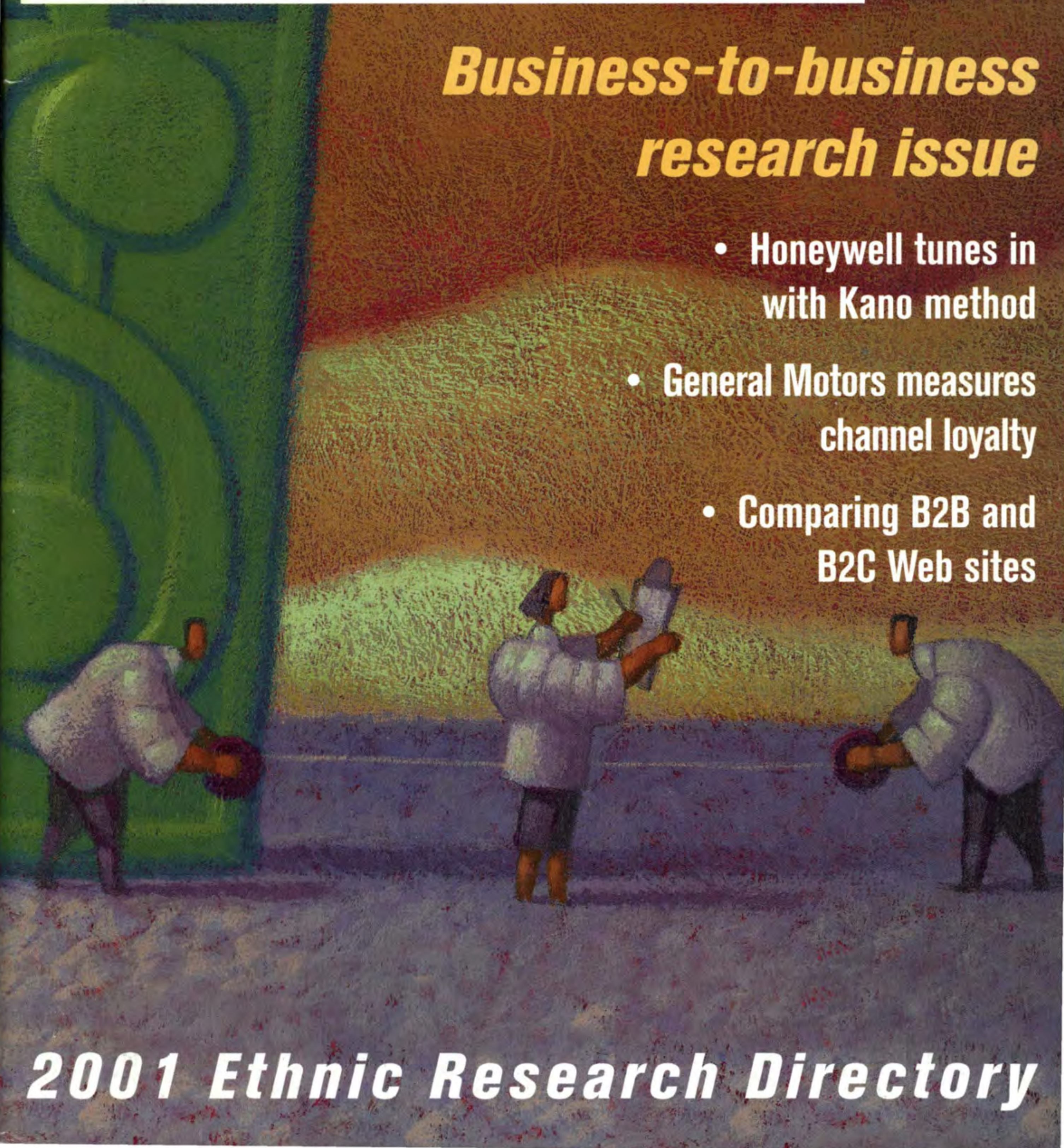
QUIRK'S Marketing Research Review

www.quirks.com

April 2001



Business-to-business research issue

- Honeywell tunes in with Kano method
- General Motors measures channel loyalty
- Comparing B2B and B2C Web sites

2001 Ethnic Research Directory

QUIRK'S Marketing Research Review

Volume XV, Number 4 April 2001

C O N T E N T S

F E A T U R E S

Case History

Techniques

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 FosteReprints at 800-382-0808 ext. 132.

D E P A R T M E N T S

Ethnic groups turning to Internet

Access Worldwide Communications, Inc., a Los Altos, Calif., marketing and market research company, has released the final results of an online research study that was conducted to understand Internet access and usage among multicultural markets in the U.S. Access Worldwide's Cultural Access Group completed the research study in partnership with Survey.com and a range of ethnic Web sites that target African-American and Hispanic audiences.

Though at lower levels than the general market, Internet access by multicultural audiences has doubled during the previous two years. The study measured online attitudes and practices among African-Americans,

Hispanics and the general market. Research indicates that ethnic and cultural factors play a prominent role in determining the unique needs, usage and attitudes of multicultural users.

Among the many findings, the study revealed the following trends:

• Online African-Americans and Hispanics are using the Internet to explore information and content for different purposes than the general market. African-Americans focus their Internet activities more on career advancement and professional development, family/relationship themes, education, entertainment and exploring hobbies and interests. Online Hispanics overwhelmingly use the Internet as a major source of news content, particularly international news. Unlike the general market, both groups are less likely to seek financial or technological information online.

• The more longevity and experience that ethnic users have with the Internet, the more likely they will engage in e-commerce activities. The level of online experience is a determining factor whether online African-Americans and Hispanics will use the Internet to eventually purchase products. More than 40 percent of online African-Americans with three or

continued on p. 60

Is business casual too casual?

More than one-third (34.2 percent) of executives polled think that business casual dress has gone too casual, according to a survey by Management Recruiters International, Inc. (MRI), Cleveland.

"More than two years ago we conducted a survey of hiring executives about the future of casual dress in the American workplace. Forty percent thought that the suit and tie would eventually vanish from the workplace," says Allen Salikof, president and CEO of MRI. "But perhaps the pendulum has swung too far. Attire such as open-toed shoes, tank tops and shorts, or sweat suits should be considered too casual for today's workplace. Yet, more people are dressing in this manner at both start-up entities and Fortune 100 companies alike.

"While no one is suggesting that the three-piece suit make a comeback in Corporate America, employers and employees alike need to find a happy medium in dress style that affords comfort and flexibility and complements today's more informal work style, while keeping within the boundaries of taste," Salikof says.

A greater percentage of companies within the real estate industry (59.9 percent) and the financial services sector (47.3 percent) said that casual dress in the workplace had become too casual. Nearly four out of 10 executives representing companies with more than 1,000 employees echoed those sentiments.

Regionally there were also differences. Companies in the North Central (38.5), Mid Atlantic (34.7) and South Atlantic (34.2 percent) regions also were more likely to report that dress in the workplace had become too casual.

"Companies in the West [29.4 percent], Southwest [29.3 percent] and South Central [24.7 percent] regions were least likely to agree," says Salikof. "These regions of the country tend to dress more casually in general and warmer temperatures may also play a role in more lax dress code policies at work.

"Casual dress has become a workplace benefit, and prospective employees do take this into consideration when exploring a new job opportunity. Employers recognize the value of added comfort throughout the workday, but they need to set the tone or create a policy to govern this benefit just as they would other benefits being offered to their employees. There is just too much room for interpretation on an issue like this." For more information visit the company's Web site at www.BrilliantPeople.com.


Ruth


Peter

Names of Note

William E. Maritz, chairman of *Maritz Inc.*, a St. Louis firm that also includes Maritz Marketing Research, passed away on February 26 due to complications from prostate cancer. He was 72.

Kmart Corporation, Troy, Mich., has named **Robert P. Woodard** vice president, consumer and market research.

Bonnie Southwick has joined *Eagle Research*, Atlanta, as a human resources generalist. **Carly Johnson** has joined the firm as project director.

Mark Nielson has joined *Sorensen Associates Inc.*, a Portland, Ore., research firm, as senior project director.


Nielson

Columbia, S.C., energy firm *Scana Corporation* has named **Daniel Siculan** manager of marketing research.

As part of a reorganization effort, Wilton, Conn., research firm *Greenfield Online* has named a five-member operating committee consisting of: **Bob Bies**, chief financial officer; **Rick Allen**, senior vice president for global client development; **Susan Rosovsky**, senior vice president for research operations; **Hugh Davis**, chief technology officer; **Mark Hardy**, senior vice president for portfolio development. In addition, **Terry Erickson** has joined Greenfield Online's San Francisco office as vice president-client development, West Region. **Robert Buchanan** has been named vice president for enterprise sales. The following promotions were also announced: Hugh Davis to chief technology officer; Mark Hardy to senior vice president portfolio development; **Bob Ferro** to vice president business development; **Gail Janensch** to vice president, corporate communications; **Paul Kuriakose** to vice president, technology; and **Susan Murtha** to vice president, research operations.

Michael Mermelstein has been named vice president of corporate development at *Field Facts Worldwide*, Bethesda, Md.

Ronn Kirkwood has been named senior vice president, executive director of the brand planning department at the Milwaukee office of the *Cramer-Krasselt* advertising agency. In addition, **Susan Northey** has been named vice president, managing director.

Debbie Bertram has been named president and COO of *Decision Insight*, a Kansas City research firm. The firm's founder, **Betsy Stewart,** will remain as CEO. In addition, **Brian DiVita** has been named vice president, client services; **Doug Clark** has been named senior research director; and **Judy Deines** has been named senior project manager.

Samuel Weinstein has been promoted to president and COO of *C.A. Walker and Associates*, a Los Angeles research firm. **Ken Anderson** has been named executive vice president. **Charles Walker** will remain CEO and board chairman.

Mark Quarry has been named client services manager of *Cooper Research, Inc.*, Cincinnati.

Wirthlin Worldwide, a McLean, Va., research firm, has promoted **Anne Aldrich** and **Justin Greeves** to vice president, senior research executive. At Wirthlin Worldwide Asia, **Elizabeth Kehler** has been promoted to deputy managing director of the Singapore office. And **Su Liu** has been named deputy managing director in the Hong Kong office of Wirthlin Worldwide Asia.

Chris Olliff has been named manager of the new Competitive Teardown/Clinic Services division of *Providata Automotive*, an Ann Arbor, Mich., management consulting and market intelligence firm.

NFO WorldGroup has announced that **Jonathan Leeds** has rejoined the San Francisco marketing group as a client services manager. In addition, **Rob Martin** has been promoted to account executive in the Toledo Marketing Group.

John Fava has been promoted to manager, customer data and research, for *QVC, Inc.*, an electronic television and e-commerce retailer based in West Chester, Pa.

Chicago-based *Research International USA, Inc.*, the U.S. member of the Research International network, has named **Bob Peterson** director of workflow, at the RI USA Cambridge office, Cambridge, Mass.

Austin, Texas research firm *Millward Brown IntelliQuest* has named **Marco Vriens** senior vice president, chief research officer, and **Dominic Ricchetti** as vice president, market and brand analysis.

Calabasas, Calif.-based *Informa Research Services, Inc.*, has named **Renee Arends** human resource manager.

Product & Service Update

New IVR survey software from TeleSage

TeleSage, Inc., Seattle, Wash., has introduced its new SmartQuest interactive voice response (IVR) software that can help companies automate market research functions such as screening focus group participants, implementing satisfaction surveys, and monitoring in-store merchandising activities.

The software automatically provides and captures spoken or numeric information, using a company's computer and telephone lines. Using point-and-click technology, users can design and edit their own surveys, making them as sophisticated or simple as desired.

The software can run up to 99 surveys simultaneously, in any language, and the system has the ability to branch to different questions, surveys or telephone numbers based on callers' responses. It automatically scores surveys as they are completed and stores all results in Microsoft Access or other standard databases. For more information call 800-636-8524 or visit www.telesage.com.

Omnibus targets small businesses

ICR/International Communications Research, Media, Pa., has introduced SmallBizEXCEL, an omnibus research service targeting businesses with fewer than 100 employees. With an omnibus survey, multiple clients insert questions, but only pay for their questions. The costs of sampling and screening, etc., are shared with other clients, thus reducing the overall cost to each. ICR will conduct 500 telephone interviews per month with owners or managers of small businesses, enabling clients to address a number of information needs, including advertising tracking, evaluating new product concepts, image and awareness, attitudes and usage, name evaluation, and market share evaluation. For more information call 610-565-9280 or visit www.icrsurvey.com.

Process links behavior with retail purchases

Catalina Marketing Corporation, St. Petersburg, Fla., and its research division, Alliance Research, Inc., have developed a process called Behavior Activated Research (BAR) that links consumer attitudinal behavior with actual purchase behavior.

Catalina Marketing works with supermarket retailers to maintain a database of consumer purchase behavior. This behavior, tracked by UPC code or frequent-shopper number, can be used to initiate surveys or other research efforts to determine consumer attitudes about products they have purchased, their likes and dislikes, and even about products they might buy in the future. The BAR program can reach consumers in a targeted manner, eliminating the need for random phone calls or pre-recruited panels. For more information visit www.catalinamarketing.com.

Firm opens auto clinic, teardown division

Ann Arbor, Mich.-based Providata Automotive, a management consulting and market intelligence firm, has formed a new division called Competitive Teardown/Clinic Services (CTCS). The division will

continued on p. 64

Research Industry News

News notes

In February, Reuters reported that Chicago-based Kraft Foods Inc. had filed a lawsuit in federal court in Chicago against frozen pizza rival Schwan's Sales Enterprises Inc. and one of its employees, trying to stop the maker of Red Baron and other pizzas from using its trade secrets. Kraft, which makes DiGiorno, Jack's and Tombstone pizzas, said that Timothy Cauley, head of Schwan's retail grocery pizza business, obtained information regarding new product strategies, financial details

Research Calendar

The Advanced Learning Institute will hold its U.S. Multicultural Marketing Summit on April 23-25 at the Hyatt West Hollywood in Los Angeles. For more information call 888-362-7400 or visit www.aliconferences.com.

Canada's Professional Marketing Research Society (PMRS) will hold its annual conference in Ottawa on April 24-25. For more information visit www.pmrs-aprm.com.

The Institute for International Research (IIR) will hold its International Market Research Forum on April 25-27 in Coral Gables, Fla. Registration for this conference includes registration for IIR's concurrent Multicultural Market Research Forum, which features panels on youth and urban markets. For more information visit www.iir-ny.com or call 888-670-8200.

Anderson, Niebuhr & Associates will hold a workshop on questionnaire design and use on April 26-27 at the Holiday Inn Select - International Airport, Bloomington, Minn. For more information call 800-678-5577 or visit www.ana-inc.com.

The San Francisco Chapter of the American Marketing Association will hold a conference titled, "Qualitative Technology: 2000 and Beyond," on April 27 at the Crowne Plaza Hotel Union Square, San Francisco. For more information visit www.sfama.org or call Jan Newman at 650-579-5590.

The American Marketing Association (AMA) will hold its energy marketing research conference at the Hotel Inter-Continental Chicago on April 29-May 2. For more information visit www.ama.org.

Anderson, Niebuhr & Associates will hold a workshop on questionnaire design and use on May 3-4 at the Holiday Inn On the Bay in San Diego. For more information call 800-678-5577 or visit www.ana-inc.com.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on Latin American marketing research on May 6-8 at the Presidente InterContinental Hotel in Mexico City. For more information visit www.esomar.nl.

Tragon Corporation will hold a workshop titled "Designing Product Success Through Descriptive Analysis" on May 7-9 at the Sheraton Palo Alto, Palo Alto, Calif. For more information call 800-841-1177 or visit www.tragon.com.

Salford Systems will present an introductory decision tree course, "Hands On Data Mining with Decision Trees (CART 4.0)," on May 15-16 in Boston. For more information visit www.salford-systems.com/training.html.

The Mystery Shopping Providers Association (MSPA) will hold its annual conference on May 16-19 at the Bahia Resort Hotel in San Diego. For more information visit www.mysteryshop.org.

The International Quality & Productivity Center (IQPC) will hold a conference titled "Maximizing Online Market Research Strategies" on May 16-17 in Chicago. For more information call 800-882-8684 or visit www.iqpc.com.

Salford Systems will present an introductory course, "Hands On Predictive Modeling with Automated Regression Tools (MARS 2.0)," on May 17 in Boston. For more information visit www.salford-systems.com/training.html.

The Institute for International Research (IIR) will hold a conference titled "Conjoint and Choice Based Modeling Essentials" on May 17-18 at the Crowne Plaza Ravinia in Atlanta. For more info visit www.iir-ny.com or call 888-670-8200.

The American Association for Public Opinion Research (AAPOR) will hold its annual conference on May 17-20 at the Hilton Montreal Bonaventure in Montreal. For more information visit www.aapor.org.

The International Quality & Productivity Center (IQPC) will hold its U.S. Hispanic marketing conference on May 21-23 at the Hyatt Regency in Miami. For more information call 800-882-8684 or visit www.iqpc.com.

and other areas while working on a Kraft project for market research firm **ACNielsen**.

Cauley left Nielsen in December for the job at Minnesota-based Schwan's, but prior to that had e-mailed to his home documents containing Kraft-related data, the lawsuit alleged.

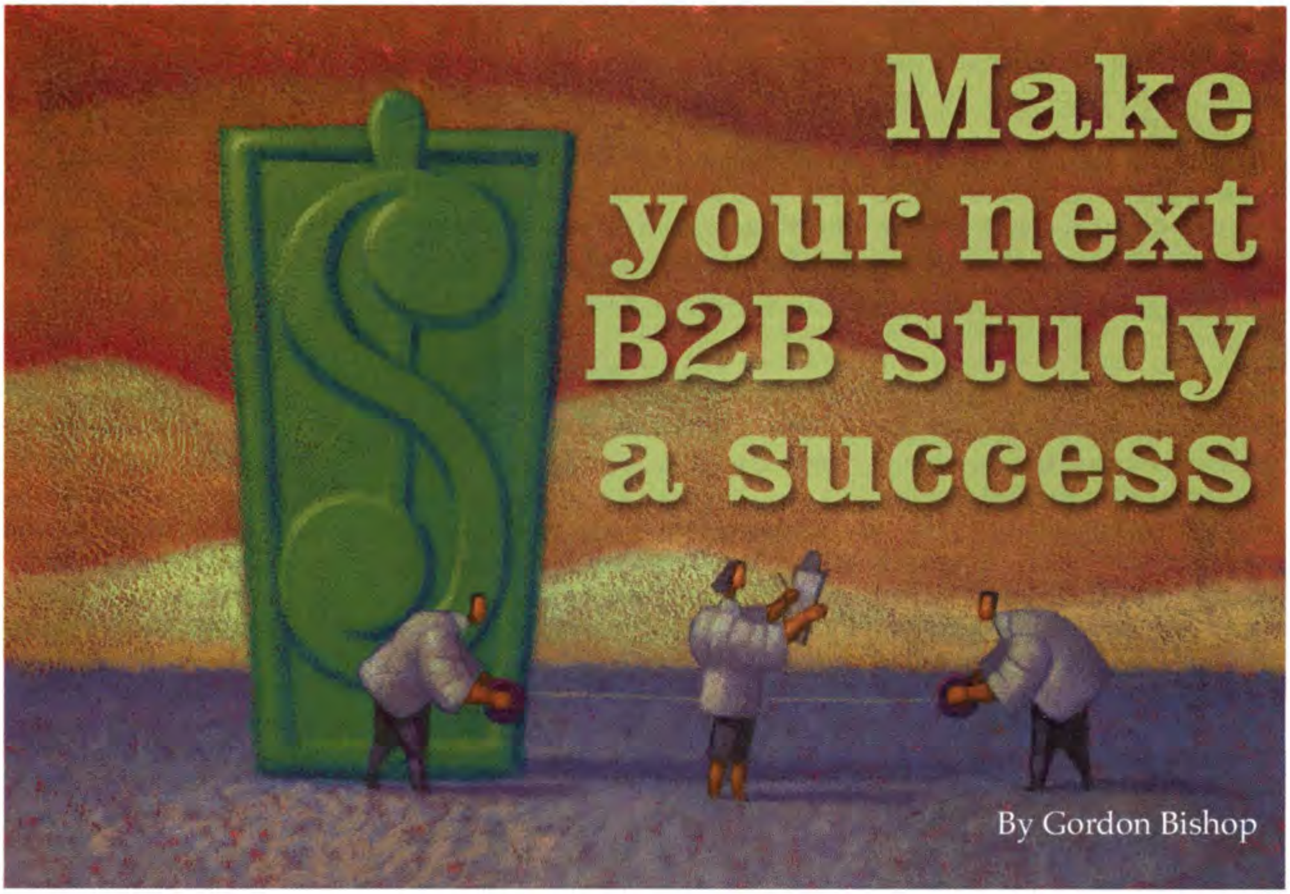
Cauley did not return any documents to Kraft or ACNielsen when he resigned, the lawsuit said, alleging that Cauley violated a confidentiality agreement he signed with ACNielsen. The suit seeks an injunction to stop Cauley from working in any job related to Schwan's pizza business for at least one year, the immediate return of any confidential documents, and unspecified damages.

Earlier this year, **Research International USA, Inc.**, Chicago, conducted a Super Group idea generation session with high school sophomores from the Chicago High School for Agriculture Sciences. The students are part of a school-based program called Food from the 'Hood Chicago, which delivers natural food products to stores, helps community shelters, and provides college scholarships to participating students. The Chicago organization was patterned after the South Central Los Angeles Food from the 'Hood program, which was born out of that city's 1992 riots. The session was conducted to help the students generate ideas for new products made from the organic produce they grow, narrow their ideas, and come to an agreement on which one they will manufacture. A percentage of proceeds from the sales of products is donated to community organizations.

Wilton, Conn., research firm **Greenfield Online** has announced a reorganization aimed at opening new markets for its Internet marketing research and business information services. To facilitate the new strategy, the firm reports that investors have committed an additional $12 million.

ACNielsen Corporation has completed its merger with **VNU N.V.**, creating a new marketing and media information firm. The $2.3 billion merger became effective on February 16, following a successful cash tender offer by a wholly-owned subsidiary of VNU, and regulatory approvals from the U.S. Federal Trade Commission and the European Commission. Under the terms of the tender offer, shareholders received $36.75 in cash for each of their ACNielsen shares. Trading in the common stock of ACNielsen ceased at the close of trading on February 16. VNU shares continue to be traded on the Amsterdam, Brussels and Luxembourg exchanges, and, in the U.S., American Depository Receipts (ADRs) are traded on the NASD Over the Counter Bulletin Board.

continued on p. 66



Make your next B2B study a success

By Gordon Bishop

Editor's note: Gordon Bishop is general manager, B2B, with Western Wats Center, a Provo, Utah, research firm. He can be reached at 801-344-5600 or at gbishop@westernwats.com.

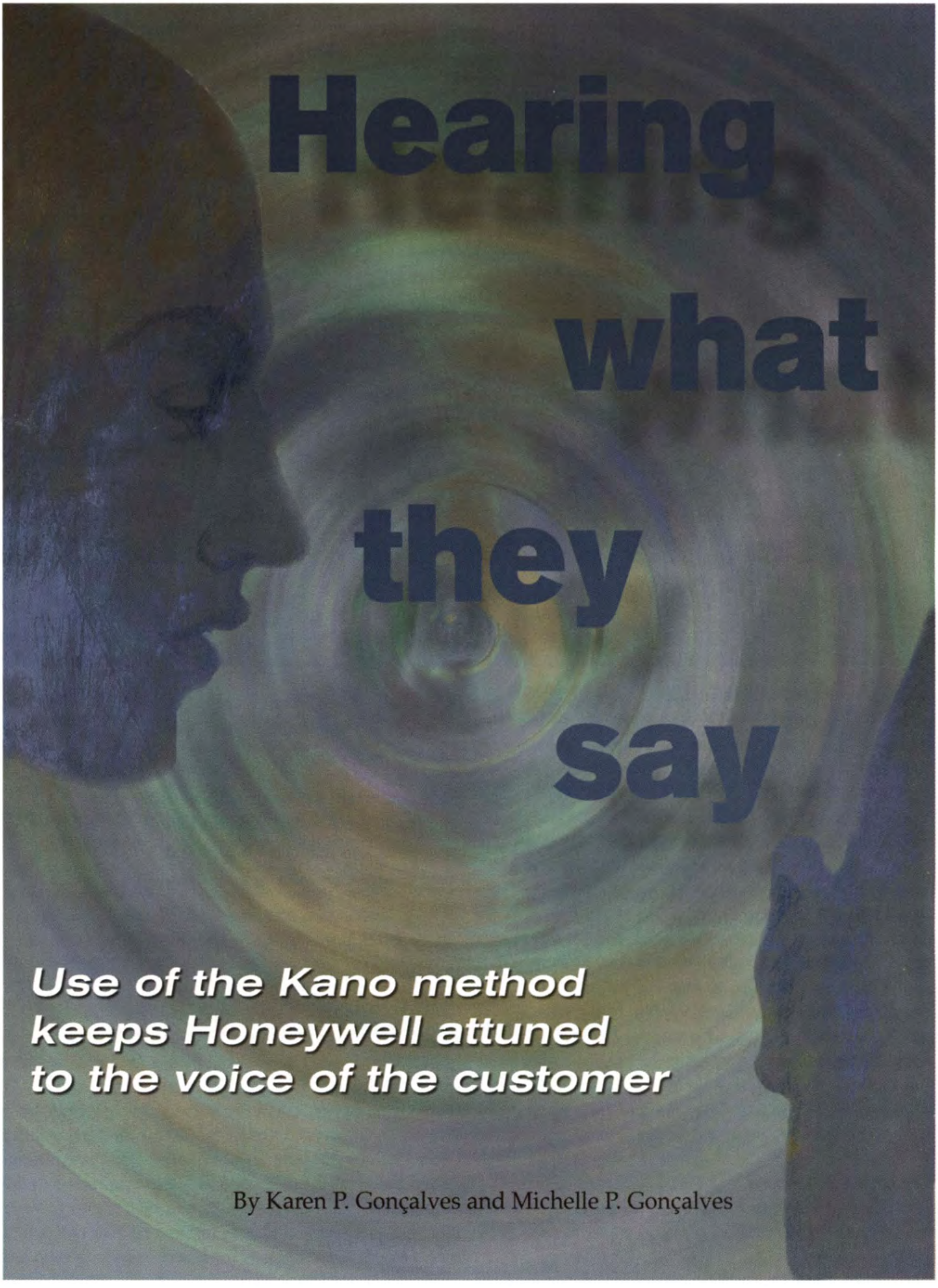
Business-to-business market research offers challenges not typically experienced with consumer research. Underestimating the effects of these challenges often leads to unnecessary frustration. Who needs missed deadlines, short quotas, higher costs, and headaches? A little additional planning will help you avoid most, if not all, of these pitfalls. Try the following tips to make your next B2B study a successful and even pleasant experience.

