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Marketing Research Review

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April 2002

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- Integrating research with the business view
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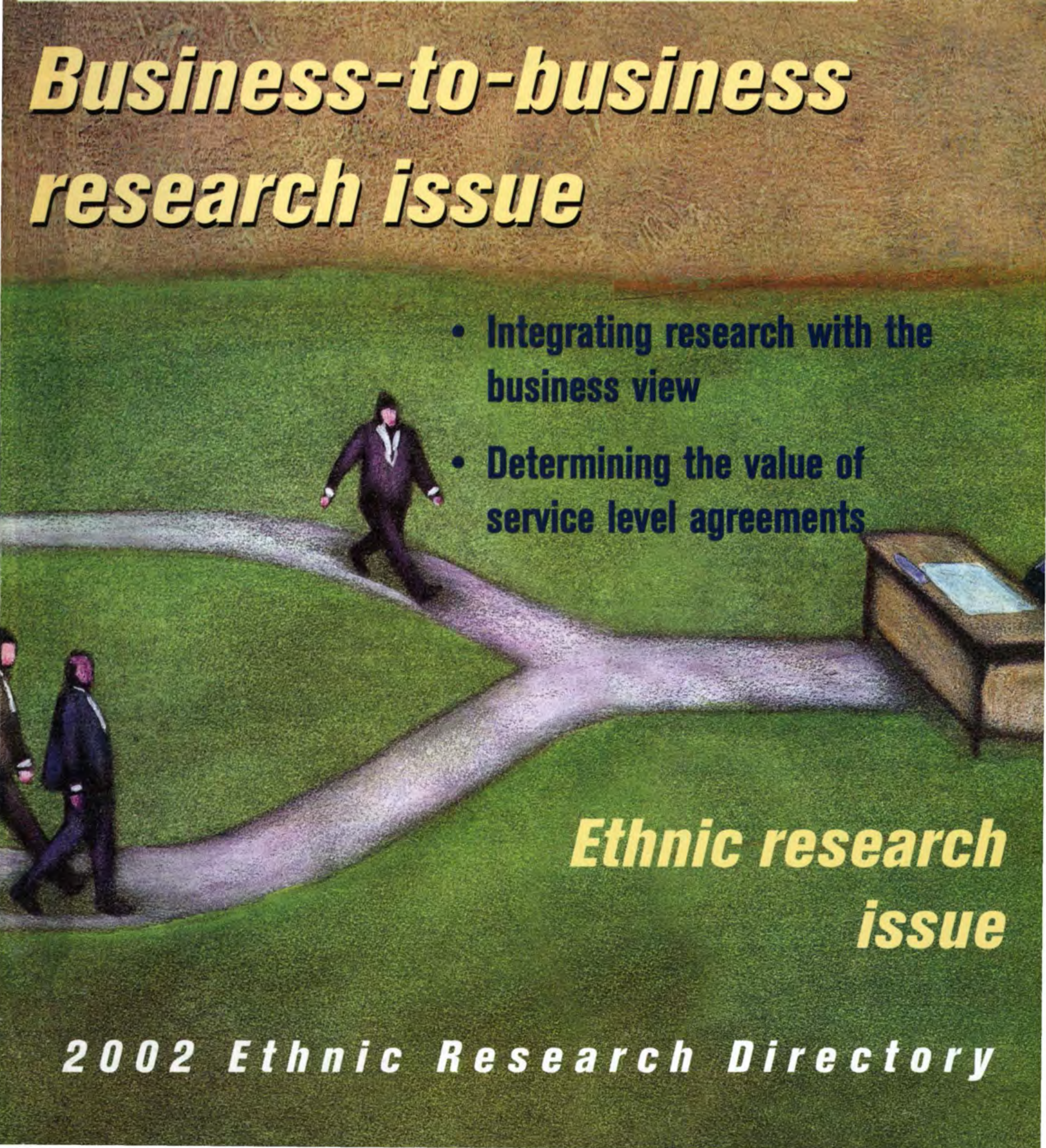
Ethnic research issue

2002 Ethnic Research Directory



QUIRK'S Marketing Research Review

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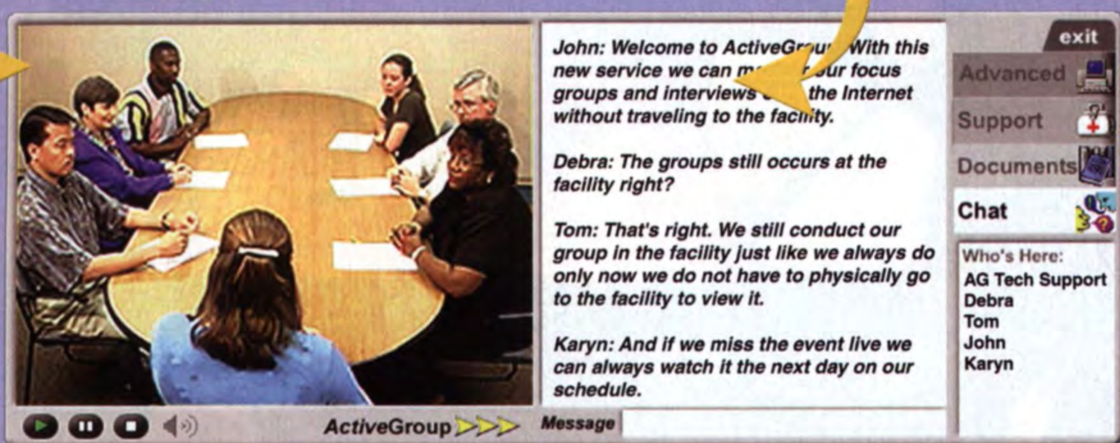

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Managers aren't managing

A recent Maritz Poll reports that 21 percent of American employees would fire their boss if they could. Moreover, the inclination of employees to give their boss the pink slip is strongly linked to their overall perceptions of senior management.

For the statement, "Senior management's words are consistent with their actions," 53 percent of those who disagreed or strongly disagreed also said they would fire their boss; however, only 5 percent of those who strongly agreed said they would fire their boss.

Overall, there is no statistical difference between the percentage of men (21 percent) and women (22 percent) who want to see their boss fired.

Maritz Poll is a national consumer opinion survey conducted periodically by St. Louis-based Maritz Research. The January 14-17 telephone poll featured responses from 1,002 randomly selected adults (502 females and 500 males) from throughout the United States.

The survey also asked employees a series of questions about their workplace environment and company leadership, and tabulated those findings against those who reported they would fire their boss. Among the findings:

• Of employees who said that satisfying the customer was not the primary focus of the company, 57 percent would fire their boss.

• Of employees who said fellow employees at their work were not on the same team and working toward the same goals, 51 percent would fire their boss.

• Of employees who said they were not provided with materials and resources needed to best perform their job, 50 percent would fire their boss.

• Of employees who said they were not satisfied with the way the organization communicates with them, 49 percent would fire their boss.

• Of employees who said that they didn't know exactly what was expected of them in their role, 46 percent would fire their boss.

Managers are not much more gracious than non-managers regarding the boss-firing proposition. Eighteen percent of those who supervise people want to see their boss fired, compared to 23 percent of non-managers. For more information visit www.maritzpoll.com.

Who won the Super Bowl's battle of the brands?

A study by Chicago-based Information Resources, Inc. shows that this year's Super Bowl was a success overall for consumer packaged goods (CPG) manufacturers and retailers. IRI Pulse: Super Bowl XXXVI, part of a series of ongoing studies around noteworthy trends in the CPG industry, examined supermarket sales of food products during the week leading up to the Super Bowl.

Supermarket dollar sales were up 6 percent versus prior year, as more consumers likely enjoyed the game from home, rather than going out — a general trend evident since the 9/11 tragedy. Quick, easy, at-home meal solutions, such as frozen pizza and frozen seafood gained major yardage (up 16 percent and 22 percent respectively versus last year). Comfort foods, including chocolate, ice cream, and sherbet scored double-digit growth rates versus last year.

Standout performances were noted within each major category as determined by incremental dollar sales during Super Bowl week versus the previous three-week average:

• Carbonated beverages benefited from fantastic runs by new products, such as PepsiCo's Pepsi Twist (+35 percent), Diet Pepsi Twist (+28 percent), and Mountain Dew Code Red (+24 percent).

• Within beer/ale/alcoholic ciders, seasoned players Corona (+38 percent), Bud Light (+36 percent), and Budweiser (31 percent) were clear winners, while relative rookie Smirnoff Ice (+34 percent) also had a strong showing.

• Salty snacks' all-pros include Wavy Lays (+77 percent), Lays (+52 percent), Tostitos (+46 percent), and rookie Tostitos Scoops (+46 percent).

Each year a battle plays out off the football field in the aisles of retailers nationwide. Major players from the CPG industry compete to gain ground in Super Bowl party planning and shopping. There is a lot at stake,

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Luciana Palmisano has joined *Research International* as European business development director.

Design Forum Research, Dayton, Ohio, has named **Beth McKeon** vice president.

Walker Information, Indianapolis, has promoted four executive management team members: **Randy Shoemaker** to executive vice president and chief oper-

Shoemaker Winzenread

ating officer; **Mark Winzenread** to chief financial officer and exec-

Kyzr-Sheeley Gibbons

utive vice president of finance and administration; **B.J. Kyzr-Sheeley** to executive vice president of people, products and strategy; and **Patrick Gibbons** to senior vice president of marketing.

Milpitas, Calif.-based audience measurement firm *NetRatings, Inc.* has named **William Pulver** CEO and member of the NetRatings board of directors. He assumes the roles from **Dave Toth,** who is stepping down from his operational responsibilities and his board of directors position to pursue other entrepreneurial interests.

Galloway Research Service, San Antonio, Texas, has promoted **Roland Cerda** to manager of telephone recruiting for the telephone

Cerda Plata

department. In addition, **Adrian Plata** has been promoted to project director for the telephone department.

Taylor Nelson Sofres (TNS) has named **Patricia Davis** and **David Luery** senior vice president of TNS Healthcare International.

David Passfield has joined market research firm *ORC International* as a business developer in the company's travel and transport research sector.

Mountain View, Calif., customer satisfaction measurement firm *Satmetrix Systems* has appointed **Fred Reichheld**, director emeritus of Bain & Co., to its board of directors.

Gregory Cross has been appointed vice president/general manager of *Delta Marketing Dynamics*, a pharmaceutical marketing research company in East Syracuse, N.Y.

Cross Calvachi

Jorge Calvachi has joined *NFO WorldGroup*, Greenwich, Conn., as director of its multicultural marketing services unit.

Dianne Ganslein has joined *MarketVision Research*, Cincinnati,

Ganslein

as vice president, business development.

Kinesis, a Seattle customer experience management firm, has added **Shannon Barnes**, training manager for Tully's Coffee, to its advisory board.

Joel Goren has joined *Opinion Research Corporation*, Princeton, N.J., as global managing director, brand strategy.

Dipak Jain, dean of

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Sensus Web from Sawtooth Technologies

Sawtooth Technologies, Evanston, Ill., has released Sensus Web, software for creating Web surveys. Sensus Web is based on Sawtooth Software's Ci3 scripting language. This permits the creation of CATI-like questionnaires — advanced skipping and branching, piping, constructed lists, calculations, rosters, etc. — without having to know HTML or Java. Sensus Web also offers quota control, e-mail and sample management, straightforward deployment, online statistics, and data export to a range of analysis systems, including SAS and SPSS. Sensus Web works with standard PCs and Web servers running Microsoft Windows operating systems and tools.

Sawtooth Technologies provides Web hosting and questionnaire conversion services for researchers who choose not to host their own surveys. For more information call Rich Gillespie at 847-486-1242 or visit www.sawtooth.com.

Sample control tool for researchers

U.K.-based Centurion Marketing Systems Limited is now offering MaRSC, a market research sample control tool. MaRSC allows research and marketing professionals to extract balanced, representative market research samples for interviewing from in-house customer databases. Designed for medium to large-sized businesses committed to customer-centric work processes, MaRSC enables companies to integrate customer research into an existing CRM or data warehouse system.

Even with limited market research expertise, marketers and other professionals can use MaRSC to identify stratified and random samples for interviewing. Selection screens allow users to set up sample selection criteria and verify, in real time, that there are sufficient eligible customers to meet sampling requirements. A weighting algorithm allows users to select samples by demographics and behavior in multiple dimensions. At a basic level the information generated will include a name, address, and telephone number. But it can include up to seven dimensions to achieve the balanced sample that research and marketing professionals require. For more information visit www.marsc.co.uk.

New Canadian online automotive panel in development

Carpoint.ca, a Canadian car-buying site, J.D. Power and Associates, and SampleNet e-Research Solutions will jointly develop and manage an online automotive panel that will produce proprietary and syndicated automotive market research using Carpoint.ca, which has more than 400,000 monthly visitors. J.D. Power and Associates intends to use the automotive panel for Canadian automotive research, including surveys, opinion polls, and market studies. Under the terms of the initiative, Carpoint.ca will help recruit panelists by providing access to its user database through promotional efforts such as banners, fixed links, newsletters, and pop-up ads. SampleNet will provide the technology infrastructure for panel development and data capture, and will conduct selected research in the Canadian market on behalf of J.D. Power and Associates. In addition, third-party research firms will be able to access the automotive panel through SampleNet services provided on behalf of Carpoint.ca and J.D. Power.

The automotive panel will be co-branded to include J.D. Power and Associates and Web Perspectives, a research service provided by SampleNet. Carpoint.ca will have access to the automotive panel to conduct its own research and polls.

Survey software for Palm OS

Vancouver-based Techneos Systems has released Entryware Professional version 3.0, survey software for mobile computers running the Palm OS. The ability to reduce input errors is one way Entryware Pro ensures data integrity. Numerous features are included to control and track changes that could produce incorrect or ambiguous data. Version 3.0 licensing includes a one-time fee and an annual maintenance agreement. Techneos is nearing completion of double-byte character support for non-Western languages, and an enterprise product for large-scale deployments. Software specifications, case studies, and software evaluation licenses can be obtained at www.techneos.com.

Neural network product from StatSoft

StatSoft, Inc., Tulsa, Okla., has released Statistica Neural Networks version 6, its data mining, exploration, and modeling tool for users who analyze complex relationships between variables. Version 6 offers a comprehensive selection of neural network architectures, algorithms, sampling methods and analytical graphs. Problem-solvers and automatic wizards are designed to make the program intuitive and easy to use.

The latest release includes the following new features: comparative results from multiple models; efficient output management — Statistica features Microsoft Binder-style workbook functionality and customizable reports; Visual Basic scripting — a fully programmable system with which users

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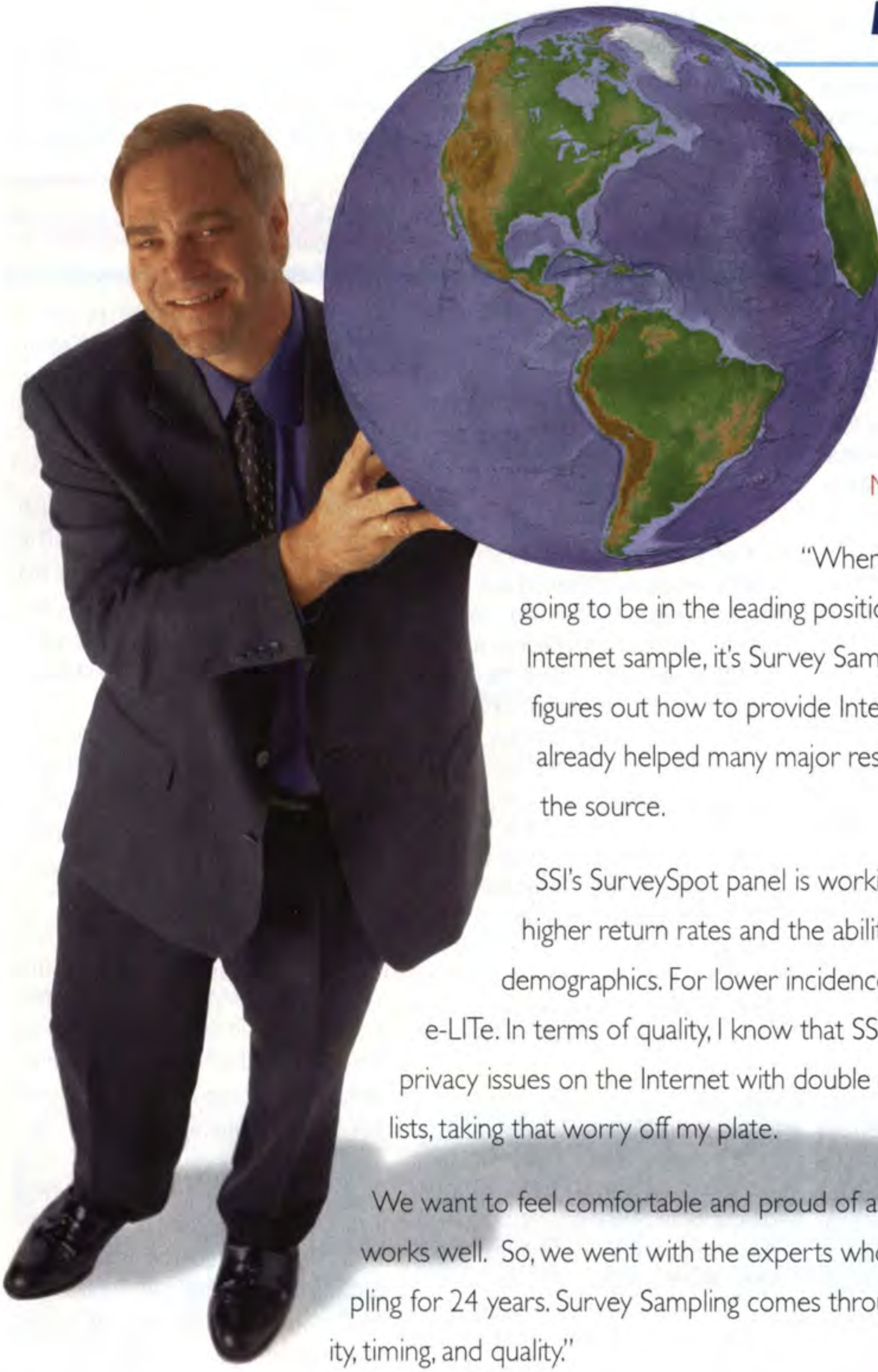

Research Industry News

News notes

ACNielsen U.S., Schaumburg, Ill., has donated Homescan consumer panel tools and information valued at nearly $500,000 to the Center for Retailing Excellence, which is part of the Sam M. Walton College of Business at the University of Arkansas.

NetRatings, Inc., Milpitas, Calif. and New York-based **Jupiter Media Metrix, Inc.** have mutually agreed to terminate their October 25, 2001 acquisition agreement and related loan and security agreement. The companies' actions come after extensive discussions with the staff of the Federal Trade Commission (FTC). The FTC staff has indicated that it would strongly recommend that the FTC challenge the loan and security agreement that the companies entered into in conjunction with the acquisition agreement. The FTC staff also rejected alternative loan structures proposed by the companies. Additionally, the FTC staff has indicated that it would recommend that the FTC challenge the acquisition and seek a preliminary injunction enjoining consummation of the acquisition. Both David Toth, CEO of NetRatings, and Robert Becker, CEO of Jupiter Media Metrix, disagreed with the FTC staff's conclusions regarding the loan and security agreement as well as the competitive impact of the acquisition. Becker said that without the benefit of the loan agreement, Jupiter Media Metrix was not in a position to contest the FTC in a lengthy court challenge. The decision to mutually terminate the acquisition agreement does not require either company to pay a breakup fee, and each company will bear its own acquisition-related expenses.

In connection with the announcement of its proposed acquisition of Jupiter Media Metrix, NetRatings also announced that it had agreed to purchase the interests of ACNielsen eRatings.com that it does not currently own. The eRatings transaction is subject to customary closing conditions as well as completion of the Jupiter Media Metrix acquisition. At press time, the parties to the eRatings transaction had not determined if that transaction would proceed.

Jupiter will form a special committee of the board of directors to explore strategic options to strengthen its position in the marketplace. The company

Research Calendar

Anderson, Niebuhr & Associates will hold a questionnaire design and use workshop on April 18-19 at the Holiday Inn Select - International Airport, Bloomington, Minn. For more information call 800-678-5577 or visit www.ana-inc.com.

The Council for Marketing and Opinion Research (CMOR) will host a forum to discuss improving respondent cooperation and relations on April 22-23 at the Yale Club in New York City and again on April 25-26 at the University of Chicago Gleacher Center. For more information visit www.cmor.org.

Klein Associates will hold a workshop on capturing and leveraging cognition in context ("Putting Cognitive Task Analysis to Work: Understanding Users, Customers, and Experts") on April 30-May 2 in Dayton, Ohio. For more information visit www.decisionmaking.com.

Anderson, Niebuhr & Associates will hold a questionnaire design and use workshop on May 2-3 at the Rosen Centre Hotel, Orlando, Fla. For more information call 800-678-5577 or visit www.ana-inc.com.

KidPower Xchange will hold Kid Power, its annual conference on marketing to kids, on May 5-8 at Disney's Grand Floridian Resort in Orlando, Fla. For more information visit www.kidpowerx.com.

Tragon Corporation will hold a workshop titled "Designing Product Success Through Descriptive Analysis" on May 6-8 at the Sheraton Palo Alto, Palo Alto, Calif. For more information visit www.tragon.com.

Sawtooth Software will hold a Web interviewing workshop on May 9-10 in Seattle. The program will feature the use of the firm's SSI Web software. For more information visit www.sawtoothsoftware.com/webwork.shtml.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its Latin American conference on May 12-14 in Sao Paulo, Brazil. For more information visit www.esomar.nl.

The American Marketing Association (AMA) will hold a conference on applied research methods on May 14-17 at the Palmer House Hilton, Chicago. For more information visit www.marketingpower.com.

The American Marketing Association (AMA) will hold its annual advanced research techniques forum on June 2-5 at the Vail Marriott in Vail, Colo. For more information visit www.marketingpower.com.

The Marketing Research Association (MRA) will hold its annual conference on June 5-7 at the JW Marriott in Washington, D.C. For more information visit www.mra-net.org.

has retained Robertson Stephens, Inc. to act as an advisor in this process.

The firm will continue pursuing its patent infringement lawsuit against NetRatings. An October 28, 2002 trial date has been set.

NetRatings has announced a number of initiatives to streamline its business and focus on core product areas, including the discontinuation of two products and a reduction in staff. The streamlining initiative will eliminate 20 positions, or about 15 percent of the company's employee base. Two products, AdSpectrum and eCommercePulse, will be discontinued. The company anticipates annualized cost savings of between $6 million and $8 million as a result of these changes and expects to incur a one-time charge of between $6 and $8 million in the first quarter of 2002 to cover reorganization and workforce reduction costs.

Atlanta mystery shopping firm **Shop'n Chek Worldwide** has expanded its licensee coverage to include Southeast Asia and Europe. The expansion took place effective January 24 with the execution of a licensing agreement with an existing Shop'n Chek Worldwide licensee presently covering Australia, New Zealand, and the U.K. With this expanded coverage, 12 licensees in more than 63 countries and territories now perform Shop'n Chek Worldwide's services.

Acquisitions

Access Data Corp., a Pittsburgh marketing firm serving the financial services industry, has acquired the financial services practice of Boston-based **Atlantic Research and Consulting**. The companies have also formed a strategic alliance in which Atlantic Research will provide Access Data with field and tabulation services in support of the firm's strategy practice. The financial services consulting arm of Atlantic Research provides field research and tabulation services in syndicated and custom research to financial services industry clients.

Germany-based **GfK** has increased its stake in the French Institut de **Sondage Lavialle** (I.S.L.) via its subsidiary GfK Sofema International from 50.01 to 71.9 percent. With 79 full-time employees, I.S.L. generated total revenue of approximately 16 million euros for 2001. The company carries out an omnibus survey in France and has had an access panel since 1999. It also measures TV ratings on behalf of Médiamétrie and carries out magazine reach surveys for France, together with two other companies.

GfK has also increased its holding in its Turkish subsidiary, **Procon GfK**, which is based in Istanbul, from 50.1 to 70.1 percent. With around 68 employees, the company achieved total revenue of just under 2.7 million euros in 2001 in the GfK business divisions of Ad Hoc Research and Non-Food Tracking.

Also, via its Austrian subsidiary, Fessel-GfK, the GfK Group has expanded its business in Central and

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Analyzing discrete choice data on monadic cards

By Jay Wu

Editor's note: Jay Wu is an independent consultant. He can be reached at jwu_717@yahoo.com.

