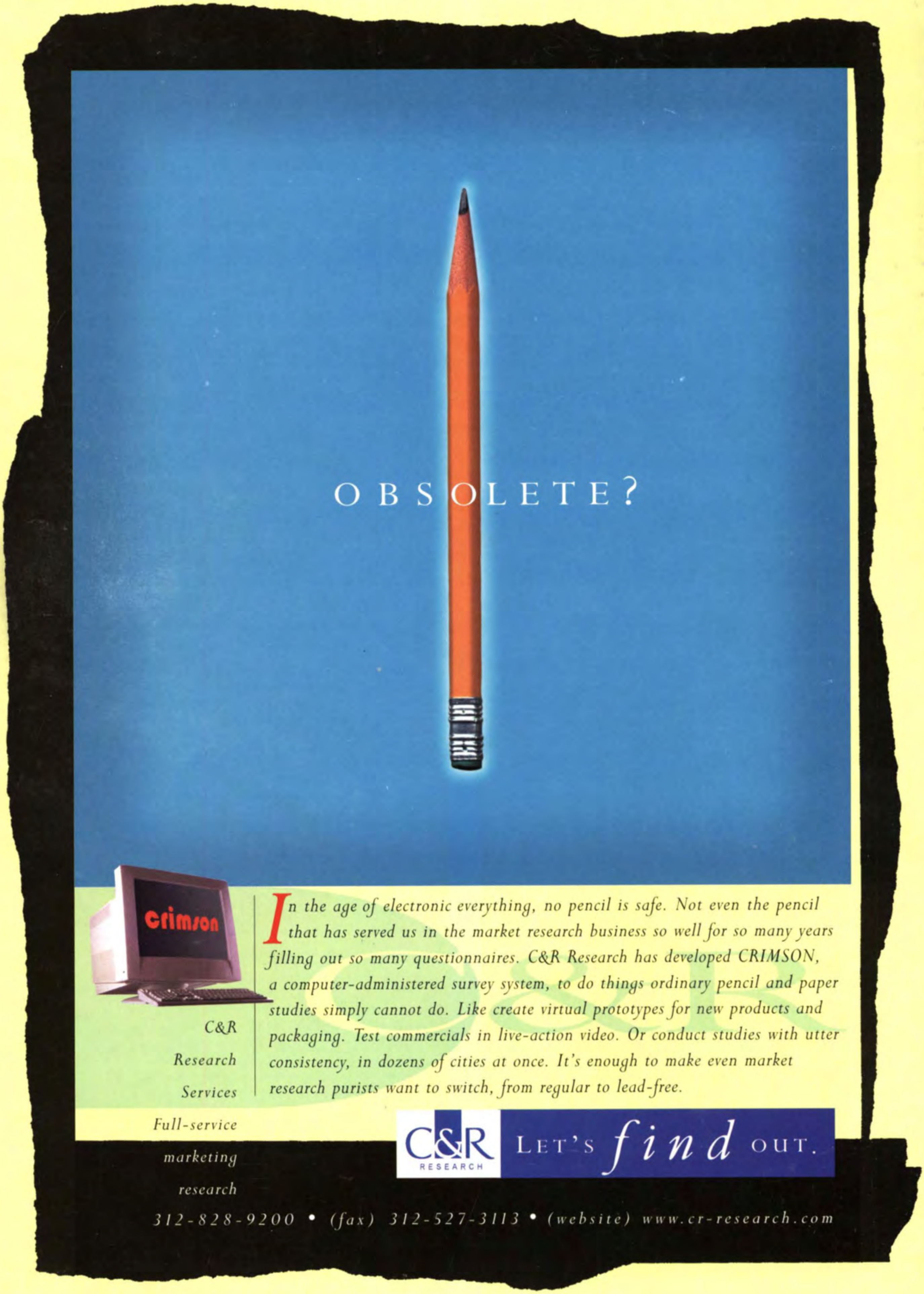
All the above ACNielsen Burke Institute seminars are available for in-house presentation.

TO REGISTER PLEASE CONTACT US AT:

Voice: 800-543-8635 or 606-655-6135 • Fax: 606-655-6064 • E-mail: BurkeInstitute@BASES.com

FOR ADDITIONAL INFORMATION OR DETAILS ABOUT OUR SEMINARS:

Please contact Mr. Jim Berling, Client Service Manager, or Dr. Sid Venkatesh, President, or visit our web site at http://www.BurkeInstitute.com


OBSOLETE?
crimson
In the age of electronic everything, no pencil is safe. Not even the pencil that has served us in the market research business so well for so many years filling out so many questionnaires. C&R Research has developed CRIMSON, a computer-administered survey system, to do things ordinary pencil and paper studies simply cannot do. Like create virtual prototypes for new products and packaging. Test commercials in live-action video. Or conduct studies with utter consistency, in dozens of cities at once. It's enough to make even market research purists want to switch, from regular to lead-free.
C&R Research Services
Full-service marketing research
C&R RESEARCH
LET'S find OUT.
312-828-9200 • (fax) 312-527-3113 • (website) www.cr-research.com