• *Allow sufficient time.* Unlike most consumer projects, B2B studies usually call for a specific respondent and it takes time to arrange the survey at their convenience. Don't create unrealistic time lines. Allow for adequate field time by planning better and starting earlier. When creating your field time line, keep in mind that Monday mornings and Friday afternoons are typically less productive than midweek days and if possible, avoid interviewing on the days immediately surrounding major holidays. You may be working, but some people — perhaps the ones you want to talk to — might have the day off. Also, think about all scheduling contingencies. Don't try to interview tax professionals in the spring or call teachers at school during summer vacation.

• *Offer an honorarium.* While not a perfect panacea, honorariums greatly help to boost response rates. Offer a participation incentive when interviewing hard-to-reach professionals such as physicians, attorneys, and IT/IS managers, or when the interview will exceed 15 minutes. An honorarium pays for itself through better cooperation and increased goodwill. Indeed, some B2B respondents expect an incentive to compensate for their time. Our firm recently conducted two virtually identical studies with construction workers where one client offered an honorarium and the other did not. Though the phone center used identical sample management and callback procedures, the study with the honorarium took 12 days to complete, compared to 25 days for the study without an honorarium. Imagine the time and cost savings accrued by spending half as many hours seeking the cooperation of the respondent!

Consider several factors when determining the appropriate honorarium. What will appeal to your sample universe? Respondents generally prefer cash; however, some

continued on p. 58



Hearing what they say

Use of the Kano method keeps Honeywell attuned to the voice of the customer

By Karen P. Gonçalves and Michelle P. Gonçalves

Editor's note: Karen P. Gonçalves is president, and Michelle P. Gonçalves is a consultant, at Delphi Market Research, Inc., Medford, Mass. They can be reached at 781-393-6600.

Honeywell Corp., a large manufacturer of consumer, industrial and commercial products and services, conducts extensive research as part of its product development process. The most important underlying goal for all of its customer research is to use customer input to improve product-related decisions.

Honeywell has experimented with several processes, and several divisions that operate in commercial and industrial markets have agreed to rely on a multi-step research process which they call the market driven product definition (MDPD) Process. One step within the MDPD process is a Kano method survey, for markets large enough to justify a survey. Among other things, Honeywell uses the results of these surveys to determine which products to develop or change, and how development resources should be allocated — in other words, it meets their most important goal of providing relevant customer input to decision making.

Honeywell's new product development process includes a range of internal and external exploration and analysis, with the early stages of the process focused on developing an extensive qualitative database on customer needs, applications, and preferences. Once qualitative data has been collected, a Kano method survey is completed as a way of quantifying some of what the firm is learning.

At Honeywell, Kano is used to validate and refine two things: first, what was learned during the earlier steps in the new product development process; second, the new product development process itself.

Several years ago, Honeywell was using quality function deployment (QFD) analysis, often referred to as the house of quality (HOQ) process. Honeywell found that for its particular business, QFD/HOQ was not being consistently applied, and as such, the firm recognized the need to evaluate other "voice of the customer" processes. It decided that future processes should provide a thorough, easy-to-follow logic and structure, to help ensure consistent administration of whatever techniques were used.

Honeywell worked with a consulting firm to develop the multi-step process it now uses. This method includes a Kano method survey, so two Kano surveys were completed internally. Honeywell learned a great deal, but felt it could benefit from outsourcing future Kano work. It contacted Delphi Market Research, Inc., and Delphi has been assisting Honeywell with the Kano portion of its process since then.

What is the Kano method?

The Kano method, developed by Noriaki Kano of Tokyo Riko University less than 10 years ago, is a new technique in a researcher's toolbelt. It is related to conjoint analysis, in that comparisons, rather than discrete answers, are an important part of the interpretation. But unlike conjoint analysis, the respondent is not asked to make trade-offs or choices among options. Rather, respondents independently rate their pleasure or displeasure with the way in which up to two dozen variables are delivered to them. The pleasure/displeasure answers allow researchers to classify each variable as "attractive," "one-dimensional," "must-be," or "indifferent."

An attractive attribute is simply that — attractive. There is no penalty for not including an attractive element, but including it makes the product or service better to use (i.e., enhanced functionality), differentiates it from competing offerings, and "delights" the user. Customers will often pay a premium for products and services that include attractive attributes.

A one-dimensional characteristic is one for which more is always better. A lower degree of functionality in a one-dimensional characteristic will displease customers, and a higher degree of functionality will please them.

A must-be characteristic is one the customer considers essential. It is much closer to binary than a one-dimensional characteristic. Without it, a consumer will not buy — you are not a serious contender in an industry unless your offering provides all of the must-be characteristics.

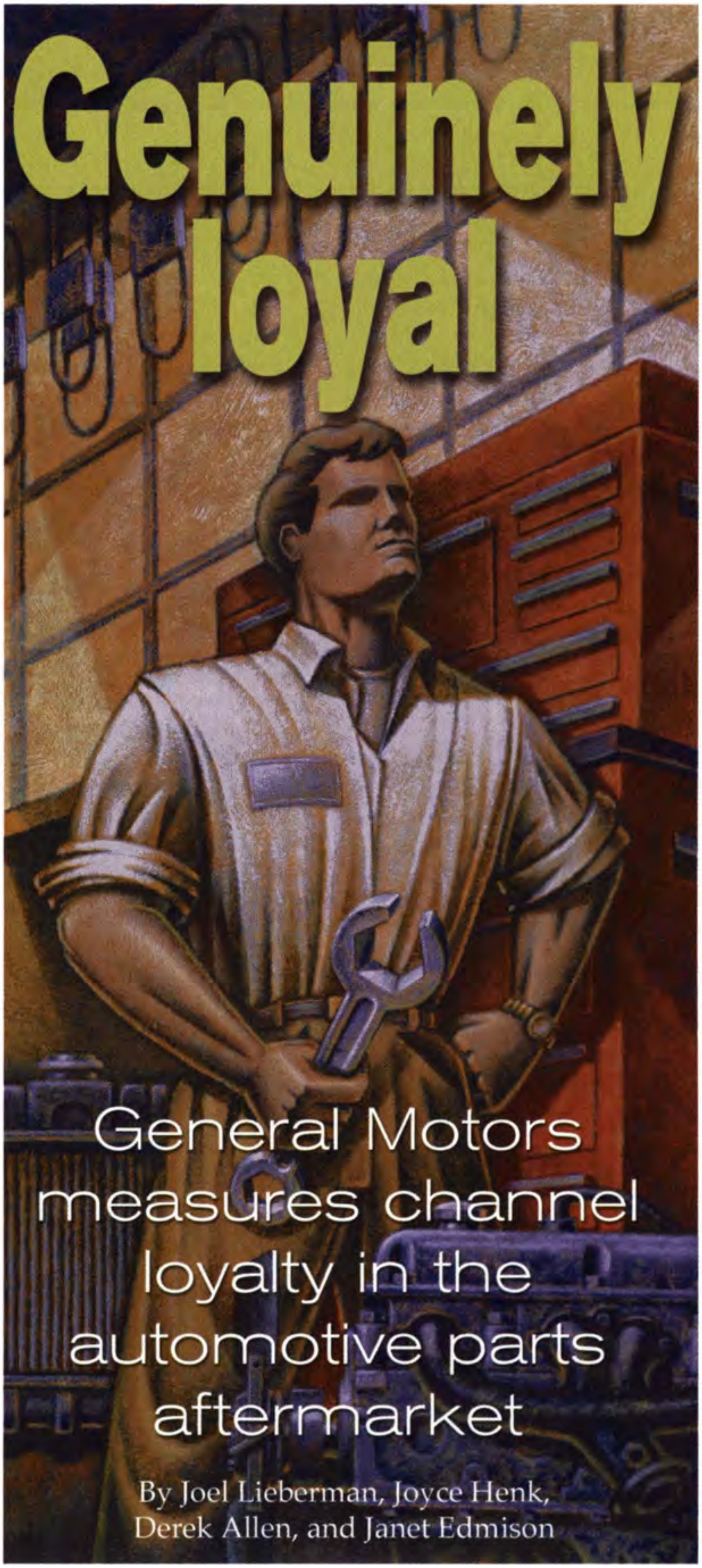
An indifferent attribute is one that consumers do not value. It is important to note that each segment of your market may be indifferent about different characteristics. While this may not be the case for a product or service with a very narrowly defined use, a general use product or service may have a large degree of variation in the indifferent category from one target market to the next.

Once each variable is categorized as attractive, one-dimensional, must-be or indifferent, researchers use the rest of the survey instrument to further break down and understand consumer needs and preferences.

Issues when applying the Kano method

An important issue emerged almost as soon as Honeywell decided to use the Kano method — how to word the scale for part one of the Kano questionnaire. There are four parts to each

continued on p. 70



Genuinely loyal

General Motors measures channel loyalty in the automotive parts aftermarket

By Joel Lieberman, Joyce Henk, Derek Allen, and Janet Edmison

Editor's note: Joel Lieberman is manager, customer research, and Joyce Henk is customer satisfaction coordinator, at General Motors Corporation, Detroit. They can be reached at joel.t.lieberman@gm.com and joyce.henk@gm.com. Derek Allen is vice president, director of research, and Janet Edmison is vice president, at Market Probe, Inc., a Milwaukee research firm. They can be reached at 414-778-6000.

Many manufacturers distribute their products indirectly to consumers through direct accounts. Although some of this is changing with the rapid integration of e-commerce into consumer purchase behavior, durable goods like kitchen appliances and automobiles continue to reach consumers through intermediary businesses like appliance stores and vehicle dealerships, respectively.

Manufacturers, interested in better understanding consumer purchase behavior, have sponsored consumer studies for many years to better understand their attitudes and opinions. In the 1980s, customer satisfaction studies became the "in" thing in research circles, and many market research companies started to advertise themselves as specialists in customer satisfaction.

In the 1990s, concepts of loyalty and customer retention made inroads into the lexicon of consumer research. The gospel of loyalty and retention spread because research clearly showed that loyalty and enthusiasm are more positively related to repurchase than satisfaction, and it costs more to gain customers than to retain them.

Companies have spent significant portions of their research dollars on consumer loyalty and customer retention studies to keep their customers and learn what it takes to cut into their competitors' customer base.

Accordingly, channel loyalty studies have taken a backseat to consumer studies in the minds of many manufacturers. In terms of push-vs.-pull marketing strategies, manufacturers are betting that con-

sumer influence will help pull sales through distribution channels.

General Motors Service Parts Operations (SPO) has traditionally focused its efforts on its direct accounts: parts departments at GM dealerships (through its GM Parts Sales organization) and warehouse distributors (through its ACDelco Sales channel). Historically, GM dealerships have represented the largest part of total revenue at SPO. They remain key to SPO's mission of providing "The Right Parts at the Right Time at the Right Price" to support new vehicle sales through consumers' overall service experience.

Because dealers can purchase parts from suppliers other than SPO, it is in SPO's best interest to provide great service. Accordingly, SPO initiated satisfaction studies in the mid-1980s to measure and monitor satisfaction of parts managers with SPO support. With the increased focus of customer loyalty research, SPO conducted a study of GM dealership loyalty in the spring of 2000.

Methodology

Parts managers from four major metropolitan areas (three U.S. sites and one Canadian location) were interviewed in group settings (i.e., parts club meetings) in March and April. Because of the nature and sensitivity of these discussions, other GM personnel (e.g., sales, warehousing, etc.) were excluded from these meetings. These meetings were facilitated, moderated and managed by members of SPO's customer research team with assistance of SPO's satisfaction research vendor, Market Probe, Inc.

A funnel approach was used to solicit information about dealer loyalty. The topic was introduced with the generic perspective:

"What do you think loyalty is, in general? Describe your feelings related to loyalty."

Discussion then moved through the high-level corporate view:

"What about loyalty to GM? What does it mean? How does it feel?"

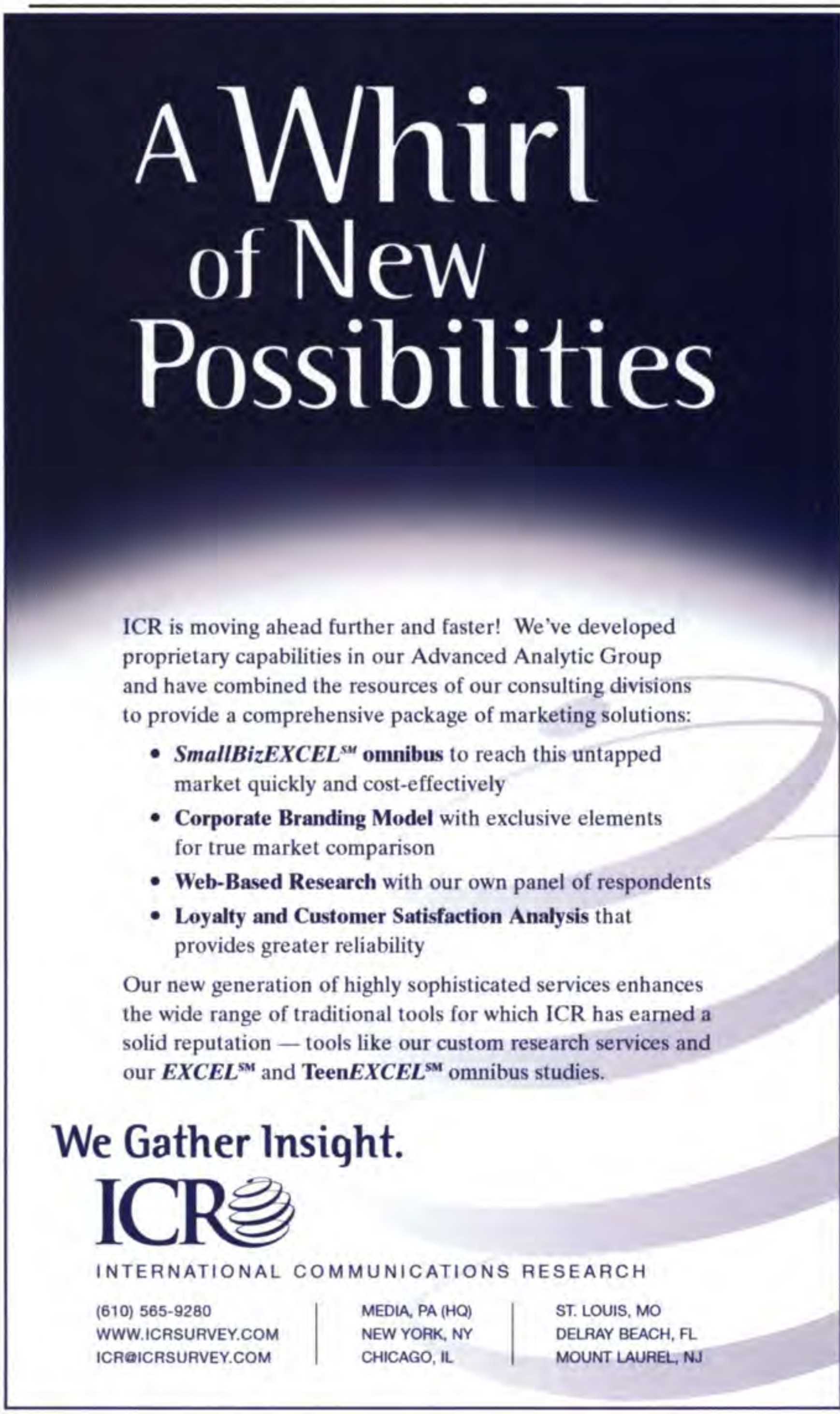
Finally, parts managers were asked to focus on the specific:

"What does loyalty to SPO mean to you as a parts manager? When you experience feelings of loyalty to SPO, what lies behind those feelings? What is it about the relationship between you and SPO that keeps you coming back? Give an example of your loyalty to SPO, especially one where you had a choice to go elsewhere."

Parts managers were then asked what choices they had in sourcing parts and what were the key drivers of that behavior. At the end of the meeting, parts managers were asked to indicate the top three reasons why they chose to purchase automotive parts from sources other than SPO.

Follow-up telephone interviews with several parts managers were conducted to identify what other loyalty issues, if any, existed.

Because larger dealerships tend to frequent parts club meetings, additional research was conducted on



smaller dealerships in more rural locations to ensure that all dealer segments were included in the study. Parts managers from these smaller dealerships were then interviewed by telephone to determine if their sourcing profile on the average differed from the profile of larger dealerships.

Finally, to answer the question about appropriate sub-issues surrounding loyalty, 24 loyalty questions were developed from this research and posed to 100 GM parts managers during further telephone interviews. Responses were then factor analyzed to determine which questions were salient to dealer loyalty.

Findings

The key elements of loyalty to a parts supplier are rooted in both emotional and practical considerations as follows:

• the practical "hard" issues (parts availability, order response time [ORT], hassle-free returns, and competitive pricing) and,

• the "soft" issues (two-way trust, and feeling valued as a customer).

Other issues that affect loyalty to a parts supplier include: quality; communications; service; relationships; consistency; empowerment; empathy; credit terms.

Parts managers clearly have strong emotional ties to the "mother corporation" and these ties unquestionably drive a strong sense of loyalty to SPO. However, the extent to which these emotional ties impact on intent to purchase parts from SPO varies from parts manager to manager and is less likely to play as strong a role in purchase intent as more practical considerations such as parts availability and speedy delivery.

Importantly, parts managers make it clear that, all things being equal, they prefer to buy from SPO, recognizing the superior quality of the parts, and responding to their customers' desire for Genuine GM or ACDelco parts.

As one parts manager said: "I try to buy as much as I can [from SPO]. People want Genuine GM – the brand name...I wouldn't want to go somewhere that's not Genuine."

The bottom line is that most parts

managers define loyalty to SPO in the context of loyalty to their customers. To the degree that they can respond to customer demand for quality parts and quick turnaround, the dealer will purchase from SPO. However, when parts availability and ORT problems occur, most parts managers will, with little hesitation, turn to other sources. They give SPO little latitude because their customers are very demanding and will, with little hesitation, go elsewhere for parts and service. And they face their customers every day.

Factor analysis of the 24 loyalty questions developed from the qualitative research above resulted in the factors shown in the boxes below (with factor loadings indicated in parenthesis).

Based on these results, the following 10 key loyalty attributes were identified:

1. Often I feel as though warehouse distributors understand my needs better than SPO.

2. As long as I buy GM Parts, it doesn't matter to me whether I get them directly from SPO or not.

3. If SPO responded quickly enough to allow me to serve my customers' needs, I would give them all my business.

4. If SPO could match insurance company pricing requirements on collision parts, I would purchase more of them from SPO.

5. SPO makes me feel like a valued customer.

6. If SPO could provide accessories on time, I would purchase more of them from SPO.

7. Non-GM suppliers represent an attractive alternative to SPO.

8. I'd rather wait an extra day for a part from SPO than buy from an outside supplier.

FACTOR 1: Hard to be loyal	
10.	It's hard to be loyal to GMSPO when there are so many alternatives. (0.70)
16.	Often I feel as though the ACDelco WDs understand my needs better than GMSPO. (0.70)
14.	There is no such thing as loyalty in the parts business. The company that can deliver the right part the fastest gets my business (0.69)
15.	I prefer to deal with ACDelco WDs because they have a more reasonable return program than GMSPO. (0.66)
19.	As long as I buy GM parts, it doesn't matter to me whether I get them directly from GMSPO or not. (0.62)

FACTOR 2: Responsiveness	
13.	If GMSPO could respond quickly enough to allow me to serve my customers' needs, I would. (0.85)
12.	If the parts I need were available, I would give all my business to GMSPO. (0.82)
22.	If GMSPO could match insurance company pricing requirements on collision parts, I would purchase more of them from SPO. (0.46)

FACTOR 3: GM values me	
11.	GMSPO makes me feel like a valued customer. (0.86)
8.	I can count on GMSPO to keep my best interests in mind. (0.85)

FACTOR 4: On-time delivery	
23.	I would purchase more glass from SPO if it was delivered on time and without damage. (0.77)
24.	If GMSPO could deliver chemicals on time, I would purchase more of them from SPO. (0.66)
21.	If GMSPO could provide accessories on time, I would purchase more of them from SPO. (0.58)
1.	All else being equal, I'd rather order parts through GMSPO. (0.45)

FACTOR 5: Alternatives	
3.	Other GM dealers represent an attractive alternative to GMSPO. (0.81)
4.	Non-GM suppliers represent an attractive alternative to GMSPO. (0.71)
2.	ACDelco WDs represent an attractive alternative to GMSPO. (0.55)

FACTOR 6: Wait for GMSPO	
5.	I'd rather wait an extra day for a part from GMSPO than buy from an outside supplier. (0.85)
6.	Even if it costs more, I'd rather get parts through GMSPO. (0.64)
7.	I dislike having to order parts from anyone other than GMSPO. (0.46)

FACTOR 7: Forced to shop around	
9.	Even though I'd prefer to do business with GMSPO, sometimes I'm forced to go with other suppliers. (0.71)
18.	Whenever possible, I look for the best deal on price for my customer. (0.60)
17.	The loyalty I feel towards GMSPO is based entirely on the contractual agreement I have with them. (0.49)

FACTOR 8: Loyal to customers	
20.	I am loyal to my customers, not my parts supplier(s). (0.88)

9. Even though I'd prefer to do business with SPO, sometimes I'm forced to purchase parts from other suppliers.

10. I am loyal to my customers, not my parts supplier(s).

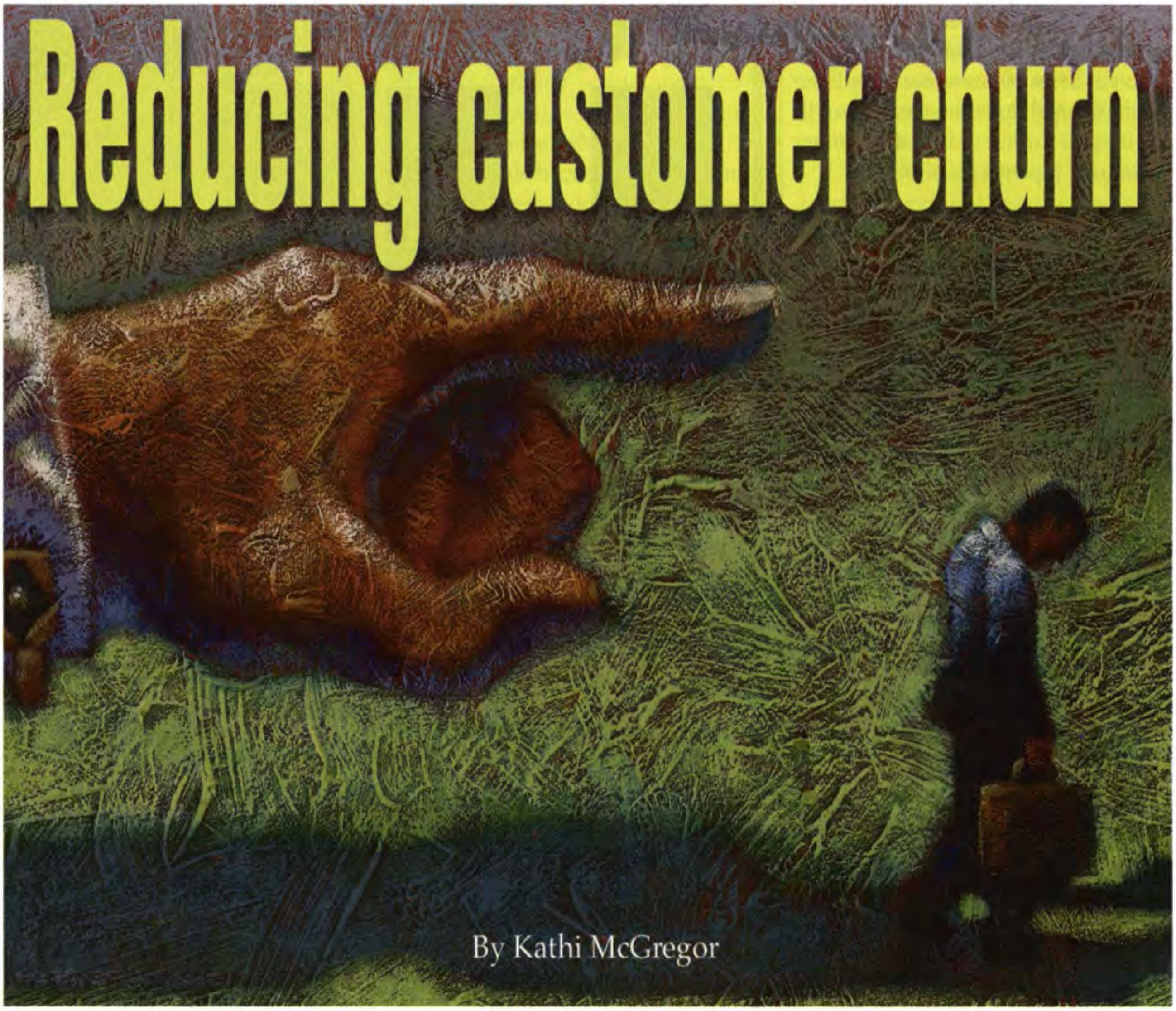
Following completion of the fall wave, these 10 statements will be reviewed and regression analysis will be used to further reduce the number of salient loyalty questions.

Summary

A multi-phased study of dealership loyalty in the automotive parts aftermarket was conducted to determine why customers choose to purchase from SPO and its competition. SPO customers clearly indicated that they prefer to purchase from SPO, but will not hesitate to purchase from other parts sources when problems with SPO parts availability and delivery occur. The overriding principle is that dealers first loyalty is to their customers.

The bottom line is that most parts managers define loyalty to SPO in the context of loyalty to their customers. To the degree that they can respond to customer demand for quality parts and quick turnaround, the dealer will purchase from SPO.

From these findings, a set of loyalty questions was developed and inserted into an existing satisfaction tracking study to help SPO monitor its efforts in providing the best service to keep their dealers loyal.



Reducing customer churn

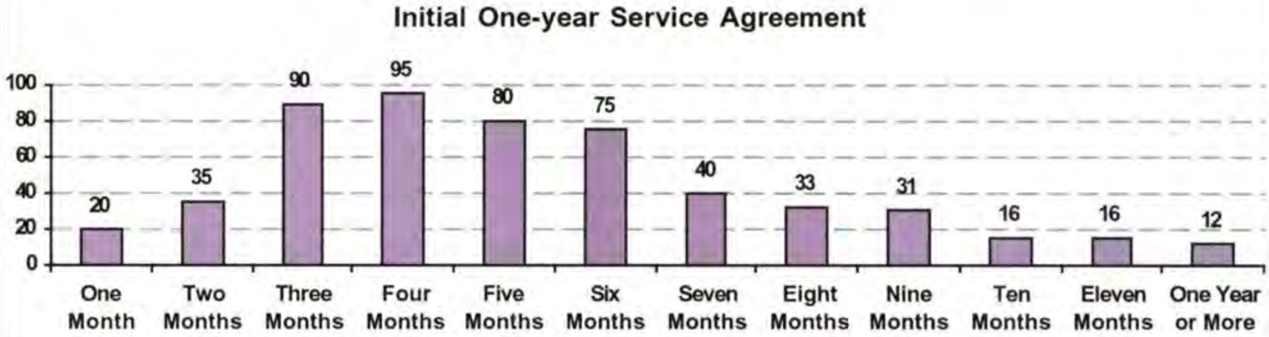
By Kathi McGregor

Editor's note: Kathi McGregor is chief operating officer at Service Strategies International, Inc., a Dallas research firm. She can be reached at 800-344-6069 or at kmcgregor@service-strategies.com.