If you ask marketing researchers what advanced research tools they actually use, not those they would dust off to put in use someday, chances are that discrete choice models (DCMs) will get picked. The reason: DCM combines multivariate complexity and realistic simulation of mundane shopping experiences. In a typical DCM, each respondent is presented with multiple cards that list major alternatives or brands that are seen or will be seen in market, with varying prices and other attributes. On each card, respondents are instructed to pick one model or brand (or to allocate proportions of brands to be picked out of their next, say, 10 or 20 shopping occasions), as well as the purchase intents for the brands picked. In such a trade-off setting, consumers reveal their true preferences.

Why monadic choice cards?

One of the defining features of DCM is an experimental design, at least for DCMs dedicated to stated preferences[1]. The fact that each respondent reacts to multiple choice cards is both a blessing and a curse. Researchers like this feature because multiple cards open up a bigger window to better understand consumers' often complex purchasing behaviors. In this aspect, marketing researchers are not much different from law enforcement authorities, who keep 10 fingerprints for each person: when one is in doubt, the others can be compared to eliminate identification uncertainty. It is widely accepted that multiple choice cards can reduce random errors in assessing consumers' preferences under various market conditions.

However, multiple cards inevitably elongate surveys and impose a bigger mental toll on respondents than simple surveys. Studies (Johnson and Orme, 1990) have shown that beyond a certain number (up to 20 cards), the more attributes included in the design the lower response quality. Further, in analyzing data from discrete choices we commonly ignore the fact that repeated measures are obtained from the same respondent. However, even though we can advise respondents to focus on each individual card without referring back and forth to any other cards, it is unlikely that responses by the same respondent are totally independent. This puts a question mark on how reliable our

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Qualitatively Speaking

The effects of 9/11 on Hispanic research

By Jim Loretta

Editor's note: Jim Loretta is president of Loretta Marketing Group, a Miami research firm. He can be reached at 305-232-5002 or at lmg8010@bellsouth.net.

The terrorist attacks that occurred on September 11, 2001 were seen and felt by all segments of the American society. The Hispanic community was no exception. Latinos on both sides of the border were as deeply affected as any other demographic population in the United States. Many Hispanics lost loved ones in both World Trade Center towers. The Windows of the World restaurant atop of WTC 1, for example, employed many Hispanics.

Like other Americans, Hispanics were left with a strong sense of fear and insecurity. These fears have caused adverse consequences in researching the Hispanic market.

Many Hispanics in the U.S. have become cautious and tentative. However, their fears were compounded with the ever-present "migra" problem. Because the INS (Immigration and Naturalization Service), commonly known as "la migra" among Hispanics, has increased its presence in cities with heavy Hispanic populations, a telephone call from an unknown person has caused added suspicions. Consequently, telephone recruiting of respondents for Hispanic focus groups has become tougher than usual. Even before 9/11 many Hispanics did not answer the telephone unless it was a family member or a friend. After the attacks, recruiting for focus groups by telephone became a real challenge for many people who study the Hispanic market.

The following are helpful suggestions in increasing respondent cooperation in focus groups that have helped many of us who work in the Hispanic research market:

1. Increase co-op fees to respondents. If the going rate has been $50, you may consider $65 in order to improve respondent participation.

2. Face-to-face recruiting, if possible, is still the preferred way to get Hispanics to a focus group. Parks, strip malls, community centers and churches where Hispanics congregate are ideal places to find respondents.

3. Hire recruiters who have good Hispanic accents appropriate to the local market (Mexicans in Los Angeles, Puerto Ricans in New York, Cubans in Miami).

4. Mail out more than the normal follow-up confirmation letters with toll-free call back numbers for validation purposes. Put the name of a responsible contact person in the letter whom the respondents can call if they have any questions. This personalizes the letter and adds legitimacy to the effort.

5. Emphasize in the letters that they are going to a Hispanic-friendly facility that has bilingual help and free babysitting services with goodies (i.e., toys, snacks) for the kids.

6. Recruit more respondents than normal in order to have a successful show rate. (For example, if it is normal to recruit 13 people to seat eight to 10 respondents, you may have to recruit 15 people.)

7. To ease respondent fears of being separated from loved ones, you may consider doing couples groups, which consist of five married couples who come and voice their opinions on the household. The show rate among couples groups is higher and the sessions many times yields richer data. (In this case, babysitting would be essential.)

8. Allow plenty of time to get enough confirmed respondents to attend the group session. If two weeks was the standard time before, you may consider adding another week to provide enough time.

Respectful and accommodating

The mindset that companies need to consider when it comes to researching the Hispanic marketplace in troubling times is the Hispanic family. The "familia" is the safe haven where Hispanics go when the going gets tough. Researchers always need to keep that uppermost in their minds when studying the Latino market. Being respectful, open, and accommodating to the Hispanic family when recruiting for focus groups demonstrates to a Hispanic person that care and concern are important to you. Companies that incorporate this attitude into their recruiting efforts will have minimal problems in achieving successful show rates in these uncertain times.


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Supplier Side

Organizing your company – are project teams the answer?

By Michael Mitrano

Editor's note: Michael Mitrano is a principal at Transition Strategies Corporation, a management consulting firm serving the research industry. He can be reached at mmitrano@transitionstrategies.com.

Among small and mid-sized full-service research companies these days, you'll hear people talking about whether their staff should be organized into "teams." What does this really mean — and why are people talking about it?

In one sense, any organization is a team — a group of people working together to accomplish a common goal. In a small company of, say, five to 10 employees, the organization really does function like a team. Everyone talks to everyone else, workload and information are shared freely, and — hopefully — all are focused directly on completing projects and satisfying clients.

As a company gets bigger, two things start to happen:

First, the top person can no longer oversee everyone directly. The staff needs to be organized in some fashion so that supervision can be delegated.

Second, specialization becomes more important. Survey research involves a wide range of tasks, from client service, research design, questionnaire writing, and analysis to questionnaire programming, interviewer supervision, coding, tabulation, and multivariate statistics. No individual can be top-notch at all these tasks. As a company grows and the kind of work it can do becomes more diverse, specialists are brought on staff.

To accommodate the need for delegation and specialization, the traditional departmental organization has emerged. Larger companies structured this way may have separate departments for sampling, questionnaire programming, field, data entry, coding, tabulation, and statistics. Even the sales and client service staff may be separate from those who manage projects and write questionnaires and reports. Each of these departments has a head who is expert in the functions of that department and manages work assignments within the department. Projects flow from department to department like autos in an assembly line, entering the factory as "sales" and emerging as shiny new "final reports."

This sounds very efficient. It lets the "geeks" work on their computers all day and the "people people" handle the project management and client contact. It provides for knowledgeable supervision, so that, for example, beginners in tabulation are working under the direction of veteran experts. It allows for the development of good work processes and quality standards, so that tasks are performed consistently. It lets the difficulty of a given project be matched with the skill of the person doing it, so that routine work is given to junior staff and the most complex tasks are reserved for the expert. This matching of work and skill levels leads to happier staff and lower project costs. Specialist staff have clear career paths that don't require them to master every aspect of the research process.

Problems emerge

If the benefits of departmental organization are so clear, why then would anyone want to change it? The answer to that question lies in human behavior. As people are organized into departments based on functional disciplines, problems often emerge.

Department staff can become focused on the execution of their task, to the

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Getting their level best

Research shows importance of service level agreements as potential marketing tool for communications firms

By Joseph Rydholm
QMRR editor

If you continually had problems with the quality of the high-speed Internet access provided by your local cable or phone company, wouldn't it be great if you had pre-negotiated a deal with the company that would let you withhold some of your household's monthly fee, as a way to compensate you for your troubles?

In reality, deals like that aren't available to small-scale users like you and me. But they are commonly found in the business world, and they're called service level agreements or SLAs.

SLAs are forged between the customer and the company providing the communications service, whether that service is an e-mail system, Web hosting, or something more arcane-sounding like an IP VPN (Internet-protocol virtual private network). They can apply to a multitude of service parameters, from bandwidth availability to how long it will take to bring the system back up if it goes down.

In a nutshell, SLAs spell out how the service will function and what is supposed to happen if it doesn't meet those levels. But some SLAs aren't guaranteed, and it's not always easy for the client companies to know if service levels are being reached.

That's where Brix Networks comes in. The Chelmsford, Mass., firm develops and markets systems that help companies like Level 3, Genuity and Net2Phone monitor the various communications processes that they provide to third-party clients, typically large firms of 500 or more employees in a host of industries.

Most firms of that size have some kind of SLA with their communication service providers, but until Brix conducted marketing research last year, it was unclear just how important SLAs are to the buyers of communication services and what the consequences are for the service providers who break them. Before the research, it was gut feelings and anecdotal evidence.

To shed some light on the issue, Brix turned to Natick, Mass.-based Sage Research, which conducted a Web-based survey on SLAs with members of its research panel of 3,000 IT professionals.

"You can have a lot of different kinds of SLAs," says Kathryn Korostoff, president of Sage Research. "The most common SLA is up-time, 'If you use our network, we promise it will be up 99.9 percent of the time.' You can say your response time for particular types of traffic will be x milliseconds, or your response times for particular types of applications will be x seconds, etc.

"A lot of carriers, such as Sprint, WorldComm, Genuity, AT&T, etc., have invested money to deploy IP-based virtual private network services, for example. Yet for most carriers, actual sales haven't lived up to the original forecasts. One hypothesis I have always had is that people are reluctant to move to one of these services because they don't see them as being as reliable as other types of services. So how do you get people past that?"

Answering that question was one of the main goals of the research. Along the way, Sage and Brix sought to verify the importance of SLAs and also to understand key issues and perceptions surrounding SLAs. Did respondents believe that their providers met or adhered to their current SLAs? What should the consequences be of non-compliance? How important are they as a service provider selection criteria? In other words, if you are choosing between two otherwise-equivalent service providers, if one has a better SLA does that make a difference? And is that more important than past brand experience, than price?

"Anybody can say they have an SLA," Korostoff says. "But what are the attributes that make customers feel that it is more than an empty promise? Is it about being able to monitor the SLA's performance in real-time? Is it about the kinds of reports you get about how the provider is meeting the SLA thresholds? Is it about the level of detail of the SLAs themselves?"

Other key questions: Do firms feel that communications services like IP-based VPNs are reliable? Would SLAs help them feel better about the services? What kind of guarantees would they need and what would the attributes of those guarantees need to be to really change their perceptions of those services?

Pay a premium

The survey found that not only were SLAs important, but the enterprises were willing to pay a significant premium for verified quality and guaranteed service — and those willing to pay came from companies in a range of industries, not just those like financial services which had shown willingness to pay in the past.

"That was the most startling finding," says Jamie Warter, Brix Networks' vice president of marketing and business development. "And the fact that it was not correlated to any industry — the findings were universal. It basically went across the board. It showed that there is a latent need for quality and people are willing to pay for it."

For example:

• Over half (56 percent) of the organizations indicated that e-mail services with guaranteed SLAs were worth over 30 percent more than e-mail services without guaranteed SLAs.

• Half (51 percent) of the organizations said that Web hosting services with guaranteed SLAs were worth over 30 percent more than Web hosting services without guaranteed SLAs.

• Half (49 percent) indicated that IP VPN services with guaranteed SLAs

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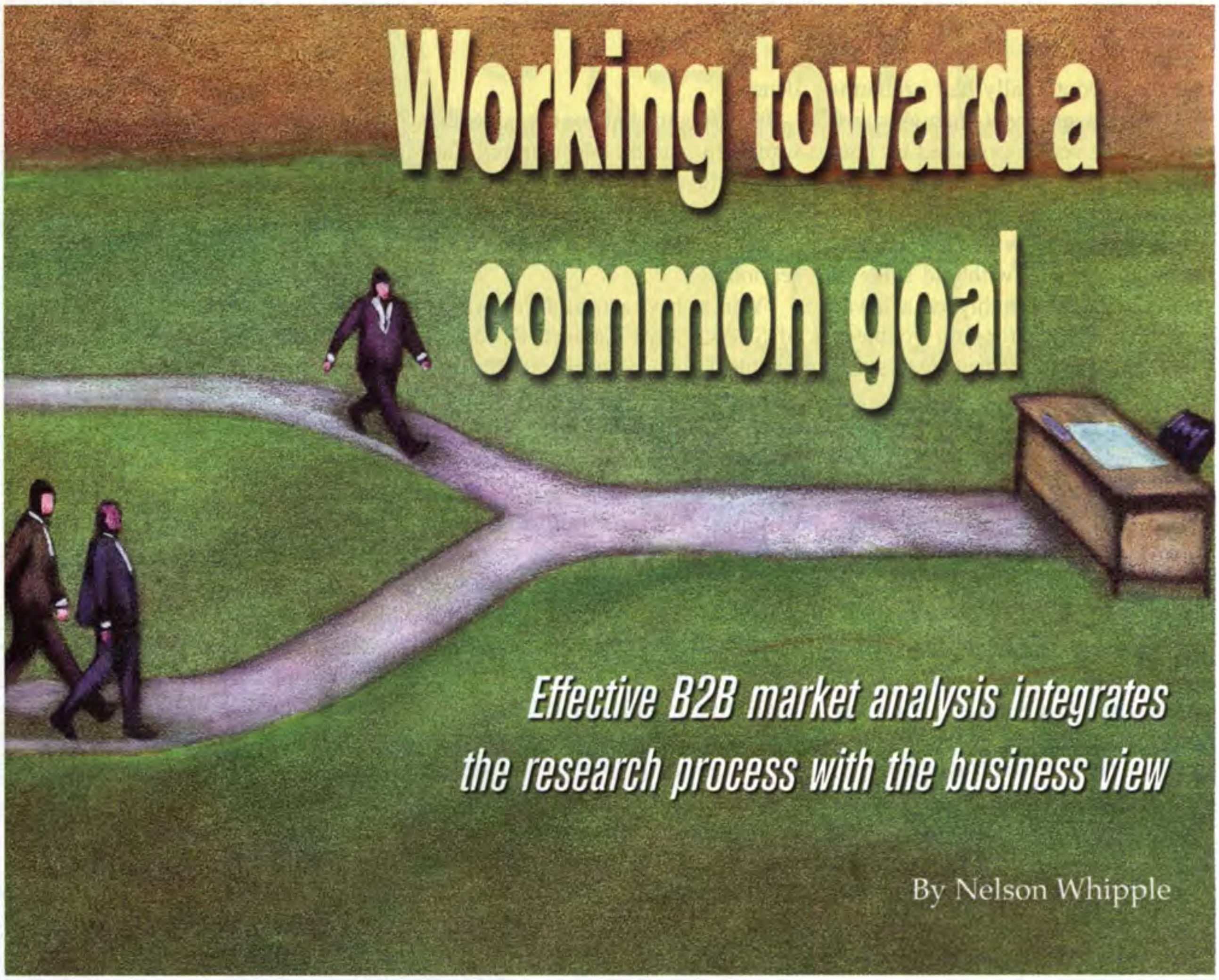
Working toward a common goal



Effective B2B market analysis integrates the research process with the business view

By Nelson Whipple

Editor's note: Nelson Whipple is vice president at John Morton Company, a Chicago consulting firm. He can be reached at 312-726-2010 or at nwhipple@johnmortonco.com.

Every business faces the core marketing challenge of how to drive sales to meet corporate financial goals through successful development and delivery of offerings to the market. While effective marketing research supports these development and delivery activities, it is often difficult to translate survey research findings into tactical actions that meet the corporate goals. There may be a significant gap between the delivery of the research and the identification of the tactical actions to take and who should take them.

For B2B marketers, it is especially critical to link research findings to business realities. In many B2B markets, customers cannot self-select into needs segments the way consumers can. By contrast, a typical B2B sales force has to actively identify leads and know which value proposition to introduce proactively to a prospect. Many B2B markets, such as chemical markets, have a very limited customer base with which to work; cost of sale can be high and opportunities for new sales may be few, so it is critical for sales people to be able to focus their efforts on activities that will have the highest success rate with accounts. Finally, compared to typical B2C markets, B2B market research is expensive, so it is imperative to find cost-effective alternatives with which to augment costly survey work and to link research results back to the internal business environment.

In order to assure the usability of marketing research, a systematic, integrative process that uses six tools is introduced below. The process integrates business perspectives with research approaches and different sources of information with each other. Researchers structure their design and analysis according to the realities of business goals and available tactical alternatives. Once an initial business objective is identified, a solid systematic process follows with these steps:

1. Choose an appropriate strategic framework that will guide the analysis and recommendations and define

criteria for segments.

2. Document the business goals, potential value proposition components, and tactical alternatives.

3. Identify and procure the necessary information sources; design and execute custom research as needed.

4. Define the market opportunity structure and create a scorecard for segment opportunity from the information analysis.

5. Map segments to the key value proposition components that drive their behavior.

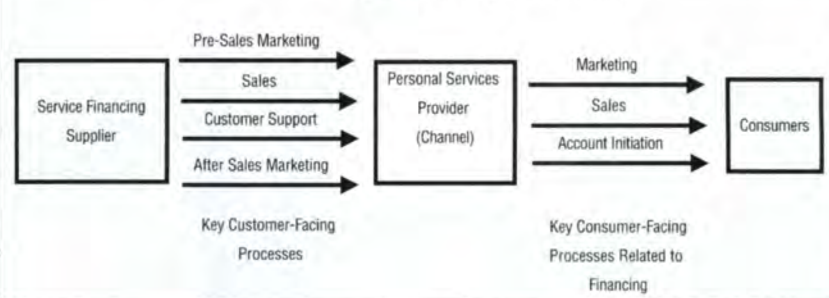
6. Map segments back to tactical alternatives.

7. Map tactics back to the functional areas that will be accountable for them.

At each step, engaging the business planner in the research process will add value to the final deliverable.

To illustrate this process, a business case will be discussed. In this case, a supplier of consumer financing for personal services planned to enter a new industry segment. The business model prohibited direct marketing to consumers, as this would incur high costs. Instead, the financing supplier would market through the service provider as a channel and deliver the necessary tools to them to offer financing to their own customers (Figure 1). The financing supplier's B2B marketing communications and actions must convince channels in the new segment 1) to carry their financing program and 2) to aggressively sell its financing plans to consumers instead of competitors' plans or cash payments.

Figure 1: Financing Market Overview

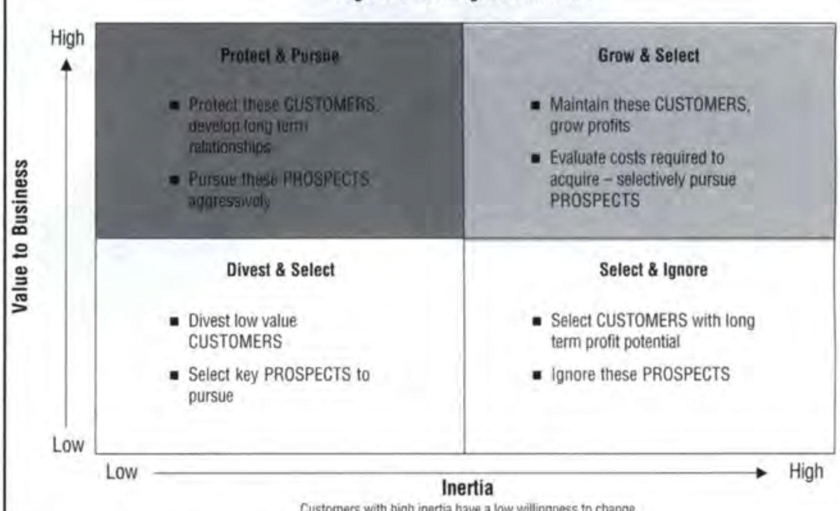


1. Strategic framework

Figure 2 illustrates a solid strategic framework that applies to many marketing challenges. Using criteria across three dimensions, the framework enables the marketer and business planner to prioritize segments and individual accounts.

The first dimension, embedded in the chart, is Customer vs. Prospect. This is a critical and often overlooked dimension of research analysis. A sin-

Figure 2: Strategic Framework



gle finding can lead to one strategy if it concerns customer retention or to something quite different if it concerns acquiring a prospect.

The next dimension is Value to the Business; if all else is equal, some accounts are more valuable than others. Value to the Business can mean high margin, high revenue, strategic importance, or other criteria to be established with the business planner during this step. The researcher will translate these criteria into variables that will segment accounts and identify alternative information sources (including custom survey research).

The third dimension is Inertia, or unwillingness to switch. The Inertia dimension is important to consider: it relates directly to potential market share and cost to sell. Two accounts that look identical in other ways may have completely opposite impact on profitability based upon this dimension. High Inertia is good for retaining customers, but makes it difficult or costly to acquire prospects.

The researcher must advise the business planner on how to best represent Inertia in the analysis based upon the available resources, likely methodology, and strategic needs. Proxies for Inertia could include ratings of willingness to switch, number of suppliers used, loyalty indices, gaps in perceptual ratings between the current supplier and competitors, etc.

Returning to the market entry case of the financing provider, defining customer versus prospect was simple: there were virtually no customers, so every business in the industry segment was a prospect. High versus low value was determined according to the expected amount of financed money that each prospect could generate if acquired. High versus low Inertia had two components: 1) the preference for the new financing supplier's value proposition versus current suppliers and 2) the channel's commitment to growing their business through financing.

2. Document the business

The design of the information gathering and the analysis of the data must be guided by the business realities, including the financial goals, the potential value proposition components, and the tactical alternatives. The business has a financial target for revenue, units, or profit, and that target will be based upon today's performance and assumptions about future market size and growth, achievable market share, time frame, and other assumptions.

In our case, the financing supplier targeted growth from their current incidental \$10 million revenue in the segment to \$300 million in the first year of aggressive marketing. This target was based upon industry reports that projected the total market for personal services in this segment to be \$30 billion and their own assumptions that 10 percent of this total would be financed and that they could achieve 10 percent market share in Year 1.

To understand the feasibility of the market share goal and to estimate Inertia, it was important to evaluate the proposed value proposition relative to competitive offerings. The components of the current value proposition and alternatives were defined through internal discussions, and competitive intelligence research on competitors' Web sites, print ads and brochures, and in-depth market interviews.

Once the value proposition components are established, it is critical to document the tactical alternatives required to deliver them. There are two key steps in documenting the tactics. First, define the customer contact process as it applies to the business and its competitors over the life cycle of the customer relationship. Next, document the different actions that might be taken to execute each process step.

In the financing supplier example, the following customer processes were identified: pre-sales marketing, sales, customer support, and after-sales marketing. Within each process, a series of action alternatives were identified (see examples in Figure 6). For other businesses, the contact model may be more complex or more detailed than in this example.

Each tactic carries a different cost and a different expected effectiveness rate. Therefore, it is important to segment the market to validate, for example, where the more costly tactics are required and, if they are required, to allocate them to the high value/low Inertia segments.

3. Information gathering

Once the business issues are sufficiently defined, information gathering becomes a matter of identifying the appropriate sources and acquiring them within the time and monetary budgets. Many sources of information exist, but some information can only be created via custom research.

In the financing supplier case, a syndicated report was purchased prior

to the custom research design. A review of the report identified channel segments with businesses that were too small to be of interest and some that were outside the scope of the business strategy (e.g., government agencies). The report also identified a small number of very large companies that represented a high potential channel with a unique business model. These were excluded from the research, but, as a result of this finding, senior management immediately established a new corporate business development function to pursue this new opportunity.

A 20-minute phone survey was designed to measure satisfaction with current value propositions, behaviors and expectations that would affect volume projections, and other parameters. Integrating these data with the analysis of the syndicated report enabled the market opportunity structure to be defined.

4. Market opportunity structure

Once the information is assembled, the market opportunity structure must be established before diving into detailed analysis. Laying out the structure of the opportunity according to the business plan assumptions provides a check on those assumptions and directs the analysis into more fruitful activities. If this check is not performed, the analysis becomes biased by the initial assumptions, and the voice of the customer is compromised.

Figure 3 illustrates the opportunity structure for the financing supplier's market according to the business assumptions. The market is stratified by employee size, a variable that correlated well with the Value to the Business parameter from the strategic framework. Across the table, the market size projections are carried through using syndicated research, custom research and the business' assumptions. This tool is dynamic, and the business can make new assumptions or substitute segment research findings for the financing level and market share assumptions to adjust the forecasts.

Figure 3: Market Opportunity Matrix

	Employee Size	From Services Targeted By Financing Program ($B)	Expected Revenue Increase* Next Year	Projected Revenue For Next Year ($B)	Financed Revenue if 10% Level Reached ($MM)	Total for Segment at 10% Market Share ($MM)
Source	*Matching variable from both data sets*	*Syndicated Research*	*Custom Research*	*Syndicated and Custom Research*	*Assumption*	*Assumption*
Segments	Smallest	$0.7	10%	$0.8	$77.0	$7.7
	Lower Middle	$0.9	12%	$1.0	$100.8	$10.1
	Middle	$2.8	18%	$3.3	$330.4	$33.0
	Upper Middle	$6.7	22%	$8.2	$817.4	$81.7
	High	$10.2	30%	$13.3	$1,326.0	$132.6
	Totals	$21.3		$26.5	$2,651.6	$265.2

* No one reported an expected decrease.