In a way, packaged goods companies have a big advantage over service providers when fighting for market share. That is because if they sell a product such as crackers, they can gain share by selling a little of their product to millions of people, who also buy crackers from several other companies. Service providers, on the other hand, may face a situation of earning either 100 percent of a customer's business in their category or none of it at all. This is particularly true in businesses like telecommunications, where most providers are bundling products and services in an attempt to meet all of a customer's needs.

Since many telecommunications companies are targeting the lucrative small-to-medium-size business market, the loss of a single customer has real impact. And as the cost of obtaining the business customer is higher than for individuals or residential populations, it is essential that a company retain every customer it can.

Many companies realize the importance of tracking the success of their loyalty efforts, and conduct general customer satisfaction studies to create and refine business strategies from the learning they obtain. Some companies add interaction-based satisfaction studies to their research mix, recognizing the importance of measuring the impact of customer service reps on their customers. They then make changes designed to enhance the customer service experience and further drive loyalty. While these studies are very important, unless a company understands the impact and causes of churn, it is missing a big piece of the puzzle.



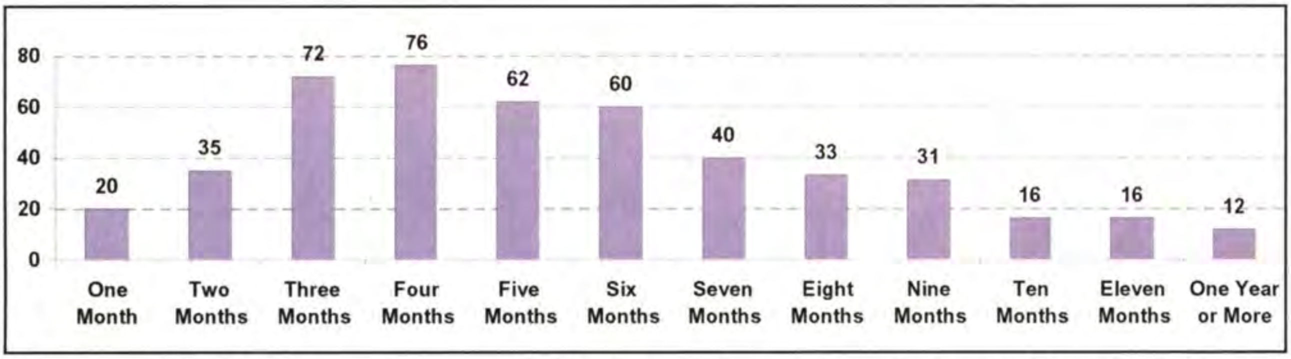
Understanding churn generally starts with a review of the entire customer database. This can reveal patterns, such as when in the customer lifecycle churn tends to take place.

The chart above illustrates an example of the number of small business customers churning in the first year of their service agreement. It clearly indicates a period of extreme vulnerability from three to six months of service.

Assuming an average billing of $500 per customer per month, the lost revenue for customers who churned during the third to sixth month of their original one-year term of service alone would be $1,290,000. If you add to this the cost of acquiring the customers, and then replacing them, the impact of even a "small" amount of churn becomes obvious.

Once a company understands the impact of churn, it naturally reaches to understand its causes. Some companies have their customer service reps call a sample of customers who have already churned and ask them why they left. A typical response received is "We didn't need it anymore," or "We were dissatisfied." While any information obtained about churn might be somewhat helpful, responses like these are clearly not sufficient to develop actions plans.

The company looking to aggressively combat churn often contracts with a qualified research partner to thoroughly investigate its reasons, and to be able to quantify the degree



of impact of individual issues. For example, churn generally falls into three categories:

• the customer is no longer in business;

• the customer was "pushed" away due to unmet expectations, either by something your company did, or failed to do;

• the customer was "pulled" away by a competitive offer.

Loss of customers who are no longer in business is not something a company can control, and would not be included in a churn study. Customers who were "pushed" or "pulled" away are considered to be controllable churn, and would be taken through a series of questions to determine what factors caused them to leave, and what remedies might have prevented their defection.

Advanced analyses could determine segments of churned customers by identifying what characteristics they hold in common. By applying this information to the company's current database, you could identify new customers at risk for defection, and take preventive action to reduce the incidence of churn.

In addition, the research should suggest which internal processes need to be modified to minimize or eliminate problems that lead to customer defection. The chart above shows the impact of reducing the amount of three to six month churn by 20 percent.

Assuming the same average monthly bill of $500 per customer, the reduction would result in the retention of over $250,000 in sales for this group of customers in the first year alone.

By adding a well-designed churn study to your customer loyalty efforts, you can quickly improve your bottom line, while minimizing future costs associated with replacing lost business.

Applying lessons learned

Differences in the evaluation of B2B and B2C Web sites

By Bill MacElroy

Editor's note: Bill MacElroy is president of Modalis Research Technologies, Inc., San Francisco. He can be reached at 415-430-2200 or at bill.macelroy@us.modalis.com.

As the Internet's influence on business has grown, many business-to-business (B2B) sites have been attempting to apply "lessons learned" from the business-to-consumer (B2C) e-commerce experience. Several recent studies have indicated that this strategy is only partially successful.

Although the B2B e-commerce market is projected to grow at many times the corresponding B2C market over the next several years, consumer-targeted commerce has been the focus of most published research. In the studies we've had the opportunity to work on, the B2B sites are visited by users with different levels of urgency and with expectations that are similar only to the most sophisticated of consumer users.

One thing that the two types of sites do seem to share is that familiarity with the layout and functionality of an e-commerce site tends to lower the interest in switching out to other, competitive sites. Once someone has learned how a site works, there is a powerful disincentive to start over again and learn new conventions. Initial trial and consummation of a successful transaction are, therefore, critical to converting a visitor to a long-time, repeat customer.

Another aspect common to both consumer- and business-oriented sites is the influence of customiza-

INVESTMENT BANKERS WITH TATTOOS

Find Them Faster and Easier. And Find Them for Less.

POLK'S RESEARCH SAMPLING

With over 200 demographic and lifestyle characteristics and purchase behavior ranging from automobiles to wines, Polk's Research Sampling delivers the most accurate and targeted samples, saving you time and money. By dealing with Polk directly, you go straight to the source. No middleman, so there's no markup on the best information available. Our experienced account executives understand your market research objectives and will customize your order with a full array of selects, cutbacks and data delivery options. Faster, easier and for less. For more information on Polk's Research Sampling call toll free 888-225-1434.

Polk®

Multi-Dimensional Intelligence™

tion. Like basic familiarity, the more data a customer accumulates with a site (e.g., shipping addresses, credit information, access to account history, customer lists, layout preferences, etc.) the harder it is for a competitive site to lure them away. Sites that incorporate a data-tracking system (allowing the customer to set reminders, automated re-order periods, etc.) erect even more powerful barriers to competitive poaching. As an example of the effectiveness of this strategy, we've found that discounts on the order of 30 percent to 50 percent would be required for someone with a deeply ingrained, personalized site to recreate their profile with an equally trustworthy site.

Outside of these two fundamental site characteristics, what the B2B user is seeking tends to diverge quickly from the features of a successful B2C site. The first issue is that speed-of-transaction is far more important to the B2B user than to the average consumer site. To clarify, this is not to say that consumers are tolerant of slow page loads or calculations; but they do tend to tolerate a more circuitous route to the conclusion of the transaction. Business users want to beeline the process with as few distractions as possible.

One artifact of this no-nonsense orientation is that brand-enhancing graphic design tends to be underappreciated in the B2B environment. Web graphics that "serve no purpose" or are "distracting" provoke negative responses. Heavy use of icons to represent functional or navigational elements is also a design technique to be used cautiously. B2B users give higher effectiveness ratings to sites that employ "bread crumb" text-based navigational aids versus graphic or simple color-coding schemes.

While ease-of-use is a frequently bandied-about attribute that all e-commerce sites should ideally possess, there appears to be a B2B tradeoff between the level of difficulty in learning a site's functionality and its eventual speed of use. In other words, some B2B customers will spend a good deal more time to learn and become proficient in a site with "deep" functionality and personalized data components IF the eventual payoff is a fast and customized transaction. Consumers are much more apt to give up and abandon a site at the first sign of difficult-to-master tasks.

Sensitivity to issues of confidentiality also appears to have a much greater impact on B2C than B2B customers. Although this difference is diminishing as consumers become less wary of using credit cards for online purchases, anxiety over "getting on e-mail lists" or "someone selling my name to telemarketers" remains a serious concern for consumers. B2B customers don't express these concerns to the same degree if they recognize the value of providing information for customization purposes.

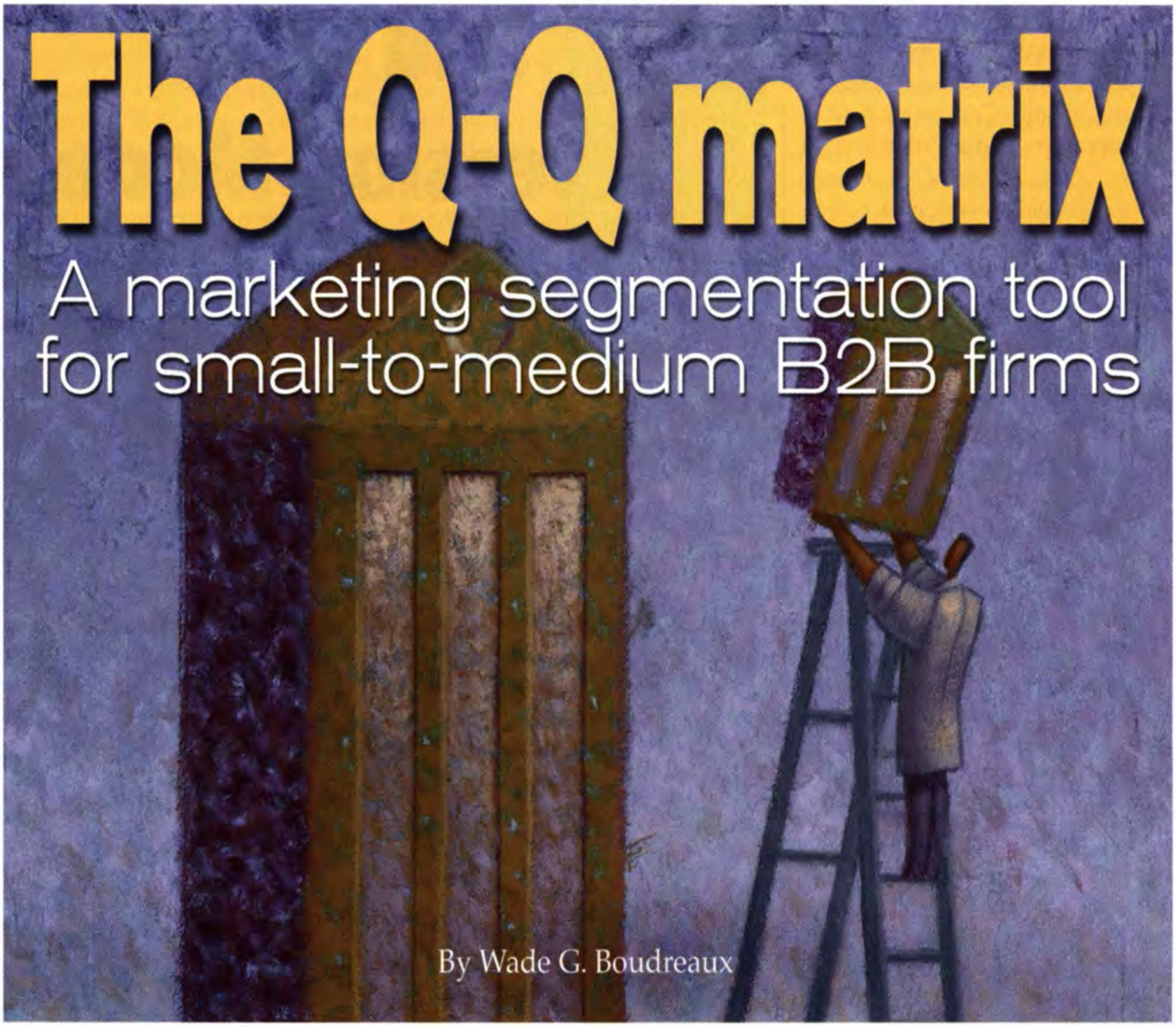
The degree to which transactions are found to be error-free is more important in the B2B world, where the dollar commitments per order are usually greater. Consumers tend to be more tolerant of a certain level of "error" (e.g., wrong sizes, missed shipping commitments, back orders, etc.) due to generally liberal return policies. The one area where zero-tolerance for error is the same for both groups is in the realm of online banking, bill payment, financial transactions and insurance. Anything related to money management is generally held to a higher level of expectation.

A final point of difference that we've encountered is the tolerance for out-of-stock positions. B2C customers have reported numerous and repeated experiences with online vendors being back-ordered on at least some portion of their order. Although frustrating, many consumers have stated that they have come to expect it. Sites that give immediate stock positions and/or suggest alternatives help to soothe consumer wrath. B2B customers, however, have little patience for out-of-stocks, particularly on standard items. To paraphrase the words of one respondent, "If they can't keep copier paper in stock, I need to find a new source." Stock position feedback functions have little effect on ameliorating B2B frustrations with out-of-stocks. Real-time tracking of order status, however, is highly valued by B2B customers.

In conclusion, the Web site elements that are acceptable for B2C applications are generally less stringent than those for B2B customers. Designing for the more discriminating B2B market means that lessons learned from the more heavily studied B2C sites may need to be updated for business audiences.

The Q-Q matrix

A marketing segmentation tool for small-to-medium B2B firms



By Wade G. Boudreaux

Editor's note: Wade G. Boudreaux is director of marketing Danos & Curole, a marine contracting company based in Larose, La. He can be reached at 504-693-3313 or at wadeb@danos.com.

The arrival of data warehousing has taken market segmentation analysis to greater, more desirable levels. The concept of "marketing to one" is now a reality for companies with thousands — even millions — of customers. But how do we apply segmentation analysis concepts to small-to-medium B2B companies? How can you really segment a market that brings, say, $70 million in revenue from only 10-20 major customers, and better yet, what would be the advantage to segment such a small customer base?

I used to argue that segmentation analysis was not a necessary practice, given my firm's market situation, but recently I have discovered a few useful ways to use market segmentation analysis on my small-customer base, which is made up of roughly 70 companies. Of these firms, about 20 represent over 90 percent of company revenue. So, how does one group these customers in order to create segments that require a unique marketing strategy?

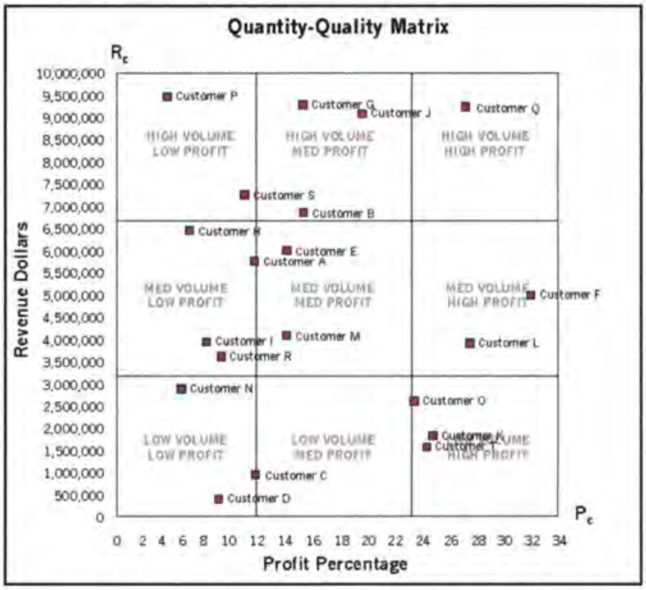
One simple solution is a Q-Q matrix (Q-Q stands for quantity-quality). The first step is to get annual revenue and profitability figures for the past two or three years for each customer. Keep in mind that revenue and profitability are not the only variables that can be plotted on the Q-Q matrix — they just so happen to make sense in the case of my firm. Other variables that can be plotted are units sold to revenues per unit or perhaps number of ads to customer calls per ad — whatever makes

sense for your unique situation.

In this case, let's use revenue by customer (R_C) to profitability by customer (P_C). First, build a chart in which the Y-axis represents annual revenue by customer in dollars and the X-axis represents profitability by customer as a percentage of annual revenue. I define profitability percentage as whatever is left after all direct costs, overhead, and general and administrative allocations have been taken out, divided by the revenue from that particular customer. Next, divide the grid into either four or nine sectors — again, whatever makes the most sense. Each sector represents a defined segmentation category. So far the graph should look something like the one on the left.

Note that the upper limit of the Y-axis scale should be the rounded-up dollar amount of sales revenue from the highest revenue-producing customer. The upper limit of the X-axis scale should be a rounded-up percentage from the profit percentage of the most profitable customer.

The next step is to plot customers on the matrix and let the chips fall where they may. The graph on the right is a sample of a plotted Q-Q matrix.



In this particular segmentation method, each customer is classified in one of the following classes and class sectors:

- Class A — small customers. Sector 1: low volume-low profit. Sector 2: low volume-medium profit. Sector 3: low volume-high profit.
- Class B — middle-of-the-road customers. Sector 1: medium volume-low profit. Sector 2: medium volume-medium profit. Sector 3: medium volume-high profit.
- Class C — big customers. Sector 1: high volume-low profit. Sector 2: high volume-medium profit. Sector 3: high volume-high profit.

Now let's look at the implications of the segmentation analysis. In this case, implications from the Q-Q matrix may lead a sales and marketing manager to the initiate the following strategies:

1) Have account representative meet with Customer C, D, and N and propose a rate increase on products and services used. If not granted, fire the customer and redistribute resources to customers in Class A, Sector 3 and attempt to

sell additional quantities of service at a higher profit.

2) Have account representative meet with Customers I and R and attempt to increase rates on products and services used, moving them into Class B, Sector 2 for now. If not granted, have sales manager attempt to get a volume increase at same rates as bulk rate discount. If still not granted, fire Customer R and put additional resources on Customers L, F, and I to get a volume increase at higher profitability.

3) Do not attempt further growth with Customer P at current rates, have account representative inform Customer P that any additional product or service sales will be at higher rates. If not granted, keep Customer P, but transfer a reasonable quantity of Customer P's dedicated resources to Customers J and Q to attempt to grow additional volume at higher profit levels.

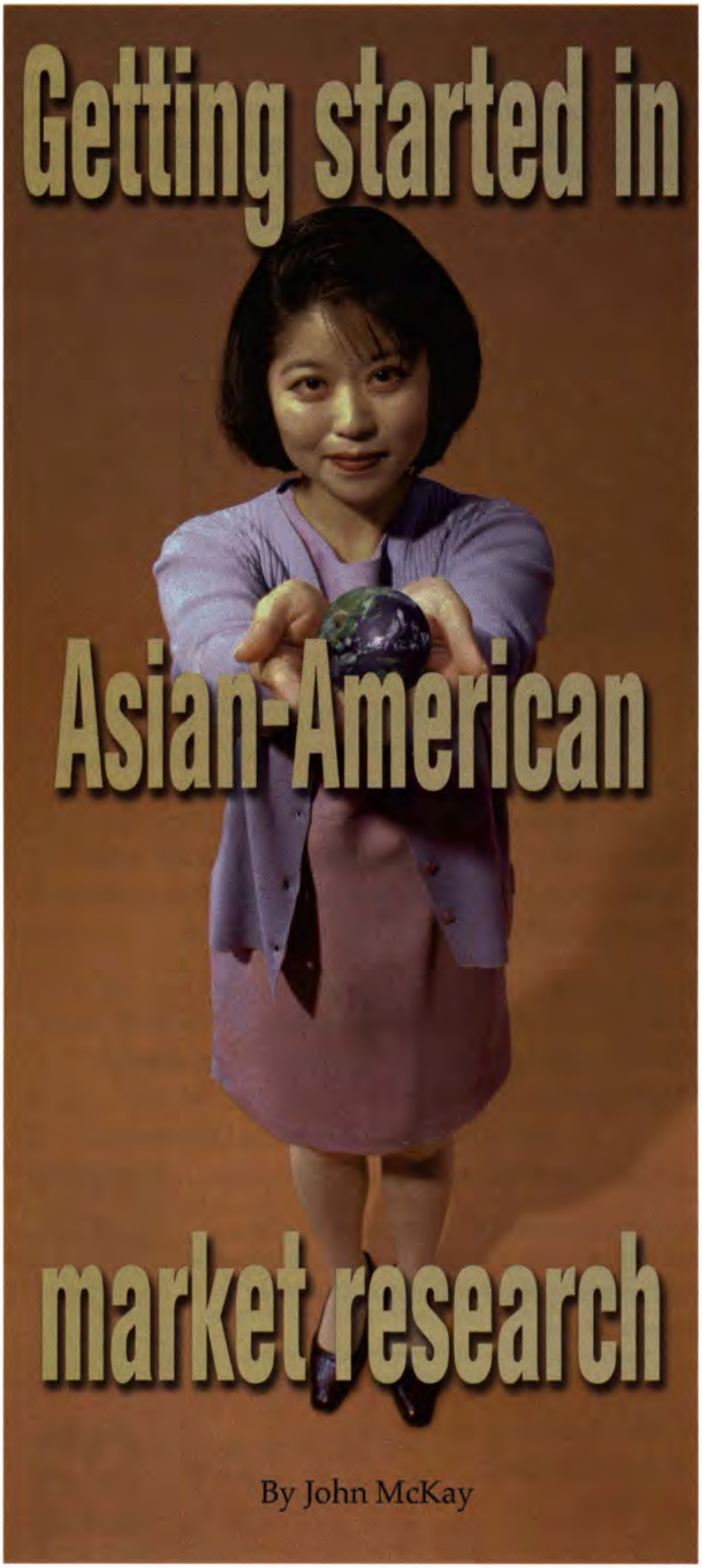
Real world

Now, many will argue that all of this looks good on paper, but in the real world there are other issues involved that may not allow for the associated strategies. This is absolutely true. Many times there are other issues not seen in revenue and profitability tables that may dissuade the "logical" strategy from being implemented. For instance, in the case of Customer C, there may be a perfectly good reason to keep this customer even if a rate increase is not granted and revenues and profits remain low. There may be a big opportunity with Customer C in the near future that will involve a bid for a large volume of business, with a chance for higher profit margins. The customer may have hinted that if we help him out now, he will help us out later (wink, wink). In this case, the sales and marketing manager may make a strategic decision to keep Customer C, even though currently it would be a better move to let him go.

Not the last word

The Q-Q matrix method of segmentation should by no means be the last word for dictating marketing strategy and application of resources. However, it can serve as a useful tool to take a look at the current customer situation and get you thinking about what strategies will be used to deal with different customer groups. It is also useful for viewing the results of an implemented strategy by plotting the following year's figures and then comparing them to those from the previous year. At least it will help discern which customers deserve a gift and a phone call during the holidays and which deserve a basket of rocks and a trip to the woodshed.

Getting started in Asian-American market research



By John McKay

Editor's note: John McKay is president of Multicultural Connection, an ethnic market research firm. He can be reached at 918-252-1213 or at jmckay4mcc@earthlink.net.

Now that you have decided to take the plunge into Asian-American market research, you are ready to find answers to key questions that will impact how you decide to move forward. There are many aspects of the Asian-American segment that marketers find difficult to understand and may use as an excuse to avoid researching this segment. Here are answers to some of the basic questions commonly asked by marketers who are ready to make a commitment to researching Asian-American consumers but don't know quite where to start. Let's assume you are planning to conduct focus groups to test ideas for a new campaign targeted to Asian-Americans. The first question you might ask yourself is:

1. Which Asian group(s) should we target? Who is your target audience? If you want to target the Chinese, for example, there are still other factors to consider: newer immigrants or more assimilated, older versus younger, English speakers versus Mandarin or Cantonese speakers. Consider the cultural aspects of your product, too. Is there anything about the product that makes it more (or less) appealing to a specific Asian segment? Will factors such as geography, language, religion, income, or education disqualify any segment from consideration?

Regardless of these factors, it is unwise to combine Asians of all backgrounds into one pan-Asian focus group. While there are traits common to all Asian segments, it is more important to understand the uniqueness of each group. Respondents will feel more comfortable expressing their feelings with a group of Asians from their same cultural heritage. You should segment your research to devote separate focus groups to each Asian group.

If targeting all Asian groups is impractical or cost-prohibitive, one option is to focus on the "core" Asian segment consisting of Chinese, Filipinos, Koreans, Japanese, Vietnamese and Asian Indians. These six segments represent about 85 percent of the total Asian-American population. Another option is to start with one or two of the largest segments. Chinese and Filipinos are the two largest Asian-American groups, each with an estimated population of about two million. These two groups combined account for approximately 40 percent of all Asian-Americans. These segments have both existed in the U.S. for generations and often are more assimilated to American life than other Asian segments.

2. How are the various Asian groups really different, other than language? One major mistake marketers make is to lump all Asians into the same category and assume that all Asians are alike. It is important to recognize that the Asian market is more heterogeneous than any other ethnic segment. Every Asian group has its own distinct culture, values and language. Ultimately this level of diversity leads to distinct differences in purchase behavior, as illustrated in these brief characterizations of key groups.

• Chinese: Price-sensitive and will often base a purchase decision on price. Recognize good value for the money. Careful and thorough, information-intensive, scrutinizing shoppers. Value quality and well-established brands. Suspicious, distrustful of monopolistic firms. Purchase decisions are made by the husband, but the wife has considerable influence in day-to-day money management.

• Japanese: As shoppers, they are analytical, rationally driven, and practical in nature. Accustomed to good service in Japan. Prefer dealing with large rather than small companies. Value corporate history. Purchase decisions are made by the husband, but the wife has considerable influence in day-to-day money management.

• Koreans: Not as price-sensitive as some Asians, but will often base a purchase decision on price. Emotional and impulsive in nature. Extremely brand loyal. Value quality and well-established brand names. Prefer dealing with Korean sales personnel. Quite frustrated if a company does not target them as aggressively as the competition. Strongly male-dominant in terms of purchase decisions.

• Filipinos: Price-sensitive, but not as demanding on quality. Influenced by ads with nostalgic or emotional themes. Value the relationship between vendor and customer, and expect rewards for loyalty. Purchase decisions made jointly by both spouses.