The market opportunity view demonstrated one immediate finding: If the current business assumptions were correct, the financing supplier would not reach its goal of $300 million. Because the smaller businesses could contribute so little, the financing provider would have to shift its focus from a 10 percent market share goal across the board toward gaining a dominant market share within key segments of high volume accounts in order to meet its financial goals. The detailed analysis would have to focus on finding opportunities to achieve dominance among larger accounts; further analysis of the smaller businesses would be largely irrelevant.

The segment scorecard is another tool that helps focus the analysis (Figure 4). An initial scorecard is developed for the known segments, and is refined as the detailed analysis progresses. In this example, the scorecard has five components:

- size of opportunity;
- number of businesses in the segment;
- value proposition fit for the product components;
- value proposition fit for the support components;
- inertia.

The first two parameters are critical to framing the business strategy, as they provide a snapshot of each segment's value to the business and the potential cost to sell. For example, the Middle segment has the same number of businesses as the Lower Middle, yet holds three times the revenue opportunity. This has tremendous implications for sales force hiring and deployment; it may not be worthwhile to hire sales people to serve the lower two market segments.

Figure 4: Initial Segment Scorecard

	Highest	Upper Middle	Middle	Lower Middle	Lowest
Projected Opportunity	$132.6M	$81.7M	$33.0M	$10.1M	$7.7M
Number of Service Providers	50	400	425	425	550
Value Proposition Fit: Product	High	High	High	High	High
Value Proposition Fit: Support	Medium	Medium	High	High	High
Inertia	Low	Low	Low	Low	Low
Short Term Strategy					
Long Term Strategy					

The next three parameters indicate segment penetrability. In this case, the value proposition is divided into two sets of components: product and support. The satisfaction levels with the existing providers' current product features and support levels were analyzed, and the results indicated a strong fit for the new financing product across all segments. The financing provider's proposed product features in every case exceeded the levels the market claimed they currently received, and the satisfaction levels were mediocre. This established that they could successfully penetrate the market as far as product issues were concerned.

Finally, each segment had a low level of Inertia, a positive finding for the supplier. As a new market entrant, they could easily switch businesses to their financing plans. The product and service fits were good, especially compared to competition. Results from competitive intelligence activities and survey analysis revealed competition to be fragmented, and no competitor was in a position to respond to an aggressive threat.

Further analysis identified the best targets for switching within the employee size segments: channels already financing more than 10 percent of their revenue. These were more likely to switch and more likely to aggressively offer financing. However, for the 50 businesses in the top segment, current financing level was irrelevant: gaining a high share among them would be critical to achieving the $300 million goal regardless of the barriers presented by their current practices. Given this further segmentation, the market opportunity and segment profiles tools were revised, and the strategy came more clearly into focus.

Figure 5: Segment-Value Proposition Map

	Highest	Upper Middle/ High Finance	Upper Middle/ Low Finance	...	Lowest/ High Finance	Lowest/ Low Finance
High approval rate for financing	High	High	High	...	High	High
Low merchant cost per plan	Medium	Medium	High	...	High	High
Easy application process	Low	Low	High	...	High	High
Training support	Low	Low	Medium	...	High	High
Marketing support	Medium	High	Medium	...	High	Low
Customer support	Medium	Medium	High	...	High	High

5. Map segments to value proposition

Mapping the segments back to the value proposition is an important bridge between the segment analysis and the tactical plan. Figure 5 shows a simplified analysis of the segments versus aspects of the value proposition. In the case of the financing provider, it shows that the least desirable segments have the highest needs. The high cost to serve these segments makes them even less desirable.

Analysis of the most desirable segment poses a different challenge. They may be convinced to switch to the new financing supplier based upon product features, but once they are converted there is very little opportunity to build Inertia via other elements of the value proposition. As implied in the earlier analysis, this segment would require a whole new approach.

6. Map segments to tactics

During the documentation phase with the business planner, the anticipated tactical alternatives are identified. In the course of the market research analysis, other tactics may be identified to augment the original list. These tactical alternatives can be mapped to the segments and systematically evaluated with the business planner.

Figure 6 shows an example of a simplified segment-tactic map for one business process. In this case, the financing provider decided to address the top two segments via dedicated sales reps because of their high value to the business and their tenuous value proposition fit. To build value in these segments outside the current value proposition framework, it was necessary to dedicate someone to focus on the individual needs of each channel in the segment. This approach would build Inertia by continually identifying new needs that could be met and by developing strong personal relationships.

Figure 6: Simplified Segment-Tactics Map

SALES PROCESS	Highest	Upper Middle/ High Finance	Upper Middle/ Low Finance	...	Lowest/ High Finance	Lowest/ Low Finance
Dedicated rep	Yes	Yes	No	...	No	No
Independent rep	No	No	Yes	...	No	No
Direct mail to person who selects which financing company to carry	Yes	Yes	Yes	...	Yes	No
Direct mail to person who selects which financing to offer to a consumer	Yes	Yes	Yes	...	No	No
Phone follow up to direct mail	No	Yes	Yes	...	N/A	N/A
Tele-sales	No	No	No	...	Yes	Yes

7. Map tactics back to functions

Finally, the segment tactics must be mapped back to the functional areas that will implement them. If the customer contact model documented at the start parallels the functional organization, the translation is straightforward. However, it is likely that the segment tactics will deviate from the current organization structure. In the course of analysis, new tactics may be identified as well as new functions. In this case, the syndicated research identified a super-segment that required an entirely new sales function.

In the example, the seven-step process produced a more direct impact on the business than would have been achieved otherwise. The research design, analysis, and strategy development were structured to meet the total business goal of $300 million. A new segment of super-size channels was identified that required a new corporate function. A new customer relationship model was identified to serve the highest opportunity segments, and resources were directed away from low opportunity segments. Finally, the process produced a set of segment-specific actions matched to internal functions that enabled the business to immediately begin to execute its market entry plan.

To summarize, B2B research delivers maximum value when a structured process is executed that continually integrates the research and the business planning function. In the seven-step process discussed here, six tools are used to guide the research design and analysis: 1) strategic framework, 2) market opportunity matrix, 3) segment scorecard, 4) segment-value proposition map, 5) segment-tactics map, and 6) tactics-function map. Following this seven-step process results in research efficiencies and greater value of the research to the business.

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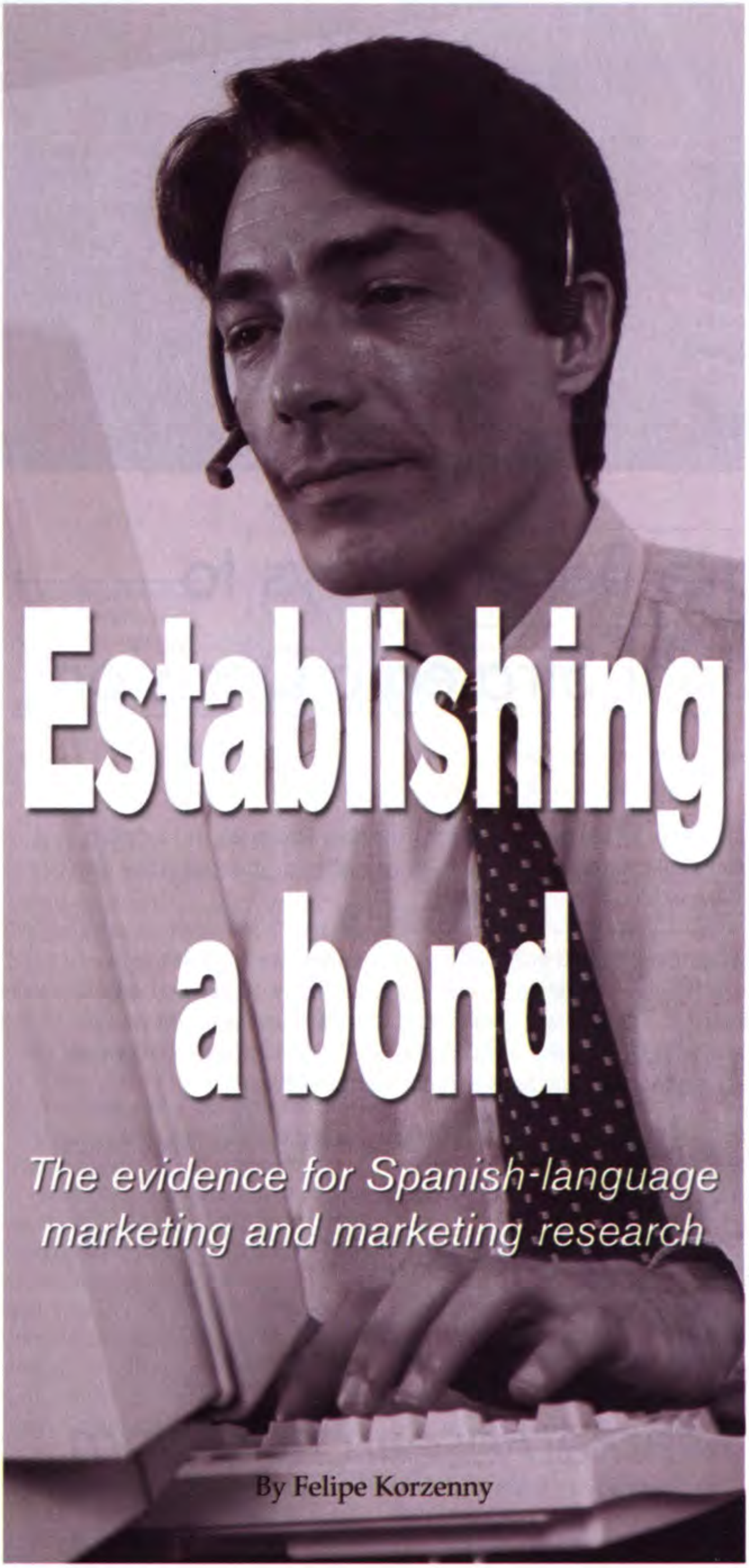

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Marketing to culturally-diverse targets is a discipline that has grown in sophistication over the past 20 years in the U.S. Most large U.S. companies now have the likes of an ethnic marketing department, a multicultural marketing department, or a special markets marketing department. These departments have to answer important questions when addressing specific culturally diverse markets.

One key question for those attempting to address the U.S. Hispanic market in particular has to do with language use and prevalence. After all, how do you address such a large market, particularly when there are so many perspectives and beliefs about the language that should be used both for marketing and for market research?

The conceptual importance of language

An initial consideration in the debate about the importance of language ought to focus on the relationship between language and culture. Communication is the basic process of culture. It is through symbolic interaction that members of a culture pass traditions, beliefs, and patterns of behavior from individual to individual and from generation to generation. Communication is the basic glue that holds a culture together.

Language is the basic tool of communication processes and it tends to be an integral part of the culture it emanates from. Thus languages reflect their cultures of origin in the words and varieties of words used for particular objects. This is why Bedouins have an ample vocabulary for types of sand, Inuits for types of snow, and Mexicans for types of hot peppers.

Languages also reflect the style of cultures. The rhythm of speech and

Hispanics: an essential market segment that enjoys surveys

By Jane Sheppard

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

The Hispanic population is the largest growing minority population in the United States. According to the 2000 Census statistics, one in eight people are of Hispanic origin, yet fewer of these individuals have ever participated in surveys according to the 2001 CMOR Respondent Cooperation & Industry Image Study. For the first time since CMOR (the Council for Marketing and Opinion Research) has been fielding the study, the sample of Hispanics was large enough to support some comparisons with the non-Hispanic population. The continuing growth of this ever-important segment of the population, with their differing attitudes and behavior, needs to be well understood by researchers in order to determine the most effective survey modes to reach them.

The Hispanics in our survey showed a more positive attitude toward surveys and polls. They seemed to understand the value of research and the benefit to them and to manufacturers. This group appreciates the opportunity to provide feedback, as evidenced in the fact that fewer Hispanics refused a survey in the past year than non-

the degree to which the language is synthetic or analytic reflect the character of the culture. Spanish is much more analytic than English, which is more synthetic. The Spanish language requires the use of many more words to communicate the same concept that takes only a few words in English.

If culture and language are strongly related, then a very important link to explore is the role of language in thinking. If language influences the way people think, then language spoken by people of a culture ought to shape in subtle and non-subtle ways how that culture differs from another in its thinking patterns. The well-known Sapir-Whorf hypothesis has been the subject of much debate and research over the past 80 years or so. Basically the hypothesis states that language determines or influences thought. What most scientists agree on now is that language may not determine thought, but certainly influences it.

If language influences thinking, then members of different cultures that speak different languages, or different varieties of a language, must differ in their patterns of thought. That is why communicating in Spanish or English with Hispanics ought to make a difference. Further, this argument suggests that Hispanics who do not speak Spanish anymore because they have replaced it with English or another language are themselves not as closely tied to the culture of their ancestors as those who speak Spanish.

What language do U.S. Hispanics prefer?

According to the latest Census figures there are about 35.3 million U.S. Hispanics. Several sources estimate

Hispanics.

The Hispanic cultures are generally known for their preference for face-to-face communication, where trust can be established more easily. This was reflected in their preference for in-person survey modes in malls, and focus groups conducted both in central locations and online, where group dynamics are key.

Telephone methods fare worse among Hispanics than non-Hispanics based upon respondents whose last survey experience was conducted by phone. They felt that the surveys were too long, the questions were too personal, and that the interviewer was less courteous and professional. This may stem from the lack of face-to-face contact or group dynamic; facility with English may come into play as well. The study was conducted in English and this distrust may not hold true if done in Spanish. It also could be more difficult to reach them by telephone since they use answering machines more frequently to screen calls than the non-Hispanic population.

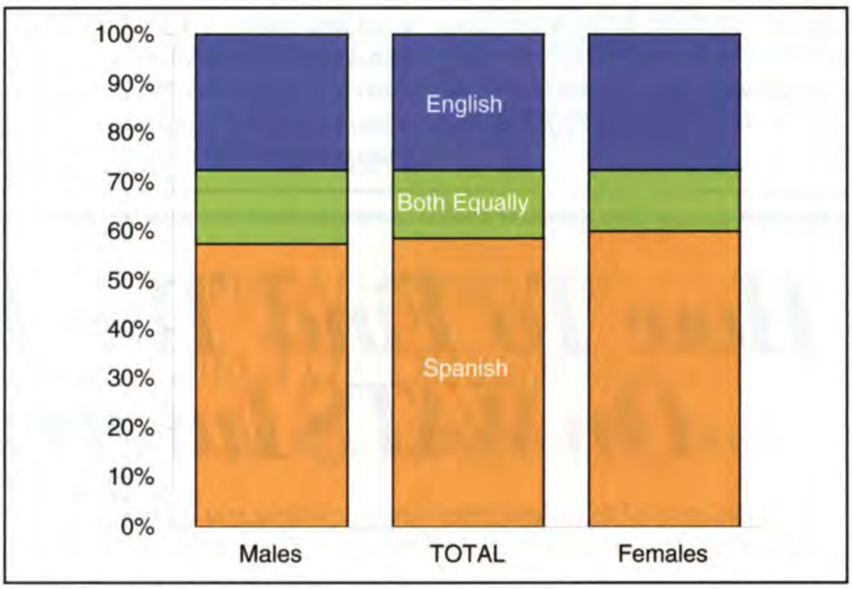
Researchers are recognizing that this ascendant population segment is an important target for products and services — well worth the different treatment they may require in market research settings. Hispanics show a very positive disposition to surveys and polls, and believe strongly in the results that are published. They are positively predisposed to TV and newspaper stories that use survey data and like to compare their own opinions with those published.

Our findings show that different survey modes are important to reach different populations and, despite concerns by some in our industry, the lower-tech "traditional" data collection techniques still have effective applications. In the Hispanic population, we have people interested in sharing their opinions with market researchers, especially through extended interpersonal sessions. This may well be a case of an incredibly important market segment telling the research industry, "Hey, let's talk."

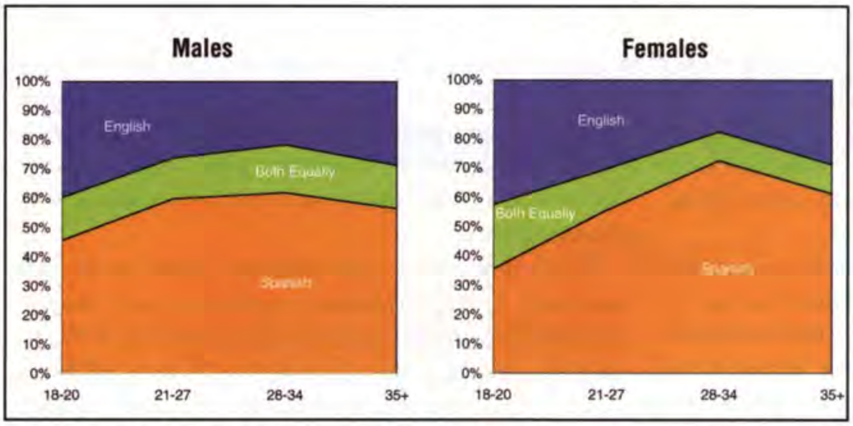
(For more information about the study, contact Jane Sheppard at jsheppard@cmor.org or 330-244-8616. Analysis conducted by Steve Everett of The Everett Group.)

that there are about an additional six million that are undocumented and difficult to pinpoint. Even the conservative estimate of the Census highlights the great magnitude and importance of the U.S. Hispanic market.

Understandably, most marketers and market researchers wonder about which language to use with this growing market. Have Hispanics largely acquired the English language and are thus reachable in English? The Census has not yet released language information, although it is estimated that will happen later in 2002 or even 2003. In the meantime, what can the marketing profession assume?



In interviews Cheskin conducted with up to 4,000 Hispanics nationwide in the U.S. we found that in the year 2000 about 70 percent of all U.S. Hispanics preferred to conduct a market research interview in Spanish (see graph on facing page). Further, when



asked about language of preference for communication when given a choice, 58 percent indicated they preferred Spanish, 27 percent said English, and 14 percent indicated not having a preference.

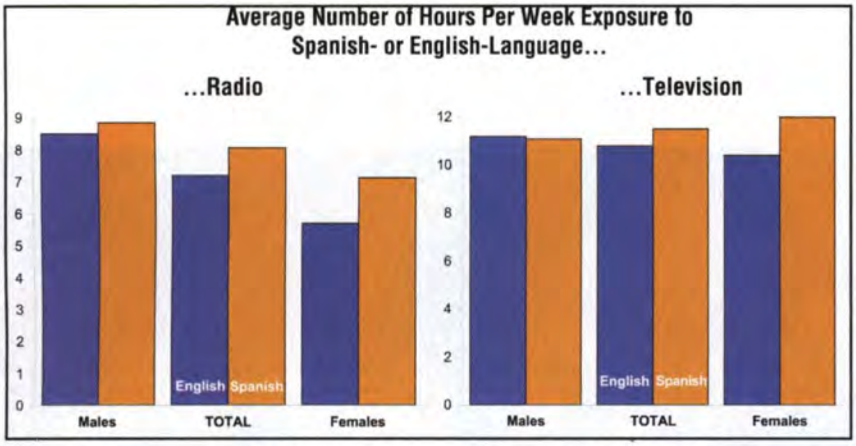
From these figures one would conclude that the Spanish language is more likely to reach the vast majority of these consumers. We could also assume, however, that younger consumers would be more likely to prefer the English language while older consumers would prefer the Spanish language.

Our data was surprising in this respect because there was a curvilinear trend in which males ages 21-34 and females 28-34 indicated a preference for the Spanish language over any other age group as indicated in the graphs above.

This tendency is puzzling, as the most obvious assumption is that younger Hispanics are most likely to learn English and quickly adapt to the U.S. culture. This data, however, suggests that there are other elements at play. A year 2000 Census brief indicates that as of 1997 10 percent of people in the U.S. were born abroad, and that about half of them were from Latin America.

This explains why younger Hispanic adults, particularly males, are those most likely to prefer communicating in Spanish more than any other age group. These are the young immigrants that come to the U.S. in search of better lives. Once established, they then bring their families to the U.S. This revelation makes it evident that marketing to young Hispanic adults in English is not a given, but a very relative proposition.

Media exposure measures provide additional food for thought. In the year 2000 U.S. Hispanics indicated being exposed to an average of 11.5 hours per week of television in Spanish and 10.8 hours in English. This is remarkable particularly because opportunities for watching Spanish language television in almost every market are very few compared with English options. Similar findings held for radio exposure where average Spanish language exposure is slightly above the average



for English language radio listenership (see graph above). These media preferences highlight not only the practical but the emotional links between in-language media and these consumers. It will be of great interest to observe how the new trend in Spanish language media growth evolves. Will the advent of Telefutura, mun2, Televisión Azteca, and Hispanic Television Network increase Spanish language television exposure by offering additional choices?

For marketers and market researchers, these trends have important implications:

• Marketing in Spanish continues to be an important way of reaching the largest numbers of U.S. Hispanics.

• Reaching the majority of Hispanics in Spanish is not just a practical issue to aid comprehension; emotion seems to be more strongly tied to Spanish than to English.

• Conducting research with Hispanic consumers must provide the option for Spanish-language interviewing and discussion so that the majority of Hispanic voices are heard.

• In uncovering cultural trends of importance to marketers, the language in which research is conducted will likely impact the findings.

• Questionnaires and other research instruments must be culturally adapted to reflect intended meanings that literal translations are likely to miss.

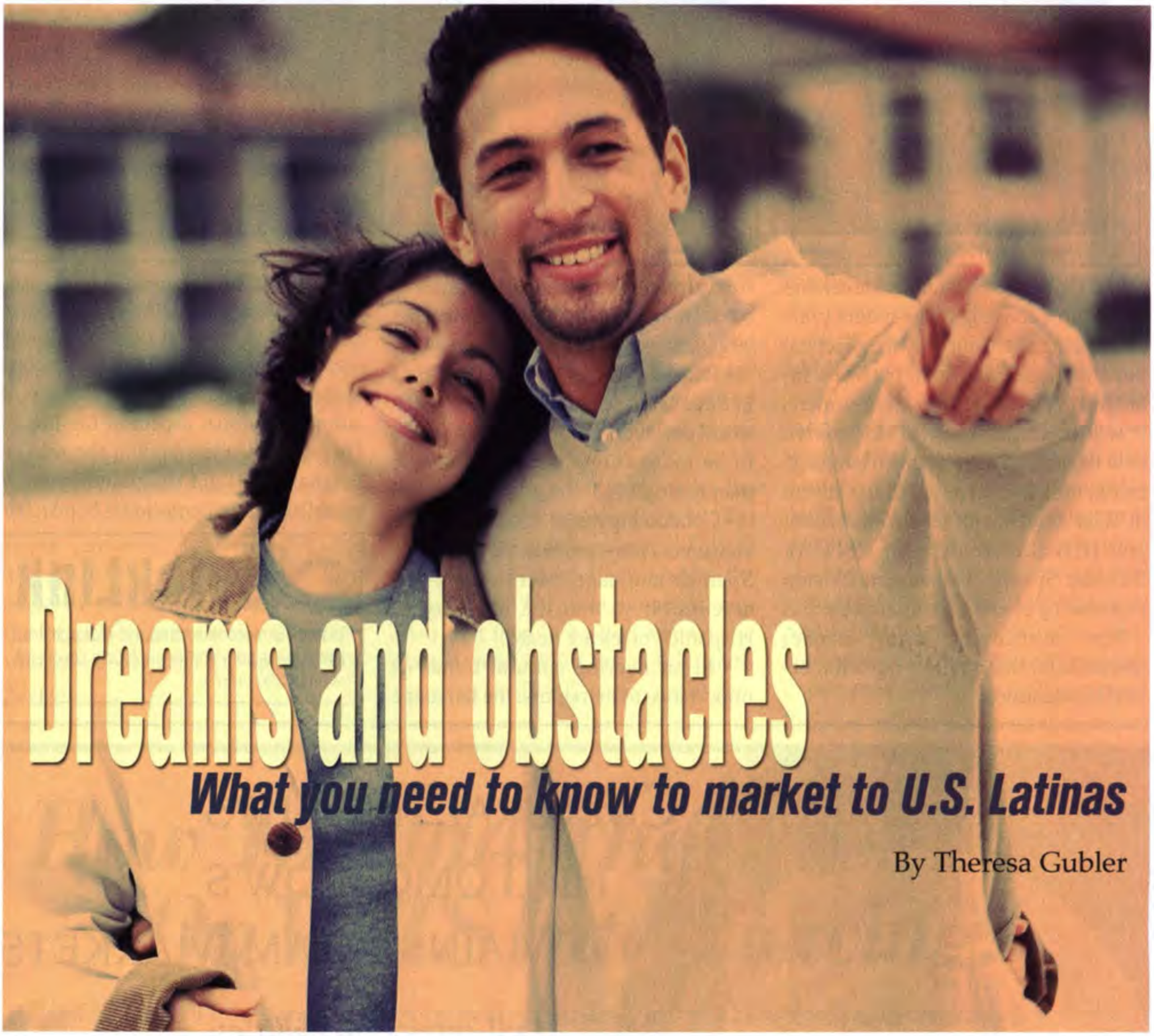
• Since language and culture are strongly related, researchers that aspire to uncover deep meanings in consumers need to be members of the culture, not just speakers of the formal language code.