• Vietnamese: Husband is ultimate decision-maker for big-ticket items. Both spouses discuss how to allocate household income, but wife is given a budget to manage the home and purchase household items.

• Asian Indians: Among recent immigrants, both spouses tend to share in financial and purchasing decisions. Otherwise, these decisions tend to be strongly male-dominated.

Recent immigrants from Korea, Taiwan and Hong Kong and other more developed Asian countries differ significantly from other immigrant groups. They arrive in the U.S. with money in their pockets, after having sold a home or business, and usually start a small business, becoming solid citizens who are willing, eager, and able to buy American goods and services. They are typically more educated and urban than the recent Southeast Asian immigrants, who are likely to be provincial, rural and less affluent.

Assimilated Asian-Americans, comprised mostly of Japanese, Chinese and Filipinos, often consider themselves first Americans, then (if at all) Asian. They are familiar with American customs, language and media, and have acquired some Western values and habits.

3. Can we use a pan-Asian approach to save money, or should we develop a separate strategy for each segment? It is possible, and sometimes advisable, to create an advertising or marketing campaign that focuses on themes common to all Asian groups. Asian-Americans, while diverse, do share some common traits that can be useful to marketers. Asians share a strong family orientation, value security, education and hard work, and often place quality above price when shopping. Asians are also very achievement-oriented and have a high degree of pride in their culture.

Market research can determine if there are enough similarities in the expectations of Asian customers so that your product or ad can serve all Asian groups, or whether unique designs or programs are required for each Asian group. If there are common attributes that can be characterized as pan-Asian, this can impact product development, marketing and advertising costs.

4. Which market(s) should we choose? Asian-Americans tend to cluster in distinct metropolitan areas, so choosing markets for your research is a simpler decision. Asian-Americans are a significant presence in metropolitan areas such as Los Angeles, San Francisco, New York, Honolulu, San Diego and Chicago. The following list provides the top metropolitan areas where each Asian group has the highest population concentration.

• Chinese: Los Angeles, New York, San Francisco, Oakland, San Jose.

• Koreans: Los Angeles, New York, Washington, D.C., Orange County (Calif.), Chicago.

• Japanese: Honolulu, Los Angeles, Orange County, San Jose, New York.

• Filipinos: Los Angeles, Honolulu, San Diego, San Francisco, Oakland.

• Asian Indians: New York, Chicago, Los Angeles, Houston, Washington, D.C.

• Vietnamese: Orange County, Los Angeles, San Jose, Houston, Washington, D.C.

When conducting focus groups among several Asian segments, Los Angeles is a logical choice because there are large populations of all six of the core Asian segments. The San Francisco-Oakland-San Jose DMA has the largest Chinese and second largest Vietnamese populations in the U.S., as well as a substantial concentration of Filipinos. New York can be an effective alternative for Chinese, Japanese, Koreans and Asian Indians, but Vietnamese and Filipinos are not well represented there.

It is not necessary to choose two or more markets to provide geographic diversity to the research. Research shows that Asian immigrants in California are not radically different than Asian immigrants in New York, for example.

5. If we are researching the Chinese, should we conduct the research in Mandarin or Cantonese, or both? Differences among the Chinese are more likely to arise based on country of origin rather than language per se. Chinese-speaking immigrants come from many countries besides mainland China, such as Hong Kong, Taiwan, Singapore, and the Philippines. In choosing your markets for Chinese research, language is only one of several factors which may impact how your product is perceived or purchased.

Recent immigrants from Taiwan and Hong Kong are usually better educated and wealthier than their counterparts from mainland China, so their purchase behavior, values, and ways of thinking tend to be very different because of these demographic factors. Assimilated Chinese-Americans and recent immigrants from Hong Kong and Taiwan are more similar to Americans in terms of making financial and purchase decisions. In contrast, recent immigrants from mainland China are more likely to adhere to the decision process of their traditionally male-dominated society. Factors such as these should be considered in developing your Chinese research plan.

Many ethnic marketers divide the Chinese segment into at least three groups based on language and place of origin. This categorization is especially important if there is a need to create language-based appeals for your campaign. These three groups are:

Origin	Dialect
Mainland China	Mandarin & Cantonese
Taiwan	Mandarin & Taiwanese
Hong Kong & Southern China	Cantonese

However, this categorization is not totally strict, since the Mandarin and Cantonese dialects may be spoken by Chinese from any of these places of origin. If you are considering conducting research among the Chinese, and budgets are tight, focusing only on Mandarin-speaking Chinese can be a practical approach, since they represent the majority.

6. Should we conduct the research in English or in the appropriate Asian language(s)? This decision depends on whether you are targeting new immigrants or more assimilated Asians. As a general rule, however, conducting focus groups in the appropriate Asian languages is advisable. While this is a more expensive approach, your research findings will be more representative of the Asian segment as a whole. Many Asian-Americans are not fluent in English and prefer to speak and receive communications in their native language. Nearly all foreign-born Asian-Americans prefer to speak their native language at home, and many of those who learn English say they do not speak English very well. Since the majority of Asian-Americans are foreign-born, they are thus most likely to retain their native language preference. Even immigrant Asians who speak and read English prefer to converse in their native language, if given the choice.

7. How do we go about finding and choosing a multicultural research partner? First, set your research goals and clarify your information objectives. This will help organize your thoughts before you prepare your RFP and contact any suppliers. Next, obtain lists of research firms specializing in multicultural, in-language research from resources such as:

• The Ethnic Research Directory, published annually in the April issue of *Quirk's*, and also available online at their Web site (www.quirks.com).

• The Source Book of Multicultural Experts, published annually by Multicultural Marketing Resources, Inc.

• The GreenBook Directory of Marketing Research Companies and Services, published annually by the New York Chapter of the American Marketing Association.

Contact several prospective firms and prepare a list of questions to ask them, such as:

• How long have you been conducting multicultural/Asian-American research?

• Which language segments/ethnic groups do you offer?

• What services do you provide: moderators, recruiting, interviewers, translators, interpreters, report writing, project management, etc.?

• Are these services provided in-house or are they subcontracted? If subcontracted, inquire about the nature and length of the relationship.

• Will cultural insights be offered and cultural differences be highlighted in the report?

• Are biographical profiles available for key personnel, including moderators?

Also, ask for a client list and a list of references. And make sure references are for the same languages/segments you are interested in.

After you have had the opportunity to talk with the firms, and with the references they have provided, send them your RFP. Be sure to include the following information:

• number of groups/interviews to be completed per segment/city;

• preferred sample source (list, recruiter's database, community contacts, etc.) and screening criteria;

• targeted Asian groups;

• targeted markets;

• expectations for analysis and report — length, format, topline and/or full report, verbatim quotes, transcripts, etc.;

• timing; and

• budget.

If possible, give each firm an adequate amount of time to prepare their bids — at least five business days. It can take longer to provide a multicultural market research bid than for the general market due to the complexity of contacting and organizing resources in multiple markets and language segments. Keep in mind that costs will be higher and timing may be longer compared to the general market due to a number of factors:

• In-language moderators are generally more expensive than their mainstream counterparts.

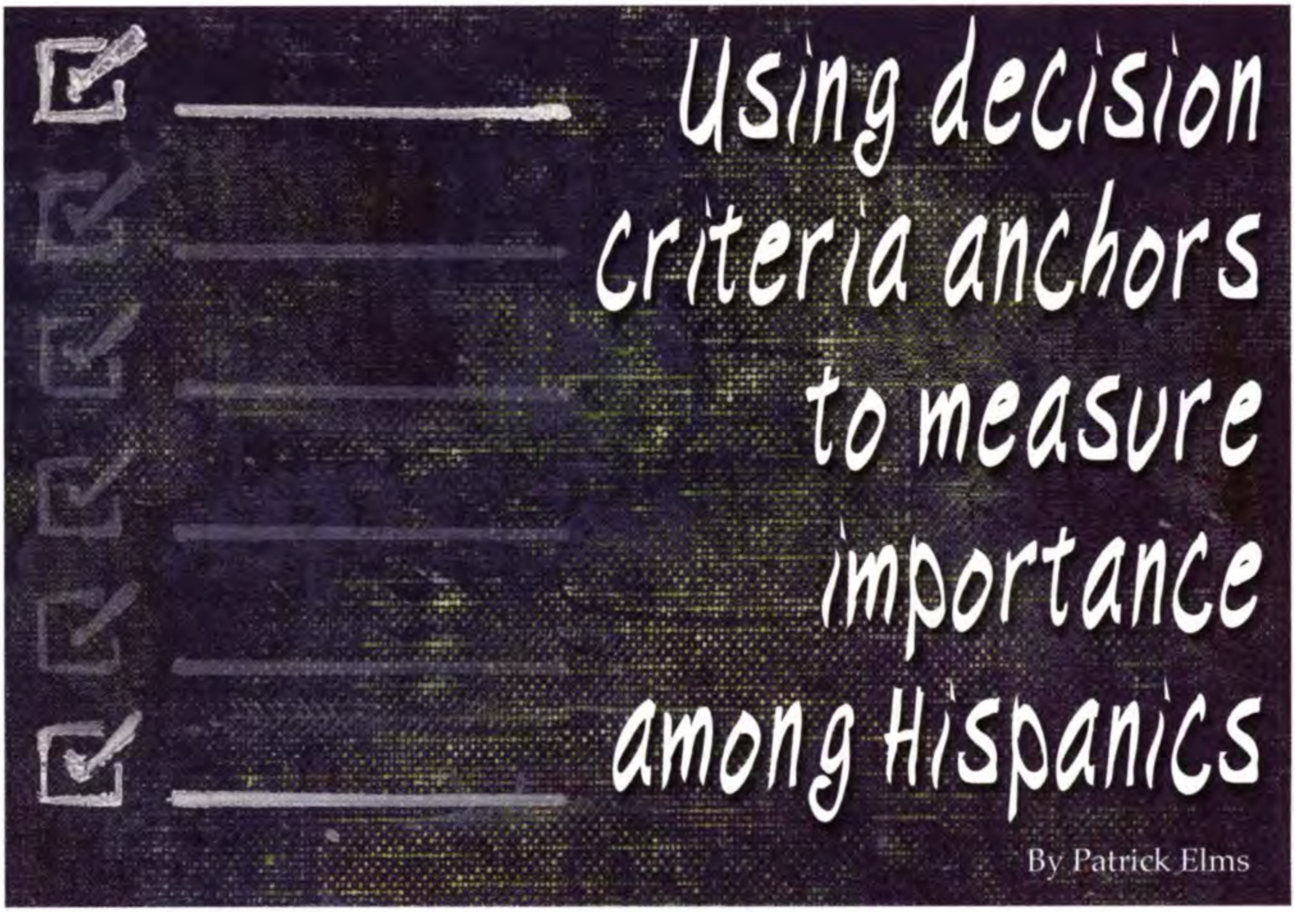
• Recruiting is more expensive and time-consuming because recruiters typically use different community-based contacts and networking, as they can't rely on focus group facility databases like those used in the general market.

• More respondents must be recruited for each group, and incentives may also be higher, than for general market groups, to ensure good show rates for Asians who are unaccustomed to American research practices.

• There are also extra expenses for translating screeners, hiring interpreters and in-language hostesses, and renting equipment for the interpreter to record the English translations.

In choosing your research partner, look beyond price and focus on their approach to your research plan, their knowledge and experience with the targeted segments, recommendations that show cultural perspective and insight, and positive endorsements from their references.

If you are new to conducting market research in the Asian-American segment, it pays to ask a few questions and educate yourself. Although it may seem intimidating to a marketer researching Asian-Americans for the first time, there is great potential for reward and a wealth of knowledge to be gained by increasing your understanding of this growing and affluent segment.



Using decision criteria anchors to measure importance among Hispanics

By Patrick Elms

Editor's note: Patrick Elms is project group manager/quantitative research at TNS Market Development, a San Diego research firm. He can be reached at 619-232-5628 or at Patrick.Elms@mktdev.tnsofres.com.

When measuring attribute importance and brand performance among Hispanics, a frequent problem researchers encounter is the tendency for Hispanics to use only the upper end of the rating scale. For example, on a 5-point scale nearly all responses will be in the 3 to 5 range, and on a 10-point scale there will be few ratings lower than 6. Ratings such as these are much higher than are typically found among the general population.

In its years of conducting research among Hispanics, TNS Market Development has encountered this phenomenon numerous times and with various types of scales, including importance ratings, brand attribute ratings, agreement ratings, and psychographic attitude ratings. While most pronounced when using a traditional 5-point scale, the problem also occurs when using a 10-point scale, with responses concentrated in the top three or four response choices. With a 5-point scale, the level of high ratings is similar whether only the end points are anchored (e.g., 5 = very important and 1 = not at all important) or all the points are anchored (e.g., extremely important, very important, somewhat important, not very important, not at all important). Specifically with importance, we find that Hispanics resist identifying any attribute as unimportant when using a traditional rating scale.

This tendency to use the upper end of rating scales poses several challenges for researchers. First, the narrow range of responses results in few significant differences between mean or top-box (percent giving the highest rating) attribute ratings, making it difficult to identify the key attributes. Secondly, if the ratings are to be used in a factor analysis or other multivariate procedure, the low variability among the ratings reduces the effectiveness of the analysis. These problems are summed up well by DeVellis (1991):

A desirable quality of a measurement scale is variability. A measure cannot covary if it does not vary. If a scale fails to discriminate differences in the underlying attribute, its correlations with other measures will be restricted and its utility will be limited [p. 64].

A third problem occurs when making comparisons to a general population survey on the same questions,

where comparing anything but the rank order of the attribute ratings can be misleading. For example, an attribute that is most important among non-Hispanics might have a top box score of 65 percent, while the same attribute among Hispanics could have a top box score of 75 percent, yet only be relatively moderate in importance. But when comparing the 65 percent score to the 75 percent among Hispanics, one might mistakenly conclude that the attribute is more important to Hispanics.

Only a handful of solutions have been suggested to address this problem. The most common is to expand the number of response items on the scale (Dana, 2000; DeVellis, 1991; Hui and Trandis, 1989). Hui and Trandis (1989) found that differences in responses between Hispanics and non-Hispanics narrowed significantly when a 10-point scale replaced a 5-point scale. However, DeVellis (1991) points out that expanding the scale runs the risk of respondent fatigue, which would lower reliability. He also notes that "false precision" may result if the respondent cannot discriminate meaningfully between the response choices (e.g., what makes an attribute a 7 versus and 8), since the error portion of the variability would increase rather than the portion attributable to the measured phenomenon.

Other proposed solutions concern the data analysis phase, including examining the complete distribution of each item rather than a single measure of central tendency or proportion, combining the two highest categories, and reporting standardized z-scores (Hui & Trandis, 1989). While these methods may shed additional light on the dynamics of the responses, they require additional analysis or data manipulation, and fail to address the key problem of invariability in high ratings. Clearly the better path is to create a scale where the tendency to heavily use the high end of the scale is less likely to occur in the first place.

To address this problem in importance ratings among Hispanics, TNS Market Development created a behaviorally anchored importance scale designed to spread the responses more evenly across the scale, and tested the scale against a standard importance rating using a split sample. It was desirable to limit the scale to five points, since that is the standard for most importance research, and therefore clients would be more familiar with its interpretation as compared to a scale with more points. Our hypothesis is that a scale with every point verbally anchored and that demands relative comparisons between attributes in the decision process would greatly decrease the occurrence of high ratings, and therefore increase variability.

Scale construction

Examples of rating scales with behavioral anchors are found sparingly in psychology and marketing. An early example of a behaviorally anchored scale is given by Nunnally (1967), who quickly dismisses behavioral scales as being too difficult to construct. More recently, Glowa & Lawson (2000) propose a "Propositional-Descriptive" scale to measure satisfaction, noting that compared to standard Likert scales, "respondents are less likely to cluster towards the middle or top of the scale." Additional rationale for using behavioral anchors is presented by Schuman and Presser (1996) in comparing measures of intensity (attitude strength) and centrality (importance to a decision) toward social issues:

The centrality measure has a behavioral reference, whereas the intensity question refers only to feelings...People apparently find it easier to report feeling strong about an issue than to say that it is one of the most important issues they would consider in an election [p. 237].

One area in which behavioral anchors are widely used is in employee evaluations, where they are known as behaviorally anchored ratings scales (BARS). Two of the advantages of BARS noted by Maiorca (1997) are applicable to the high ratings issue among Hispanics. First, BARS "eliminate the use of potentially misleading numerical volume measures that are not readily interpretable," and secondly, they "reduce rater bias and error by anchoring the rating with specific behavioral examples" (p. 1).

With these goals in mind, the specific wording selected to anchor each of the points on the scale intentionally set a high standard for the top response choice. Also, the anchors were designed to reflect the weight of each attribute in the decision-making process rather than some general notion of importance. The topic for the test was the importance of job attributes and benefits when making employment decisions. The following are the scale anchors and their corresponding numeric values:

5) You would never accept a job that did not have this benefit.

4) You consider this benefit equally with other important benefits when deciding whether to take a job.

3) You would accept a job that did not have this benefit if it had other

Table 1. Overall comparison of traditional and behavioral scales

	Traditional Scale		Behavioral Scale	
	Top 2 Box	Top Box	Top 2 Box	Top Box
Base: Total Sample	(302)	(302)	(299)	(299)
Items				
High income	90.1	76.2	66.0	25.3
Job security	91.9	86.9	74.9	45.7
Flexible working hours	74.7	56.3	53.0	26.6
Good health-care and other employee benefits.	93.5	88.9	74.7	41.4
A fun, social working atmosphere	75.9	59.6	43.3	17.9
Opportunities for advancement	94.7	87.3	64.9	35.0
Close to where you live	80.8	65.7	49.4	22.9
A company with a good reputation	88.7	76.1	63.9	32.7

benefits you want.

2) You consider this benefit a minor factor in your job decisions.

1) You don't care at all about this benefit when considering job opportunities.

We call this scale a decision criteria anchor importance scale because points are anchored with phrases that describe attributes in relation to the decision process. The scale can be easily transformed for any product or service category by replacing "benefit" with "feature" and referring to purchasing the appropriate category rather than accepting a job.

Test methodology

The scale was tested as part of a quarterly telephone omnibus study among Hispanics in the Los Angeles, Houston and San Antonio designated marketing areas (DMAs). The sampling method used listed Hispanic surname selection, in which phone numbers are randomly selected among those listed in the phone book with surnames that are among the 13,000 identified by the U.S. Census Bureau as typically Hispanic. Respondents were screened to be self-identified Hispanics age 18 or older. Approximately half of the sample was in Los Angeles, with one-quarter each in Houston and San Antonio, and the data was weighted by market to reflect Hispanic population size. Half the interviews were among males and half among females.

A total of 601 interviews were completed, with 302 asked the employment importance questions using a traditional importance scale and 299 asked the questions using the decision criteria anchor importance scale (we will refer to this as the "behavioral scale" in the analysis). The traditional scale asked for a rating from 1 to 5, where 5 means very important and 1 means not important at all, with the middle points undefined. Random selection was used to determine which type of scale each respondent received. The employment benefits tested were as follows:

- high income;
- job security;
- flexible working hours;
- good health care and other employee benefits;
- a fun, social working atmosphere;
- opportunities for advancement;

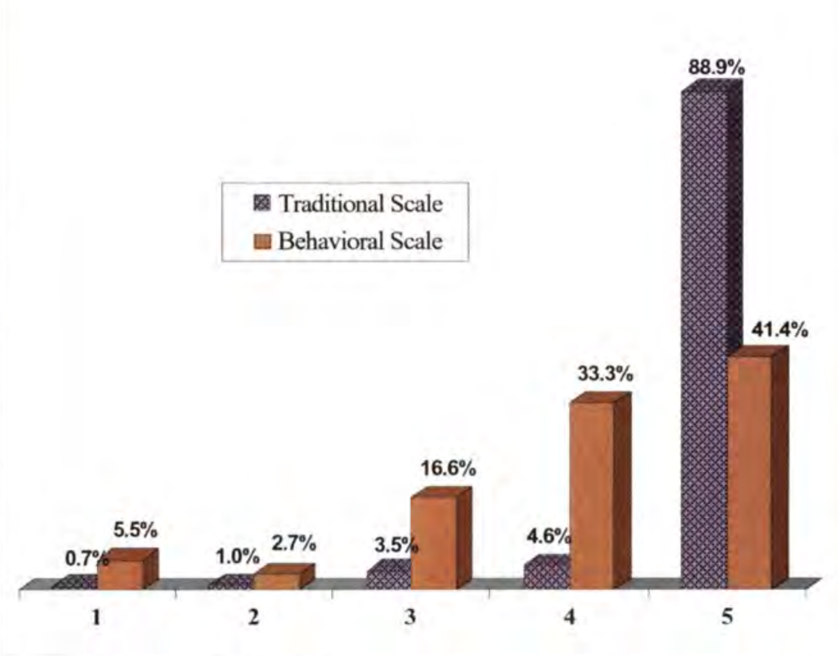
- close to where you live;
- a company with a good reputation.

Results

The results for each of the items on the two scale types using top box (5) and top two box (4 or 5) ratings are shown in Table 1. The behavioral scale performed as expected by significantly reducing the percentage of responses in the upper two choices across every attribute. The difference was most pronounced for top box scores, where the anchored scores ranged from 18 percent to 46 percent, compared to the traditional scores from 56 percent to 89 percent.

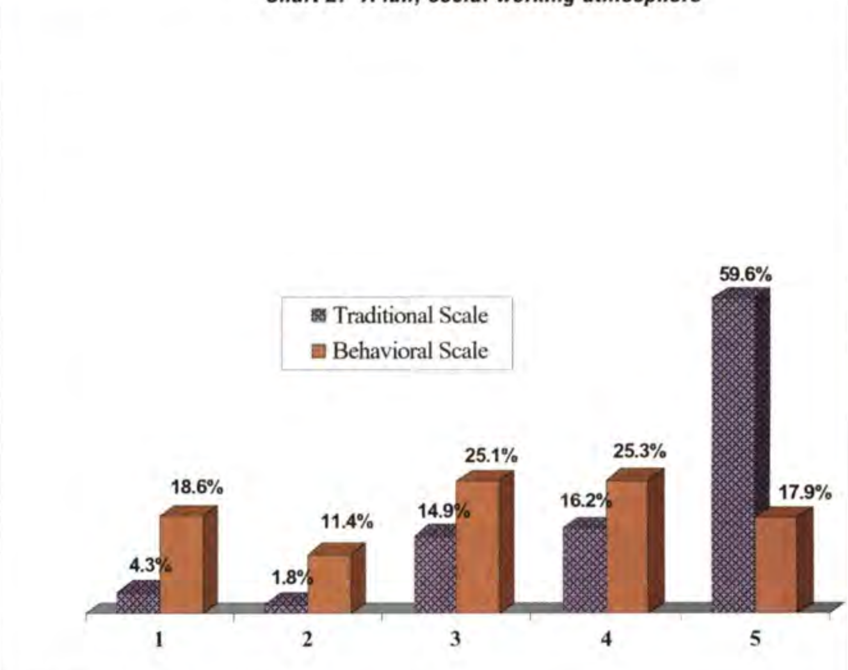
Charts 1-3 show the full distribution for three of the attributes (one highly important, one moderately important, and one less important).

Chart 1. Good health care and other employee benefits

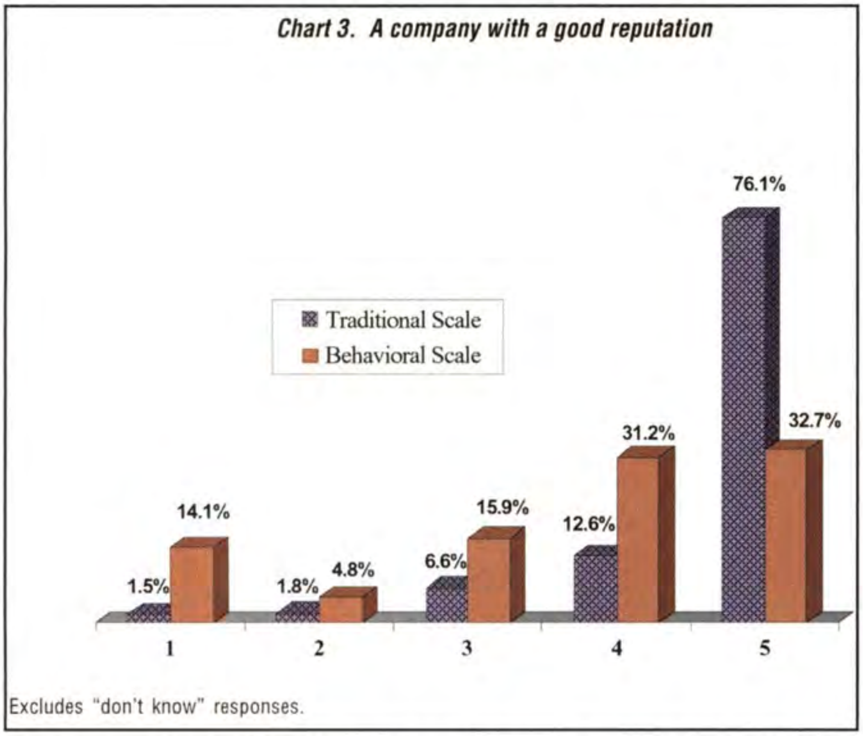


Excludes "don't know" responses.

Chart 2. A fun, social working atmosphere



Excludes "don't know" responses.



In each case the traditional scale is skewed severely to the right, with the large majority of responses in the top category and almost none in the lowest two categories. The behavioral scale is much more evenly distributed, and in one case no more that 25 percent of the responses are in any of the categories.

To detect any interactions between the ratings and respondent characteristics, Tables 2 through 5 show the top box scores for both scale types by gender, age, place of birth and language spoken at home. There are no significant differences between gender and age, but place of birth and language show that more acculturated Hispanics (i.e., U.S.-born and speaking English more than Spanish) are much less likely to give high importance ratings than less acculturated Hispanics on the traditional scale. With the behavioral scale, responses from more acculturated Hispanics were somewhat less positive than among those less acculturated, but not nearly as much as in the traditional scale. In other words, the ratings gap between more acculturated and less acculturated Hispanics was smaller using the behavioral scale.

Another hypothesized effect of using the behavioral scale is that the variability will be greater than when using the traditional scale. Table 6 compares the standard deviation (dispersion of the responses around the mean) and squared multiple correlation (correlation between each item and a combination of the other seven

Table 2. Top box comparison of traditional and behavioral scales by gender

	Traditional Scale		Behavioral Scale	
	Male	Female	Male	Female
Base: Total Sample	(148)	(154)	(152)	(147)
Items				
High income	73.2	79.1	26.3	24.2
Job security	86.0	87.8	46.4	45.0
Flexible working hours	53.7	58.7	24.4	29.0
Good health-care and other employee benefits.	89.4	88.4	42.5	40.3
A fun, social working atmosphere	59.5	59.7	21.4	14.4
Opportunities for advancement	89.8	84.9	37.5	32.5
Close to where you live	63.9	67.4	22.0	23.9
A company with a good reputation	74.1	78.1	26.7	38.9

Table 3. Top box comparison of traditional and behavioral scales by age

	Traditional Scale			Behavioral Scale		
	18-34	35-49	50+	18-34	35-49	50+
Base: Total Sample	(125)	(120)	(49)	(130)	(106)	(57)
Items						
High income	73.6	79.3	77.6	27.9	23.3	18.2
Job security	84.5	92.1	84.3	44.2	47.6	42.5
Flexible working hours	56.8	56.6	60.6	25.0	27.1	28.3
Good health-care and other employee benefits.	87.6	90.0	94.4	43.2	39.9	40.5
A fun, social working atmosphere	55.3	60.7	73.0	13.4	24.3	18.2
Opportunities for advancement	86.4	87.6	91.0	38.8	34.3	26.4
Close to where you live	61.5	63.6	82.0	17.0	27.1	26.3
A company with a good reputation	75.0	79.3	77.6	31.2	35.2	30.4

Table 4. Top box comparison of traditional and behavioral scales by country of birth

	Traditional Scale		Behavioral Scale	
	Foreign Born	U.S. Born	Foreign Born	U.S. Born
Base: Total Sample	(205)	(91)	(204)	(88)
Items				
High income	81.4	57.0	26.9	18.7
Job security	88.0	83.9	44.9	47.6
Flexible working hours	61.5	36.1	28.7	18.0
Good health-care and other employee benefits.	89.5	88.0	39.8	45.4
A fun, social working atmosphere	64.7	42.5	19.1	11.8
Opportunities for advancement	87.8	86.4	32.2	46.9
Close to where you live	69.8	50.4	24.7	15.7
A company with a good reputation	78.6	67.2	33.1	31.3

Table 5. Top box comparison of traditional and behavioral scales by language dominance

	Traditional Scale			Behavioral Scale		
	Spanish dominant	Bi-lingual	English dominant	Spanish dominant	Bi-lingual	English dominant
Base: Total Sample	(191)	(58)	(52)	(184)	(58)	(57)
Items						
High income	79.3	80.4	52.8	26.1	28.8	17.9
Job security	88.0	83.1	86.6	44.7	51.8	43.2
Flexible working hours	60.5	54.5	35.6	26.4	36.4	16.9
Good health-care and other employee benefits.	87.5	95.5	86.7	38.7	48.0	45.4
A fun, social working atmosphere	63.8	52.8	46.0	19.4	23.0	6.4
Opportunities for advancement	87.0	86.6	89.4	30.9	47.0	39.1
Close to where you live	70.4	64.3	42.0	26.1	18.2	14.8
A company with a good reputation	77.3	77.7	67.1	33.2	32.6	30.6

Table 6. Variability comparison of traditional and behavioral scales

	Standard Deviation		Squared Multiple Correlation	
	Traditional Scale	Behavioral Scale	Traditional Scale	Behavioral Scale
High income	0.78	1.15	0.24	0.31
Job security	0.60	1.27	0.28	0.36
Flexible working hours	1.11	1.42	0.12	0.29
Good health-care and other employee benefits.	0.60	1.09	0.22	0.33
A fun, social working atmosphere	1.08	1.36	0.20	0.28
Opportunities for advancement	0.62	1.26	0.26	0.33
Close to where you live	1.01	1.39	0.19	0.20
A company with a good reputation	0.81	1.36	0.26	0.32

items) for each employment benefit by each of the scales. For each item the variation using the behavioral scale is higher than when the traditional scale is used, indicating that multivariate analyses based on the correlation matrix will yield better results.

Conclusions

As predicted, the decision criteria anchor importance scale successfully reduced the number of high ratings, with top box ratings typically less than half of those produced with a traditional numeric rating scale. The scale is effective across gender and age groups, and reduces the differences between acculturation levels due to high ratings.

One issue to consider when deciding whether to use the behavioral scale is whether any comparisons are to be made against other data sets, either from Hispanic benchmark data or to similar studies with other populations. It is clear that data from the behavioral scale cannot be directly compared to previous research among Hispanics that used a traditional importance scale. However, as noted at the beginning of this article, this problem also exists when comparing traditional scales where Hispanics focus on the upper end of the scale. Considering the benefits of the behavioral scale, we recommend that it be used as a new benchmark, and any comparisons to past data use rank order of the attributes. For general market and other population comparisons, we similarly recommend using the anchored scale, either for Hispanics only for rank order comparisons, or ideally for the entire project, including non-Hispanics.

Several opportunities for further research would be useful to further test and utilize this scale. First is a comparison using the behavioral scale between importance ratings of Hispanics and the general population on the same set of attributes, to see whether the scale lowers the number of upper category responses for both populations equally or instead narrows the gap between Hispanics and non-Hispanics. A similar comparison among Hispanics in markets other than the Mexican-dominated cities used in this test (e.g., New York and Miami) could confirm whether the behavioral scale reduces high ratings for other Hispanic-origin groups. A second useful inquiry is to explore the interval properties of the behavioral scale to determine how far off the intervals are from a true metric scale. A third path of investigation is to develop scales for other types of questions using the decision criteria anchor importance scale as a guide. Attribute performance ratings, satisfaction ratings and psychographic attribute ratings are three possible areas for this type of work.

References

Dana, J. (2000). Lingua franca. *Marketing News*, 34, 17.

DeVellis, R. F. (1991). Scale development: Theory and applications. Newbury Park, Calif.: *Sage*.

Glowa, T., & Lawson, S. (2000). Satisfaction measurement: Is it worth it? *Quirk's Marketing Research Review*, 14(9), 32-38.

Hui, C H., & Triandis, H. C. (1989). Effects of culture and response format on extreme response style. *Journal of Cross-Cultural Psychology*, 20, 296-309.

Maiorca, J. (1997). How to construct behaviorally anchored rating scales (BARS) for employee evaluations. *Supervision*, 58(8), 15-18.

Schuman, H. & Presser, S. (1996). Questions and answers in attitude surveys: Experiments on question form, wording and context. Thousand Oaks, Calif.: *Sage*.

Hispanic cool

Mainstream moves to a Latin beat

By Horacio Segal

Editor's note: Horacio Segal is president of Planet Latino Market Intelligence, Inc., a Miami qualitative research firm. He can be reached at 305-480-0096.

For many decades, Hispanics in the U.S. have felt rejected by the mainstream because of the way they look, live and the language they speak. For many Hispanics it has always been mandatory to assimilate into the culture as soon as possible, and their children have retained very little of their cultural background.

But now, based on what respondents tell me in focus groups across the country, Hispanics are starting to feel that they don't have to be ashamed of who they are and where they came from, and they are seeing that many Hispanic customs, like food and music, are becoming cool for the general market.

Acculturation vs. assimilation

For those of us who conduct research in the U.S. Hispanic market this is not news. We have observed that Hispanics are not assimilating in the same manner as previous immigrant groups that came to the U.S. Assimilation — replacing one's culture with a new culture — is happening less and less, while acculturation — the learning of a new culture while still retaining your own — is what is happening to most Hispanics.

Access to media has been a key factor to fuel acculturation. Decades ago it was difficult to read the news from one's country of origin and Spanish-language radio and television were just starting. On television, Univision and Telemundo used to be the two main channels. But cable TV has brought a myriad of Spanish-language channels that originate in both Latin American and the U.S. In many areas, Hispanics can now watch newscasts live from Mexico, Argentina, Colombia and Chile to be up to date with what is happening in their country of origin. The Discovery Channel, as well as Disney, CNN, MTV and VH1 have 24-hour Spanish-language channels available in many areas of the country, and HBO recently debuted its new offering, HBO Latino.

The Internet has also brought about a revolution in media access by making it possible for Hispanics in the U.S. to read newspapers and magazines from their country of origin


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

everyday. Spanish-language radio, one of the key media for Hispanics, now has a national network that broadcasts from coast to coast, Radio Unica. Spanish-language radio beats its English-language counterparts in both Miami and Los Angeles in ratings, as well as in many other areas of the country. There are many successful magazines and newspapers published in the U.S. in Spanish, including *La Opinion* in Los Angeles, *El Nuevo Herald* in Miami and *People en Español*.

Hispanic teens are influencing the mainstream market

In recent years, I have conducted a lot of research with bicultural teens and they have told me about the influence they have on their mainstream counterparts, which I have been able to verify by talking to general market teens.

Dominican teens in New York speak about their African-American friends who use Spanish words in their everyday conversations and who feel as comfortable dancing *merengue* as they do hip-hop when they have a party. Cuban teens in Miami teach their non-Hispanic friends to dance salsa, so they can dance together in a party where songs in English and Spanish follow each other seamlessly. Mexican teens are as comfortable listening to hip-hop and alternative music as when they switch to rock en Español, *rancheras*, *norteña* and *cumbias*. The resurgence of break dancing is led by Hispanic youth, and many Anglo kids throughout the U.S. learn new moves from Hispanic teens, whom they also imitate in the way they speak and the clothes they wear.

American teens are now much more comfortable than their parents with people from different ethnic backgrounds. These teens state that they are interested in diverse cultural influences, spirituality and family ties, things that Hispanic teens already embrace. American teens admire the involvement of Hispanic parents in their teen's everyday life, the strong connections to relatives and the emphasis on religion.

Hispanic teens value the sacrifices their parents have made to come to the U.S. and make it possible for them to have a better future. They tell me that because their parents work very hard every day, they now have the opportunity to complete high school and get a college degree, something they say it would have been hard to accomplish if they had stayed in Mexico or Central America, where often young children have to work to contribute to the financial support of the family.

Hispanic teens often do not feel they are a minority anymore. The percentage growth of Hispanic youth is very fast, and in many areas of the country, they are the largest group. It is expected that by 2005 Hispanic youth will be the largest youth population in the country. So it is very possible that this trend of Hispanic influence in mainstream culture will continue to grow in the upcoming years.

Music leads the way

Ever since Ricky Martin made everybody dance at the 1999 Grammy awards, singing in Spanish and English, there has been a resurgence of interest in Hispanic artists and music styles by mainstream consumers. Martin's crossover was not the first by a Hispanic artist — Desi Arnaz and Gloria Estefan did it before — but it is different because it appears that mainstream consumers, especially teens, are more open to experiencing different cultures.

After Ricky Martin, Marc Anthony and Enrique Iglesias have also been extremely successful crossing over, and even a major mainstream artist like Christina Aguilera is also crossing over but in the opposite direction, coming out with a Spanish-language record.

American pop culture has embraced Hispanic rhythms and artists, from Santana, who dominated last year's Grammy awards by picking up the most awards for his latest album (which included Spanish-language songs), to Jennifer Lopez, the first artist ever to have a #1 song and #1 movie the same week in the U.S. Just recently, Chayanne, the Puerto Rican singer, made Ally McBeal nervous with his passionate dancing in prime time television.

Food is trendier, fashion starting to change

Hispanic food is already very popular throughout the U.S. Besides tacos and Mexican style salsa, there now are trendy restaurants, like Patria in New York, where young non-Hispanics flock to try a new Latino cuisine, eating *empanadas* (meat pies) while having a shot of a premium brand of tequila.

Mexican beer brands, especially Corona, have become a staple for trendy consumers around the country, while Chilean wine is sold in most supermarkets, even in the ones located in Napa valley. In HBO's popular *Sex and the City* series, the protagonist was recently shown drinking Cristal, a Colombian *aguardiente*, at a party where only the "in" crowd in Manhattan was invited.

Fashion is also been influenced by Hispanics. Young cool Americans are often seen wearing *guayaberas*, a Cuban shirt, in super hip South Beach in Miami and the trendiest nightclubs in Los Angeles and New York. Major clothing designers like Versace and stores like the Gap started recently to include Hispanic inspired designs with great results.

Mainstream brands with Hispanic flavors

Hispanic consumers see that major companies are communicating with them in their language, using icons from their culture, and emphasizing values that are part of what it means to be Hispanic. Some participants in Los Angeles told me recently that finally major corporations are talking to them directly. "We spend money on their products like everybody else and it's about time they pay attention to us. Our dollars are as green as anyone else's."

Another recent indication of the

rise of the Hispanic culture is the successful introduction of Hispanic-influenced flavors and products by well-known brands. The best example of this is Haagen-Dazs and its flavor dulce de leche. Dulce de leche, which is made out of milk instead of butter, like caramel, is well known throughout Latin America and it has become a very popular ice cream flavor with mainstream consumers, becoming second only to vanilla for Haagen-Dazs.

On its Web site, Haagen-Dazs explains that it went to Argentina, where dulce de leche ice cream is the number one flavor, developed its product there, and, once it had become a top seller, introduced it in the U.S. It positioned the product as a premium flavor and have had great results ever since, coming out with frozen yogurt and low-fat versions as well.

The interesting part of this particular product is that not only was the inspiration for the flavor in Latin America, but that Haagen-Dazs came out with packaging in which the name of the flavor is in larger print in Spanish, and the English translation is below in a smaller copy. This usage of Spanish by a major ice cream manufacturer signals to Hispanic consumers what they have known all along: that Hispanic foods have flavors that appeal to people outside of the Hispanic culture. Other ice cream companies have followed Haagen–Dazs's lead and have come out with dulce de leche, such as Starbucks and Edy's. Other examples of major brands coming out with Hispanic flavors are Kool-Aid and Gatorade, which have a flavor called mandarina, again in Spanish on the label, with the translation "tangerine" below and in smaller print.

Changing landscape

Hispanic populations have emerged in many areas of the U.S. No longer are they only found in New York, California, Texas, and Florida. Hispanic communities have sprung up in states like Georgia, Arkansas, Colorado, Illinois, and Massachusetts, among many others, forever changing the demographic landscape in those markets.

Hispanics number approximately 36 million in the U.S., and are supposed to become the largest minority in the five years. Their purchasing power has grown approximately 67 percent since 1990, to $365 billion. Though some companies like Toyota, AT&T, and Pepsi are already talking to Hispanics, there are still many companies that do not take them into consideration and barely spend any research and marketing dollars talking to them.

For other companies, it has become crucial to address Hispanics with advertising, products and services that appeal to their cultural background. As the influence of Hispanic culture continues to increase, these companies will earn a worthwhile return on their investment in communicating with Hispanic consumers.

Success

continued from p. 16

researchers have successfully used free software, travel coupons, or charitable donations. Remember that some companies may restrict the types of honorariums their employees can accept, or forbid incentives completely.

• *Provide listed sample.* Give your field house a clean, accurate sample frame. The hours spent wading through hundreds or sometimes thousands of disconnected, misdirected, or unqualified numbers takes time, wastes money, and exhausts patience. When possible, include an accurate contact name to minimize the need to go through call-screening gatekeepers. Fewer gatekeepers mean fewer refusals. If the sample does require significant screening, provide more sample and plan for extra data collection time.

• *Arrange to pre-notify and recruit.* Give respondents advance notice of your call and obtain their cooperation before attempting the interview. A comparison between two similar Western Wats studies found that recruiting, coupled with subsequent notification, decreased field time by as much as 50 percent.

To obtain the best results, recruit via telephone or e-mail. Recruiting can be conducted prior to study fielding or concurrently with questionnaire administration. Remember that not all recruited respondents actually participate so virtually every study requires some over-recruiting to actually reach the end goal. When determining your recruiting quotas, consider the respondent type, the expected incidence, and the study topic.

Notification alone can dramatically increase cooperation rates among respondents. Depending on the timing and nature of the study, notify respondents via telephone, mail, e-mail, or fax. We recently completed a study consisting of two identical waves of physician interviewing. In wave one, the client elected to cold-call the physicians and procure cooperation when administering the survey. Before the start of wave two, the client mailed a letter to each physician in the sample base, asking for their participation. The letter briefly explained the purpose of the research, gave the approximate length of the questionnaire, and provided a phone number

The shorter the questionnaire, the better the response rate. Calling a respondent at work is, at best, a minor disruption. Keep your questionnaire as short as possible. Resist the temptation to ask unimportant questions simply because you have the chance.

where physicians could confirm the validity of the study. Thanks to these efforts, wave two of the study was out of the field in three weeks as opposed to the six weeks needed to complete the first wave.

When notifying or recruiting hard-to-reach professionals, always include an 800 number directly to the call center so respondents can initiate an inbound call at their convenience. Our call centers are equipped with multiple 800-lines expressly for this purpose. You never know when a busy professional will find the time to complete the study and providing them with the additional flexibility increases the likelihood of their cooperation. In wave two of the physician study outlined above, the 800 number was given in the introductory letter, resulting in more than 60 percent of the completed interviews coming from inbound calls. Since most call centers price inbound calls considerably lower than outbound ones, this little bit of advanced planning can result in big cost savings. When using an 800 number, make sure to include the study field dates and the call center hours in your materials to potential respondents.

• *Manage survey length.* In market research, less is more. The shorter the questionnaire, the better the response rate. Calling a respondent at work is, at best, a minor disruption. Keep your questionnaire as short as possible. Resist the temptation to ask unimportant questions simply because you have the chance, you'll pay for it through increased terminates. To get the maximum respondent cooperation, keep questionnaire lengths to 10 minutes or less.

Some field services have even gone so far as to restrict long B2B questionnaires. The Gallup Organization no longer accepts any B2B questionnaire over 15 minutes in length. According to Jane Miller, executive vice president and CFO for Gallup, negative influences on respondents and higher costs to researchers prompted the restrictions.

• *Consider the Internet.* With many businesses providing e-mail and Internet access to their employees, a Web survey offers a viable and cost-effective alternative to more traditional forms of data collection. Market researchers have used and refined the Internet as an interviewing vehicle for the B2B crowd almost since its inception; consequently, Web-based B2B studies pose fewer sample problems and limitations than their consumer counterparts.

Cooperation rates for Internet studies continue to increase. According to the 1999 Respondent Cooperation and Industry Image Study conducted by the Council for Marketing and Opinion Research (CMOR), nearly one in five individuals who participated in any type of survey within the past year did so over the Internet. Furthermore, those who refused to participate in a telephone survey indicated that they preferred the Web second only to mail as a survey method.

In addition, the Internet adds wonderful flexibility to your study. For example, you can notify or recruit via telephone or e-mail, then provide the respondent with a Web address to access the questionnaire. Or you can collect data using both the telephone and the Internet (remember to account for differences in the two methodologies in your final data analysis). An Internet survey also provides creative design freedom to incorporate graphics or sound into the questionnaire. Just don't get too carried away. A visually stunning but very slow-to-load display will only frustrate respondents and may increase terminates. Slow modems still abound, so keep your survey friendly to even the slowest models. And remember that length remains a major factor, even with the Internet. Once again, the shorter the better.

A visually stunning but very slow-to-load display will only frustrate respondents and may increase terminates.

With an Internet study, be especially selective when choosing a field service. Do they have the capacity and the experience to host your study? Can they implement either a telephone-to-Internet or an e-mail-to-Internet methodology? Can they supply live online or telephone assistance if a respondent hits a snag or has a question. Do they provide study updates and data in real-time?

While there is no magic formula for the perfect B2B study, using the suggestions here will help your project run smoother and minimize your headaches.

Survey Monitor

continued from p. 8

more years of experience have purchased products from the Internet, compared to only 19 percent of online African-Americans with less than three years of experience. Similarly, 42 percent of online Hispanics with three or more years of experience have purchased products from the Internet, compared to 26 percent of online Hispanics with less than three years of experience.

• Despite increasing usage, continuing skepticism characterizes the attitudes of many ethnic Internet users, particularly among online African-Americans. Among all groups, online African-Americans are the least likely market to believe that the Internet removes racial barriers and creates new social opportunities. African-American and Hispanic respondents were nearly three times and five times as likely, respectively, than the general market to mention negative perceptions of the Internet.

• Online African-Americans and Hispanics are very concerned about the influence of the Internet on their children and families. In contrast to 37 percent of the general market, 55 percent of online African-Americans and 89 percent of online Hispanics have children at home. Forty percent of the African-American and Hispanic respondents were dissatisfied with the Internet content for children. Half of African-American respondents even felt that the Internet should be censored, twice the level of Hispanics and the general market.

The study was conducted online and included approximately 3,500 responses from Internet users recruited from ethnic Web sites and Survey.com's consumer panel. Respondents had the option of completing the survey in either English or Spanish. A copy of the research report is available at www.access-cag.com.

Hispanics adopt computer technology at robust pace

Redwood Shores, Calif.-based Cheskin Research has released the second wave of its research on Hispanics and digital technology. The study expands on the initial research of April 2000 that examined the attitudes, behaviors, and usage and ownership patterns of U.S. Hispanics with regard to computers and the Internet. Findings in the study indicate a significant increase in household computer penetration, and a slight decrease in online purchasing and purchase intent.

A nationally representative sample of over 2,200 Hispanic respondents participated in telephone interviews that addressed both households and adults. Key household measures included the presence of computers and computer users, technology penetration and adoption, intent and barriers to purchase and usage. Key individual measures included, but were not limited to, computer brand awareness, future purchase intent and brand consideration, Internet usage and activities, usage of Internet services (i.e., ISPs, browsers, search engines, and key Web sites), language preferences, and e-commerce attitudes, behaviors, and intent.

Five key findings emerged from the research:

• Technology adoption is increasing rapidly. Computer penetration among Hispanic households has increased from 42.3 percent in Q1 2000 to nearly 47 percent in Q4. The rate of growth of Hispanic household technology penetration over the last two years is 80 percent compared with 21 percent for the overall market.

• Lack of information is still one of the key reasons for not having a computer in the home, although this trend is diminishing significantly. Perceived expense is seen as the greatest barrier to computer ownership.

• Opportunity exists for computer brands to own the market. Computer brand awareness has changed little in the past eight months and over 70 percent of current non-owners have no brand in mind for future purchase, indicating that manufacturers still have a significant opportunity to own the Hispanic market.

• Hispanic users continue to prefer mainstream portals. Yahoo! has increased its lead as the primary portal for U.S. Hispanics who are using Yahoo! in English. There is still an opportunity for Spanish-language portals as increasingly more Spanish-dominant consumers are entering the online world.

• Internet trust among Hispanics

has decreased significantly over the past eight months. This growing lack of trust may be fueled by the prevalence of media coverage of payment and fulfillment problems.

The second wave of the study also provided insights into Internet access speed and mobility. Wireless Internet access appears to be substantive. Of U.S. Hispanic adults who mentioned having access to the Internet, 16 percent said they have wireless access and almost a third indicate having high-speed or broadband access at home. This indicates that about 6.5 percent of U.S. Hispanic households have broadband access. For more information visit www.cheskin.com.

Teens surf the Net but shop the mall

Today's active teens may love to surf the Net, but when it comes to clothing their bodies for school and sports, they head to traditional department or other brick-and-mortar stores, according to a national survey of 1,000 13-to-19-year-olds conducted for the Sporting Goods Manufacturers Association's (SGMA) Super Show.

This loyalty to physical stores is especially interesting because the survey was conducted on the Internet. Wilton, Conn., research firm Greenfield Online teamed up with Target Management, also of Wilton, to field research about the sports participation and sports-related behaviors of teens, as well as their brand preferences and buying behaviors in regards to footwear, clothing, and equipment.

When they want to buy something, teens leave parents at home and hit the stores themselves, despite the fact that most respondents said their parents ultimately paid for their purchases.

The survey found teens shop most often for active wear and athletic apparel at the following: department stores, 38 percent; specialty stores, 14 percent; full-line sporting goods stores, 14 percent; discount stores, 12 percent; athletic footwear stores, 7 percent; catalogs, 3 percent; online sites, 2 percent.

Nike, Adidas, Speedo, Hanes, Reebok, and the Gap were leading brands of active wear and athletic apparel worn by the teens for participating in sports.

Swimming, bowling and billiards/pool were the top three sports identified by teens as sports in which they have participated in the past year. Only seven of the top 35 sports — basketball, soccer, volleyball, touch football, baseball, tackle football, and softball — require team participation.

The survey was conducted over the Internet between Dec. 7, 2000 and Jan. 2, 2001 among 1,000 13- to 19-year olds who were drawn from Greenfield Online's research panel. The findings were weighted to represent the U.S. census in terms of gender. For more information visit www.greenfield.com.

Minorities give high marks to new car buying experience

Automotive Retailing Today asked The Gallup Organization to measure how satisfied consumers are with the new vehicle purchase/leasing experience — and asked Wirthlin Worldwide to determine if there are different perceptions by minority purchasers. Both studies indicate that a strong majority of all consumers gives high marks to the process.

Automotive Retailing Today is a coalition that includes all major automobile manufacturers and dealer organizations. Its goal is to promote a better understanding of the industry and build stronger customer relationships.

Gallup conducted a survey of consumers, dealers and the news media about their car buying experiences. Separately, Wirthlin Worldwide conducted a similar survey solely focused on the car buying experiences of minorities.

When asked specifically about how they liked their dealership, 94 percent of non-minority consumers overall were satisfied, of which 75 percent were very or extremely satisfied according to the Gallup research. The Wirthlin research confirmed that 88 percent of minority consumers were satisfied (66 percent very or extremely satisfied) with their dealership.

The Wirthlin survey found that one in every five (19.6 percent) Americans has recently bought or purchased a new vehicle. More than 11 percent of the new car purchasers are minorities. Additionally, minorities purchase a new vehicle more frequently than non-minorities, an average of every 23.1 months versus 45.6 months respectively.

Both surveys found that Internet use in the vehicle buying experience has increased dramatically since 1998. Gallup found that 43 percent of non-minorities who recently purchased a vehicle conducted research online to help guide their decision, compared to 27 percent who did so for their last vehicle purchase. Still, 90 percent (63 percent very or extremely useful) said the visit to the dealership was a useful source of information in the purchase experience.

Among minorities polled by Wirthlin, 36 percent reported that the Internet influenced their latest decision, up from 24 percent for their last purchase. Asian-Americans used the Internet the most (62 percent), followed by Hispanic-Americans (39 percent) and African-Americans (27 percent).

According to Gallup, information most sought on the Internet by all consumers included price (88 percent), options and color (86 percent), and comparisons among different makes and models (68 percent). Only 8 percent used the Internet to agree on vehicle price, 3 percent to fill out the necessary paperwork, and 2 percent to arrange pick-up or delivery.

In addition to the Internet, consumers of all ethnicities now use a variety of other information sources to influence their purchase decision, and there are only minor differences in preferences between minorities and non-minorities. "Minorities are a bit more likely to rate word of mouth, consumer guides, and government safety ratings higher on their list. Non-minorities tend to give slightly more emphasis to visiting a dealership," says John Peterson, chairman of Automotive Retailing Today.

When asked to rate the various information sources on reliability, the same pattern holds true. Minority consumers tend to rate all sources slightly higher than non-minorities, except "visit to a dealership," which non-minorities rate slightly higher.

Other key findings from both studies included:

• Women were somewhat more positive with the overall purchasing/leasing experience (3.43 mean for women vs. 3.30 for men). Overall satisfaction with their dealership was also higher for women (4.0 mean vs. 3.84 mean). (Gallup) (The numerical scale for the positive mean is: 5 = extremely positive, 4 = very positive, 3 = somewhat positive, 2 = somewhat negative, 1 = very negative. The scale for the satisfaction mean is the same.)