Establishing links

Think about it! Marketing and market research is about uncovering and establishing emotional links with consumers. The Spanish language is a strong emotional aspect of the life of Hispanics. Understanding the role of language will aid the practitioner in establishing that emotional bond.

QuickLink

To find out more about Hispanic research, visit www.quirks.com and enter Article QuickLink number 330 or 579.



Dreams and obstacles

What you need to know to market to U.S. Latinas

By Theresa Gubler

Editor's note: Theresa Gubler is an associate of La Agencia de Orcí & Asociados, a Los Angeles advertising agency. For more information visit www.laagencia.com.

With the release of the 2000 Census numbers, U.S. marketers have been confronted with data they can not ignore. As never before, corporate America is now faced with the challenge of how to successfully market to the 34 million Latinos who call the U.S. home.

Research and research analysis is playing an important role in helping marketers ascend this learning curve. Research continues to reveal why marketers should address the U.S. Latino consumer (profits to be made) and how it can be done successfully (high returns on investments).

La Agencia de Orcí & Asociados (Orcí & Asociados), a Los Angeles Hispanic advertising and marketing agency, has completed a research study entitled "Dreams & Obstacles, Understanding Latinas." Through this study, La Agencia has confirmed how Los Angeles Latinas represent enormous economic potential. The study also portrays how Latinas are realizing their dreams while facing the challenges of being a dual minority for whom culture plays a profound role.

Orcí & Asociados' research objective for the study was, while experiencing firsthand the pulse of Latinas in Southern California, to identify consumer insights that could be used to strengthen marketing programs for its clients. Many ideas and theories have been tossed around about the U.S. Latina. The study's findings confirmed, substantiated, and organized the definition of the U.S. Latina and provided analysis on how to better communicate with her. Due to the types of issues that were covered and the diversity of the ethnic sampling for this study, the findings may be reasonably applied to Latinas across the country (see chart).

Six focus groups were conducted in

San Diego's Premier Focus Group Facility

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Feature	City View	East View	Bay View
Conference Room with Ledges	20 x 16	19 x 17	18 x 16
Tiered Viewing Room	15 x 16	14 x 17	16 x 16
Viewing Seats	12	16	20
Client Office (PC, Fax, Modem, Voice, Copier, Printer)	Yes	Yes	Yes
Voice Line in Conf. & Viewing	Yes	Yes	Yes
Complimentary Static Video	Yes	Yes	Yes
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Private Client Entrance	Yes	Yes	Yes
Video Conferencing Available	Yes	Yes	
Separate AC for Conf. & Viewing		Yes	Yes

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Latina Women by DMA and age category (000)*

Age	LA	NY	Miami
18+	1,988	1,256	597
12-24	704	334	117
18-34	871	446	167
18-49	1,511	879	346
21-49	1,351	803	319
25-54	1,276	812	343
50+	477	316	251

*Nielsen 9/00

the agency's on-site Los Angeles facilities. The agency utilized on-staff, credentialed focus group leaders. The groups consisted of U.S.- and foreign-born Latinas from Mexico, Guatemala, Nicaragua, Cuba, El Salvador, Colombia, and Argentina. One group each was conducted with 10-11-year-olds; 15-year-olds; 18-30-year-olds; and 30-50-year-olds. Two groups were held to question Latina professionals. In addition, Orcí & Asociados conducted extensive interviews with teachers and market researchers and compiled and analyzed quantities of secondary research, both qualitative and quantitative.

The study confirmed that U.S. Latinas are succeeding in leading their families into the middle-class. They are the engines driving the small-business sector. They are improving their education and job competence. They are making great strides, despite difficult obstacles. Latinas are resolute despite the major obstacles they face.

Inside the home

Inside the home environment, the U.S. Latina's strength is represented by her role as manager of the household budget. She is the family CFO and purchasing agent. She also manages family routines and focuses on maintaining family values. Fact: Latinas represent the largest percentage of female heads of households in the U.S. — 24 percent vs. 13 percent of general market (survey, March 2000, PGP-4, 2005 Projection, DRI/McGraw-Hill, 1995).

Outside the home

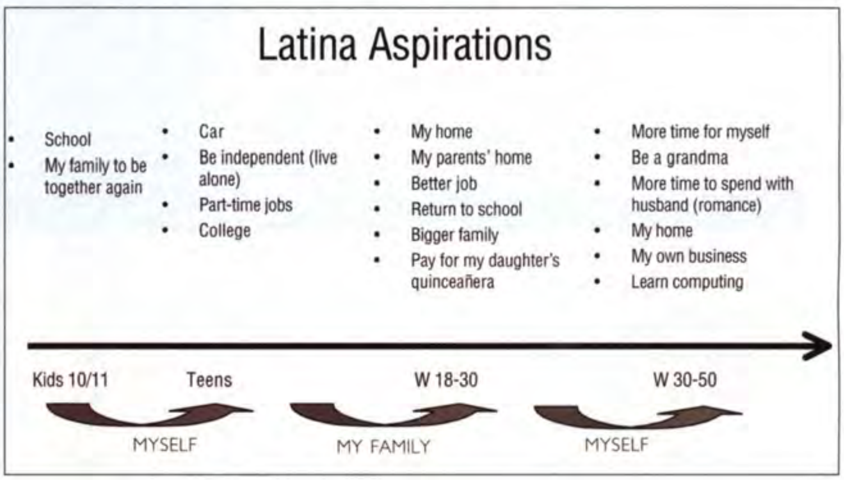
Outside the home environment, U.S. Latinas' volition is illustrated by highly successful entrepreneurship. Typically, after fulfilling their family obligations, they burst through the concrete and blossom into career women. They want to control their own destiny, improve their economic situation and achieve greater flexibility. Fact: In 1996, 382,400 Latina-owned businesses generated sales of $67.3 billion ("The Spirit of Enterprise: Latina Entrepreneurs in the U.S.," May-June 2000; the National Foundation of Women Business Owners and sponsored by Wells Fargo).

Lifestyle elements of the study

The study also provided insights about the U.S. Latina in regards to the lifestyle elements: family environment, education, the future, shopping, Hispanic heritage, role models and advertising. It also examined in depth the different levels of aspirations that a U.S. Latina goes through as she ages.

The research substantiated that Latinas want to take control of their lives and of their dreams. They want to be more self-centered and able to focus on what makes them happy. Latinas believe in the future, possess many strengths and are full of hope, anticipation, ambition and self-awareness.

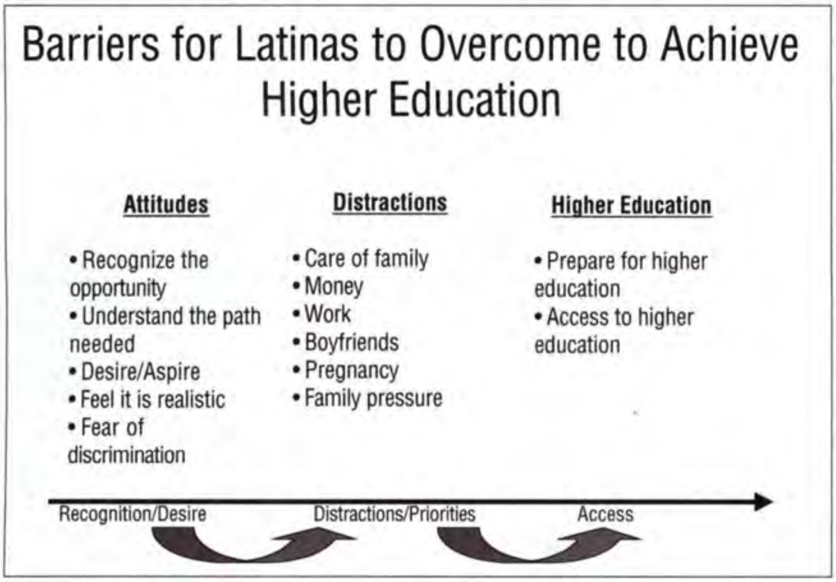
For U.S. Latinas, the concept of "family/mother sacrifice" is translated into self-imposed guilt and a sense of responsibility towards family. As one focus group participant expressed, "I have to return to my family all they have done for me." This guilt, plus living in a bicultural world, takes the U.S. Latina through a faster maturity process. By causing her conflict when she's faced with making decisions on factors such as shopping, education, and the profession she would like to pursue, this guilt also effects her ability to accomplish her dreams.



U.S. Latinas face duality in all aspects of their lives. Marriage is a beautiful state, but interferes with their dreams. Education is essential, but other duties make it difficult to incorporate it into their lives. As for their career role models, they have deep love and loyalty for their parents, but they do not aspire to be like them. U.S. Latinas wish to go beyond what their parents have accomplished.

Challenges

As the "Latina Aspirations" chart shows, Latinas want to get an educa-



tion, earn a good income and have a family. However, living in a bicultural world, they sometimes experience conflicting influences that pull them in opposing directions. There are social pressures to marry early and raise children. Although Latinas have ambitious dreams, they face difficult social obstacles to reaching their dreams (see chart). This results in a segment of the U.S. Latina population that is undereducated and underpaid in the workforce.

Solutions

Latinas need to accommodate all the influences in their life. As covered earlier, they are being pulled by two different worlds and have to keep the influence of each alive. They need to find a balance that will allow them to fulfill their potential and prosper without losing the essence of their culture and their identity. Latinas need accessible support systems to get them over the academic and emotional obstacles while helping them see education as an integral part of their future.

Based on the findings from this study as well as its experience marketing to the U.S. Latina, Orcí & Asociados recommends that advertisers commit to branding communications programs that respond to Latinas' stated aspirations and acknowledge their needs and wants.

Corporate/branding communications programs should:

• include role models who show that professional careers are rewarding, achievable options;

• portray the Latina image in a positive way, show a wider spectrum of beauty to help them accept and love who they are;

• demonstrate that professional success is compatible with family;

• acknowledge the constant struggle Latinas go through in modern times while keeping traditional ties.

As an example of a corporate/branding communications program, corporate sponsorship could provide support and encouragement in attaining educational and career goals through:

• offering practical alternative resources for child care;

• creating full-time employee programs;

• providing financial aid/loans;

• establishing mentoring programs;

• supporting recruitment and internship programs;

• organizing field trips to universities and colleges so that students and families become familiar with the academic system.

In conclusion, research continues to play an important role in helping marketers plan and execute their communications programs, especially in regard to new or emerging markets such as the U.S. Latina. Many marketers are just now discovering this substantial target market, a valuable group of consumers who may represent one of the final frontiers in expanding a company's market share.

Establishing a comfort level

Rapport is the root of qualitative research

By Jim Eschrich

Editor's note: Jim Eschrich is president of Catalyst Qualitative Services, Inc., Lenexa, Kan. He can be reached at 913-599-1131 or at CatalystQ@aol.com.

There are a lot of interesting new ways to engage research respondents. Many seem as attractive as a shiny new toy, and can bring variety to the moderator growing weary of repetition, and in need of stimulus.

But the fact remains that establishing and maintaining rapport is the foundation upon which all interactive research is based. It is the most important aspect of a moderator's job.

Basically consumer research involves conversing freely with people. It is all too often focused on subjects that normal people don't talk about in their everyday life. The moderator's job is to unearth attitudes, values, motivations, and behaviors in relation to certain subjects — often in spite of respondents' contention that they've never thought about it, they have no opinions, or they have nothing of value to report.

Rapport is the medium that makes research work. A moderator develops a free and easy sense of discourse about anything with respondents. These strangers meet and are helped to a common ground through the ease of rapport. In a comfortable, non-threatening, lively place, they can talk about anything at all — about sausage, insurance, tires, baked goods, magazines.

Rapport means a relationship marked by harmony, accord, or affinity. It comes from the French word *rapporter*, meaning to bring back, and, more remotely, from the Latin *aportare*, meaning to carry. Its etymology offers an interesting root word metaphor that ties rapport to bridge-building, creating back-and-forth, reciprocal relationships through external support.

In research the moderator is the bridge builder, and rapport is the bridge between people's everyday lives and the client's business interest. Sometimes it seems like helping people hop over a stream; sometimes it's

like a tri-span trestle in a strong wind.

One fallacy, in my opinion, is that rapport either exists or it doesn't — there's really nothing the moderator can do. Not true. There's a lot a moderator can and should do. This may be obvious to regular practitioners, but it doesn't hurt to preach to the choir about the ways and means to establish and maintain rapport with respondents.

Here are some things that I do, as I focus on rapport.

Warm up

Ask personal questions during warm-up. Get to know them as people first, then as consumers. Ask about their kids, applaud their anniversaries or birthdays. Inquire about the schools they attend, the courses they're taking. Get personal. Also follow up on a statement by a respondent. I recall a woman who simply said she was a computer software programmer, taking college courses at night. I asked what field she was studying. Only then did she reveal that she was studying to be a teacher, an ambition that she had always harbored. She was three years into the program, and was planning on a complete career change when she graduated the following year. This revelation went a long way toward modeling open disclosure and comfort in personal discussion.

Include yourself

By the same token, it helps to include personal information in the first round of introductions. If you expect revelations from them, you should reveal a bit about yourself. I usually say where I'm from, that I'm married for 10 years, and that I have two girls aged eight and four and reside in Kansas City. If I've asked for some background information that I expect from them, I'll reveal it as well — whether I've been in a hospital recently, or bought a new car, or whatever single fact that I've used as an ice breaker. It's a simple method, but it breaks down the artificial barrier between moderator and respondent.

Ask for help

Don't be afraid to ask respondents for assistance in the process of the research. It helps rapport if they're up and moving around, and feel comfortable in the space. Ask them to pass out stimulus, keep time, pin things to the wall, or take notes. This small involvement opens the two-way involvement in the relationship.

Getting help can also keep it light. You are often unfamiliar with the local community and its attractions — ask advice, be a tourist, request help. Putting yourself in a dependent relationship gives respondents a sense of knowledge, confidence, and leadership that may ease the transfer to the topic at hand.

Check for comfort

Make sure that respondents are physically comfortable. Inquire if the temperature in the room is adequate; get soft drinks, pass around cookies. Allow respondents to move chairs so they are relaxed without interfering with others. The key is to ask and then do something about it — adjust the temperature, close the curtains, or whatever is appropriate.

Raise topics

Raise topics for discussion in addition to asking probing questions. Saying "Tell me about..." gives the respondent a chance to frame an answer in his or her own experience. The response can be a story, a personal experience, an attitude, advice, or a thought. It's open-ended and simply invites discourse, rather than being pointed and confrontational. Questions are important, but when initially raising an unfamiliar topic, they may seem confining. Respondents sometimes seem to feel that there are right or wrong answers to questions, and so they hesitate to embarrass themselves. There is no judgment associated with "Tell me about..." It's simply curiosity and inquisitiveness.

Join the group

Feel free to sit among the respondents, becoming one of them. It can break down the formality of the situation to take an empty seat next to someone talking as you move about the room. This simple act can go far to break down the artificial barriers between the strangers in the room.

Listen

Listen to the content of their comments, and reference things respondents have said by name. "Fred, wasn't it you who said that you had a good experience with Fleck Insurance?" Nothing shows that you are actively listening more than playing back specific content to the person who said it — for clarification, or as a counterpoint.

Also, listen to all they say. There may be important signals in a preface like "I'm not sure, but..." before an explanation. You might focus on the preface and explore — "Joan, you began with the phrase, 'I'm not sure.' That interests me. What part of this are you unsure about? What could someone do to reassure you?"

Encourage and protect

Encourage and protect respondents who dare to stray from consensus. Often in our warm-ups we encourage diversity of opinion. It's a lot to ask of a group of unfamiliar strangers who aren't there to be confrontational (well, they're not all there to be confrontational — some usually fill that role to the hilt!). They're not there to be criticized or ignored. We are asking them to step out of the bounds of normal propriety and stick to their guns on an unpopular opinion rather than safely staying quiet. This can be the most important aspect of rapport-building, and the trickiest. It takes special tact to encourage diversity of opinions. Sometimes I look for body language — if I see someone slightly shaking their head, or looking down, or somehow sending a signal that they do not agree with what others are saying, I'll pursue it: "Mary, you look like you may disagree. Do you have a different point of view?" Even if Mary agrees, you've given credibility to other opinions, and you've validated your initial request for unique points of view.

Lighten up

Lighten things up with humor. Laughter is energy. It goes a long way to helping break the ice and pick up the pace. Encourage humor from others, and enjoy yourself as well. Self-deprecating humor can be more successful than focusing on any of the respondents.

Use body language

Show that you're interested in what they're saying. Reinforce the importance of each person's contribution by the way you hold and position yourself. Lean forward, nod your head, turn your entire body toward the speaker, giving them your full attention.

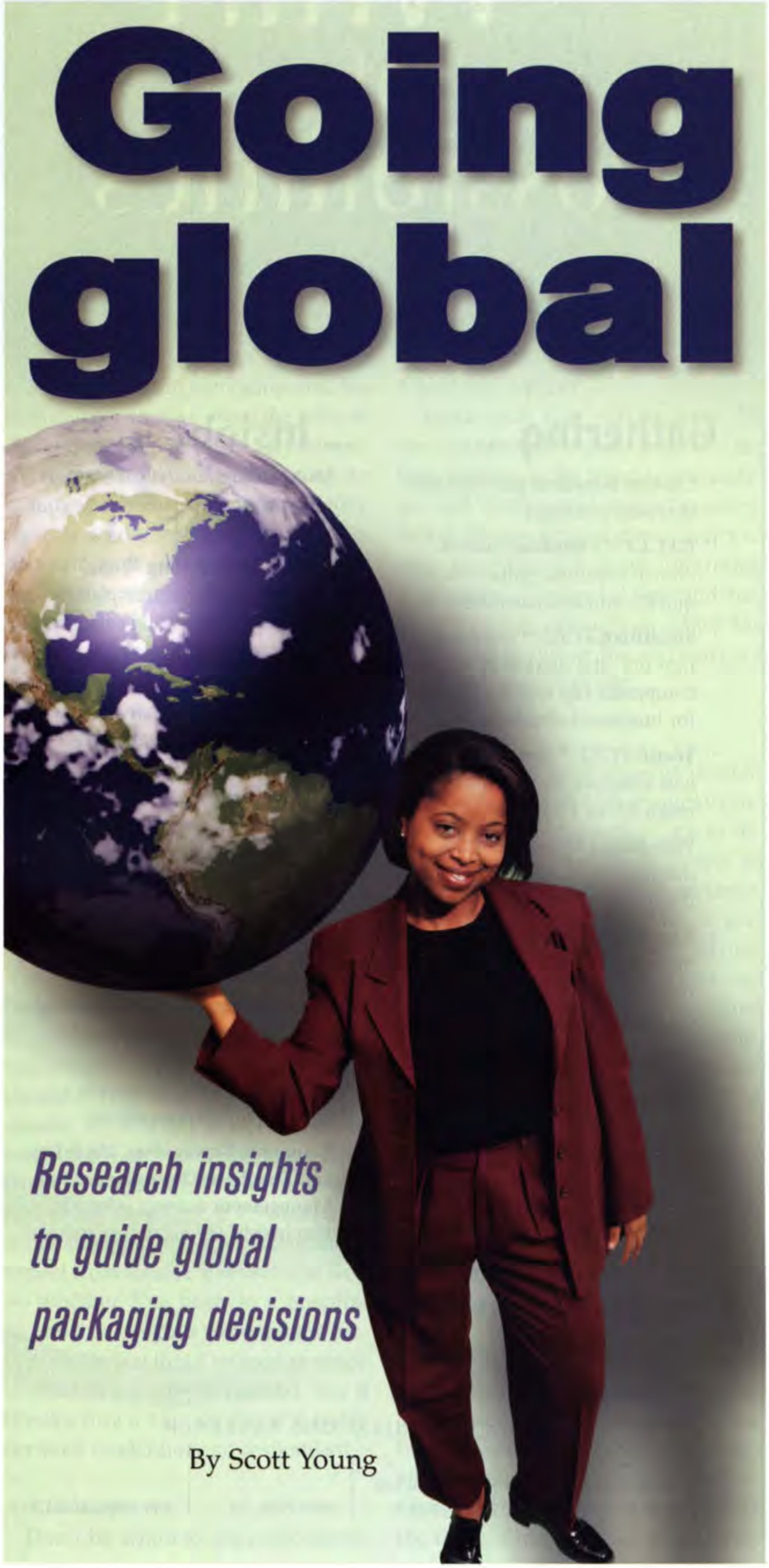
It's about the subject matter

One caveat: It's not all about you, it's about the subject matter. You're the bridge-builder to get to their values and attitudes; you shouldn't color the content. The tips and checkpoints for rapport that I've presented above are not meant as a means to focus on the moderator. Rather, the intention is always to focus on the subject at hand, to gather the right respondents in a comfortable environment to reveal obvious and discover not-so-obvious, subtle opinions and reactions. It's a human interchange, and the best way to conduct a realistic interchange is to be human yourself. Involve yourself, engage yourself, listen actively, encourage dissent, focus on results, and enjoy the process.

With effective rapport, you can often watch the discussion take on a life and energy of its own. Some of the peak moments in moderating for me have been without me — watching a group manage itself, and carry on a pointed, energetic, focused conversation about the subject. All I have to do is keep them on schedule and get them out on time.

The bottom line: research is better when people are talking to someone who cares, someone they can trust, someone with whom they have a sense of rapport.

Going global



Research insights to guide global packaging decisions

By Scott Young

Editor's note: Scott Young is president of Perception Research Services, Fort Lee, N.J. He can be reached at syoung@prsresearch.com.

Our company specializes in packaging research and, lately, more companies are asking us to help them develop "global packaging" for their brands. Generally, this means a single design system, in which text can be translated into local languages.

Global packaging certainly offers tremendous benefits in terms of economies of scale. More importantly, it just makes sense as our world becomes smaller and consumers' attitudes and tastes become more universal. However, marketers also face a minefield of challenges in developing effective global packaging, given that competitors, retail environments and, most importantly, customers and their attitudes, vary from market to market.

With these challenges in mind, I'd like to share several insights gathered from our research, along with some guidelines for evaluating global packaging systems.

Developing effective global packaging

In developing global packaging, marketers should be skeptical of broad generalizations across products, categories and countries, particularly "can't do" statements such as "Red packaging doesn't work in Brazil." Generally, the right packaging solutions are specific to a particular brand and its situation and we've found that breaking convention is often what leads to breakthrough packaging. However, our studies have also shown that the fundamental principles of effective communication are consistent worldwide and that marketers would be best served by:

Communicating visually

In any culture, people acquire their

information primarily through pictures and visual icons. In fact, our eye-tracking research has shown that shoppers spend over half of their time on the visual elements of a package, a figure that is typically consistent across markets. With respect to specific visuals, I can offer two interesting anecdotes:

• "Lifestyle" visuals (particularly pictures of people) are very difficult to do well. Often, people interpret them quite literally/narrowly and end up telling you why they are not like the person in the visual. Multi-cultural "collages" (one Asian woman, one Black man, etc.) are also frequently dismissed as overused.

• Product visuals are critical, even in categories and cultures where the product is frequently displayed at retail. If nothing else, it provides a reassurance that the right product is in the box, and minimizes the likelihood of opened boxes that can't be sold.

"Owning" a color or a unique shape

Because people are primarily visual (and translations are a very inexact science), non-verbal symbols are vital to convey branding and messages across cultures. "Owning" a color (such as Kodak yellow or IBM blue) is one effective strategy and a powerful way to help insure visibility, consideration and brand recognition at retail.

• Color can also be an effective way of differentiating products. In introducing a new global packaging system for its four sub-brands, Motorola found bright colors consistently signaled products for home/personal use, while darker colors suggested products for business use.

Shape can also be an effective tool in differentiating from competitors and battling "knock-offs," as local companies are often unwilling or unable to change their production processes to replicate a structure. Importantly, we've also found that a package's shape says a great deal about the "personality" of a brand. One prominent and familiar example is Coca-Cola's contoured bottle, which the company found to invoke a sense of nostalgia and to be linked to many shoppers' positive associations with the brand.

Keeping it simple

Our research has also shown that the time people spend with a package is generally not related to the amount of information on the label. This means that when more messages are placed on a label, it decreases the likelihood that any single message will be seen and read. Therefore, marketers must identify the three or four key points to be communicated at retail and prioritize accordingly.

• Interestingly, Asia appears to be an exception to the "keep it simple" rule. While people in most countries typically associate design simplicity with ease-of-use and sophistication, the Japanese are more comfortable and familiar with louder and busier packages, particularly for technology and software products.