• Members of the news media (54 percent) believe that consumers had negative experiences, in sharp contrast to what both minority and non-minority consumers reported. (Gallup)

• There is little disagreement among minorities and non-minorities that the purchase process at dealerships across the country is getting better (39 percent and 36 percent respectively). (Wirthlin, Gallup)

• 5.3 percent of all new vehicle buyers/leasers are African-Americans; 9.9 percent of African-Americans buy/lease new vehicles. (Wirthlin)

• 3.8 percent of all new vehicle buyers/leasers are Hispanic-Americans; 9.5 percent of Hispanic-Americans buy/lease new vehicles. (Wirthlin)

Data for the Gallup survey was collected June 28, 2000 to July 28, 2000 by random telephone interviews of 1,003 people who purchased or leased a new vehicle within the previous 18 months. R.L. Polk & Co. supplied the sample based on vehicle identification numbers registered within the past 18 months. In addition, 100 reporters/media representatives and 403 dealership owners were asked the same questions for comparison purposes. The individual groups have the following margin of error levels: consumer +/-3.1 percent; dealer +/-4.9 percent; and news media +/-9.8 percent.

Wirthlin Worldwide's results are based on 2000 telephone interviews conducted between October 6 to November 1, 2000, and have a sample error of +/-2.2 percent. In addition, Wirthlin results focus on 292 interviews with minorities who had purchased or leased a new vehicle within the last 18 months. A sample of 292 has an error level of +/-5.7 percent. The ethnic sub-samples have the following error levels: African-Americans +/-8.8 percent; Hispanic-Americans +/-11.3 percent; and Asian-Americans +/-13.9 percent. Complete copies of both surveys are available at www.autoretailing.org.

Agencies confirm streaming media viability

Advertising agencies say streaming media is a viable advertising medium and that streaming media ads are effective corporate and product branding tools, according to the "Advertising Agency Streaming Media Awareness Study" conducted by MeasureCast Inc., a Portland, Ore., audience measurement firm, and The Yankee Group, a Boston research firm.

One hundred advertising agency executives were interviewed for the study. Fifty of them worked for traditional ad agencies (including media buying services) with online media capabilities, and 50 were with online, or interactive, agencies.

Some highlights:

• Six out of 10 respondents (61 percent) have recommended streaming media advertising to clients in the past 12 months.

• 65 percent of the respondents are likely to recommend streaming media advertising to clients in the next 12 months.

• Nearly half of all respondents (47 percent) say clients who have not previously invested in streaming media advertising will allocate dollars to streaming ads during the next 12 months.

• More than half of the respondents (56 percent) who previously purchased streaming media ads expect to spend more on streaming media advertising in the next 12 months.

• Nearly seven out of 10 respondents (69 percent) agree that audience demographic data is crucial to making ad purchase decisions.

• More than half of the respondents (54 percent), say clients' perceptions that streaming media ads are too expensive keep them from purchasing those ads.

The objective of the MeasureCast/Yankee Group study was to identify ad agencies' level of awareness and their perception of streaming media, to understand the online media buying decision process, and to reveal trends in the streaming media marketplace. The survey also targeted agencies with experience managing clients that have some accounts purchasing online advertising, and that make recommendations to clients on placing interactive media. For more information visit www.measurecast.com.

Product & Service Update

continued from p. 12

incorporate both automotive component teardown capabilities and consumer clinic capabilities within the company's full-service package to vehicle manufacturers and automotive suppliers. As part of the CTCS operations, Providata Automotive offers its new ClinicTech product line: ClinicTech Consumer Product Focus Group Clinics; ClinicTech Consumer Technology Clinics; ClinicTech Consumer Attitude Clinics; and ClinicTech Ride & Drive Focus Group Clinics. For more information visit www.providata.com.

ACNielsen releases PRICEMAN

ACNielsen U.S., an operating unit of ACNielsen, has released PRICEMAN 3.0, an enhanced version of its strategic pricing software. The newest version of PRICEMAN, which helps retailers manage their many product pricing decisions, includes over 30 upgrades. New features include a true 32-bit Windows-based environment and the flexibility to use PRICEMAN as a standalone product or to network it on a client's server.

Other PRICEMAN upgrades include 20 viewable pricing zones, up from six in the previous version. This allows users to make pricing decisions based on a comparison to a greater number of competitive stores covering a wider geography. The new product's rule-based pricing models also give users more power. For example, clients can write rules into the program to set prices that are within a certain amount of a competitor's prices but never below the client's product costs. With the upgraded version of PRICEMAN, reports can now be automatically exported into an Excel format as well. For more information visit www.acnielsen.com.

Apparel industry site from NPD

As part of a planned series of industry-specific sites, the NPD Group, Inc., a Port Washington, N.Y., marketing information firm, has debuted NPDFashionworld, offering secure access to apparel industry data and analysis, along with the ability to query and view hundreds of specialized data sets. The site offers users access to information from NPD's online consumer panel and retail point-of-sale tracking. NPDFashionworld combines information on behavioral trends with insight on consumer attitudes from the same consumers, delivered via the Internet on an ongoing basis. The site can be customized to address the particular business issues of each user.

NPD's "My Dashboard" puts users in the driver's seat by highlighting topline, current industry trend information via six customizable graphs. Clients designate sets of sales, marketing or attitudinal information most relevant to their business, and can change the sets anytime. NPD's Solution Folders feature access to charts, organized around business issues such as brand performance, pricing, customer satisfaction and other key topics.

Additionally, the site includes "ClientCenter," an electronic library of information encompassing access to full NPD reports and presentations. Other features of the site include industry news, an archive of topical NPD articles and white papers, special industry reports, a calendar of events and content from other sources in the industry. For more information visit www.npdfashionworld.com.

System determines need for health care services

East Peoria, Ill.-based Customer Potential Management (CPM) Corporation, a customer relationship management (CRM) firm, has introduced a new system to help health care organizations determine who might get sick and need certain services. The identification of such individuals allows providers to help their patients receive the most appropriate services to improve wellness, approach disease more proactively, or to lessen the physical and financial burden of chronic illness.

The three levels of CPM's Consumer Healthcare Utilization Index (CHUI) are designed to help organizations determine who is the best audience for their programs and products. CHUI, unlike other segmentation systems, is based on health need and health variables rather than geography, attitudes and other non-health variables.

CHUI was developed using data mining techniques, actual behavior and individual demographics, providing precise bits of data to forecast health care needs. Information from more than 20 million encounters using over 50 input variables were used to construct the three CHUI levels.

When a planner or health care strategist takes a CHUI level and applies it to the organization's customer database, it gives each individual a score from 1-999, rating the person's likelihood to utilize a particular service. The higher the CHUI score, the greater the need for services.

The three CHUI categories are:

• CHUI I-Scores for each of the broad 25 major diagnostic categories (MDC) for inpatient hospital encounters such as digestive system, pregnancy and childbirth and the circulatory system.

• CHUI II-Scores for the ICD-9 code categories as well as other approximately 120 top diseases and procedures of the 21st century such as diabetes, weight management and cardiovascular disease.

• CHUI III-Scores for the 29 diagnostic related groups (DRG) or medical service areas defined around hospital business lines such as cardiovascular medicine, endocrinology and urology. For more information visit www.cpm.com or call 800-332-2631.

Competitive Strength Inventory available for licensing

Competitive Benchmarking Associates (CBA), The Woodlands, Texas, is offering its Competitive Strength Inventory (CSI) for licensing to research firms throughout North America and Europe. The CSI benchmarks the performance of all companies providing a product/service to a defined target market on three factors: 1) acceptance and utilization; 2) entrenchment with the target customer base; 3) marketing effectiveness. The CSI's focus on comparative performance ratings make it a useful tool for both multi-client (syndicated) and single-client benchmarking studies. Along with rights to use the CSI, CBA will provide training and consulting to licensees. For more information contact Michael Branham at branham@competitiveanalysis.com or at 281-364-8299.

SigmaPlot from SPSS

SPSS Inc., Chicago, has released SigmaPlot 2001, the latest version of its scientific graphing software. With SigmaPlot 2001, users can export graphs as dynamic Web objects to be posted on a Web site or an intranet page instead of simple GIF or JPEG files. SigmaPlot's WebViewer enables anyone — whether or not they have SigmaPlot — to explore the data used to create the graph and to zoom, pan or print the image at full resolution directly from a Web browser window. Optional security settings restrict data access to authorized users only.

The WebViewer, a free Internet Explorer plug-in, is automatically downloaded when the browser first encounters a SigmaPlot 2001 graph. If for any reason the Viewer plug-in is not installed, the browser will display a screen resolution JPEG image.

Additional new features in SigmaPlot 2001 include:

• Equation solver — Solve equations or functions containing a single independent variable and any number of parameters.

• Graph style gallery — Users can save templates of their favorite graphs for reuse, saving the time and effort of recreating complex plots.

• Area plots — Researchers can shade areas below or between curves, calling attention to regions of particular interest.

• True color EPS export — Images can be exported as full color vector EPS files, the preferred format for illustration and page layout programs. A live demonstration of a SigmaPlot Web graphic is available at www.spssscience.com/viewer.

Research Industry News

continued from p. 15

Acquisitions

Harris Interactive, a Rochester, N.Y., research firm, has acquired the custom research division of **Yankelovich Partners**, Norwalk, Conn. Harris Interactive acquired only the custom research division of Yankelovich. The custom research division, which currently conducts the majority of its research using the telephone, is expected to generate approximately $15 million in revenue during the remainder of calendar year 2001. Also as part of the agreement, Harris Interactive hired approximately 65 Yankelovich employees, mostly project personnel, research analysts, data collection management, and data processing employees. Harris Interactive acquired no real estate in the transaction.

Alliances/strategic partnerships

Step 9 Software Corporation, Fairfax, Va., and **SPSS Inc.,** Chicago, have announced a strategic partnership to integrate SPSS analytic technologies into Step 9's iCustomer, an order entry/order management application. The joint solution will give service provider executives the ability to measure performance in areas such as service provisioning, product profitability, and overall customer churn, and generate business intelligence.

San Diego-based **Claritas Inc.** and San Francisco-based **Cogit Corp.** have announced an agreement to incorporate Claritas' proprietary consumer segmentation systems PRIZM and MicroVision into Cogit's visitor relationship management services, enabling Web marketers to increase response from anonymous Web visitors by optimizing content for each visitor.

Under terms of the agreement, Claritas, a marketing information firm, will market private label versions of Cogit's visitor relationship management services to be known as eMAGE Profile and eMAGE Target. Cogit is a provider of such services within the Internet industry.

Tokyo-based research firm **Marketing Intelligence Corp.** (MiC) and New York's **Jupiter Media Metrix** have formed a joint venture, Jupiter Media Metrix K.K. (JMMJ), which brings together Jupiter Media Metrix, a media measurement firm, and MiC, the 17th largest marketing research firm in the world.

The **Interactive Marketing Research Organization (IMRO)**, a non-profit organization dedicated to the creation of ethical and best practices for research conducted on the Internet, and the **Institute for International Research** (IIR), a New York business conference organization, have announced a new administrative alliance. IMRO has contracted IIR to manage the administrative functions for the organization. IIR will provide support and manage such activities for IMRO as the membership program, public relations and Web site management, sponsorships, distribution of the periodic newsletter and the speaker bureau. The administrative agreement is designed to provide IMRO members with efficient service and easy access to IIR events. IIR will benefit from the discussion forums regarding ethical approaches to interactive and online research.

New York-based **WebSurveyResearch** and Princeton, N.J.-based **Total Research** have announced that they will work together to deliver online surveys to assess marketing research information from physicians and other health care professionals. Under the terms of the letter of intent, Total Research will have immediate access to WebSurveyResearch's physician panel for performing marketing research. Total Research will perform the questionnaire design and analysis of data.

Awards

Research Data Design, a Portland, Ore., research firm, has been named to *Inc.* magazine's list of the fastest-growing privately held U.S. companies for the second year in a row.

New accounts/projects

Econometrics, Inc., a Chicago database marketing and advertising firm, has entered into a marketing agreement with Porsche Cars North

America and its advertising agency, Carmichael Lynch, to conduct consumer market research in preparation for the launch of Porsche's new off-road sport utility vehicle, the Cayenne. Porsche Cars North America, based in Atlanta, announced the introduction of the Cayenne vehicle on June 9, 2000. The Cayenne will be produced in a new factory in Leipzig, Germany, and will be available sometime in 2002. Annual sales are expected to exceed 25,000 units worldwide. Econometrics has provided predictive modeling and marketing data to Porsche during the past two years in connection with the Porsche Boxster and 911 projects.

Opinion Research Corporation, Princeton, N.J., has been chosen by Eurostat, the Statistical Office of the European Communities, to conduct a series of social research projects in Europe.

Information Resources, Inc. (IRI), Chicago, has extended its partnership with News America Marketing, a subsidiary of News Corporation Ltd., to provide scanner-based tracking data and analysis delivered via the Internet. Under the three-year agreement, IRI will provide News America Marketing with tracking data regarding its in-store and newspaper insert programs.

The Ministry of Science and

Technology in Croatia recently purchased licenses for Tulsa, Okla.-based **StatSoft**'s Statistica and Statistica Neural Networks to be used by more than 100,000 students at all four universities. The purchase makes Statistica the standard statistical software used throughout the university community in Croatia.

In conjunction with the formation of a consumer advisory council, online travel site Expedia, Inc., has partnered with **MarketTools**, a Sausalito, Calif., research firm, to develop and maintain consumer relationships and activity as well as gather and analyze feedback. The community of several thousand travelers will provide ongoing feedback in areas ranging from overall industry topics to specific features and services — helping improve the Expedia.com Web site. Council members will be invited from the general online travel community as well as Expedia's customer base.

Fidelis Care New York, a Catholic-sponsored health care plan, has retained New York ad agency **Eric Mower and Associates** (EMA) as a partner for its multimillion-dollar marketing campaign. EMA's Albany, N.Y., office will handle all of Fidelis Care's integrated marketing communications including advertising, marketing research, public relations, sales promotion and direct marketing services.

New companies/new locations

Research & Marketing Services, the Gallup International institute in West Africa, has opened RMS Cameroon. The firm, with offices in Douala, also coordinates and supervises projects in the Democratic Republic of Congo, Congo Brazzaville, Gabon and Chad.

Market Voice Consulting, LLC, an Indianapolis-based market research, planning and business analysis firm, has moved to a new location at 445 N. Pennsylvania St., Suite 900, Indianapolis, Ind., 46204. Phone 317-635-9640. Fax 317-635-9641.

Scott Kincer, Joey Harmon and others have purchased the former Polk Call Center in Riverside, Calif., and reopened the 160-CATI-station facility as **Datascension, Inc.** For more information call 909-826-8182.

MarketVision Research, Cincinnati, has opened a new 56-station call center in West Chester, Ohio, north of Cincinnati.

German ag research firm **Kleffmann** and Scottish ag research firm **Phillips McDougall** have established a new joint venture company, amis global Ltd. While Kleffmann and Phillips McDougall will continue to operate independently, the new company will develop global databases and provide consulting services. The firms began cooperating in 1999 to release amis global, a computer-based product that links market research information on the crop protection, seed and biotech industries with global sector analysis. The new company will initially be based on England.

Research Data Design, a Portland, Ore., research firm, has opened a new call center, its fourth, in Las Cruces, N.M.

Company earnings reports

National Research Corporation, a Lincoln, Neb., health care performance measurement firm, announced results for the fourth quarter and year ended December 31, 2000. Revenues for the fourth quarter ended December 31, 2000, were $4.2 million compared with revenues of $4.6 million for the fourth quarter of 1999. Net income for the fourth quarter was $742,000, or $0.11 per basic and diluted share, compared with net income, including nonrecurring charges related to the closing of duplicate facilities, of $625,000, or $0.09 per basic and diluted share, in the prior-year period.

Revenues for the year ended December 31, 2000, were \$18.3 million compared with revenues of \$18.2 million for the year-ago period. Net income for the year ended December 31, 2000, was \$2.7 million, or \$0.39 per basic and diluted share, compared with net income, including the nonrecurring charges in the fourth quarter of 1999, of \$1.5 million, or \$0.21 per basic and diluted share, in the prior-year period.

Opinion Research Corporation, Princeton, N.J., reported record results for the fourth quarter and the year ended December 31, 2000. For the year, revenues were a record \$161 million, an increase of 36 percent compared to 1999 revenues of \$119 million. Organic revenue growth was 11 percent for the year. Operating income for 2000 totaled \$11.7 million, an increase of 38 percent from \$8.5 million in 1999. Organic operating income growth was 16 percent for the year. Net income for the year was \$3.3 million, an increase of 31 percent from net income of \$2.5 million in 1999.

Princeton, N.J.-based **Total Research Corporation** announced second-quarter and six-month results for the periods ended December 31, 2000. For its second fiscal quarter, the firm reported record revenues of \$13,081,463, compared with \$12,112,292 for the same quarter of fiscal 2000, an 8 percent increase. Net income for the second fiscal quarter was \$616,582, or diluted earnings per share of \$0.05, compared with \$646,379, or diluted earnings per share of \$0.05, for the same quarter of fiscal 2000.

For the six-month period ended December 31, 2000, the company reported record revenues of \$27,111,237 compared with \$25,903,242 for the same six-month period of fiscal 2000, a 5 percent increase. Net income for the six-month period was \$1,120,770, or diluted earnings per share of \$0.08, compared with \$1,271,017, or diluted earnings per share of \$0.10, for the same six-month period of fiscal 2000.

Westport, Conn., health care information firm **IMS Health** announced full-year 2000 diluted earnings per share of \$0.85, a 23 percent increase over 1999 results. Net income grew 15 percent year-over-year, to \$253.6 million, while constant-dollar revenue rose 16 percent and reported revenue increased 13 percent to \$1,254.0 million. For the fourth quarter, net income grew 11 percent, to \$78.0 million, and diluted earnings per share were \$0.26, an 18 percent increase over 1999 fourth-quarter results. Fourth-quarter revenue rose 17 percent constant dollar, or 11 percent, to \$346.4 million on a reported basis, compared with the year-earlier period.

Separately, the firm's board of directors declared a regular first-quarter dividend of \$0.02 per share, payable on March 9 to shareholders of record at the close of business on March 2.

Honeywell

continued from p. 19

Kano method questionnaire, and the first is a series of paired comparison questions that are answered using a five-point ordinal scale.

The first U. S. published article on the Kano Method, which appeared in the Fall 1993 issue of *The Center For Quality Management Journal*, provided the original scale designed by Dr. Kano along with several variations developed by early adopters of this method. In each case, companies using this method believed that rewording the scale would yield more useful results. The original wording of the scale, as first introduced by Dr. Kano, along with three typical paired comparison questions is provided in Exhibit 1.

EXHIBIT 1

PART I: PRODUCT REQUIREMENTS IMPORTANT TO YOU

For each question, please circle the number that most closely matches your opinion, using the scale noted below. If your opinion does not match the responses offered, please select the number that is closest to your opinion.

1 = I like it that way
2 = It must be that way
3 = I am neutral
4 = I can live with it that way
5 = I dislike it that way

How would you feel if:	**1**	**2**	**3**	**4**	**5**
the gas mileage were well above average for this type of vehicle?	1	2	3	4	5
the gas mileage were a little below average for this type of vehicle?	1	2	3	4	5
ABS brakes were standard equipment?	1	2	3	4	5
ABS brakes were an option you could select and pay for?	1	2	3	4	5
the front seats were heated?	1	2	3	4	5
the front seats were not heated?	1	2	3	4	5

The Honeywell team was not in agreement about the wording of the five-point scale. Some clients have used the scale as is, to help build experience and a body of knowledge about the scale, while other clients have revised the wording. Honeywell tried several variations over the course of a year, and after considerable discussion and experimentation agreed on a revised scale. It now uses the exact same wording for all of its Kano method surveys, to ensure consistency over time and across markets.

There continues to be considerable debate about how to word the five options among firms using the Kano method. As long as experimentation continues, it will be difficult to determine which (if any) set of words is "best" across all markets. However, regardless of the final scale used, the goal is to include a scale for which each available choice is clearly understood and there is no confusion about what each choice means.

The second big issue to emerge was how to word the paired comparison questions in part one. It is very difficult to word each pair so that one half of each pair will be viewed as "functional" (positive) and the other half as "dysfunctional" (negative, or at least less positive than the functional half). Furthermore, it is often difficult to determine how general or specific each question should be. If the questions are too general one may not learn a great deal from the research. If the questions are too specific, there may be too many "indifferent" responses, as respondents may not have strong opinions about subtle product changes.

When it completed the first Kano survey, Honeywell found that a larger percent of questions than anticipated fell into the "indifferent" category. This

Every "indifferent" characteristic takes the place of what a client might have learned about the other three categories. Therefore, one of the goals for later Kano surveys was to rule out as many potentially indifferent attributes as possible, replacing them with pairs that had a high potential to fit into a more helpful category.

was useful, as it helped the company determine priorities for further development. However, it had hoped to discover more about the other three categories — attractive, must-be and one dimensional.

Respondents will only spend a certain amount of time on a survey, so there are limits to how many variables can be tested in a single questionnaire. Every "indifferent" characteristic takes the place of what a client might have learned about the other three categories. Therefore, one of the goals for later Kano surveys was to rule out as many potentially indifferent attributes as possible, replacing them with pairs that had a high potential to fit into a more helpful category.

Honeywell accomplished this in four ways. First, it refined the earlier steps in the product development process, to help identify and rule out "indifferent" attributes before it was time to complete a Kano method survey.

Second, to the extent that it is practical, Honeywell matched what customers actually said with the wording of each paired comparison question.

Third, the firm worked with Delphi Market Research on the final wording for each paired comparison question, to make sure each included both a functional and a dysfunctional half.

Fourth, Honeywell and Delphi both pre-tested each proposed questionnaire, and revised them as appropriate before each survey was administered. Steps two and four are particularly satisfying to Honeywell, because they provide a very effective way to use direct customer input to make decisions, even during the research process.

Results

The results were both surprising and rewarding. During the first year Honeywell and Delphi worked together, they jointly completed five Kano method surveys, all for highly technical, complex commercial and industrial products. Honeywell has been in these businesses for many years and has devoted considerable effort to remaining up-to-date on the needs and preferences of its customers. Despite this, there were several surprises.

In one market, Honeywell thought it understood all the applications for a group of products used in factory automation and in vehicles. As a result of the Kano survey on this product line, the company learned about some additional product uses, and has since been able to respond with product refinements.

For another product line that is sold into commercial and military markets, Honeywell knew that differences existed in customer needs and preferences, but did not fully understand why. The Kano survey was extremely helpful in defining and confirming these differences, as well as the reasons why these differences exist. With this new knowledge, the firm has been able to re-focus its development efforts and its marketing materials and approaches.

In another instance, Honeywell had developed a new technology, and customer reaction was being tested through the Kano survey. The firm was prepared to devote considerable resources to a new line of products using this technology. Surprisingly, customers thought the new technology was interesting, but they felt that it offered no constructive benefits and did not want to pay more for the new technology. Therefore, unless or until a viable market is found for this technology, internal resources will be used elsewhere.

An aspect of Kano that Honeywell finds most helpful is the ability to sort and order data into the four Kano categories — attractive, one dimensional, must-be and indifferent. Another aspect the company finds particularly useful is the ability to rate and rank attributes within each of these four categories. By using the complete analysis, Kano method users can decide exactly how to deploy their development resources, and which aspects of product or service development can wait or be halted.

The category and ranking data which Kano generates have been extremely helpful for Honeywell executives, as they allow the firm to make decisions based on quantifiable results, as opposed to the earlier-stage qualitative data, which can be hard to interpret. The earlier-stage data is critical in developing broad directions and in understanding customer needs, applications and preferences. However, only with quantifiable results can solid decisions be made. As one Honeywell executive said, "Kano helps us do what the customer says is important, rather than what we think we're supposed to do." As the Honeywell example shows, clients are often surprised by data, and by how straightforward the decisions can be, when objective, quantitative results are available.

In the end, what makes Kano so effective for Honeywell is its role in the company's multi-step product development process. For example, questionnaire generation is strengthened by the qualitative research that precedes it – voice-of-the-customer research allows Honeywell to identify a range of key issues, some of which will be tested through the Kano survey. This makes the questionnaire more effective, and also helps attain a high response rate to the survey, because customers already know that they are being asked to participate in a process that will provide them with better products and services.

After some of the Kano surveys, key customers were contacted to test whether or not the more surprising findings were in fact correct and not due to respondents' misunderstanding certain questions. These follow-up meetings validated the Kano results and demonstrated Honeywell's commitment to meeting its customers' exact needs. By combining qualitative and quantitative research, Honeywell was able to gain significant insights into their markets and to more effectively meet its customers' needs.

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 952-854-5101. Fax 952-854-8191. Or visit www.quirks.com/mod_market/index.htm.

Access Worldwide, Cultural Access Group
5150 El Camino Real, Ste. B-15
Los Altos, CA 94022
Ph. 800-671-9525
Fax 650-965-3874
E-mail: info@accesscag.com
www.accesscag.com
Contact: David Morse
Contact: Jannet Torres
Latino/African-American/Asian, Full-Service Market Research.

ActiveFocus
3832 Mintwood St.
Pittsburgh, PA 15201
Ph. 412-683-5975
Fax 412-681-7975
E-mail: cjrobbins@activefocus.com
www.activefocus.com
Contact: Carole J. Robbins
Member: National Assoc. of Practicing Anthropologists & Qualitative Research Consultants Assoc. (QRCA).

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: jeff@jeffandersonconsulting.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.

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. 1,750 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.

Balaban Market Research Consulting
Phoenix, AZ
Ph. 602-765-2172
E-mail: ReprtWrite@aol.com
Contact: Caryn Balaban, M.P.H.
Health, Medical & Pharmaceutical.

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: Luis N. Ortiz
6 Moderators; All Subjects, In English or Spanish; U.S. & Latin America; 35+ Years Experience; Analysis/Reporting Services.

Brophy Research
221 E. 94th St.
New York, NY 10128
Ph. 212-348-1041
E-mail: dbbrophy@worldnet.att.net
Contact: David B. Brophy, President
New Product Development; Advertising Checks A Specialty.

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, & In-Depth 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.

CALO RESEARCH SERVICES

Calo Research Services
10250 Alliance Rd.
Cincinnati, OH 45242
Ph. 513-984-9708
Fax 513-792-7404
E-mail: ncalo@caloresearch.com
www.caloresearch.com
Contact: Nick Calo
15+ Years B2B, Tech, Legal/Graduate Degrees Psych. & Marketing/Recruit Nationally From One Location.

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
Focus Groups, Conjoint Analysis, Surveys. Call To Discover The Difference.

Cambridge Research, Inc.
3521 W. 24th St.
Minneapolis, MN 55416
Ph. 612-929-8450
Fax 612-929-8460
E-mail: dalelongfellw@cambridgeresearch.com
www.cambridgeresearch.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.

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
Contact: Tyler J. Walker
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 K. Shimamoto
Intercultural & Int'l. Mkt. Cnsltg. & Rsch. We Help Firms Compete In The New Global Internet Economy. Multilingual Staff/20+ Cultures.

Consumer Network, Inc.
3624 Market St.
Philadelphia, PA 19104
Ph. 215-235-2400
Fax 215-235-6967
E-mail: mona@monadoyle.com
www.monadoyle.com
Contact: Charles Ebner
Contact: Mona Doyle
Contact: Mark Saks
With Focus Grps., The Consumer Network Panel & Her Web Site, Mona Doyle Talks With 5,000+ Consumers Per Year. Packaging/Supermarkets/Mass Retailing/Eldercare.

Creative Focus Inc.

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.

Moderator MarketPlace™

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.

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.

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

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

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

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

Focus Plus, Inc.
79 5th Avenue, 5th fl.
New York, NY 10003
Ph. 212-675-0142
Fax 212-645-3171
E-mail: focusplus@msn.com
www.focusplusny.com
Contact: John Markham
Innovative, Reliable Full-Service Qual. Research. Online 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.focusedmr.com
Contact: Vern Dougherty
Insightful Analysis & Actionable Reports. Consumer, B-to-B, Internet, Rx & Pets Products. Call Us Today!

Global Qualitative Group, LLC
One World Trade Center
121 S.W. Salmon St., 11th floor
Portland, OR 97204
Ph. 503-471-1397 or 503-784-5110
Fax 800-878-1422 or 253-681-8102
E-mail: ghansen@globalqualitative.com
www.globalqualitative.com
Contact: Greg Hansen
Focus Grps./In-Depths/Dyads/Triads/Online For Technology & Telecomm. Also Edu., Utilities, Gov't., Health care. Design/Mgmt./Recruit/Mod./Analysis/Report.

graff works

GraffWorks Marketing Research
10178 Phaeton Dr.
Eden Prairie, MN 55347
Ph. 952-829-4640
Fax 952-829-4645
E-mail: cgraff@graffworks.com
www.graffworks.com
Contact: Carol Graff
Partnering With Market Leaders to Deliver Qualitative B2B Research, Competitive Intelligence, Due Diligence and Market Planning.

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.

HYPNOSIS FOCUS GROUPS

Hypnosis Focus Groups
39 Acacia Tree Lane
Irvine, CA 92612
Ph. 800-646-4041 or 949-551-3400
Fax 949-551-3419
E-mail: hgqandqres@aol.com
www.hypnosisfocusgroups.com
Contact: Hal Goldberg
Free Demo Video, Fortune 500 & Major Ad Agency References.

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, Exec. Rsch. Dir. 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, Also Bilinguals.

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.

Loretta Marketing Group
13935 S.W. 102 Court
Miami, FL 33176
Ph. 305-232-5002
Fax 305-232-8010
E-mail: lmg8010@bellsouth.net
Contact: Jim Loretta
U.S. Hispanic/Latin Amer. Consumer Rsch. 25 Yrs. Exp. Bilingual/Bicultural. Born in Mexico/Educated in the U.S.

Low + Associates, Inc.
5454 Wisconsin Ave., Ste. 1400
Chevy Chase, MD 20815
Ph. 301-951-9200
Fax 301-986-1641
E-mail: nrussell@lowassociates.com
www.lowassociates.com
Contact: Nan Russell, V.P. Mkt. Intel. 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: marketaxcs@aol.com
Contact: Mary Goldman Patton
Research For Medical/Surgical and Pharmaceutical Products.

Moderator MarketPlace™

Market Resource Associates
800 Marquette Ave., Ste. 990
Minneapolis, MN 55402
Ph. 800-795-3056
Fax 612-334-3121
E-mail: johnMRA@aol.com
www.mraonline.com
Contact: John Cashmore
Exp. with Architects, Builders, Remodelers, DIY, Lawn & Garden.

MarketBetter, Inc.
4304 Marshfield Dr.
Evansville, IN 47711
Ph. 812-401-6365
Fax 812-401-6366
E-mail: chris@marketbetter.com
www.marketbetter.com
Contact: Chris Lemmon, Director
Quality Work From MBA Professionals. MarketBetter.

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/Internet/Telecomm.

Marketing Matrix International, Inc.
2566 Overland Ave., Ste. 716
Los Angeles, CA 90064
Ph. 310-842-8312
Fax 310-842-7212
E-mail: mmatrix@primenet.com
Contact: Marcia Selz, Ph.D.
Foc. Grps., In-Depth Intvs. & Surveys For Financial Svce. Companies.

MarketResponse International
6385 Old Shady Oak Rd., Ste. 270
Minneapolis, MN 55344
Ph. 952-943-2230
Fax 952-943-2320
E-mail: decide@marketresponse.com
www.marketresponse.com
Contact: Tom Pearson
Dynamic Groups & Powerful Reports That Clients Love! QRCA Member.

MCC Qualitative Consulting
100 Plaza Dr.
Secaucus, NJ 07094
Ph. 201-865-4900 or 800-998-4777
Fax 201-865-0408
E-mail: info@meadowcc.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
www.mmrcinc.com
Contact: Anthony Diaz
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. 952-540-0718
Fax 952-540-0721
E-mail: MedPr@aol.com
Contact: Asta Gersovitz, Pharm.D.
MedProbe™ Provides Full Qualitative & Advanced Quantitative Market Research Including SHARECAST & SHAREMAP.

Michelson & Associates, Inc.
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 Inspired Global Thinking.

Millennium Research, Inc.
7493 W. 147th St., Ste. 201
Apple Valley, MN 55124
Ph. 952-431-6320
Fax 952-431-6322
E-mail: millenres@aol.com
Contact: Jan Johnson
Nat'l. & Int'l. Focus Groups, Executive Interviews, Fast Turnaround.

NOP Business Strategic Research, Inc.
11654 Plaza America Dr., Ste. 174
Reston, VA 20191
Ph. 703-390-9330
Fax 703-390-9332
E-mail: info@nopresearch.com
www.nopresearch.com
Contact: Bernadette DeLamar, Ph.D.
Extensive Experience - Top Hi-Tech Clients. Domestic and International. B2B, B2C, IT, Communications.

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
Qual. & Quant. Strategic Thinkers; Bus., Hi-Tech, Med., Cons.

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.

Planet Latino Market Intelligence, Inc.
4837 S.W. 147th Place
Miami, FL 33185
Ph. 305-480-0096
Fax 305-480-7732
E-mail: latinoplanet@aol.com
Contact: Horacio Segal
Qual. Rsch. Specializes in U.S. Hispanic/Latin America. All Indus. Consumer/Prof./Bicul. Teens. Ads.

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 Casey
Sensitive Topics. Ideation. In-Depth Analysis. Action-Oriented Recommendations.

Research Connections @ Talk City
219 E. Broad St.
Westfield, NJ 07090
Ph. 908-232-2723
Fax 908-654-9364
E-mail: ayoffie@researchconnections.com
www.rci.talkcity.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.
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!

Paul Schneller Qualitative LLC
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 Group
413 N.E. 3rd St.
Delray Beach, FL 33483
Ph. 561-997-7270
Fax 561-997-5844
E-mail: sil@silgroup.net
www.silgroup.net
Contact: Timm Sweeney
Qualitative Specialists Since 1983. Business-to-Business & International.

Smithmark Corporation
4136 N. Keystone Ave.
Indianapolis, IN 46205
Ph. 317-541-9165
Fax 317-541-9297
E-mail: info@smithmark.com
www.smithmark.com
Contact: Michael Smith
Qualitative: B2B/Consumer, GenX and Ethnic Groups.

James Spanier Research
120 E. 75th St.
New York, NY 10021
Ph. 212-472-3766
E-mail: paninfo@ix.netcom.com
Contact: Jim Spanier
Excellent focus groups and interviews in many categories. Serving domestic and international clients since 1986.

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: Raul Lopez, Sr. Vice President
Contact: Vivian Hernandez
Contact: Gloria Canteñs
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
E-mail: sunbeltra@aol.com
www.sunbeltresearch.com
Contact: Barbara L. Allan
20+ Years Exp.; Business & Consumer Studies; Nat'l. & Int'l. Exp.

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.

Thorne Creative Research
480 Mamaroneck Ave.
Harrison, NY 10528
Ph. 914-381-5533 or 914-381-5554
Fax 914-381-5557
E-mail: gthorne@thornecreative.com
www.thornecreative.com
Contact: Gina Thorne
Sensitive Issues/Actionable Results With Kids, Teens. Hi-Tech, Idea Generation.

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.

GEOGRAPHIC CROSS-INDEX OF MODERATORS

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

SPECIALTY CROSS-INDEX OF MODERATORS

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

Moderator MarketPlace™

James Spanier Research
Strategy Research Corporation

ARTS & CULTURE
Strategic Focus, Inc.

ASIAN
Access Worldwide, Cultural Access Group
Asian Perspective, Inc.
Cheskin Research
Data & Management Counsel, Inc.
Erlich Transcultural Consultants

ASSOCIATIONS
Low + Associates, Inc.

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

BIO-TECH
MedProbe, Inc.

BUILDING PRODUCTS
Market Resource Associates

BUS.-TO-BUS.
Access Research, Inc.
BAIGlobal Inc.
Behavior Research Center, Inc.
C&R Research Services, Inc.
Calo Research Services
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Campos Market Research, Inc.
Creative Focus, Inc.
Data & Management Counsel, Inc.
Fader & Associates
First Market Research Corp. (TX)
FOCUSED Marketing Research, Inc.
Just The Facts, Inc.
Knowledge Systems & Research, Inc.
Market Resource Associates
MarketResponse International
MCC Qualitative Consulting
Millennium Research, Inc.
NOP Business Strategic Research
The Pat Henry Group
The Research Department
Jay L. Roth Associates, Inc.
Paul Schneller Qualitative LLC

CABLE
C&R Research Services, Inc.

CHILDREN
C&R Research Services, Inc.
Fader & Associates
Just The Facts, Inc.
Matrixx Marketing-Research Div.
Thorne Creative Research

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

COMPUTERS/HARDWARE
Global Qualitative Group, LLC
NOP Business Strategic Research

COMPUTERS/MIS
C&R Research Services, Inc.
Calo Research Services
Cambridge Associates, Ltd.
Daniel Associates
Fader & Associates
First Market Research Corp. (TX)
Marketing Advantage Rsch. Cnslts.
NOP Business Strategic Research

CONSUMERS
Behavior Research Center, Inc.
C&R Research Services, Inc.
Cheskin Research
Consumer Network, Inc.
Decision Drivers
Just The Facts, Inc.
Knowledge Systems & Research, Inc.
Market Resource Associates
Marketing Advantage Rsch. Cnslts.
The Pat Henry Group
Planet Latino Market Intelligence
The Research Department
Jay L. Roth Associates, Inc.

CUSTOMER SATISFACTION
BAIGlobal Inc.
Global Qualitative Group, LLC
Low + Associates, Inc.
Market Resource Associates

DIRECT MARKETING
BAIGlobal Inc.
Strategic Focus, Inc.

DISTRIBUTION
Burr Research/Reinvention Prevention

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

ELECTRONICS - CONSUMER
MarketResponse International

ETHNIC
Cheskin Research

ETHNOGRAPHIC RESEARCH
ActiveFocus
Alexander + Parker
Cheskin Research

EXECUTIVES
BAIGlobal Inc.
C&R Research Services, Inc.
Calo Research Services
Decision Drivers
Fader & Associates
First Market Research Corp. (TX)
Low + Associates, Inc.
Marketing Advantage Rsch. Cnslts.
The Research Department
Jay L. Roth Associates, Inc.
Paul Schneller Qualitative LLC
Strategy Research Corporation

FINANCIAL SERVICES
Jeff Anderson Consulting, Inc.
BAIGlobal Inc.
Burr Research/Reinvention Prevention
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Fader & Associates
FOCUSED Marketing Research, Inc.
Low + Associates, Inc.
Marketing Matrix International, Inc.
Matrixx Marketing-Research Div.
MCC Qualitative Consulting
Jay L. Roth Associates, Inc.
The Research Department

FOOD PRODUCTS/ NUTRITION
ActiveFocus
BAIGlobal Inc.
C&R Research Services, Inc.
Just The Facts, Inc.
The Research Department
Jay L. Roth Associates, Inc.
Paul Schneller Qualitative LLC

FOREST PRODUCTS
Market Resource Associates

GENERATION X
Thorne Creative Research

HEALTH & BEAUTY PRODUCTS
BAIGlobal Inc.
Paul Schneller Qualitative LLC

HEALTH CARE
Jeff Anderson Consulting, Inc.
Balaban Market Research Consulting
Chalfont Healthcare Research, Inc.
Erlich Transcultural Consultants
First Market Research Corp. (MA)
I+G Medical Research International
Knowledge Systems & Research, Inc.
Low + Associates, Inc.
Market Access Partners
MarketBetter, Inc.
MarketResponse International
Matrixx Marketing-Research Div.
Medical Moderators, Inc.
MedProbe™ Inc.
Strategy Research Corporation

HIGH-TECH
Jeff Anderson Consulting, Inc.
Calo Research Services
Cheskin Research
Ergo Research Group, Inc.
Global Qualitative Group, LLC
MarketBetter, Inc.
Research Connections @ Talk City
NOP Business Strategic Research
Primary Insights, Inc.
Jay L. Roth Associates, Inc.
James Spanier Research

HISPANIC
Access Worldwide, Cultural Access Group
Behavior Research Center, Inc.
Cheskin Research
Data & Management Counsel, Inc.
Erlich Transcultural Consultants
Hispanic Research Inc.
Planet Latino Market Intelligence
Loretta Marketing Group
Strategy Research Corporation
Target Market Research Group, Inc.

HOUSEHOLD PRODUCTS/CHORES
The Research Department
Paul Schneller Qualitative LLC

HUMAN RESOURCES ORGANIZATIONAL DEV.
Primary Insights, Inc.

IDEA GENERATION
BAIGlobal Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Consumer Network, Inc.
Creative Focus, Inc.
Global Qualitative Group, LLC
Just The Facts, Inc.
Matrixx Marketing-Research Div.
Primary Insights, Inc.
Thorne Creative Research

IMAGE STUDIES
Cambridge Associates, Ltd.
MarketResponse International

INDUSTRIAL
First Market Research Corp. (TX)

INSURANCE
Burr Research/Reinvention Prevention

Moderator MarketPlace™

Erlich Transcultural Consultants
Low + Associates, Inc.

INTERACTIVE PROD./ SERVICES/RETAILING
Ergo Research Group, Inc.
Low + Associates, Inc.
Research Connections @ Talk City

INTERNATIONAL
Primary Insights, Inc.

INTERNET
Calo Research Services
Cheskin Research
Ergo Research Group, Inc.
Fader & Associates
First Market Research Corp. (MA)
FOCUSED Marketing Research, Inc.
Global Qualitative Group, LLC
Knowledge Systems & Research, Inc.
Low + Associates, Inc.
Research Connections @ Talk City
Jay L. Roth Associates, Inc.

INTERNET SITE CONTENT & DESIGN
FOCUSED Marketing Research, Inc.

LATIN AMERICA
Access Worldwide, Cultural Access Group
Best Practices Research
Cheskin Research
Loretta Marketing Group
Planet Latino Market Intelligence
Strategy Research Corporation

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

MODERATOR TRAINING
Cambridge Associates, Ltd.

MULTIMEDIA
Marketing Advantage Rsch. Cnslts.

NEW PRODUCT DEV.
ActiveFocus
BAIGlobal Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Data & Management Counsel, Inc.
Fader & Associates
First Market Research Corp. (TX)
Global Qualitative Group, LLC
Just The Facts, Inc.
Market Resource Associates
Marketing Advantage Rsch. Cnslts.
Millennium Research, Inc.
Primary Insights, Inc.
The Research Department
Jay L. Roth Associates, Inc.
Paul Schneller Qualitative LLC

NON-PROFIT
Consumer Network, Inc.

ONLINE FOCUS GROUPS
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
Cheskin Research
Consumer Network, Inc.
The Research Department

PARENTS
Fader & Associates

PET PRODUCTS
Cambridge Research, Inc.
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.
Fader & Associates
I+G Medical Research International
MarketResponse International
MCC Qualitative Consulting
Medical Moderators, Inc.
MedProbe™ Inc.
Paul Schneller Qualitative LLC

POLITICAL/SOCIAL RESEARCH
Cambridge Associates, Ltd.

POSITIONING RESEARCH
Paul Schneller Qualitative LLC

PUBLIC POLICY RSCH.
Cambridge Associates, Ltd.

PUBLISHING
Cambridge Associates, Ltd.
First Market Research Corp. (TX)
Marketing Advantage Rsch. Cnslts.
James Spanier Research

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

SENIORS
Consumer Network, Inc.
Burr Research/Reinvention Prevention
Primary Insights, Inc.

SMALL BUSINESS/ ENTREPRENEURS
FOCUSED Marketing Research, Inc.
Strategy Research Corporation

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.
MarketBetter, Inc.

STRATEGY DEVELOPMENT
Paul Schneller Qualitative LLC

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

TELECOMMUNICATIONS
BAIGlobal Inc.
Calo Research Services
Creative Focus, Inc.
Daniel Associates
Ergo Research Group, Inc.
Erlich Transcultural Consultants
First Market Research Corp. (TX)
Global Qualitative Group, LLC
Knowledge Systems & Research, Inc.
Marketing Advantage Rsch. Cnslts.
MarketResponse International
MCC Qualitative Consulting
NOP Business Strategic Research
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.
MedProbe, Inc.
Millennium Research, Inc.

TOYS/GAMES
Fader & Associates

TRANSPORTATION SVCES
Low + Associates, Inc.
Strategic Focus, Inc.

TRAVEL
Cambridge Associates, Ltd.
James Spanier Research

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

VETERINARY MEDICINE
FOCUSED Marketing Research, Inc.
Paul Schneller Qualitative LLC

WEALTHY
Strategy Research Corporation

YOUTH
MarketResponse International

2001 Ethnic Research Directory

Quirk's Marketing Research Review

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

Service Codes

FS	Full-Service
C	Consulting
DC	Data Collection
DP	Data Processing
FG	Focus Group Facility
S	Sampling
ST	Survey Translation
T	Transcriptions

A O C Marketing Research
10100 Park Cedar Dr., Ste. 100
Charlotte, NC 28210
Ph. 704-341-0232
Fax 704-341-0234
E-mail: aocinc@bellsouth.net
www.aocresearch.com
Betty Collins, Co-Owner
Services: DC, FG
African-American

ACCESS WORLDWIDE
CULTURAL ACCESS GROUP

Access Worldwide, Cultural Access Group
5150 El Camino Real, Ste. B-15
Los Altos, CA 94022-1527
Ph. 650-965-3859 or 800-671-9525
Fax 650-965-3874
E-mail: info@accesscag.com
www.accesscag.com
Suzanne Whitmore, Dir. of Sales
David Morse, COO
Services: FS
African-American, Asian, Hispanic

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

*Adrian Information Strategies (AIS)
14675 Midway Rd., #200
Addison, TX 75001-4991
Ph. 972-980-0227
Fax 972-385-7745
E-mail: RCCDallas@aol.com
www.adrianreyesconsulting.com
Adrian Reyes, President
Services: FS, C, DC, DP
African-American, Asian, Hispanic

*Advanced Insights
255 Corte Madera Ave.
Corte Madera, CA 94925
Ph. 415-332-5573
Fax 415-332-5573
E-mail: mickey@advancedinsights.com
Services: FS, C
African-American

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
Services: S
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. 50)

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
Services: DC, FG, ST
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. 81)

*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
Services: DC, DP
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
Services: DC
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
Services: FS, C
African-American, Asian, Hispanic

* Indicates minority-owned firm

AIM
ASSISTANCE IN MARKETING
RESEARCH SERVICES NETWORK

Assistance In Marketing/Los Angeles
3760 Kilroy Airport Way, Ste. 100
Long Beach, CA 90806
Ph. 562-981-2700
Fax 562-981-2705
E-mail: dweinberg@aimla.com
www.aimresearchnetwork.com
David Weinberg
Services: DC, FG
African-American, Asian, Hispanic

Branch office:
949 S. Coast Dr., Ste. 525
Costa Mesa, CA 92626
Ph. 714-755-3900
Fax 714-755-3930
E-mail: AIMLA@aol.com
www.aimresearchnetwork.com
David Weinberg
Services: DC, FG
African-American, Asian, Hispanic

The Assistance in Marketing Research Services Network offers state-of-the-art qualitative research facilities within five major metropolitan areas: Los Angeles, New York/New Jersey, Chicago, Cincinnati and Baltimore. Highly developed databases include business-to-business, commercial, residential and ethnic. Diverse composition of Hispanic and African-American respondents. Turnaround in as little as 24 hours. Click www.aimresearchnetwork.com.
(See advertisement on p. 82)

ATKINS RESEARCH GROUP

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
Services: FS, DC, FG
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. 83)

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
Services: FS, DC
African-American, Asian, Hispanic

Service Codes

FS . . . . . . .Full-Service
C . . . . .Consulting
DC . . . . . .Data Collection
DP . . . . . .Data Processing
FG . . . . . . .Focus Group Facility
S . . . . .Sampling
ST . . . . . . .Survey Translation
T . . . . .Transcriptions

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-research.com/field
www.brc-research.com
Earl de Berge, Research Director
Services: FS, DC, DP, FG, ST
Hispanic, Native American

Bethart Bilingual Research
7600 S.W. 117 St.
Miami, FL 33156
Ph. 305-255-2170
Fax 786-242-8029
E-mail: mbethart@yahoo.com
www.focusgroupmoderator.com
Services: FS, C, ST, T
African-American, Hispanic

*The Blackstone Group
360 N. Michigan Ave.
Chicago, IL 60601
Ph. 312-419-0400
Fax 312-419-8419
E-mail: info@bgchicago.com
www.bgglobal.com
Ashref Hashim, President
Services: FS, DC, DP, FG
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 773-933-0558
E-mail: crobinson@crmarket.com
www.crmarket.com
Cherlyn Robinson, Project Coordinator
Services: DC, FG, ST
African-American, Hispanic

C&R
RESEARCH

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
Services: FS
African-American, 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 and 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)

* Indicates minority-owned firm

*Castillo & Associates
3604 Fourth Ave., Ste. 2
San Diego, CA 92103
Ph. 619-683-3898
Fax 619-683-3820
E-mail: info@c-asoc.com
www.c-asoc.com
Enrique F. Castillo, Principal
Services: FS, C, ST, T
Hispanic

Cheskin
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
Denise Klarquist
Services: FS, C
Asian, Hispanic

Cheskin, a leading strategic 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. 83)

Service Codes

FS	Full-Service
C	Consulting
DC	Data Collection
DP	Data Processing
FG	Focus Group Facility
S	Sampling
ST	Survey Translation
T	Transcriptions

Cheskin (Br.)
1540 E. First St., Ste. 200
Santa Ana, CA 92701
Ph. 714-560-1120
Fax 714-560-1121
E-mail: info@cheskin.com
www.cheskin.com
Wendy Bryan, Facility Manager
Services: DC, DP
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. 83)

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
Services: FG
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
Services: FS, C, DC, DP, ST
African-American, Asian, Hispanic, Middle Eastern

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: datamngt@aol.com
www.DMChome.com
Bill Ziff-Levine, Managing Director
Services: FS
African-American, Asian, Hispanic, Middle Eastern

Data Research Services
3323 Chamblee - Dunwoody Rd.
Atlanta, GA 30341
Ph. 770-455-0114
Fax 770-458-8926
E-mail: tab@dataservice.com
www.dataservice.com
Jon Mitchell, Exec. Vice President
Services: FS, C, DC, DP, ST, T
African-American, 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
Services: FS, C, DC, DP, S, ST
African-American

*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
Services: DC, FG
African-American, Asian, Hispanic

Delve
(Formerly Quality Controlled Services - QCS)
1355 N. Highway Dr.
Fenton, MO 63099
Ph. 800-325-3338 or 636-827-1773
Fax 636-827-3373
E-mail: postmaster@delve.com
www.delve.com
Services: DC, DP, FG
African-American, Asian, Hispanic, Middle Eastern, Native American

Delve is an innovative data collection partner that fosters natural environments for dialogues between marketers and customers, whether they be face-to-face, voice-to-voice, or technology-based settings like the Web. Nationwide services include: focus groups, central location tests, pre-recruits, taste tests, Web surveys, IVR, telephone interviewing, project management and mystery shopping. Formerly QCS.
(See advertisement on p. 27)

Direct Marketing Services Group, Inc.
413 Northeast Third St.
Delray Beach, FL 33483
Ph. 800-229-4921
Fax 800-599-5688
E-mail: dmsg@silgroup.net
www.silgroup.net
Arnold Sheer, Managing Director
Services: FS, DC, DP, S, ST, T
Asian, Hispanic, Middle Eastern

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
Services: FS, C, DC, DP, FG, S, ST
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. 84)

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
Services: DC
African-American, Asian, 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
Services: FS, DC
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. 85)

* Indicates minority-owned firm

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
Services: FS
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)

Service Codes

FS	Full-Service
C	Consulting
DC	Data Collection
DP	Data Processing
FG	Focus Group Facility
S	Sampling
ST	Survey Translation
T	Transcriptions

Fieldwork, Inc.
500 Michigan Ave., Ste. 1200
Chicago, IL 60611
Ph. 800-TO-FIELD or 312-832-8730
Fax 312-923-7405
E-mail: karynp@network.fieldwork.com
www.fieldwork.com

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
Services: DC
African-American

Fieldwork Chicago-North, Inc.
5750 Old Orchard Rd., Ste. 500
Skokie, IL 60077
Ph. 773-282-2911
Fax 773-282-8971
E-mail: info@chicago.fieldwork.com
www.fieldwork.com
Karen Borgardt or Judy Piechocki
Services: DC
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 Kleinman, President
Services: DC
African-American, Asian, Hispanic, Middle Eastern

Fieldwork Chicago-Schaumburg
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
Services: DC
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 Carol Tauben
Services: DC
African-American, Hispanic

Fieldwork New York at Westchester
555 Taxter Rd., Ste. 390
Elmsford, NY 10523
Ph. 914-347-2145
Fax 914-347-2298
E-mail: info@westchester.fieldwork.com
www.fieldwork.com
Maria Buncamper, President
Services: DC
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
Services: DC
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
Services: FS, DC, FG
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
Services: FS, FG
African-American, Asian, Hispanic

Premier focus group facility and data collection service featuring three full-sized rooms and one mini room. Two oversized conference rooms at 22x25 and one room at 19x22. All offer three-tiered seating for 15+ with adjoining client office, installed video cameras, central air, videoconferencing, mini refrigerators, laptop and Internet/modem capabilities. Introducing two new Web site usability labs. Mini room seating six to eight provides identical amenities to above. All are two blocks from Union Square shopping, hotels and restaurants. Ninety telephone stations, CATI system. Member FocusVision.
(See advertisement on p. 87)

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
Services: DC, FG, T
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: focusom@bellsouth.net
Lisa Switkes, President
Services: DC, FG
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
Services: FG
Hispanic

*Focus World International, Inc.
146 Hwy. 34, Ste. 100
Holmdel, NJ 07733
Ph. 732-946-0100
Fax 732-946-0107
E-mail: focusworld@att.net
www.focusworldint.com
Paulette Eichenholtz, President
Services: C, DC, DP, FG, ST
African-American, Asian, 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
www.focuscope.com
Kevin Rooney, Vice President
Services: DC, FG
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
Services: FS, C, DC, DP, FG, ST, T
African-American, Hispanic

* Indicates minority-owned firm

GENESYS Sampling Systems
565 Virginia Dr.
Fort Washington, PA 19034-2706
Ph. 800-336-7674 or 215-653-7100
Fax 215-653-7115
E-mail: gkennedy@m-s-g.com
www.genesys-sampling.com
Gregg Kennedy, Vice President
Services: S
African-American, Asian, Hispanic, Middle Eastern, Native American

*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
Services: FS, C
Hispanic

Service Codes

FS	Full-Service
C	Consulting
DC	Data Collection
DP	Data Processing
FG	Focus Group Facility
S	Sampling
ST	Survey Translation
T	Transcriptions

*HEADFIRST Market Research
332 Osprey Point
Stone Mountain, GA 30087
Ph. 770-879-5100
Fax 770-879-0014
E-mail: research@headfirstinc.com
www.headfirstinc.com
Greg Head, President
Services: FS
African-American

*Henceforth, Inc.
3412 Hopkins Crossroad
Minnetonka, MN 55305-4305
Ph. 952-938-1948
Fax 952-938-2098
E-mail: hence4th@att.net
www.henceforthinc.com
Judith Hence, Principal
Services: FS
African-American, Hispanic, Native American

Herrera Communications
42418 Cosmic Dr.
Temecula, CA 92592-3202
Ph. 909-676-2088
Fax 909-676-2996
E-mail: herreracom@earthlink.net
www.herrera-communications.com
Enrique Herrera, Vice President
Services: DC, ST, T
Hispanic

*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
Services: FS, C, DC, FG, ST
Hispanic

Hispanic Research Inc.