Allowing some local customization

As you might assume, the critical selling points for a specific product often vary by market, depending on the competitive set and the market's level of development. For example, a certain feature (low fat) may differentiate a product in one market, but not in others. For this reason, the best global packaging systems are often those that present a consistent global look but allow for some flexibility by market. For example, they may mandate the number and positioning of messages (i.e., four bullet-points in the left column), but allow each market or region to decide on which messages to place on the label.

Speaking with customers

To develop effective global packaging, or to ensure that a packaging system will work around the world, marketers must start with their customers. From experience, I can offer two important guidelines for doing so effectively:

• Show each person only one packaging design for your brand. The most accurate findings come from monadic studies, in which each person is shown only one packaging option for a product, and responses from the people who saw Option A are then compared to those from people who examined Option B or those who saw Option C. Packaging "beauty contests" (in which several designs are placed in front of a shopper and he/she is asked to pick a winner) often provide misleading results. All of the options may be terrific or all may be poor, but one will always emerge as the best. Since people will never see different packages for the same brand, these side-by-side comparisons also tend to take people away from their perspective as shoppers evaluating a product. Instead, they become art directors and focus too much on design aesthetics. This is important, because one lesson we've learned is that as that the most attractive package design is not always the most effective packaging design.

• Use consistent research measures globally...but interpret findings locally. When conducting global research, it is important to remember that the basic criteria for packaging effectiveness are universal. Whether in Bangkok or Boston, a package must be noticed in store, convey key messages, and ultimately generate purchase interest. Therefore, a consistent research methodology (which addresses visibility, communication, and persuasion) should be used in all markets.

However, within each market, a brand's packaging should be judged relative to its competitors. Ratings are only relevant in the context of a customer's other choices and people in different cultures tend to evaluate things quite differently. Therefore, mandated absolute "scores" in each country (such as "The packaging must have 50 percent purchase interest in each country") often don't make sense. A more appropriate approach is to use a consistent competitive objective across markets ("top quartile in the category").

"Selling in" global designs

Finally, I should mention that "selling" a design to your customers is often only half of the battle. In most companies, introducing global packaging requires addressing the sensitivities of local marketers, who nearly always have their own priorities. While consumer research can be valuable in getting a company past the competing opinions of regional marketing directors, it is also important to consider which packaging systems are shown to customers. Specifically, we have found two common problems:

• Local marketers are nearly always resistant to having the "home" or headquarters country's packaging system forced upon them.

• Attempts to "blend" existing designs (introducing a combination of the European and North American package) often lead to watered-down, lowest-common-denominator packaging that is deficient in every market ("global mediocrity").

Given these realities, we've found that entirely new design systems often have the best chance of winning with both customers and your company's regional marketing executives.

Research Industry News

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Eastern Europe to include the Federal Republic of Yugoslavia. The newly established GfK Belgrade has started up its activities in the Federal Republic of Yugoslavia and has taken over the business of **Fokus Marketing Research**, the third-largest market research organization in the Federal Republic of Yugoslavia at the time.

The GfK Group has also acquired major segments of **PMSI**, a U.K. company owned by IMS Health which specializes in health care research. The services taken over by GfK include using tracking instruments to measure the impact of communications on general practitioners and hospital doctors, and PMSI's omnibus survey instrument, Generator, for ad hoc surveys of doctors.

GfK also acquired the business division of **IMS Health** in the U.K. and Ireland which focuses on providing services to the veterinary industry. The core feature of this division is a retail panel which records veterinary products bought by vets in the U.K. and Ireland.

In organizational terms, these two acquisitions form part of GfK's majority shareholding in Martin Hamblin GfK, which was acquired in 2001. This trades under the name Martin Hamblin GfK Health Care Ltd. and has a target total revenue of 4 million euros for 2002.

Aegis Group plc, the media communications and market research group, has acquired **Market&More**, a full-service research company with operations in Germany, the Netherlands, Belgium, and France. The initial consideration of 6.0 million euros is payable in cash on completion; there is also deferred cash consideration, subject to performance criteria, payable over the next three years. Market&More had revenues of approximately 13.5 million euros during the year ended December 31, 2001.

Separately, Aegis has also acquired an effective 25 percent interest in **The Filter Group**, a marketing consultancy company with offices in Singapore, Hong Kong, and Bangkok. The initial consideration comprises £0.3m cash payable on completion. Additional consideration may include an issue of 109,178 Aegis shares in January 2005. In addition, there are put and call options over the remaining 75 percent exercisable in 2005 payable in cash based on performance criteria.

U.K.-based **Business & Market Research** (B&MR) has become a member of **Wirthlin Worldwide**, a strategic research and consulting firm. The addition of B&MR's 120 employees makes this the largest acquisition in Wirthlin's history. Andrew Vincent has been named managing director of Wirthlin-Europe, Ltd. B&MR will merge with Wirthlin's existing operations in London and Brussels. Initially, the U.K. operation will be known as B&MR, a member of Wirthlin-Europe, Ltd., and after a transition period it will assume the name Wirthlin-Europe, Ltd.

Call_Solutions.com, Inc., a Waukesha, Wis. CRM firm, has acquired **Service Strategies International, Inc.**, a Dallas marketing research company. Pam Borders, who founded SSI in 1988, continues as CEO.

Alliances/strategic partnerships

As part of a strategic alliance with Illumitek, Inc., a Herndon, Va., software firm, Chicago-based **Research International** has deployed illumitek's nVIZn business intelligence product in Research International's marketing information distribution system, Torii, to deliver enterprise-wide marketing intelligence applications to their customers.

Cincinnati-based **Burke Institute** and **Burke, Inc.** have entered into a joint venture to combine the ACNielsen Burke Institute and Burke's The Training & Development

Center under one organization to be named The Burke Institute. This joint venture will bring together the faculty and course content from both organizations. The Burke Institute will be based in Cincinnati.

SPSS MR, Chicago, has signed a deal with Cincinnati-based Language Logic to become an official distributor of Ascribe, Language Logic's online coding system. Customers access Ascribe via their Web browsers and can code responses from any type of survey.

The Penton Electronics Group, Hasbrouck Heights, N.J., has signed an agreement with **Merrill Research & Associates** to provide a range of qualitative and quantitative research services for technology marketers in the electronics OEM. The parties said they plan to co-brand two major syndicated research projects in 2002, and will work jointly on several vendor-sponsored projects throughout the year.

Spatial Insights, Inc., a Vienna, Va., GIS firm, has formed a strategic alliance with Mapping Solutions, LLC under which East Lansing, Mich.-based Mapping Solutions will act as a value-added reseller for Spatial Insights.

Awards

Survey Service, Inc., Buffalo, N.Y., presented its first annual Beatrice J. Gorbaty Award of Excellence to Shirley Brodsky Adler, a Survey Service senior project manager. The award was created to honor Survey Service Founder Beatrice J. Gorbaty and to recognize an individual who exemplifies her standards, values, and leadership qualities.

New accounts/projects

ACNielsen U.S., Schaumburg, Ill., has become Winn-Dixie's preferred provider of syndicated sales information and consumer insights. Under the agreement, Winn-Dixie also becomes a user of Category Business Planner, ACNielsen's category management intelligence system, and the ACNielsen Homescan consumer panel suite of syndicated applications.

Chicago-based **Information Resources, Inc.** (IRI) has reached an agreement with PepsiCo to fold in the Quaker Oats Company to the existing contract which includes Pepsi-Cola, Tropicana Products, and Frito-Lay. IRI will continue to be the company's primary provider of UPC scanner-based information and consumer insights through December 2005.

New companies/new locations

Target Market Research Group, Miami, has changed its name to **Encuesta, Inc**.

Japan-based **Video Research Ltd.**, has opened a new company, Video Research International (Thailand) Ltd., in Bangkok. The new company will offer a range of marketing information services in Thailand and will bid for the national television audience measurement service contract.

Former HMR and Associates employee Vicki Phillips has taken over the HMR and Associates focus group facility at 2904-A Tazewell Pike, Suite A, Knoxville, Tenn., 37918. The facility includes a viewing room accommodating up to 14 clients, a conference room seating up to 15 respondents, and a kitchen for food testing. For more information call 865-546-7678 or e-mail vphilips@bellsouth.net.

Company earnings reports

New York-based **Jupiter Media Metrix, Inc.** announced results for the fourth quarter and year ended December 31, 2001. Revenues for the fourth quarter were $14.5 million, compared to $38.5 million for the fourth quarter in 2000. Revenues for the year ended December 31, 2001 were $89.2 million, compared to pro forma revenues of $142.8 million in 2000. Contract value, defined as the annualized value of all subscriptions at the end of each period, was $54.1 million on December 31, 2001 compared to $120.5 million on December 31, 2000.

Net loss for the fourth quarter of 2001, excluding amortization, was $10.4 million or ($0.29) per share, compared with a net loss of $8.2 million or ($0.23) per share for the same period in 2000. Net loss for the year ended December 31, 2001, excluding amortization and other one-time cash and non-cash charges recorded during the year, was $44.6 million or ($1.26) per share, compared to a pro forma net loss of $9.8 million or ($0.28) per share in 2000.

Net loss for the fourth quarter, including amortization, was $20.7 million or ($0.58) per share, compared to a loss of $37.4 million or ($1.07) per share for the fourth quarter in 2000. Net loss for the full year, including amortization and other one-time cash and non-cash charges recorded during 2001, was $519.2 million or ($14.62) per share, compared to a pro forma loss of $124.4 million or ($3.57) per share in 2000.

Ipsos reported consolidated revenues of 480.1 million euros for the year ended December 31, 2001. Revenues are up 46 percent over 2000 (329.5 million euros). For the fourth quarter 2001, revenues rose to 147.2 million euros, up 31 percent from the fourth quarter 2000 (112.6 million euros). Ipsos growth for the last quarter reached 7.7 percent over 4Q 2000.

Opinion Research Corporation, Princeton, N.J., reported results for the fourth quarter and the year ended December 31, 2001. For the year, revenues were a record $177 million, an increase of 10 percent compared to 2000 revenues of $161 million. Operating income for 2001 totaled $8.8 million compared to $11.6 million in 2000. Net income for the year was $1.6 million and earnings per share were $0.27 compared to $3.3 million and $0.65, respectively, in 2000.

For the year 2001, the company generated EBITDA (earnings before interest, taxes, depreciation, and amortization) of $17.3 million compared to $18.9 million in 2000. Cash earnings per share for the year were $0.71, compared to $1.06 last year. Cash earnings per share (earnings per share plus the per share amount of after-tax goodwill amortization) are consistent with what will be reported as earnings per share in 2002 under FASB Statement 142.

For the fourth quarter of 2001, revenues were $44 million, compared to $43.7 million in the fourth quarter of 2000. Operating income for the quarter was $1.8 million, compared to $3.2 million in the fourth quarter of 2000. Net income for the fourth quarter was $188,000 and earnings per share were $0.03, compared to $909,000 and $0.16, respectively, in the fourth quarter of 2000. For the fourth quarter, EBITDA was $4.0 million, compared to fourth quarter 2000 EBITDA of $5.2 million. Cash earnings per share for the fourth quarter were $0.15 compared to $0.26 in last year's fourth quarter.

Fairfield, Conn.-based **IMS Health** announced full-year 2001 diluted earnings per share of $0.90 from recurring operations, a 6 percent increase over 2000 results. Net income from recurring operations grew 7 percent year over year, to $270.6 million. For the fourth quarter, the company reported diluted earnings of $0.22 per share, 15 percent below the year-earlier period, and net income of $66.8 million from recurring operations, down 14 percent year over year.

Recurring results exclude a previously announced pre-tax charge of $94.6 million reflecting costs to streamline operations, increase productivity, and improve client service. Recurring results also exclude divestitures and other one-time gains and charges, including a $24.6 million fourth-quarter write-down of the Enterprises venture capital portfolio; and $6.5 million of terminated transaction costs.

During the 2001 fourth quarter, revenue totaled $340.9 million, up 1 percent constant dollar year over year and down 2 percent on a reported basis. Operating income was $98.1 million, down 17 percent constant dollar and 23 percent on a reported basis from the year-earlier quarter. Net income declined 14 percent to $66.8 million, or $0.22 per share, in the 2001 fourth quarter.

IMS Health's full-year 2001 revenue rose to $1,332.9 million, up 11 percent constant dollar and 6 percent on a reported basis. This compares with revenue of $1,254.0 million in 2000. Operating income for 2001 grew 14 percent constant dollar, or 6 percent on a reported basis, to $427.6 million. Net income rose 7 percent in 2001 to $270.6 million, or $0.90 per share, compared with $253.6 million, or $0.85 per share, in 2000.

Preliminary figures indicate that **GfK**, Nuremberg, Germany, saw total revenue rise to 534.0 million euros and consequently exceeded the figure for the previous year of 480.9 million euros by 11 percent. Earnings before interest and tax including income from participations (aEBIT), increased by 14.5 percent to 45.1 million euros. Consequently, aEBIT grew more rapidly than total revenue, with the aEBIT margin rising from 8.4 to 8.6 percent.

Net income for financial year 2001 was affected by non-recurring charges totalling 10.5 million euros, which were reported by GfK in the last quarterly accounts. The charges comprised the costs of changes in the field research team at GfK Data Services and migrating the finance and personnel management to SAP R/3, amounting to 3.5 million euros.

A figure of 7 million euros also related to the depreciation concerning the participation in Jupiter Media Metrix (JMXI) in the USA. The write-down became necessary because of the takeover offer by VNU subsidiary Netratings for JMXI. Given the prohibition by the FTC, the parties involved in the takeover agreed not to pursue this any further. Since the write-down on JMXI is not tax deductible, GfK is expecting a taxation ratio of some 45 percent.

SPSS Inc., Chicago, announced results for the fourth quarter and fiscal year ended December 31, 2001. On a pro forma basis, excluding acquisition-related and other non-recurring charges, but including, for both years, the full implementation of prior year accounting interpretations on revenue recognition, diluted earnings per share and revenues for the quarter ended

December 31, 2001 were $0.25 and $48.2 million, respectively. These results compare to analyst expectations of earnings of between $0.35 and $0.40 and revenues of between $48.0 and $50.0 million, as well as to pro forma earnings per share and revenue figures for the same period last year of $0.23 and $51.2 million, respectively.

On the same pro forma basis, diluted earnings per share and revenues for the fiscal year ended December 31, 2001 were $0.56 and $187.4 million, respectively, which compare to pro forma earnings per share and revenue figures in the previous year of $0.98 and $197.9 million, respectively.

On a reported basis, diluted loss per share and revenues for the quarter ended December 31, 2001 were ($0.73) and $48.2 million, respectively. These reported results include acquisition-related and other non-recurring charges as well as the effects of the prescribed implementation of the recent accounting interpretations. Such results for the fiscal year ended December 31, 2001 were ($1.52) and $176.6 million, respectively.

Chicago-based **Information Resources, Inc.** (IRI) reported improved results for the fourth quarter and year ending December 31, 2001. For the quarter ended December 31, 2001, the firm reported net income, before restructuring and other items, of $2.2 million or $.08 per share, an improvement of $1.9 million or $.07 per share from the fourth quarter of 2000. Including the impact of restructuring and other items of $3.0 million, IRI reported net income of $0.3 million or $.01 per share, an improvement of $2.7 million or $.09 per share from last year's fourth quarter. Fourth quarter 2001 restructuring and other items include a one-time gain of $2.0 million relating to the settlement of a legal dispute with Manugistics, Inc.

Revenues of $140.5 million were up 3 percent compared with last year. U.S. revenues were $105.0 million, an increase of 6 percent compared to the prior year. International revenues decreased 3 percent to $35.5 million due to reduced revenues in Germany. Operating income before restructuring and other items was $4.2 million, an increase of $3.7 million from last year.

For the full year 2001, IRI reported net income, before restructuring and other items, of $5.8 million or $0.20 per share, an improvement of $5.4 million or $0.18 per share from fiscal 2000. Including the impact of restructuring and other items of $15.4 million, IRI reported a net loss of $3.9 million or ($0.13) per share, an improvement of $3.6 million or $0.13 per share from last year.

Revenues of $555.9 million were 5 percent above last year. Revenues from the company's U.S. business increased 6 percent for the year compared to 2000 while international revenues were up 2 percent over 2000, a 6 percent increase in local currencies. Operating income before restructuring and other items was $13.2 million, or $9.7 million higher than prior year. The increase was primarily due to higher profitability from the company's U.S. business.

Survey Monitor

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particularly for carbonated beverages, beer/ale/alcoholic cider and salty snacks, which top the list in driving incremental sales during Super Bowl week.

Super Bowl 2002 Leading CPG Categories

Rank	Product Category	Incremental Super Bowl Week Total U.S. Supermarket Sales (Millions $)	Dollar Sales percent Increase vs. Prior 3 Week Average
1	Carbonated Beverages	$47.8	21%
2	Beer/Ale/Alcoholic Cider	$24.2	21%
3	Salty Snacks	$23.6	19%
4	Frozen Pizza	$12.1	20%
5	Crackers	$8.7	13%
6	Natural Cheese	$7.8	8%
7	Total Chocolate Candy	$7.7	21%
8	Processed Cheese	$7.0	15%
9	Ice Cream/Sherbet	$6.7	8%
10	Coffee	$6.0	12%
11	Dinner Sausage	$5.3	20%
12	Mexican Sauce	$5.2	29%
13	Frankfurters	$5.2	18%
14	Frozen Appetizers/Snack Rolls	$5.1	29%
15	Mayonnaise	$4.4	24%
16	Mustard & Ketchup	$4.1	29%
17	Snack Nuts/Seeds/Corn Nuts	$4.0	26%
18	Wine	$3.9	6%
19	Cookies	$3.8	5%
20	Frozen Seafood	$3.4	13%

IRI Pulse Super Bowl XXXVI examined supermarket sales of food products during the week leading up to the Super Bowl. Using IRI's InfoScan Reviews Advantage syndicated retail tracking service, the study compared supermarket sales of 289 product categories for the week ending Super Bowl Sunday with each category's average weekly sales for the prior three weeks. For more information visit www.infores.com.

Energy researchers fighting uphill battle

Is market research preparing the way for energy companies to meet customer needs in a restructured environment where customers will have a choice of energy suppliers? A survey of market research professionals in energy companies suggests the answer is no.

According to a majority of market researchers surveyed, market research is valued less in the energy industry than other industries and fails to receive the respect it deserves in their company. Obstacles to market research include the absence of top level-buy-in to market research and the existence of "old line, regulated attitudes."

Although energy industry deregulation has not yet arrived in most states, the survey reveals that it has already had a profound influence on market research. Internal reorganizations, rethinking of business plans and strategy, expectations for quicker research results, and changes in staffing levels are some of the impacts on market research associated with restructuring, according to survey respondents.

The demands associated with restructuring have taken a toll on market researchers themselves. Two-thirds of respondents say their market research department is understaffed and 60 percent feel they are overworked. Only 37 percent of respondents believe they have sufficient time to get everything done.

These are some findings from a national survey of energy market research professionals conducted by Schulman, Ronca, and Bucuvalas, Inc., a New York research firm. "The survey results indicate that many market researchers in the energy industry face tremendous challenges," says Carla Jackson, vice president and national director of energy research at SRBI. "While industry restructuring has increased interest in market research at many companies, staffing and resource issues have also impacted the ability of market research departments to meet the demands upon them."

Amidst the negative trends revealed by the survey, there is also some cause for optimism. A majority of market research professionals working in the energy industry report that appreciation for market research has increased among senior management in the past five years. On balance, more, rather than less resources, are allocated to market research in these companies compared to five years ago. And twice as many market researchers in the energy field see growth, compared with retrenchment, in utility market research in the next three years.

Other findings of the study include:

- One-half of respondents have encountered obstacles in conducting market research within the past year, including the lack of financial resources. Less than one-half of respondents are optimistic that these obstacles can be overcome.

- Two out of three market researchers indicate that their department has been involved in an internal re-organization within the past three years. Among these respondents, 61 percent have experienced more than one reorganization.

- More than one-half of respondents are distracted from their primary function by other issues.

- Approximately 50 percent of respondents are concerned about job stability and energy-industry mergers.

The survey was conducted anonymously by mail in fall 2001. Thirty-two percent of the 295 energy market researchers surveyed returned questionnaires. SRBI will be repeating the survey in 2002 to identify industry trends. For more information visit www.srbi.com.

Study of kids' Internet use shows big differences by age, gender

According to a recent study conducted by KidzEyes.com, an online research panel operated by Chicago-based C&R Research, American kids between the ages of 6-14 spend about an hour (59 minutes) on the Internet each day. Not surprisingly, older kids tend to spend more time on the Internet than younger kids. On average, 12-14-year-olds spend 70 minutes a day, 9-11-year-olds spend 56 minutes a day, and 6-8 year-olds spend 40 minutes a day online. Interestingly, girls begin spending more time on the Internet at earlier ages. Girls between the ages of 6-8 spend an average of 48 minutes per day on the Internet while boys at the same age spend only 34 minutes per day. As kids get older, the difference narrows, but girls continue to spend more time (73 minutes per day) on the Internet than boys (66 minutes per day).

The activities that kids partake in while on the Internet differ across age groups and gender as well. Younger kids tend to use the Internet primarily as a source of entertainment in the form of online games. Older kids, however, use the Internet for a variety of purposes: as a means of communicating with friends, a way to get information, and a source of entertainment. Game-playing dominates kids' use of the Internet, among both boys and girls, until about the age of 10 or 11, after which the activity drops off sharply, especially among girls. Seventy-three percent of kids between the ages of 6-8 report that their No. 1 use of the Internet is playing online games. Between the ages of 9-11, this figure drops to 43 percent, and by the time kids are 12-14, only 19 percent say that playing games is their primary use of the Internet. Older kids (12-14), especially older girls, are more inclined to use the Internet for e-mail and instant messaging than for playing games. In fact, girls between the ages of 12-14 are twice as likely as their male counterparts to send instant messages: 64 percent of girls aged 12-14 reported sending instant messages as compared to only 31 percent of their male counterparts. Finally, while parents may hope that their kids are using the Internet to conduct research for their homework, only 11 percent of kids indicate that this is their chief use of the Internet. Nonetheless, nearly three quarters of kids claim to use the Internet at least "some of the time" for schoolwork.

Kids aged 6-14 claim to visit an average of seven Web sites during the course

Percent of kids who say they do these online activities at least some of the time

	Total Kids (6-14)	Kids 6-8	Kids 9-11	Kids 12-14
Playing Games	92%	94%	94%	87%
Doing Homework or Research for School	73%	54%	78%	86%
E-mail	71%	51%	70%	90%
Surfing	67%	42%	71%	87%
Checking out Products to Buy	49%	35%	49%	62%
Sending Instant Messages	47%	20%	43%	76%
Listening to or Downloading Music	45%	24%	47%	64%

of a typical week. As kids get older, the number of sites they visit each week increases. Kids 6-8 years old visit an average of four sites weekly, kids 9-11 years old visit seven sites a week, and kids 12-14 visit an average of 10 sites a week. Overall, boys and girls claim to visit roughly the same number of Web sites weekly, but older boys between 12-14 years old tend to visit slightly more sites per week than girls of the same age with boys visiting about 12 per week and girls visiting 10 per week.

Speaking of Web sites that kids visit, Yahoo.com was the top search engine among kids, followed by AskJeeves.com and Google.com. When asked to name their most favorite Web site to visit for fun, kids crowned Nickelodeon.com as the king of kids' Web sites. Other favorites included: Disney.com for both boys and girls 6-8, Cartoon Network.com among boys 6-11, Nick Jr.com and Barbie.com among girls 6-8, Zoog Disney.com among girls 9-11, music sites like MTV.com and launch.com among girls 12-14, and sports sites like WWF.com and ESPN.com among boys 12-14.

And what does the future hold in terms of today's Internet generation kids? Web-hosting companies take note: over one-third of today's kids plan to have their own Web site in the future. That figure represents a significant increase from the 11 percent of kids who currently maintain their own Web sites. Interestingly, today's Internet-using girls are more likely than boys to build their own Web site: 27 percent of girls 12-14 have their own Web site compared to only 16 percent of their male counterparts.

But the news may not be as good for providers of broadband Internet access. Very few kids (18 percent) have even heard of broadband Internet access, which may be problematic for broadband providers. Since broadband enhances online game playing, fostering awareness of broadband access among kids may hold the key to driving adoption of this otherwise expensive Internet service among households with kids.

The study was conducted among 890 children nationwide with Internet access and examined kids' usage of, experiences with, and attitudes about the Internet. For more information call Paul Metz at 312-828-9200 or visit www.crresearch.com.

Beef still what's for dinner

Year-end demand data indicate consumers' appetite for beef remains strong, with preliminary figures showing consumer demand in 2001 up 5.7 percent compared to 2000 levels, according to the National Cattlemen's Beef Association (NCBA).

Year-end gains were driven by a strong fourth quarter, despite the fact that the U.S. beef industry was facing record beef supplies, softened exports to key international markets, and a downturn in the nation's economy during the last few months of the year.

According to Chuck Lambert, chief economist for the NCBA, demand gains in the last few months of the year reflect the fact that the industry sold large beef supplies at strong retail prices. "Fourth quarter beef production reached 6.7 billion pounds, which is nearly 3 percent larger than the same quarter one year ago. That combined with softer exports means total domestic beef supplies for the quarter were record large," Lambert says. "At the same time, average retail beef prices were slightly higher compared to the same time last year. When we sell more supply at steady prices or better, we will see increased demand."

The industry plans to keep pace with consumers' busy lifestyles by helping manufacturers bring more consumer-friendly products to market. Just a few years ago, the industry helped introduce a new category of fully cooked beef products that could be heated in the microwave and ready to serve in minutes. Sales for these types of products have increased 100 percent since 1999, and annual sales for the category topped $116 million as of October 2001 (ACNielsen, Fresh Look Marketing, October 2001).

This type of innovation helped spur an influx of new beef products to the supermarket channel. According to January 2002 findings from Productscan Online, an online database service of Marketing Intelligence Service, Ltd., roughly 1,100 new beef products were introduced at the retail level in the past three years.

The industry also is using checkoff funds to help introduce new beef items on restaurant menus. Taco Bell recently launched its new Steak Quesadilla and will be working with the beef industry and state beef council partners on a nationwide promotion of the product through March. The Taco Bell Steak Quesadilla is the third steak product the 6,300-unit chain has introduced in the past 12 months. Its previous two steak items — the Grilled Steak Taco and the Steak Grilled Stuft Burrito — helped move more than 27 million pounds of steak in 2001.

Also related to overall consumer confidence is the number of consumers who feel good about the nutritional value of beef. A January 2002 NCBA/Wirthlin Worldwide consumer survey found the percent of consumers who consider beef as a healthful part of the diet is up slightly from December 1998. Consumers perceived beef steaks and roasts to be significantly more healthful than pork chops and roasts, and consumer perceptions about ground beef is improving. The percentage of people who rated ground beef as healthful is up three percentage points since 1998, with 90 percent lean ground beef being perceived as the most healthful of all beef segments. For more information visit www.beef.org.

Brix Networks

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are worth over 30 percent more than IP VPN services without guaranteed SLAs.

(Even if organizations were overstating the amount they would pay for guaranteed SLAs, the fact that people are willing to pay some kind of premium provides an opportunity to sell differentiated services — like flying first-class instead of coach.)

And if there is a dispute over SLA compliance (43 percent said they had experienced SLA disputes), the companies aren't afraid to take action against the service provider: 38 percent said they withheld payment for services and 31 said they had changed service providers as a result of SLA disputes.

"Those findings gave us really great data," Korostoff says. "After all, we can measure attitudes all we want but what you really want to know is, what behaviors do they result in? That's where the rubber hits the road."

Sales handbook

In addition to providing solid data, the survey also helped Brix create a sales handbook for product managers at the telecom firms. "One of the things we found was that the typical offering manager or product manager at a service provider doesn't have a lot of time and has trouble putting the business case for SLAs together. So this research has been one of the foundations for what we call the offering manager handbook, where we offer a business plan, a rollout plan, and a marketing plan to the carrier on how to compete on verified quality using service level agreements. And a lot of the core data for that came from the study," Warter says.

A white paper based on the research findings has been a popular item to download from the Brix Networks Web site and it has also received a lot of attention in the industry, Warter says. "The fact that we used an independent agency has helped improve the credibility of the report and now a lot more people believe the numbers and support the results."

Short and sweet

The survey earned a good response rate — a testament to the value of keeping things short and sweet, Korostoff says. "We're all plagued by dwindling response rates and everyone in the industry is struggling to keep response rates up. One of the things we ask our clients to work with us on is fine-tuning their objectives and avoiding scope-creep. Brix was a good client to work with in that regard because they really took our advice to heart and as a result we had a nice short survey and got great response rates."

The Web seems like a natural vehicle for a survey of this type, but it wasn't the first choice for Brix. "This is the first time we had done Web research and I was used to more traditional market research," Warter says. "Going in, the thought of using the Web was a negative; I was thinking of a phone survey. But now I wouldn't do anoth-

Wake-up call

Sage Research's Kathryn Korostoff says the tech meltdown served as a wake-up call for many companies and has spurred them to conduct more research. "Right now, in technology markets, people are so concerned about customer loyalty. As soon as the market started to turn down, technology companies started coming to us and saying, 'We need to make sure that the clients we *do* have are happy.' And data like the kind we uncovered in the Brix study about what causes people to churn is really valuable."

In addition to a big increase in brand research, Korostoff says tech companies are also doing more product development research. "For a while in tech markets, people thought, 'We'll develop a product, and if it flies, great; if it doesn't, we'll just develop another one.' They aren't doing that anymore. Our clients are being very careful. They are coming up with product concepts, testing the concepts, and working to make sure the new products address a real need before they spend millions of dollars developing them."

er phone survey ever again. After Sage showed us the profiles of the people on their panel and we realized how quickly the survey could be conducted using the Web, we knew it was obviously the right way to go."

"We do a lot of Web-based research at this stage because we are surveying IT professionals," Korostoff says, "and you can't get these people on the phone; they're never at their desks. But with Web-based surveys, they can take the survey when they want to and that works really well. Overall it has been a great methodology for us. We do well over half of our quant work on the Web."

In addition to keeping things brief, she says, it's important to speak the respondent's language. "Many companies are so immersed in their own corporate jargon. So we spend a lot of time with our clients saying 'OK, we know what you want to find out, but we have to word it very differently, because you are using language that already has baggage, or is language that is not commonly accepted outside of your company.' This is particularly true in technology because we are so thick with jargon. If you send out a survey that people can't understand, or is obviously filled with marketing-speak, you'll just frustrate and anger the respondents."

Korostoff says the depth of information Sage has on its Web panel helps make sure the right surveys go to the right people. "We have over 50 variables about them in terms of the possible technologies they might have responsibility for. That way we are only sending relevant surveys to people. We aren't sending a survey about laptops to the person who runs the printers. We are very careful not to over-survey them. We treat them like gold!"

In the Brix study, company size was an important factor. "We only wanted to talk to companies that had at least 500 employees. It's not that SLAs couldn't possibly be of interest to companies that are smaller but we know for certain that companies of that size or greater would definitely use the services that SLAs would be relevant to," Korostoff says.

Not for every situation

While the Web panel approach worked well in this instance, it's not appropriate for every situation, Korostoff says. "I think a lot of us old-time research purists went kicking and screaming into panels, but the truth of the matter is, especially in technology research, I have to have qualified respondents. And it's so hard to get good respondents these days and my best bet for meeting clients' objectives, budgets, and timelines is usually a panel. I wouldn't recommend a panel for every type of project. But there are a lot of times where panels are perfectly fine. You just have to keep a good eye on your statistics, make sure you are testing for reliability, and do your homework."

Product & Service Update

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can record interactive analyses as Visual Basic macros for repeated use, access all features from the object model, and integrate Statistica with other applications such as Excel, C++, Java, etc.; ensemble models and resampling — the ability to create and store cooperative networks provides a learning tool that can result in a lower generalization error; new network types — self-organizing feature map, generalized regression neural networks, linear models, cluster networks and network ensembles.

Statistica Neural Networks version 6 integrates with Statistica 6, the company's data analysis and visualization software. For more information visit www.statsoft.com.

Category Business Planner updated

San Diego-based ACNielsen U.S., an operating unit of ACNielsen, has released version 1.5 of its Web-based Category Business Planner (CBP). Enhancements have been added to the category management intelligence system, giving users insights into their business issues and increased flexibility in how they view information. New features in CBP version 1.5 include the ability to analyze product sales performance down to the UPC and characteristic levels. In addition, a product's share basis can be viewed not only by share of sales within a retailer, but within a specific department at that retailer as well. Another upgrade will enable clients to customize alerts, turning off those that a user prefers not to receive and changing alert thresholds.

CBP users can also now access the system via the new ACNielsen Answers Internet portal. Besides being the entry point for CBP, the portal will provide users with daily retail industry news updates and news from various VNU trade publications. Users will also be able to personalize their start screen with links to weather reports, stock updates, traffic conditions, and other information. Eventually, the portal will provide ACNielsen clients with "one-window" access to all ACNielsen content, applications and news. For more information visit www.acnielsen.com/cbp.

New data mining components from NAG

Marketers seeking new insights from massive databases of customer and related information can now accelerate their development of customized data mining applications by using NAG Data Mining Components as building blocks for their applications. The NAG Data Mining Components, from the Numerical Algorithms Group, Downers Grove, Ill., are designed to free users from needing to re-invent basic data mining routines, enabling the development of specialized data mining applications more quickly and at lower cost.

The NAG Data Mining Components are statistical and artificial intelligence software components specifically developed for mining massive datasets. Algorithms are included in the Data Mining Components for each stage of the modeling process — data preparation (case wise deletion and dummy variables generation), data transformation (principle component analysis and data scaling), and model building (decision tree analysis; K-means and hierarchical clustering; multi-layer perceptron neural networks; logistic regression; general multiple regression). Application developers can use these components in their own application designs using standard development tools.

The NAG Data Mining Components are geared to help developers select the most appropriate modeling methods quickly and easily. Some of the algorithms can be called in a "novice" mode to get results faster or in "expert" mode to provide precise control of the algorithm. Less experienced users can also get the benefit of detailed advice via hyperlinked documentation guiding them to data mining solutions most applicable to their data.

Written in C for Windows, Linux or Solaris platforms, NAG Data Mining Components can extract data from flat files or OBDC compliant databases. For more information visit www.nag.com.

Cohorts segmentation system updated

Denver-based marketing information company Looking Glass has released a new version of its household-based consumer segmentation system, Cohorts. The product update adds three new segments that better reflect current household demographics.

Developed with the technical assistance of Northwestern University's Integrated Marketing Communications Department, the updated Cohorts utilizes information from two consumer data companies, Experian and Equifax.

Through cluster analysis, 30 naturally occurring Cohorts were identified, featuring both demographic and lifestyle characteristics. The segments were then validated using information from two syndicated research companies, Simmons Market Research Bureau and Scarborough Research. Through this validation, the segments were further described by attitudes and consumer behavior.

The three new segments that emerged include: Barry & Kathleen — affluent professional couples, educated, dual-income, childless; Andrea — single moms with careers, successful, professional; Frank & Shirley — conservative older couples (grandparents and parents) raising kids.

In each segment, the first names used to describe a given Cohort are dramatically over-represented within that segment and are intended to make Cohorts easier to use and understand by "humanizing" the data. The evolved Cohorts also reflects some of the changes noted in the ongoing release of 2000 Census data. For more information visit www.cohorts.com or contact Sandy McCray at 303-893-8600.

Book details current and future uses of GIS

Planning Support Systems, a new book from ESRI Press, demonstrates how geographic information system (GIS) technology is being used — and may be used in the future — by planners, architects, engineers, developers, Realtors, government and regulatory officials, and concerned citizens. The book includes full-color maps, descriptive diagrams, three-dimensional representations, and work by planning scholars and professionals. *Planning Support Systems* demonstrates current methods and possibilities of GIS in land use professions from 15 different perspectives. Editors Richard Brail of Rutgers University's Edward J. Bloustein School of Planning and Public Policy and Richard Klosterman of the University of Akron have assembled papers from colleagues around the globe who are working to expand both the applicability and understanding of the most important issues in computer-aided planning. The book is available at bookstores or online at www.esri.com/esripress or by calling 800-447-9778.

Briefly...

Stamford, Conn., research firm InsightExpress is offering a **free white paper** designed to illustrate how online research is more efficient than mail research for concept testing. The study, "Online Concept Testing: A Concept Whose Time Has Come," can be accessed at www.concepttestexpress.com.

China Xin Network Media Corporation will begin selling **industry reports, broker research, and market analysis** through the www.marketresearch.com service. CXN Media Corporation is a provider of financial, economic, and business information on the People's Republic of China.

DeYoung Communications, a Racine, Wis., research firm, is offering a **free 28-page booklet on the functions and benefits of small-sample business-to-business research**. The booklet, "The Value of Small Scale B-T-B Research – Wisdom You Can Take to the Bank," contains nine brief case histories of the use of tactical research in solving marketing problems. To obtain a copy, write "Wisdom" on your business card and mail it to DeYoung Communications, 3706 Douglas Ave., Suite 806, Racine, Wis., 53402 or call Bruce DeYoung at 800-633-9686.

Dallas-based DialTek's **I-VIEW application** allows researchers and call centers the means to deploy many types of research studies or telephony projects and record data. Options such as instant reporting, e-mail/fax-on-demand, and Web integration let users customize I-VIEW to meet changing needs. DialTek offers the I-VIEW application using an application service provider model. Users pay only for the use of the platform as they need it, whether for one-time or long-term projects. For more information call 678-580-0149 or visit www.dialtek.com.

Harris Interactive, Rochester, N.Y., has **upgraded its voter registration (VR) system** — a prime component of its Internet survey process. This system, which utilizes Microsoft .NET technology, will offer a more robust user interface to the Harris Interactive online panel community. Harris Interactive developers incorporated the Microsoft .NET Framework into the improved VR application. Harris Interactive expects to deploy this improved version of the VR by mid-2002, and plans to continue working with Microsoft to provide a richer interface for its online community.

Supplier Side

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detriment of the whole process and the client. Departmental standards and scheduling policies may take on lives of their own, optimizing the efficiency and quality of a department's work but making timely completion of the whole project tough. By becoming removed from client contact, departments can become inwardly oriented, viewing clients as problems rather than the source of their livelihood. Inter-departmental communication and scheduling can become time-consuming and flawed as project managers or operations schedulers negotiate each project's schedule with a series of independent department heads. Each department may feel that it is performing perfectly, yet the whole process viewed from the outside can seem rigid, bureaucratic, and ineffective.

In response to problems like these, some companies are organizing by teams. They are breaking up functional departments and organizing their staff into units based around client groups or research types. These teams include people with all or most of the skills necessary to complete a study from beginning to end. A typical team might include several client service/project management people, a field director, a questionnaire programmer, and a tab specwriter. Tasks such as coding may be carried out by general clerical staff or junior project managers. Staff are frequently cross-trained in multiple functions. Almost always, the team is headed by a senior staff member with a client service or project management background.

There are many variations on this theme. Within the teams, work may remain specialized (the specwriter does the tables) or there can be extensive cross-training (everyone does tables). Highly specialized functions (such as statistical analysis) that are carried out by one or two experts may remain as functional departments, available to all. A hybrid approach is also possible, where some functions are moved within the teams while others (such as field management) remain as separate departments.

Several benefits

When a functionally organized company reorganizes into teams, staff perceive that the operating departments like coding and tabulation have been "broken up" and dispersed among the client service units. If not carefully handled, this can lead to considerable ill will. Once a transition is completed, though, top management may see several benefits.

Because each client group controls its own resources, scheduling and communication are easier. With no department heads or central scheduling to go through, the group head directly prioritizes the work of everyone working on his or her projects.

Technical and operations personnel become closer to clients and more aligned with their needs. By reducing the organizational distance between the client and these staff members, it is easier for them to appreciate the client's situation and focus on serving his or needs.

Staff may develop more flexibility and broader skills. Cross-training and cross-assignment of work are easier when all the people involved report to the same person.

Restore focus

Organizing your company into project teams recaptures some of the benefits of being a small company. It's an anti-bureaucratic move that can restore client focus to a mid-sized company suffering from growing pains. It can work well when setting up new offices — because the communication and goal-alignment problems that can arise with functional departments grow worse when the departments and their internal clients are geographically separated. It also works well when projects are extremely large, and can support specialist staff full-time.

With all these benefits, why do companies remain organized departmentally? Teams do not work in every situation. They make it much harder to develop and retain top-level people in specialized functions. They make quality standards hard to develop or enforce. They can reduce efficiency by tying up high- or mid-level specialists with lower-level work. And they definitely require far stronger group heads —executives who can and will manage the operational functions in their groups as well as the research functions.

Are teams right for you? If your different client groups have different operational needs, putting those operations within the groups can make sense. If you are having difficulty breaking down organizational barriers and getting everyone focused on client needs, project teams can bring improvement. If your group heads have a track record of successful cooperation, you are less likely to find yourself with idle team members in one group while specialist staff in other groups are overwhelmed with work. The easier an operations function is for researchers to understand, the easier it is to handle within a team. Coding, for example, is more easily managed within the team than CATI.

Not the only way

While teams do shorten communication channels and increase client focus, they are not the only way to do this. If your departmental organization isn't working, the problem may be your managers' attitudes and management skills rather than the structure of your organization.

For some companies — and some functions within those companies — teams make sense. In other cases, their liabilities outweigh their benefits. You should carefully consider your client needs, staff capabilities, and mix of work when deciding if teams are right for you.

Data Use

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choice data really are, despite the well-documented superiority of trade-off data in comparison to ordinary survey data (Louviere et al., 1990; Louviere & Woodworth, 1983).

Years of marketing research experience in general, and new product forecasts in particular, suggest to us the importance of combining the best of two worlds — trade-off exercises and straightforward surveys — in generating market insights and improving accuracy of forecasts. In this regard, we have found monadic card data to be a valuable piece of total data influx for forecasts.

Several aspects of monadic cards are just like ordinary survey items:

• no repeated measurements — unlike regular DCM cards, each respondent typically sees just one scenario, thus the name "monadic";

• no experimental design — monadic cards are designed to be a snapshot of market conditions, not a full simulator of all possible scenarios; and

• straightforward and fitting squarely into the logical flow of the survey — as a result, monadic cards can be presented at the early stage of surveys, preceding regular DCM cards.

Yet monadic cards also share features with full-fledged DCM cards:

• trade-off pressure is present when we ask respondents to pick just one brand, one product, or one service option out of many;

• respondents are stimulated by the same concept exposure used for regular DCM cards;

• the options listed on monadic cards are typically compatible to regular DCM cards; and

• the attributes and their value levels are also typically similar to regular DCM.

Monadic cards occupy a unique place in all trade-off exercises for three reasons.

First, a monadic card can be devised to resemble current or most likely market conditions for the products in question, ranging from toothbrushes to high-definition TV sets. Take price as an example: those listed on monadic cards could reflect what most consumers would likely encounter in most marketplaces either today or one, five, or 10 years down the road, while regular choice cards may convey prices randomly determined within predetermined ranges.

Second, a monadic card may be either more complete or more focused than regular choice cards in its list of models or brands[2]. For example, models/brands expected to phase out in the future will not be listed on a regular choice card for forecasting purposes, but may still be on a monadic card designed to reflect today's market. On the other hand, regular choice cards may sometimes show more models, anticipating future line extensions either by clients and/or by competitors, while monadic cards may choose to focus on today's major competing brands that jointly account for no less than 80 percent of market shares.

Finally, because of their positions in the flow of the survey, monadic cards typically command more of respondents' attention and thus help reduce some random errors.

Usages of monadic cards

Monadic cards have been used in practice as:

• "Shelf exposure" cards, where monadic cards deliberately simulate market scenarios today or tomorrow in order to get a direct read on specific demands under those conditions, the latter is then subject to calibration before being utilized in forecasts.

• "Design demo" cards, where monadic cards themselves are used as a demonstration of new product concepts, with details about the price and/or design features. However, monadic cards not only describe new concepts, but immediately solicit consumer responses to the concepts.

• "Holdout" cards, where monadic cards may be used to check on the predictive validity of the models and utilities derived from regular choice scenarios.

• "Sample correction" cards, where shares of preferences from monadic cards are compared with actual market shares to obtain a sense of how closely the sample at hand is representative of consumer populations and markets.

• "Add-on" cards to a hybrid design, where monadic cards depict a choice environment just like a regular choice card, so we can assess sources of volume, while the focus of the project is a conjoint exercise for an optimal product design.

• "Replacement" cards, where they are used to replace multiple choice cards when researchers are pressed with time and budget constraints. This last use is relatively rare and perhaps less defendable.

Shelf exposure cards – This usage requires that we design monadic cards in a separate process, not to be mixed and mingled with regular choice cards. While the latter are pulled out of a random process from running automated computer procedures (e.g., in SAS or SPSS), the former may involve sometimes lengthy discussions/negotiations with your clients regarding which levels, which attributes, and which alternatives (e.g., brands, models, SKUs) provide the best snapshots of market conditions. Further, it is likely these monadic cards were first drafted by hand and then given to the graphics department for tuning up and final polish before being mass produced for field execution.

Evaluating the designs requires different criteria for regular than for monadic cards. With regular cards, the objective is to fully span the experimental space with the fewest cards possible, a criterion called efficiency. This amounts to including some anchoring levels of experimental factors (i.e., attributes, brands, prices) and coming up with the best combinations of factor levels — best in the sense that our parameter estimates have the least amount of variance-covariance. With monadic cards, the objective is to achieve a "bull's-eye" hit on a specific market condition that allows a targeted read of market demands. The design of monadic cards emphasizes simulation or resemblance of market rather than efficiency, as only a few cards are involved to begin with[3].

Shelf exposure monadic cards should not replace concept exposure, especially when new products with little publicity and zero public awareness are introduced. Concept exposures bring respondents up to speed with new products, and hatch a parallel awareness level between new and existing brands, for example.

Design demo cards – Used in this setting, monadic cards are very similar to cards in a conjoint exercise: a single concept is introduced on each card detailing its key features. Although different concept cards can be designed to show potentially different SKUs of the same new product, each respondent typically views just one such card, leaving different SKUs to regular conjoint cards.

The design calls for industry expertise and knowledge of the new product. Therefore, your best bet would be to consult your clients before laying out features on the card. As is typical with monadic cards, design demo cards are not generated randomly, but deliberately by asking client which levels are "most typical" for the new product.

Holdout cards – Holdouts are choice cards presented to respondents but not used in the model. Instead, the observed shares of preferences are recorded and compared with expected preferences derived from model utilities. Like shelf exposure cards, the design of holdouts is also separated from regular choice cards to ensure an independent check on predictive validity.

When used appropriately, these monadic holdout cards can be useful for improving forecasts on share of preferences. For example, if 15 percent picked Brand A from monadic holdout cards, and the expected frequencies from choice cards were also about 15 percent, we gain more confidence with the model.

Unlike shelf exposure cards, monadic holdout cards can be derived from an independent experimental design, and can contain any combinations of attributes and levels, as long as the levels are within the same range as the regular choice cards. Thus if the lowest price on the regular cards was $150 for all DVD players, you don't want to design your holdouts to contain a player with a price tag of $100. If you go out of the boundaries, model checking becomes a process of extrapolation, with a lower hit rate than intrapolation. Further, more than one monadic card is typically needed to convince yourself that the hit rates are not based on pure luck.

If the design size or the number of cards turns out to be an issue, sometimes you may make a better use of both by specifying attribute levels resembling shelf exposure. That way, you can hit two birds (shelf exposure and holdouts) with one stone. To do so, however, you have to surrender the randomization principle, as pure chance won't guarantee cards with pre-determined attribute levels for shelf exposure purpose.

Sample correction cards – If monadic cards are configured to closely resemble current market conditions, then at aggregate, monadic picks should bear similarity to current market shares. Along the same line, monadic cards can be designed to reflect the "most likely" scenarios in a perceivable future, and provide a read of how the future market landscape will look.

It is rare to use monadic cards solely for correcting samples, as monadic cards have their best place in trade-off exercises assessing consumer preferences. This usage can use the same design as for shelf exposure. However, sample correction cards should only cater to options currently available, as "new to the world" options tend to distort pictures of the current market.

Add-on cards – We practitioners all know too well that sometimes we try to hit two or more birds with one stone. For example, it's not uncommon for your clients to come to you for two things at the same time: bundling the best attributes together for an optimal design, and figuring out potential sources of volume after market introduction. In an ideal world, this case requires two studies or two modules: a conjoint exercise focusing on the optimal design, and a DCM predicting sources of volume. However, time and budget constraints are not on your side and you have to come up with a "conditional" or "constraint" optimal research design. Monadic choice cards may prove useful here.

Unlike a full-fledged DCM, respondents do not go through 10 or 20 choice cards. Instead, a couple of monadic cards featuring the low and high prices are presented, for example. Unlike conjoint cards, which focus on a single product or model or brand, monadic cards list all current or potential competitors on each card, so the respondents won't be misled into assuming the test product is the only game in town. Combining monadic and conjoint cards, you should be able to tell your client a story both about the source of volumes (from the monadic cards) and about the best bundling strategy (from a conjoint exercise) — without breaking the bank.

Replacement cards – This is a problematic usage of monadic cards. In all situations discussed above, monadic cards are supplementary to either regular choice cards or conjoint cards. Here however monadic cards are used solo, in place of a full-fledged DCM. To see why we cannot mix the two, we move to a discussion of problems and limits with monadic cards.