Hispanic Research Inc.
1 Springfield Rd.
East Brunswick, NJ 08816
Ph. 732-813-0060
Fax 732-613-8612
E-mail: info@hispanic-research.com
www.hispanic-research.com
Ricardo A. Lopez, President
Services: FS, C
Hispanic

Hispanic Research Inc. is a marketing consulting firm that specializes in the U.S. Hispanic market. It provides consulting services to businesses that intend to market their products and/or services to the U.S. Latino community. The services offered by the company fall within these general categories: basic consulting, secondary research, speaking events and presentations, qualitative research and quantitative research.
(See advertisement on p. 89)

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

HOUSE OF MARKETING

House of Marketing Research
836 S. Arroyo Pkwy.
Pasadena, CA 91105
Ph. 626-793-9598
Fax 626-793-9624
E-mail: HMResearch@earthlink.net
Amy Siadak
Services: DC, FG, ST
African-American, Asian, Hispanic

House of Marketing Research is the largest multilingual focus group and fieldwork company in the Los Angeles area. Our language capabilities include: Spanish, Mandarin, Cantonese, Korean, Japanese. Since 1977, House of Marketing Research 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. 88)

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

IMAGES MARKET RESEARCH

***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
Services: FS, C, DC, FG
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 throughout the country.
(See advertisement on p. 89)

In Focus Consulting
2327 Blueridge Ave.
Menlo Park, CA 94025-6709
Ph. 650-854-8462
Fax 650-854-4178
E-mail: echardon@pacbell.net
Elena Chardon-Pietri, Ph.D., President
Services: FS
Hispanic

* Indicates minority-owned firm

*Insight Research, Inc.
1000 Broadway, Ste. 292
Oakland, CA 94607
Ph. 510-286-8000
Fax 510-286-2022
E-mail: info@iresearchinc.com
www.iresearchinc.com
Services: FS, FG, ST, T
African-American, Asian, Hispanic

The Insight Works, Inc.
111 Fifth Ave., 10th fl.
New York, NY 10003
Ph. 212-674-3100
Fax 212-477-5642
E-mail: markcooper@theinsightworks.com
www.theinsightworks.net
Services: FS
African-American, Asian, Hispanic, Middle Eastern, Native American

Service Codes

FS . . . . Full-Service
C . . . . Consulting
DC . . . . . . Data Collection
DP . . . . . . Data Processing
FG . . . . Focus Group Facility
S . . . . Sampling
ST . . . . Survey Translation
T . . . . Transcriptions

*Insights Marketing Group
2512 Swanson Ave., Ste. 1A
Miami, FL 33133
Ph. 305-854-2121
Fax 305-854-2130
E-mail: belkist@insights-marketing.com
www.insights-marketing.com
Belkist Padilla, President
Services: FS
African-American, 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
Services: DC, DP
African-American, Asian, Hispanic, Middle Eastern

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
Services: DC, DP
African-American, Asian, Hispanic, Middle Eastern

*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
Services: FS
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
Services: FS, C, DC, FG, ST
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
Norman P. Ishimoto, President
Services: FS, C, DC, ST
Asian

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
www.thefocusnetwork.com
Lisa Balelo Wendy Feinberg, Partners
Services: FS, FG
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@lrwonline.com
www.lrwonline.com
Dave Sackman, President
Services: FS
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: lmg8010@bellsouth.net
Jim Loretta, President
Services: FS
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. 91)

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
Services: C
Hispanic

MARI HISPANIC
MARKETING ADVERTISING RESEARCH INFORMATIONS

Mari Hispanic Research & Field Services
2030 E. Fourth St., Ste. 205
Santa Ana, CA 92705
Ph. 714-667-8282
Fax 714-667-8290
E-mail: mari.h@ix.netcom.com
Lance L. Lindemann
Services: DC, ST
Hispanic

Mari offers complete Hispanic interviewing with multiple field sites in Orange and LA County. Product/concept survey placement/test markets/all sites with video and TV copy testing/accurate data about Hispanic consumerism/cross-country assignment translation available. Focus group Spanish translation, recruitment and moderator. (See advertisement on p. 91)

* Indicates minority-owned firm

*Market Ease/Urban Focus
1229 N. Northbranch, Ste. 306
Chicago, IL 60622
Ph. 312-654-9910 or 312-280-4964 (facility)
Fax 312-654-9917
E-mail: market-eas@aol.com
Iliana R. Moran, President
Services: FG
African-American, Asian, Hispanic, Middle Eastern

MARKET FACTS

Market Facts, Inc.
3040 W. Salt Creek Ln.
Arlington Heights, IL 60005
Ph. 847-590-7000
Fax 847-590-7167
E-mail: tpayne@marketfacts.com
www.marketfacts.com
Tom Payne, President
Services: FS, DC
Asian, 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 and Telenations Global. Market Facts also offers TeleNation, a national omnibus telephone survey. (See advertisements on pp. 33, 90)

Market Intelligence
Customer Satisfaction Rsch. & Consulting
15421 Lake St. Ext.
Minnetonka, MN 55345-1914
Ph. 952-933-6825 or 612-250-6562
Fax 559-663-4358
E-mail: ahmed@uswest.net
Services: C
Middle Eastern

Service Codes

FS	Full-Service
C	Consulting
DC	Data Collection
DP	Data Processing
FG	Focus Group Facility
S	Sampling
ST	Survey Translation
T	Transcriptions

MARKET RESOURCE ASSOCIATES, INC.

Market Research Associates
17320 Redhill Ave., Ste. 370
Irvine, CA 92614
Ph. 949-833-9337
Fax 949-833-2110
E-mail: cesar@mra-us.com
Cesar Carbajol
Services: FS, C, DC, DP, FG, ST, T
Asian, Hispanic

As a full-service market research company, we offer a complete list of services when conducting research within the Latino or Asian community. Our staff includes researchers with Hispanic or Asian heritage resulting in a unique understanding of their respective culture. Our staff also includes a Hispanic bilingual moderator with extensive moderating experience. This insight adds in the development of actionable research recommendations.
(See advertisement on p. 56)

*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
Services: C, DC, DP
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
Services: FS, DC, FG
Hispanic

*Market Trends Pacific, Inc.
1001 Bishop St., Ste. 505
Honolulu, HI 96813
Ph. 808-532-0733
Fax 808-532-0744
E-mail: info@markettrendspacific.com
www.markettrendspacific.com
Wanda L. Kakugawa, President
Services: FS, DC, DP
Asian

*Marketing Matrix International, Inc.
2566 Overland, Ste. 716
Los Angeles, CA 90064
Ph. 310-842-8312
Fax 310-842-7212
E-mail: moran@markmatrix.com
Lynn Walker Moran, Facility Manager
Services: FS, FG
Hispanic

*Marketing World, Inc.
Mktg. Rsch. Consultants
823 White Rock Dr.
St. Louis, MO 63131-0426
Ph. 314-966-6188 or 314-821-7448
Fax 314-966-7750
E-mail: SAXENAMWI@aol.com
Swaran L. Saxena, President
Services: FS, C
Asian

Mars Research
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
Services: DC, FG, ST
Hispanic

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
Services: FS, C, DC, FG, S, ST
African-American, Asian, Hispanic, Middle Eastern, Native American

*MDI Interviewing Services, Inc.
1101 Bay Blvd., Ste. D
Chula Vista, CA 91911
Ph. 619-424-4550
Fax 619-424-4501
Services: DC
Hispanic

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

Medicis Communications
4045 Bonita Rd., Ste. 209
San Diego, CA 91902
Ph. 619-267-6010
Fax 619-267-5965
E-mail: medicis@pacbell.net
Services: FS
Hispanic

*Menendez International
1331 White St.
Key West, FL 33040
Ph. 305-296-0505
Fax 305-292-6950
E-mail: menendezin@aol.com
Services: FS, C, FG, ST, T
Hispanic

*Meneses Research & Associates
1996 Frankfort St.
San Diego, CA 92110
Ph. 619-276-5335
Fax 619-276-7330
E-mail: wmeneses@aol.com
www.menesesresearch.com
Walter Meneses
Services: FS, DC
Hispanic

*Miami Market Research, Inc.
6840 S.W. 40 St., Ste. 201A
Miami, FL 33155
Ph. 305-666-7010
Fax 305-666-7960
E-mail: miamktrsch@aol.com
Luis Padron, President
Services: DC, FG, ST, T
African-American, Hispanic

MMR Research
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
Services: FS, DC, DP
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
Services: FS, C
Hispanic

Multicultural Connection
6106 S. Memorial Dr.
Tulsa, OK 74133
Ph. 918-252-1213
Fax 918-252-1214
E-mail: jmckaymcc@earthlink.net
John McKay, President
Services: FS, C, DC, ST, T
Asian, Hispanic, Middle Eastern

NATIONAL OPINION
NORS
RESEARCH SERVICES
"The Bilingual Data Collection Professionals"

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

Nation's premiere bilingual data collection company. With 100 CATI stations, 150+ bilingual interviewers, recruiters, and supervisors, remote monitoring, two beautiful, new full-sized focus group rooms, mini-conference/IDI room, wireless headphone system, bilingual moderators, client Internet access. Friendly, well-trained, completely bilingual staff guarantees that your project will be delivered on target/on time. All services available in English and Spanish. Ten minutes from Miami International Airport.
(See advertisement on p. 93)

* Indicates minority-owned firm

Service Codes

FS	Full-Service
C	Consulting
DC	Data Collection
DP	Data Processing
FG	Focus Group Facility
S	Sampling
ST	Survey Translation
T	Transcriptions

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

*OmniTrak Group, Inc.
725 Davies Pacific Center
841 Bishop St., Ste. 725
Honolulu, HI 96813
Ph. 808-528-4050
Fax 808-538-6227
E-mail: omnitrak@lava.net
www.omnitrakgroup.com
Frances Pirie, Exec. Vice President
Services: FS, DC, FG
Asian

OMR (Olchak Market Research)
7255-A Hanover Pkwy.
Greenbelt, MD 20770
Ph. 301-441-4660
Fax 301-474-4307
E-mail: info@OMRdc.com
www.OMRdc.com
Jill L. Siegel, President
Services: DC
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: l.hoffman@opinionaccess.com
www.opinionaccess.com
Lance Hoffman, Account Representative
Services: DC, DP
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. 95)

*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
Services: FS, DC, DP
African-American, Asian, Hispanic, Middle Eastern

Paramount Market Publishing, Inc.
301 S. Geneva St., #109
Ithaca, NY 14850
Ph. 607-275-8100 or 888-787-8100
Fax 607-275-8101
E-mail: editors@paramountbooks.com
www.paramountbooks.com
Services: C
Hispanic

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
Services: FS, C, DC, DP, FG, S, ST, T
African-American, Asian, Hispanic, Native American

Phase III Market Research
436-A Irving Ave.
San Jose, CA 95128
Ph. 408-947-8661 or 408-251-3512
Fax 408-251-5093
E-mail: npphase3@jps.net
Martha Mogyorossy, Director Field Services
Services: DC
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
Michael Schlegel, President
Services: DC, DP
Hispanic

Nationwide WATS house, 150-station CATI telephone centers using CfMC software in Tucson, Ariz., and Albany, N.Y. We want your difficult studies! Experience in business-to-business, pharmaceutical, consumer and public opinion studies, Spanish interviewing - paper or computer. In-house programming staff. Electronic data transmission. We provide impeccable survey results, on-time and at a competitive price.
(See advertisement on p. 24)

Planet Latino Market Intelligence, Inc.
4837 S.W. 147th Place
Miami, FL 33185
Ph. 305-480-0096
Fax 305-480-7732
E-mail: latinoplanet@aol.com
www.marketplanetlatino.com
Services: FS, C
Hispanic

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
Services: DC, S
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. 31)

*Q & A Research, Inc.
64 Digital Dr.
Novato, CA 94949
Ph. 415-883-1188
Fax 415-883-1344
E-mail: wpino@qar.com
www.qar.com
Services: FS, C, DC, DP, FG, S, ST
Hispanic

Qualitative Insights
15060 Ventura Blvd., Ste. 125
Sherman Oaks, CA 91403
Ph. 818-988-5411
Fax 818-988-4057
E-mail: q-insights@q-insights.com
www.q-insights.com
Jennifer von Schneidau, Vice President
Services: FS, DC, FG, ST
African-American, Asian, Hispanic, Middle Eastern

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

Recruiting Resources Unlimited, LLC is the largest recruiting company in the northeast area. We recruit for focus groups, mock juries, IDI's, testimonials, political surveys and more. Our specialties include: executives, technical, medical, legal and financial professionals; millionaires; entrepreneurs; e-commerce; business travelers; investors/traders; foreign language studies; ethnic markets - Asian, Black, Hispanic; ordinary and extraordinary consumers recruited throughout the entire tri-state area from our extensive computerized database or from your sample.
(See advertisement on p. 39)

* Indicates minority-owned firm

Service Codes

FS	Full-Service
C	Consulting
DC	Data Collection
DP	Data Processing
FG	Focus Group Facility
S	Sampling
ST	Survey Translation
T	Transcriptions

Research Data, Inc.
900 W. Leigh St.
Richmond, VA 23220
Ph. 804-643-3468
Fax 804-644-3502
E-mail: info@researchdata.com
www.researchdata.com
Services: FS, C, DC, DP, ST
Hispanic

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
Services: DC, FG, ST, T
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
www.rifemarketresearch.com
Mary Rife, President
Services: DC, FG, ST
African-American, Hispanic, Native American

*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
Services: FS
African-American, Asian, Hispanic

Roslow Research Group
16 Derby Rd.
Port Washington, NY 11050
Ph. 516-883-1110
Fax 516-883-4130
E-mail: info@roslowresearch.com
Peter Roslow, President
Services: FS
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
Services: FS, C, DC, DP, FG, S, ST, T
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. 96)

* Indicates minority-owned firm

SCHLESINGER

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
Services: DC, DP, FG
African-American, Asian, Hispanic

Qualitative and quantitative data collection agency covering New York/New Jersey, southern California, Atlanta, and Orlando, Florida, markets. Focus groups, one-on-ones, door-to-door, telephone, executive, medical interviewing; product placements, CLT taste tests, store audits, mystery shopping.
(See advertisement on the Inside Front Cover)

SCHWARTZ

***Schwartz Consulting Partners, Inc.**
Laurel Oaks
5027 W. Laurel St.
Tampa, FL 33607
Ph. 813-207-0332
Fax 813-207-0717
E-mail: shirley@schwartzresearch.com
www.schwartzresearch.com
Shirley Marte, Qualitative Consultant
Services: FS, C, FG
Hispanic

Full range qualitative research consulting firm, general/Hispanic/ethnic research. Over 20 years of experience. Specialty segments: Hispanic multicultural targeting, partially/non-acculturated. Experienced bilingual/bicultural moderators/staff. Tampa's premier qualitative facility, located in Westshore Business District, three miles from Tampa International Airport. Freestanding building, excellent parking, near hotels/fine dining. Four focus suites, world-class amenities: video/Internet streaming, videoconferencing, online focus groups, simultaneous translation equipment. Rated #1 in Florida.
(See advertisement on p. 97)

STS SCIENTIFIC TELEPHONE SAMPLES

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
Services: S
African-American, Asian, Hispanic, Middle Eastern

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.
(See advertisement on p. 55)

*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
Services: FS
African-American, Asian, Hispanic

Service Codes

FS	Full-Service
C	Consulting
DC	Data Collection
DP	Data Processing
FG	Focus Group Facility
S	Sampling
ST	Survey Translation
T	Transcriptions

*Smithmark Corporation
4136 N. Keystone Ave.
Indianapolis, IN 46205
Ph. 317-541-9165
Fax 317-541-9247
E-mail: info@smithmark.com
www.smithmark.com
Michael Smith
Services: FS, C, DC, FG
African-American

*Southern Spectrum Research, Inc.
1600 Canal St., Ste. 400
New Orleans, LA 70112
Ph. 504-539-9222
Fax 504-539-9228
E-mail: lindecuir@aol.com
www.southernspectrum.com
Linda DeCuir, Research Coordinator
Services: DC
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
Services: FS, DC, DP
Hispanic, Native American

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
Rick Tobin, President
Services: FS, FG
African-American, 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 TeleNación, a U.S. Hispanic telephone omnibus. (See advertisement on p. 98)

*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
Services: FS, C, DC, ST, T
Asian

SuperDatos de México
a wholly-owned subsidiary of Cheskin
Ensenada 61
Colonia Hipodromo
Mexico City, DF, CP 06100
Ph. 650-802-2100 (U.S.) or 52-5-553-2754 (Mex.)
Fax 650-593-1125 (U.S.)
E-mail: SuperDatos@cheskin.com
www.cheskin.com
Jennifer Mitchell (U.S.)
Services: FS
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 of Redwood Shores, California.

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
Services: S
African-American, Asian, Hispanic

SSI offers samples for Internet and telephone research in 18 countries. Targeted sample based on race/ethnic origin, income, and age. Business sample selections by employee size, sales volume, dot-com companies, and more. Order online with SSI-SNAP software, combining convenience and cost savings of in-house sample production with SSI's 24 years of experience. SSI has been partners with survey researchers since 1977. (See advertisements on pp. 11, 99)

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
Services: DC, FG, S, ST
African-American, Asian, Hispanic

* Indicates minority-owned firm

Service Codes

FS	Full-Service
C	Consulting
DC	Data Collection
DP	Data Processing
FG	Focus Group Facility
S	Sampling
ST	Survey Translation
T	Transcriptions

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
Services: DC, FG, S, ST
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
Services: FS, C, DC
Hispanic

* Indicates minority-owned firm

*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, Sr. Vice President
Services: FS
Hispanic

*United Marketing Research
1516 53rd St.
Lubbock, TX 79412
Ph. 806-744-6740
Fax 806-744-0327
www.umspromo.com
David McDonald, Sales/Marketing Dir.
Services: DC, FG, ST
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
www.vlmarketresearch.com
Delphyne L. Lomax, Principal, Quant. Rsch.
Services: FS, C, DC, DP, FG, S, ST, T
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
Services: FS
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
Services: FS, DC, DP
African-American, Hispanic

*Viewtech Market Research & Analysis
P.O. Box 47906
Forestville, MD 20747
Ph. 301-922-3927
Fax 301-350-1428
Services: DC
African-American

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
Services: ST
Asian, Hispanic, Middle Eastern

Classified Ads

Index of Advertisers

Trade Talk

By Joseph Rydholm, QMRR editor

Snow or no snow, the show must go on

Researchers, more than most people, probably know how wrong forecasts can sometimes be. In spite of everyone's best efforts at predicting the future, things just don't go as planned — whether we're talking about sales of a new product or a snowstorm.

In the days leading up to the Advertising Research Foundation's annual convention in New York in early March, forecasters in the local media were predicting the Storm of the Decade. As a result, plans were changed, trips were cancelled, lives were disrupted.

Then a funny thing happened: nothing.

The storm did dump snow in great quantities on Boston and other eastern cities but it left New York mostly unscathed, except for a bitter wind and some clumpy snowflakes.

The threat of having their planes stranded at snow-packed airports led several airlines to cancel flights into New York, leaving ARF exhibitors, speakers and attendees alike in the lurch. But even the tag team of Old Man Winter and his evil sidekick Overreaction Boy couldn't stop the show from going on (mostly) as planned.

Floor traffic in the Infoplex trade show portion of the convention seemed steady both days. Many kind readers stopped by the *Quirk's* booth to chat and pick up a copy of the March issue.

At the booth and at luncheons and other functions, the conversation usually turned to the weather. Everyone seemed to have their own story of how they had made it through the storm. As a lifelong resident of Minnesota, where talking about the weather is a statewide obsession, it was nice to find out that people from all corners of the globe can be gripped by weather-mania. It was also heartening to hear New Yorkers skewer their own local media's fear-mongering. I had thought the Twin Cities TV and radio stations were the only ones who needlessly terrorized the public with news of threatening weather.

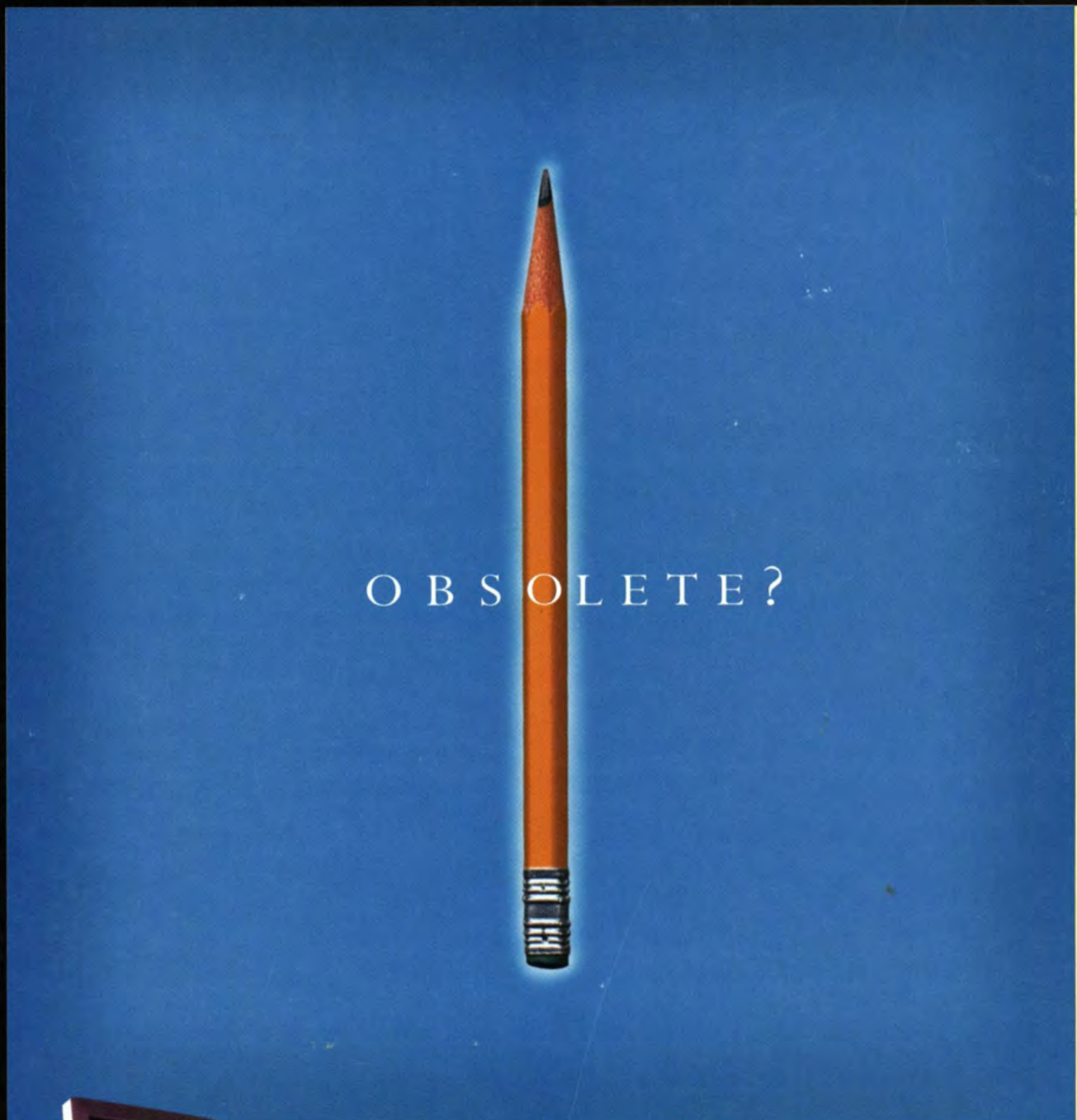
Gauge the mood

One of my main goals at the show this year was to try to gauge the mood of the industry in the face of the current economic doldrums. The consensus of my unscientific poll of people from various research companies was a feeling of cautious optimism. Many said the fourth quarter of 2000 had picked up a bit after a slowish start to the year. And 2001 was shaping up to be OK — not gangbusters but not cause for panic, at least not yet.

Clients are pulling back on budgets a bit — "They're waiting to see how things shake out" was a sentiment I heard often — and that has given some larger research firms pause. At the smaller firms, those run by independent researchers/consultants and moderators, things are apparently as busy as or busier than ever.

So what to make of it all? I guess we'll have to wait and see how things shake out! Seriously though, the threat of recession (my apologies to one visitor to our booth who said he preferred not to use the r-word) still looms but its effects, while not leaving the research industry untouched, have yet to wreak havoc.

If we're lucky, the much-feared full-scale economic downturn will never materialize. Perhaps it, like the "snowstorm that wasn't," will leave the research industry bloodied but unbowed.


OBSOLETE?


crimson