Weaknesses of monadic choice cards

Just because monadic cards are designed to replicate market scenarios does not automatically guarantee a reading of true share of preference. In fact, because only one scenario is presented, one risks over-generalization of a chance response or a random pick out of low involvement, low motivation, ill-preparation, or even bias towards a respondent's last shopping experience, whichever brands or models he or she happened to pick. It is in this sense that we discourage "standalone" or solo use of monadic cards. Unless circumstances rule out other options, projects that totally rely on monadic cards should not be viewed as viable.

Although one may argue, as we did above, that monadic cards typically receive more respondent attention than some of regular choice cards towards the end of a DCM exercise, the early position of monadic cards in the survey flow may also invite problems. For example, some practitioners have been heeding the academic advice to add one or two "warm-up" cards in places where a monadic card is expected, in order to prepare respondents for the task of making hypothetical choices. Those warm-up cards are not analyzed in models due to the concern they may contain more noise than data. Although evidence suggests that usage of warm-up cards has never been a mainstay, given the time and budget constraints of real-life projects, it does underscore the concern that all choice cards are not equal: responses to the first few cards may result in garbage inputs. This is exactly where a process of information acceleration is called upon, as discussed later.

As a final caution, your clients may have placed too much emphasis on the monadic card results, sometimes simply because they are as intuitive as any survey items, while regular DCM results are less transparent. Emotions may run high because these scenarios mirror clients' strongest belief as to how the current or future markets will look. It is the analyst's responsibility to educate clients that the objective of DCM exercises is to generate utilities — which are then used to estimate shares of preferences to be used for forecasting consumer demand — not to bid on any single choice card exclusively. Our hope is to work with multiple choice cards to arrive at reliable and accurate utility estimates. Once we have utilities, we can easily come up with various simulations, including those that are believed to be most likely scenarios.

On a more general note, DCM analyses typically are based on three aggregations — aggregating across respondents (that is, we obtain utilities for the entire sample or segments of sample, not for individual respondents) aggregating over attributes (that is, at the end of the analysis, we often come to a conclusion about which models or brands take on how many respondents, not about which attribute levels [e.g., a specific price or a brand name] appeal most to people, although the latter is an important intermittent result and can be used to address separate concerns if needed), and aggregating over scenarios or cards (that is, we care less about how respondents react to a specific card than about how alternatives are preferred overall, across all cards).

Ways of utilizing monadic choice data

Perhaps the simplest way of utilizing monadic cards is to record proportions of picks for each alternative. For example, from a monadic card 15 percent of the sample picked Brand A, 45 percent Brand B, 30 percent Brand C and 10 percent none. These observed proportions are then used directly in gauging market demands and calibrating the forecasted figures. Using observed proportions of picks from monadic cards is especially appropriate for a holdout function. It has the advantage of simplicity and is analytically friendly.

The best practice in utilizing monadic cards in forecasts should include two features. First, concept demonstrations of new products should be presented prior to monadic cards to better prepare respondents to the trade-off task. This is part of what Urban & Hauser (1983) called "information acceleration" processes. Second, since observed picks contain random errors, analytically it makes sense to estimate utilities from monadic data just like we do with regular choice scenarios. By subjecting monadic choice data to the scrutiny of statistical models, one obtains utilities — which are similar to the predicted values in a regression model — of each attribute and each model/brand, and puts monadic data on a par with the rest of choice data, rendering more reliable benchmarks information for forecasting.

Most trade-off analysts are familiar with modeling multiple choice cards. This practice is so prevalent that multi-card modeling may have been mistakenly viewed as equivalent to DCM. However, suffice it to mention that economists have been using single observed choice data to generate utilities all the time. In fact, we have witnessed a long history of DCMs with revealed preferences. (e.g., Ben-Akiva & Lerman, 1985). We will present a real-life example showing how to estimate utilities from monadic cards. However, some general discussion of issues with using monadic choice cards is due first.

Analyzing monadic choice data: what is at stake?

Analyzing monadic choice data requires some customization. As pointed out earlier, monadic cards are typically not part of random designs. We thus do not have the luxury of packaged procedures to work with, and have to take manual and customized steps.

The major steps involved are to 1) translate monadic cards into an array of attributes, 2) set up a design using these attributes, 3) read in the monadic responses, 4) merge design variables with responses or picks to a dataset ready for analysis, and finally 5) estimate utilities. You may opt to add an extra step for checking goodness of fit of the monadic models. The pivotal part of this process is to set up a post hoc experiment design file as if the monadic cards were generated from such a design.

As far as software is concerned for analyzing regular and monadic choice data, our favorite is SAS, which has powerful procedures like PROC FACTEX, PROC PLAN, and PROC OPTEX that address your design needs well and create efficient designs. For analytic purposes, SAS uses two procedures: PROC TRANSREG sets up data and PROC PHREG estimates utilities. In the sample analysis below, we present SAS codes for completing an analysis from start to finish.

A real-life example

The card and the design. Table 1 shows a monadic card for jumbo TV sets. The card itself is "jumbo" in the number of possible choices. Each cell in the grid denotes a unique choice for respondents to pick, and there are 12 rows and 17 columns, making a total of 12 x 17 = 204 possible cells, of which 46 were marked "N/A" due to unavailability of certain brands at certain sizes (e.g., Brand A for all PLATFORM As; all brands for Screen Format X with Signal Type 1,) thus reducing the number of non-missing cells to 158.

Table 1	Sample Monadic Choice Card for A Consumer Electronic Project																	
		Platform Type A					Platform Type B										Platform Type C	
		Format Y		Format X			Format Y			Format X							Format X	Format X
Signal Type One		S1	S2	S1	S4	S6	S9	S11	S13	S5	S7	S10	S14	S2	S5	S8	S10	S12
Brand A	1	NA	NA	NA	NA	NA	P5	P7	P8	NA	NA	NA	NA	P47	P49	P54	NA	NA
Brand B	2	P6	P16	P18	P25	P32	P2	P9	P16	NA	NA	NA	NA	P47	P51	P54	NA	NA
Brand C	3	P8	P17	P20	P28	P35	P3	P10	P17	NA	NA	NA	NA	P47	P51	P54	NA	NA
Brand D	4	P4	P13	P17	P23	P30	P1	P7	P14	NA	NA	NA	NA	P49	P49	P53	NA	NA
Brand E	5	P11	P19	P22	P31	P39	P5	P15	P19	NA	NA	NA	NA	P47	P52	P54	NA	NA
Brand F	6	P8	P17	P20	P28	P35	P2	P9	P16	NA	NA	NA	NA	P49	P49	P53	NA	NA
Signal Type Two																		
Brand A	7	NA	NA	NA	NA	NA	P30	P37	P44	P46	P47	P48	P47	P49	P51	P54	P56	P60
Brand B	8	P16	P24	P27	P36	P42	P32	P37	P46	P46	P40	P46	P49	P51	P54	P54	P57	P60
Brand C	9	P17	P26	P29	P39	P44	P35	P40	P47	P48	P41	P47	P50	P51	P54	P55	P57	P60
Brand D	10	P12	P21	P25	P34	P40	P30	P34	P48	P45	P38	P43	P48	P48	P53	P55	P57	P60
Brand E	11	P19	P31	P33	P41	P47	P39	P42	P48	P49	P46	P48	P52	P51	P54	P55	P57	P61
Brand F	12	P17	P26	P29	P39	P44	P32	P37	P46	P46	P40	P46	P49	P48	P53	P55	P58	P61

Eyeballing of the card points to five experimental factors: technological platforms (Platforms A, B, and C), screen formats (Formats X and Y), signal types (Signals 1 and 2), brands (with faceless names from Brand A to Brand F for client confidentiality), and screen sizes (ranging from S1 to S14).

The following codes are written with the above monadic card in mind:

```
proc format;
value signalf 1="Signal 1" 2="Signal 2";
value platformf 1="A" 2="B" 3="C";
value scrnformf 1="Y" 2="X";
value sizef 1="S1" 2="S2" 3="S3" 4="S4" 5="S5"
6="S6" 7="S7" 8="S8" 9="S9" 10="S10"11="S11"
12="S12" 13="S13" 14="S14";
value brandsf 1="BRAND A" 2="BRAND B" 3="BRAND C"
```

```
4="BRAND D" 5="BRAND E" 6="BRAND F";
run;
*---step 1: generate all possible combinations of
5 factors---;
proc plan ordered;
factors platform=3 scrnform=2 signal=2 brands=6
sizes=14;
output out=CAND1;
run;
```

PROC PLAN is good for generating full factorial experimental designs, which in this case amount to 3 x 2 x 2 x 6 x 14 = 1,008 unique combinations of five attributes.

A portion of the output data, CAND1, is shown in a condensed format in Table 2.

Table 2

Platforms	Scrnforms	Signals	Brands	Sizes													
1	1	1	1	1	2	3	4	5	6	7	8	9	10	11	12	13	14
			2	1	2	3	4	5	6	7	8	9	10	11	12	13	14
			3	1	2	3	4	5	6	7	8	9	10	11	12	13	14
			4	1	2	3	4	5	6	7	8	9	10	11	12	13	14
			5	1	2	3	4	5	6	7	8	9	10	11	12	13	14
			6	1	2	3	4	5	6	7	8	9	10	11	12	13	14
		2	1	1	2	3	4	5	6	7	8	9	10	11	12	13	14
			2	1	2	3	4	5	6	7	8	9	10	11	12	13	14
			3	1	2	3	4	5	6	7	8	9	10	11	12	13	14
			4	1	2	3	4	5	6	7	8	9	10	11	12	13	14
			5	1	2	3	4	5	6	7	8	9	10	11	12	13	14
			6	1	2	3	4	5	6	7	8	9	10	11	12	13	14

We have a total of 3 x 2 x 2 x 6 = 72 lines with the last SIZES factor folding up its 14 levels to a single line. When you expand SIZES into different lines or rows, you obtain the full design with 72 x 14 = 1,008 cases.

The fact that we started with a full factorial design marks the first difference between monadic and regular choice cards. For the latter of the same size as the monadic card shown above, we would often use a fractional factorial design generated by PROC FACTEX because we want to let randomization play its role to generate the best combinations of attributes or factors across multiple cards. Monadic cards, however, contain pre-determined attribute levels; there is thus no place for randomization. We are merely using PROC PLAN to generate an exhaustive list of all possible combinations of numbers to be trimmed down to what is actually shown on the monadic cards. The vast majority in CAND1 will have to go away as they do not resemble what the respondents actually have been exposed to.

Our next step is to cut down 1,008 values to 158:

```
*---step 2: matching the number of cells on monadic
card---;
data CAND2;
set CAND1;
if (platform=1 and scrnform=1 and sizes in(2,4) and
brands ne 1) or
(platform=1 and scrnform=2 and sizes in(1,3,6) and
brands ne 1) or
(platform=2 and scrnform=1 and sizes in(9,11,13))
or
(platform=2 and scrnform=2 and signal=2 and sizes
in(5,7,10,14)) or
(platform=3 and scrnform=2 and signal=1 and sizes
in(2,5,8)) or
(platform=3 and scrnform=2 and signal=2 and sizes
in(2,5,8,10,12));
run;
```

The IF statement with a list of target conditions selects the combinations consistent with the monadic card. The CAND2 dataset now has 158 cases. We list the first 10 observations in Table 3.

One key element missing from CAND2 is prices. All

Table 3

Obs	Platforms	Scrnforms	Signals	Brands	Sizes
1	A	Y	Signal 1	Brand B	S1
2	A	Y	Signal 1	Brand B	S2
3	A	Y	Signal 1	Brand C	S1
4	A	Y	Signal 1	Brand C	S2
5	A	Y	Signal 1	Brand D	S1
6	A	Y	Signal 1	Brand D	S2
7	A	Y	Signal 1	Brand E	S1
8	A	Y	Signal 1	Brand E	S2
9	A	Y	Signal 1	Brand F	S1
10	A	Y	Signal 1	Brand F	S2

cells in Table 1 are filled with a price. We need to do the same for our post hoc design file. While there are many ways to enter the prices, we chose to enter them all into a spreadsheet file in a comma-separated format ("MONADIC PRICES.CSV") in the order listed on the monadic card, and then merge them into the design file.

```
*---step 3: read in price variable from excel---;
data PRICES;
infile 'monadic prices.csv';
input prices;
run;
*---step 4: add prices to design matrix---;
data DES_PRI;
merge CAND2 PRICES;
price_sq=prices*prices;
size=input(put(sizes,sizef.),6.0);
size_sq=size*size;
drop sizes;
run;
```

Dataset DES_PRI generated in Step 4 also contains price-squared and size-squared in case they may be needed to help fit the monadic data better.

The first five observations of the design file are shown in Table 4.

Frequencies of monadic picks. With the design file in place, we now switch to the responses (i.e., picks) on the monadic card, which were stored in a previously created

Table 4

Obs	Platforms	Scrnforms	Signals	Brands	Prices	Price_Sq	Sizes	Size_Sq
1	A	Y	Signal 1	Brand B	P1	P1_Sq	S1	S1_Sq
2	A	Y	Signal 1	Brand B	P2	P2_Sq	S2	S2_Sq
3	A	Y	Signal 1	Brand C	P3	P3_Sq	S2	S2_Sq
4	A	Y	Signal 1	Brand C	P4	P4_Sq	S2	S2_Sq
5	A	Y	Signal 1	Brand D	P5	P5_Sq	S1	S1_Sq

SAS file, DCM_RESPONSE.

```
*---step 5:responses or picks from monadic card---;
data MONADIC;
set DCM_RESPONSE;
*--code the screen size variable--;
*--"A_X_S1" means Platform A, Screen format X, and
Screen size S1; refer to Figure One for the choic-
es--;
if A_X_S1 ne . then sizes=1;
if A_Y_S1 ne . or C_X_S1 ne . then sizes=2;
if A_X_S4 ne . then sizes=3;
if A_Y_S2 ne . then sizes=4;
if B_X_S5 ne . or C_X_S5 ne . then sizes=5;
if A_X_S6 ne . then sizes=6;
if B_X_S7 ne . then sizes=7;
if C_X_S8 ne . then sizes=8;
if B_Y_S9 ne . then sizes=9;
if B_X_S10 ne . or C_X_S10 ne . then sizes=10;
if B_Y_S11 ne . then sizes=11;
if C_X_S12 ne . then sizes=12;
if B_Y_S13 ne . then sizes=13;
if B_X_S14 ne . then sizes=14;
*--array for coding screen formats--;
array scrnf(*) A_Y_S1 A_Y_S2 B_Y_S9 B_Y_S11 B_Y_S13
A_X_S1 A_X_S4 A_X_S6 B_X_S5 B_X_S7 B_X_S10 B_X_S14
C_X_S1 C_X_S5 C_X_S8 C_X_S10 C_X_S12;
*--create screen format variable--;
do i=1 to 5;
if scrnf(i) ne . then scrnform=1; /*Screen format
"Y"*/
end;
do i=6 to 17;
if scrnf(i) ne . then scrnform=2; /*Screen format
"X"*/
end;
*--array for coding tech platforms, signal types,
and brands--;
array rinits(*) A_Y_S1 A_Y_S2 A_X_S1 A_X_S4 A_X_S6
B_Y_S9 B_Y_S11 B_Y_S13 B_X_S5 B_X_S7 B_X_S10 B_X_S14
```

```
C_X_S1 C_X_S5 C_X_S8 C_X_S10 C_X_S12;
*—create the tech platform variable—;
do i=1 to 5;
  if rinits(i) ne . then platform=1; /*Tech Platform
"A"*/
end;
do i=6 to 12;
  if rinits(i) ne . then platform=2; /*Tech Platform
"B"*/
end;
do i=13 to 17;
  if rinits(i) ne . then platform=3; /*Tech Platform
"C"*/
end;
*—code signal type variable—;
do i=1 to dim(rinits);
  if rinits(i) in(7,8,9,0,11,12) then signal=2;
/*Signal Type 2*/
  else if rinits(i) in(1,2,3,4,5,6) then signal=1;
/*Signal Type 1*/
end;
*—code brands variable—;
do i=1 to dim(rinits);
  if rinits(i) in(1,7) then brands=1;
  else if rinits(i) in(2,8) then brands=2;
  else if rinits(i) in(3,9) then brands=3;
  else if rinits(i) in(4,0) then brands=4;
  else if rinits(i) in(5,11) then brands=5;
  else if rinits(i) in(6,12) then brands=6;
end;
drop i;
format A_Y_S1 A_Y_S2 A_XS1 A_X_S4 A_X_S6 B_Y_S9
B_Y_S11 B_Y_S13 B_X_S5 B_X_S7 B_X_S10 B_X_S14 C_X_S1
C_X_S5 C_X_S8 C_X_S10 C_X_S12 dcpick.
brands brandsf. platform platformf. sizes sizef.
scrnform scrnformf. signal signalf.;
run;
```

Our goal is to align monadic responses (i.e., the picks) with the design file. That is, dataset MONADIC created above contains all variables (PLATFORM SIZES SCRNFORM SIGNAL BRANDS) in the design file except prices. But why do we need duplicated variables in both response dataset (i.e., MONADIC) and the design dataset (i.e., DES_PRI)? The answer is, we don't. The only reason we have them there in MONADIC is that so we can create frequencies of picks for all cells on the monadic card, which is derived from jointing those five design variables.

The following PROC FREQ counts how many respondents picked which options out of the monadic card:

```
*---step 6: get freq for each alternative in monadic
card---;
proc freq data=MONADIC noprint;
  tables platform*scrnform*signal*brands*sizes
/out=CC(drop=percent);
run;
The output dataset CC contains frequencies falling
into the "N/A" cells on the monadic card, where
there should be none. We run another data step to
clean up the data.
*—step 7: delete illegal responses—;
data NCC;
set CC;
*—delete responses that are not part of design—;
if platform=2 and scrnform=2 and signal=1 then
delete;
*—delete aggregated frequency—;
if platform=. and scrnform=. and signal=. and
brands=. and sizes=. then delete;
run;
```

The first 10 observations of NCC are listed in Table 5.

There were, for example, eight respondents picking the first non-missing cell, and five for the next cell.

Merging design with monadic responses. This is one of the key steps: merging the frequencies of picks with the design file:

```
  *---step 8: merge response with design---;
data READY;
merge DES_PRI NCC;
by platform scrnform signal brands size; /*merge by
all five factors to ensure exact match*/
*—two lines output for each case in NCC, creating
a censoring variable required by PROC PHREG—;
freq=count;
c=1; /*censoring variable*/
output;
freq=752-freq;
*—if no price listed frequency is 0—;
if prices=0 and freq=752 then freq=0;
c=2; /*censoring variable*/
output;
drop count;
run;
```

PROC PHREG, which we use to analyze monadic choices, requires a censoring factor (called "C" in our code above) with a value of "1" denoting frequencies of picks and "2" for non picks (PHREG was originally designed for survival analysis, in which censored variables play a crucial role in models). Thus for the first non-missing cell, the

Table 5

Obs	Brands	Platforms	Scrnforms	Signals	Sizes	Counts
1	Brand B	A	Y	Signal 1	S1	8
2	Brand B	A	Y	Signal 1	S2	5
3	Brand C	A	Y	Signal 1	S1	4
4	Brand C	A	Y	Signal 1	S2	1
5	Brand D	A	Y	Signal 1	S1	12
6	Brand D	A	Y	Signal 1	S2	4
7	Brand E	A	Y	Signal 1	S1	9
8	Brand E	A	Y	Signal 1	S2	8
9	Brand F	A	Y	Signal 1	S1	4
10	Brand F	A	Y	Signal 1	S2	11

eight respondents falling into this specific cell have a value of "1" on variable C, while 752 - 8 = 744 cases have a value of "2" for not picking this specific choice (the total sample size for this study was 752). This step doubles the number of observations in dataset READY shown in Table 6 for the first six cases.

Coding main and interaction effects for the model. Dataset READY is in a shape ready for PROC TRANSREG, which creates all main effects, all linear effects, and interaction or cross effects between PLATFORM, SCRNFORM and prices.

```
*---step 9: set up data for PHREG, adding cross
effects---;
proc transreg data=ready design=2000 noz nor;
model class(brands platform scrnform signal
/zero=none)
identity(size size_sq prices)
class(platform                         scrnform
/zero=none)*identity(prices)/lprefix=0;
output out=CODED(drop=_type_ _name_ intercept);
id c freq;
label prices='Prices' platform='Platform' scrn-
form='Screen format' signal='Signal Type'
```

Table 6

Obs	Platform	Scrnform	Signal	Brands	Prices	Price_sq	size	Size_sq	freq	C
1	A	Y	Signal 1	Brand B	P1	P1_sq	s1	s1_sq	8	1
2	A	Y	Signal 1	Brand B	P1	P1_sq	s1	s1_sq	744	2
3	A	Y	Signal 1	Brand B	P3	P3_SQ	s2	s2_sq	5	1
4	A	Y	Signal 1	Brand B	P3	P3_SQ	s2	s2_sq	747	2
5	A	Y	Signal 1	Brand C	P2	P3_SQ	s2	s2_sq	4	1
6	A	Y	Signal 1	Brand C	P2	P3_SQ	s2	s2_sq	748	2

```
  size='Screen size' size_sq='Size Squared';
run;
```

With PROC TRANSREG, linear effects are created with an IDENTITY statement, while the ANOVA-type main effects are coded with a CLASS statement for classification factors (the option "ZERO=NONE" in the CLASS statement asks for no explicit zeros, thus the last level of each factor will act as the reference level, with a "0" value of estimated parameter). To find out whether different platforms and screen formats have different price elasticities, the statement:

```
  CLASS(Platform Scrnform /Zero=None)*IDEN-
TITY(PRICES)
```

creates an interaction between the two CLASS variables, PLATFORM and SCRNFORM, and prices.

Modeling monadic picks. The total number of variables in the output dataset CODED from PROC TRANSREG is now 27 instead of 10 as in dataset READY. Most of them have a binary coding with values of "1" and "0", suiting the need for PROC PHREG.

```
*---step 10: analyze the
model---;
proc phreg data=coded
outest=betas nosummary;
model c*c(2)= &_trgind
/ties=breslow;
freq freq;
title "DCM for Monadic
Data";
run;
```

PROC TRANSREG saves much time on coding model effects. Once you have run it, your code for PROC PHREG will be quite succinct. For example, instead of citing all the effects on the right hand of the MODEL statement, you simply put "&_trgind" there, which is a macro variable containing all coded effects, both main and interactions[4].

After submitting the above code, we obtain the output shown in Table 7.

Table 7

Effects	DF	Parameter Estimates	Standard Error	Chi-Square	Pr > ChiSq
Brand A	1	0.75	0.15	25.17	<.000
Brand B	1	0.12	0.14	0.79	0.373
Brand C	1	-0.49	0.16	8.69	0.003
Brand D	1	-0.01	0.14	0.01	0.920
Brand E	1	1.03	0.13	67.29	<.000
Brand F	0	0	.	.	.
Platform A	1	-0.71	0.44	2.63	0.105
Platform B	1	-3.15	0.45	49.60	<.000
Platform C	0	0	.	.	.
Screen Format Y	1	0.71	0.35	4.14	0.042
Screen Format X	0	0	.	.	.
SIGNAL 1	1	-1.23	0.13	85.95	<.000
SIGNAL 2	0	0	.	.	.
Screen sizes	1	0.40	0.06	48.07	<.000
Size Squared	1	-0.00	0.00	40.70	<.000
Prices	1	-0.00	0.00	43.18	<.000
Platform A * Prices	1	0.00	0.01	0.27	0.606
Platform B * Prices	1	0.00	0.08	14.03	0.000
Platform C * Prices	0	0	.	.	.
Screen format Y * Prices	1	-0.00	0.01	25.98	<.000
Screen format X * Prices	0	0	.	.	.

We see that Brand E is the most preferred brand, followed by A, B, F, D, and C. For platforms, C is the most preferred one, followed by A then B. For screen formats, Y is preferred to X. For signal types, Signal 2 is preferred to Signal 1. Further, larger screen sizes and lower prices are preferred. Looking at the interactions, we observe that although Platform C had an edge over Platforms A and B, the latter two had a positive price interaction, implying that respondents may have used price as a quality proxy and thus as the price moves up, we may see more picks of those platforms. This is true especially for Platform B, whose price interaction was significant. On the other hand, of the two screen formats, Y had a positive main effect compared to X, but its price interaction was significantly negative, meaning that consumers may not tolerate a high price tag for Screen Format Y. Setting too high a price would hurt its share. Finally, we see that Platform A's price interaction was not significant (Pr>0.606). At this point we may opt to delete that specific effect and re-fit the model.

Assessing goodness of fit. Having just one card makes it easier to compare the expected and the observed picks to assess goodness of model fit[5]. The following steps are taken to achieve that goal.

First we need to multiply multinomial logit model parameters with design values to produce predicted values. Although there are many ways of doing it, the most elegant and yet convenient is to use SAS PROC SCORE, which yields a new variable we call "XB",

$$\hat{y}=\sum_i\sum_j x_{ij}\hat{\beta}_j$$

where "i" denotes respondents and "j" design factors.

As the model parameters are on a log scale, XB really denotes log predicted values, which are then anti-log transformed through another data step.

Table 8

Obs	sizes	size_sq	prices	brands	Platforms	scrnforms	signals	freq	xb
1	s1	s1_sq	p1	Brand B	A	Y	Signal 1	8	-1.79406
2	s1	s1_sq	p1	Brand B	A	Y	Signal 1	744	-1.79406
3	s2	s2_sq	p2	Brand B	A	Y	Signal 1	5	-1.67708
4	s2	s2_sq	p2	Brand B	A	Y	Signal 1	747	-1.67708
5	s1	s1_sq	p1	Brand C	A	Y	Signal 1	4	-2.45768
6	s1	s1_sq	p1	Brand C	A	Y	Signal 1	748	-2.45768
7	s2	s2_sq	p2	Brand C	A	Y	Signal 1	1	-2.35589
8	s2	s2_sq	p2	Brand C	A	Y	Signal 1	751	-2.35589
9	s1	s1_sq	p1	Brand D	A	Y	Signal 1	12	-1.85878
10	s1	s1_sq	p1	Brand D	A	Y	Signal 1	740	-1.85878

```
*---step 11: log utilities---;
  proc score data=coded(drop=c) score=betas type=parms
  out=p(keep=platform scrnform signal size size_sq prices brands freq c rename=(c=xb));
  var &_trgind;
  run;
```

Dataset CODED was created from PROC TRANSREG and used in PROC PHREG. It is used again as input for PROC SCORE. Because of its origin from PROC TRANSREG, the automatic macro variable &_TRGIND is still active to be used here in PROC SCORE.

The first 10 cases from output dataset P are shown in Table 8.

All attributes from the design file are listed first, followed by XB. At this step, we have not deleted duplicated values due to the censoring variable C having two values. Therefore, each unique combination of attributes is repeated twice. This problem is fixed next.

```
*---step 12: removing duplicated utilities, computing exponential utilities---;
```

Table 9

Obs	size	prices	brands	platform	scrnform	Signal	freq	Exp_freq
1	32	1329	Brand B	CRT	4x3	SD	8	3.0
2	36	1709	Brand B	CRT	4x3	SD	5	4.1
3	32	1399	Brand C	CRT	4x3	SD	4	1.5
4	36	1799	Brand C	CRT	4x3	SD	1	2.0
5	32	1259	Brand D	CRT	4x3	SD	12	2.6
6	36	1619	Brand D	CRT	4x3	SD	4	3.7
7	32	1539	Brand E	CRT	4x3	SD	9	6.4
8	36	1979	Brand E	CRT	4x3	SD	8	8.1
9	32	1399	Brand F	CRT	4x3	SD	0	2.3
10	36	1799	Brand F	CRT	4x3	SD	4	3.0

```
data p2;
  set p;
  if mod(_n_,2) ne 0; /*cut off duplicated utilities caused by censoring variable C*/
  exb= exp(xb); /*exponential utilities*/
run;
```

Using predicted values we next compute shares of preference for each cell on the monadic card. First we obtain the total utility across all attributes, which is to be used as the denominator for computing expected picks.

```
*---step 13: sum of exp utilities---;
proc means data=p2 noprint;
output out=S sum(exb) = t_exb;
run;
```

Dataset S contains just one line of data — the sum of exponential utilities. Next we compute share of preferences for all combinations of design factors (i.e., all 158 choices listed on the monadic card).

```
*---step 14: share of preferences---;
data p3;
```

Table 10

Source	DF	Sum of Squares	Mean Square	F Value	Pr > F
Model	1	3258.86	3258.86	454.69	<.0001
Error	141	1010.57	7.17		
Corrected Total	142	4269.43			
Root MSE	2.68	R-Square	0.77		
Dependent Mean	5.26	Adj R-Sq	0.77		
Coeff Var	50.91				

```
if _n_=1 then set s;
set p2;
e_sop=exb/t_exb; /*expected share of preference*/
exp_freq=e_sop*752; /*expected picks*/
run;
```

Table 9 shows the first 10 cells on the monadic card showing both observed picks (FREQ) and that based on model utilities (EXP_FREQ).

With expected and observed picks, we run a simple linear regression model using observed picks as dependent and expected picks as independent variables.

```
    proc reg data=p3;
  model freq=exp_freq;
  run;
```

The ANOVA result is shown in Table 10.

The model has successfully explained almost 80 percent (77 percent) of the observed picks.

Conclusion

This article discussed usage of monadic cards in forecasting consumer demands and consumer preferences. It demonstrated one way of analyzing monadic data to estimate utilities, using a real-life forecasting project in consumer electronics. We showed that even large monadic cards with about 160 valid cells can be analyzed successfully.

[1]Most DCM projects in marketing research handle stated preferences: we put respondents in hypothetical yet realistic shopping situations and they state which models, brands, or products they prefer most in each situation. Economists often conduct studies for revealed preference, in which people's behaviors are observed in a field setting rather than asked and stated. This latter type does not require repeated measures from the same individual. We focus on stated preferences in this article.

[2]Monadic cards with a different set of alternatives from regular cards, however, may render the two less comparable. If the purpose of monadic cards is to provide benchmarks to help calibrate trade-off results, one should reduce the dissimilarity with regular choice scenarios to the extent possible. Of course, extracting utilities from monadic cards — as this article is focused on — should enhance comparability with regular choice scenarios.

[3]Multiple monadic cards are needed when multi-year forecasts are desired (e.g., forecasting sales in the years of 2003, 2005, and 2010). Either a between- or a within-subject design is feasible, depending on sample sizes, design sizes (i.e., how many regular choice cards for each year to be forecasted), and length of survey. A between-subject design amounts to dividing the sample into cells or groups, with different cells viewing different monadic cards for different years. A within-subject design calls for each respondent to view several monadic cards, and to make a pick from within each scenario.

[4]If some cross effects turn out insignificant, you can use the following trick: add a line "%put &_trgind;" immediately after PROC TRANSREG, which puts all the model effects to the LOG window. You can then cut and paste those effects to be part of PROC PHREG code, replacing MODEL C*C(2)=&_TRGIND with a long list of effects.

[5]Although technically feasible, the author is not aware of any goodness of fit diagnosis for regular choice data. Again, this is at least partly due to the fact that our focus is not on any single card of data, but the pattern of responses across several cards.

References for further reading

Ben-Akiva, M. and Lerman, S. R., *Discrete Choice Analysis: Theory and Application to Travel Demand*, The MIT Press, 1985

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Names of Note

continued from p. 10

Northwestern University's Kellogg School of Management, has been elected to the *Deere & Company* board of directors. Jain has taught courses in strategic marketing, new products and services, and quantitative marketing research at the Kellogg School.

Jana Millen has joined *Understanding UnLtd.*, a Cincinnati market research firm, as vice president of the firm's quantitative research division.

John Tapper has been named chief methodologist at *Ziment*, a New York research firm.

Highland Hts., Ohio-based *Brown, Flynn Communications, Ltd.* has named **Jennifer Dolin Olsen** marketing and research associate.

Delahaye Medialink, a Norwalk, Conn.-based communications research firm, has promoted **Mark Weiner** to chief executive. He will continue to run the day-to-day operations of the research group. Additionally, **Beth Roed** has been promoted to vice president of global sales and **K.C. Brown** has been promoted to vice president of new services.

With the acquisition of the financial services practice of Boston-based Atlantic Research and Consulting by Pittsburgh marketing firm Access Data Corp., **Lonnie Macdonald**, senior vice president for Atlantic, will join Access Data as managing director, research; and **Brett Sullivan**, vice president for Atlantic, will become director, research for Access Data. Both will be based at Access Data's Boston office.

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Loretta Marketing Group
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Saurage Research
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ONLINE FOCUS GROUPS
Saurage Research

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ConsumerSpeak
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Knowledge Systems & Research, Inc.
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SPORTS
FOCUSED Marketing Research, Inc.

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Saurage Research
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YOUTH
Image Engineering, Inc.
Leflein Associates, Inc.

2002 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 businesses 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., Suite 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: FS, FG
African-American

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*
515 North St.
Sausalito, CA 94965
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Fax 415-331-3425
E-mail: mickey@advancedinsights.com
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Services: S
African-American, Asian, Hispanic, Middle Eastern

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(See advertisement on p. 66)

Aha Solutions Unlimited®
91 Bynner St., Suite 9
Boston, MA 02130
Ph. 617-524-4980
Fax 501-423-1067
E-mail: judytso@ahasolutions.org
www.ahasolutions.org
Judy Tso, MAA, Principal
Services: FS, C, DC, DP
African-American, Asian

AIM RESEARCH

Aim Research
10456 Brian Mooney
El Paso, TX 79935
Ph. 915-591-4777
Fax 915-595-6305
E-mail: AIMRES@aol.com
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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. 88)

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1320 E. Shaw, Suite 100
Fresno, CA 93710
Ph. 800-627-8334 or 559-252-2727
Fax 559-252-8343
E-mail: jnichols@aismarketresearch.com
www.aismarketresearch.com
Jennifer Nichols, Manager
Services: FS, C, DC, DP, FG, S, ST, T
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, ST
African-American, Hispanic

ARG - Riverside
A Div. of Athena Research Group, Inc
6700 Indiana Ave., Suite 270
Riverside, CA 92506
Ph. 909-369-0800
Fax 909-369-0957
E-mail: lynn@athenamarketresearch.com
www. athenamarketresearch.com
Lynn Atkins, Owner
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African-American, Hispanic, Native American

ARG – Riverside features the combination of cutting-edge focus group facilities, a large audience research auditorium, high quality recruiting, personalized attention in a pleasant atmosphere, and professional quality research. We know and understand the facets of the Inland Empire (the fastest growing marketing district in the United States). Let us help you to know the Inland Empire, too.
(See advertisement on p. 89)

* Indicates minority-owned firm

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New York, NY 10023
Ph. 212-721-5825
Fax 212-595-1993
www.aslinkny.com
Wanla Cheng, President
Services: FS, C, ST
African-American, Asian, Hispanic, Middle Eastern

Assistance In Marketing/Los Angeles, Inc.
949 S. Coast Dr., Suite 525
Costa Mesa, CA 92626
Ph. 714-755-3900
Fax 714-755-3930
E-mail: aimla@aol.com
www.aimla.com
Services: FS, DC, FG
Hispanic

Athena Research

Athena Research
446 1/2 Linnie Canal
Venice, CA 90291
Ph. 310-439-2067
Fax 310-439-1095
E-mail: lynn@athenamarketresearch.com
www. athenamarketresearch.com
Lynn Atkins, Owner
Services: FS, C, ST, T
African-American, Hispanic, Native American

Athena Research is a full-service research and consulting firm specializing in Hispanic and African-American markets. Your organization has a powerful underlying personality. You will be successful to the degree that marketing strategies accurately portray that personality. Our goal is to define your image, cultivate your unique personality, and assist you in growing your business to its fullest potential.
(See advertisement on p. 89)

ATKINS RESEARCH GROUP INC

Atkins Research Group, Inc.
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Los Angeles, CA 90010
Ph. 323-933-3816
Fax 323-933-3916
E-mail: atkins@atkinsresearchinc.com
www.atkinsresearchinc.com
Kim Atkins, President
Services: FS, DC, FG
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Ideal central Los Angeles location close to Beverly Hills, yet uniquely near our ethnic research specialties: African-American, Korean, Chinese and Hispanic. Spacious three-suite complex comfortably accommodates groups from 1 to 75 and features state-of-the-art translation equipment and free stationary videotaping. Our extensive staff is also well-trained in pre-recruits, mystery shops, on-site interviewing, and medical research. ActiveGroup available.
(See advertisement on p. 89)

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S . . . . Sampling
ST . . . . Survey Translation
T . . . . Transcriptions

Barry Leeds & Associates, Inc.
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New York, NY 10016-7911
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Fax 212-889-6066
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(See advertisement on p. 65)

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E-mail: mbethart@yahoo.com
www.focusgroupmoderator.com
Services: FS, C, ST, T
African-American, Hispanic

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Chicago, IL 60601
Ph. 312-419-0400
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Services: FS, DC, DP, FG, ST
Hispanic, Native American

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Universal City Professional Bldg.
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Ph. 800-882-1983 or 773-933-0548
Fax 773-933-0558
E-mail: info@crmarket.com
www.crmarket.com
Cherlyn Robinson, Project Coordinator
Services: DC, FG, ST
African-American, Hispanic

C&R Research Services, Inc.
Creative & Response Research Services, Inc.
500 N. Michigan Ave., 12th fl.
Chicago, IL 60611
Ph. 312-828-9200
Fax 312-527-3113
E-mail: info@crresearch.com
www.cr-research.com
Amy Fliegelman, New Business Dev./Mktg. Mgr.
Services: FS
Hispanic

C&R Research Services, Inc. is a full-service research company with extensive Hispanic and Latin American market research experience. With offices in both the U.S. and Buenos Aires, C&R offers an array of services for clients targeting the Spanish-speaking markets in the U.S., Central America, South America, and Europe. C&R provides a wide variety of custom qualitative and quantitative research services including customer satisfaction, strategic studies, new product development, brand imagery and positioning research, concept and advertising testing, and children's research.
(See advertisement on Back Cover)

Castillo & Associates*
3604 Fourth Ave., Suite 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
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255 Shoreline Dr., Suite 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. 91)

Chicago Focus
The Focus Network
7 E. Huron St.
Chicago, IL 60611
Ph. 312-951-1616
Fax 312-951-5099
E-mail: info@chicagofocus.net
www.thefocusnetwork.com
Lynn Rissman, Partner
Services: FG
African-American

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Park Central VII
12750 Merit Dr., 10th fl.
Dallas, TX 75251
Ph. 800-800-5055 or 972-386-5055
Fax 972-387-9915
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www.superooms.com
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Services: FG
African-American, Hispanic

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(See advertisement on p. 30)

* Indicates minority-owned firm

Cultural Access Group
445 S. Figueroa St., Suite 2350
Los Angeles, CA 90071
Ph. 213-228-0300
Fax 213-489-2602
E-mail: info@accesscag.com
www.accesscag.com
David Morse, President
Services: FS
African-American, Asian, Hispanic

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. 39)

Cultural Insights Services, Inc.
10510 Buckeye Trace
Goshen, KY 40026-9756
Ph. 502-228-3708
Fax 502-228-2829
E-mail: listening@culturalinsights.com
www.culturalinsights.com
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
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Atlanta, GA 30341
Ph. 770-455-0114
Fax 770-458-8926
E-mail: jon@dataservice.com
www.dataservice.com
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Services: FS, C, DC, DP, ST, T
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Philadelphia, PA 19102-4403
Ph. 215-790-8900
Fax 215-790-8930
E-mail: info@mdavisco.com
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Services: FS, C, DC, DP, S, ST
African-American

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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 and project management.
(See advertisement on p. 11)

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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, C, DC, DP, S, ST, T
Asian, Hispanic, Middle Eastern

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

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

Eastern Research Services
Corporate Headquarters
1001 Baltimore Pike, Suite 208
Springfield, PA 19064
Ph. 610-543-0575
Fax 610-543-2577
E-mail: mail@easternresearch.com
www.easternresearch.com
Services: FS, DC, DP, ST
Hispanic

One hundred-station CATI facility located in El Paso. The entire staff is fluent in English and Spanish. Interviewing in language of choice. Translation services: English to Spanish and back to English. Multiple methods of Hispanic telephone sampling. Spanish-language scripting with Spanish computer keyboards.
(See advertisement on p. 93)

Ebony Marketing Research, Inc.*
2100 Bartow Ave., Suite 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. 92)

Encuesta, Inc.*
(formerly Target Market Research Group, Inc.)
4990 S.W. 72nd Ave., Suite 110
Miami, FL 33155-5524
Ph. 800-500-1492 or 305-661-1492
Fax 305-661-9966
E-mail: martin.cerda@encuesta.com
www.encuesta.com
Martin G. Cerda, President
Services: FS, C
Hispanic

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

* 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

etc Erlich Transcultural Consultants

Erlich Transcultural Consultants
21241 Ventura Blvd., Suite 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)

Fieldwork Atlanta, Inc.
200 Galleria Pkwy., Suite 1600
Atlanta, GA 30339
Ph. 770-988-0330
Fax 770-955-1555
E-mail: info@atlanta.fieldwork.com
www.fieldwork.com
Services: DC
African-American

Fieldwork Chicago-North, Inc.
5750 Old Orchard Rd., Suite 500
Skokie, IL 60077
Ph. 847-583-2911
Fax 847-583-1996
E-mail: info@chicago.fieldwork.com
www.fieldwork.com
Services: DC
African-American, Hispanic

Fieldwork Chicago-O'Hare
8420 W. Bryn Mawr Ave., Suite 650
Chicago, IL 60631
Ph. 773-714-8700
Fax 773-714-0737
E-mail: info@ohare.fieldwork.com
www.fieldwork.com
Services: DC
African-American, Asian, Hispanic, Middle Eastern

Fieldwork Chicago-Schaumburg
1450 E. American Ln., Suite 1880
Schaumburg, IL 60173
Ph. 847-413-9040
Fax 847-413-9064
E-mail: info@schaumburg.fieldwork.com
www.fieldwork.com
Services: DC
African-American, Hispanic

Fieldwork East, Inc.
2 Executive Dr., Suite 800
Fort Lee, NJ 07024
Ph. 201-585-8200
Fax 201-585-0096
E-mail: info@ftlee.network.com
www.fieldwork.com
Services: DC
African-American, Hispanic

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

Fieldwork Phone Center
4849 N. Milwaukee Ave., Suite 500
Chicago, IL 60630
Ph. 888-TO-FIELD or 773-282-0203
Fax 773-282-6422
E-mail: info@phoneroom.fieldwork.com
www.fieldwork.com
Services: DC
Hispanic

Findings International Corp.
9100 Coral Way, Suite 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

Fleischman Field Research
250 Sutter St., Suite 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: DC, 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 high-speed Internet/modem capabilities. Mini-room seating six to eight provides identical amenities to above. Two Web site usability labs. All are two blocks from Union Square shopping, hotels and restaurants. Additional facilities in Walnut Creek, CA - suburban San Francisco. Ninety telephone stations, CATI system. Interviewing/recruiting in English, Spanish and many Asian languages. Member FocusVision, AMA, MRA.
(See advertisement on p. 95)

* Indicates minority-owned firm

Focus & Testing, Inc.
20847 Ventura Blvd.
Woodland Hills, CA 91364
Ph. 818-347-7077
Fax 818-347-7073
E-mail: spence@focusandtesting.com
www.focusandtesting.com
Spence Bilkiss, President
Services: DC, FG, T
African-American, Asian, Hispanic, Middle Eastern, Native American

FOCUS LATINO

Focus Latino*
1617 Cabinwood Cove
Austin, TX 78746
Ph. 512-306-7393
Fax 512-328-6844
E-mail: gcafocuslatino@austin.rr.com
Guy Antonioli
Services: FS, C, DC, ST, T
Hispanic

Established 1996. Specializing in Hispanic qualitative consumer research. Beatriz – a psychologist, Guy – a research, marketing and advertising professional, each has over 25 years of experience working in Mexico, Latin America and the United States. Bilingual and bicultural, both moderate in Spanish or English. Our combined areas of expertise enable us to better uncover consumer insights and provide value-added information and recommendations.
(See advertisement on p. 94)

Focus On Miami*
8603 S. Dixie Hwy., Suite 218
Miami, FL 33143
Ph. 305-661-8332
Fax 305-661-9686
E-mail: focusom@bellsouth.net
Lisa Switkes, President
Services: FS, C, DC, FG
African-American, Hispanic

Focus World International, Inc.*
146 Hwy. 34, Suite 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., Suite 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

Freeman, Sullivan & Co.
Population Research Systems, LLC
131 Steuart St., Suite 500
San Francisco, CA 94105
Ph. 415-777-0707 or 800-777-0737
Fax 415-777-2420
E-mail: lesliederbin@fsc-research.com
www.fsc-research.com
Leslie Derbin, Ph.D., Director Marketing Research
Services: FS, C, DC
African-American, Asian, Hispanic

Garcia Research Associates, Inc.*
2550 Hollywood Way, Suite 110
Burbank, CA 91505
Ph. 818-566-7722
Fax 818-566-1113
E-mail: info@garciaresearch.com
www.garciaresearch.com
Carlos Yanez, Project Director
Services: FS, C, DC, DP, FG, ST, T
African-American, 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

GENESYS SAMPLING SYSTEMS

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: info@m-s-g.com
www.genesys-sampling.com
Gregg Kennedy, Vice President
Services: S
African-American, Asian, Hispanic, Middle Eastern, Native American

GENESYS Sampling Systems has the experience and resources to help you define and reach any low-incidence target group. Ethnic sampling capabilities include geo-targeted RDD (random digit dialing), listed surname, dual frame and other options. We will outline your alternatives in balancing representational accuracy and data collection costs. Genesys-IDplus attended number screening and sample/list enhancement services also available.
(See advertisement on p. 21)

Geo Strategy Partners
3340 Peachtree Rd. N.E.
1000 Tower Walk
Atlanta, GA 30326
Ph. 678-354-1579 or 404-593-5833
Fax 404-720-1001
E-mail: marktowery@geostrategypartners.com
www.geostrategypartners.com
Services: FS, C, DC, DP, FG, S, ST, T
Asian, Hispanic

Greenfield Consulting Group
274 Riverside Ave.
Westport, CT 06880-4807
Ph. 203-221-0411
Fax 203-221-0791
E-mail: info@greenfieldgroup.com
www.greenfieldgroup.com
Services: FS
Hispanic

HEADFIRST market research inc.

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

HEADFIRST Market Research is a full-service research company engaging in a variety of qualitative and quantitative projects. Helping clients create successful business-building strategies from research data is our passion. We specialize in general/African-American/Hispanic/young adult. Our ability to uncover and recognize consumer inspirations fuels outcomes that are strategic - rather than "just more data".
(See advertisement on p. 96)

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 or 866-676-2088
Fax 909-676-2996
E-mail: herreracom@earthlink.net
www.herrera-communications.com
Enrique Herrera, Vice President
Services: DC, ST, T
Hispanic

Hispanic America, Inc.*
Hispanic Market Research & Advertising
116 Weldon Way, Suite 1
Pennington, NJ 08534-1829
Ph. 609-333-1400
Fax 609-466-7430
E-mail: hispanicamerica@aol.com
www.market2hispanics.com
Dr. Jose Acuna, President
Services: FS, C
Hispanic

Hispanic Focus Unlimited*
303 W. Park Ave.
Pharr, TX 78577
Ph. 956-797-4211
Fax 956-797-4244
E-mail: hispfocs@hiline.net
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. 732-613-0060
Fax 732-613-8612
E-mail: info@hispanic-research.com
www.hispanic-research.com
Ricardo A. Lopez, President
Services: FS, C, ST
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. 96)

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

* Indicates minority-owned firm

HOUSE OF MARKETING RESEARCH

House of Marketing Research
836 S. Arroyo Pkwy.
Pasadena, CA 91105
Ph. 626-793-9598
Fax 626-793-9624
E-mail: info@hmr-research.com
www.hmr-research.com
Amy Siadak
Services: DC, DP, FG, ST
African-American, Asian, Hispanic

House of Marketing Research is one of the largest multilingual and multicultural focus group and interviewing research companies serving the Los Angeles area. Our language capabilities include Spanish, Mandarin, Cantonese, Vietnamese, Korean, Japanese and Tagalog. From ethnic to mainstream market segments, we can reach and deliver the results you need. Visit our Web site at www.hmr-research.com for immediate facility availability and project costs.
(See advertisement on p. 97)

Service Codes

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

The Hunter-Miller Group*
1525 E. 53rd St., Suite 605
Chicago, IL 60615
Ph. 773-363-7420
Fax 773-363-1415
E-mail: pmiller@huntermillergroup.com
www.huntermillergroup.com
Pepper Miller, President
Services: FS
African-American, Hispanic

Image Engineering, Inc.
10510 Buckeye Trace
Goshen, KY 40026-9756
Ph. 502-228-1858
Fax 502-228-2829
E-mail: listening@imageengineering.net
www.imageengineering.net
Services: C, DC, DP, ST
African-American, Asian, Hispanic, Middle Eastern

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
Deborahr White
Gary Gosztonyi
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. 98)

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

Insight Research, Inc.*
1000 Broadway, Suite 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: mark@theinsightworks.net
www.theinsightworks.net
Services: FS
African-American, Asian, Hispanic, Middle Eastern, Native American

img

Insights Marketing Group*
2512 Swanson Ave., Suite 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

If your marketing decisions depend on great qualitative research, choose the moderators with the background, skills and charm to get the insights you need. IMG provides full-service qualitative for Hispanic and African-American markets. Based in Miami, IMG's moderators are fully bilingual (English - Spanish) and bicultural; over 13 years of experience in consumer products, financial services, and high net worth segments.
(See advertisement on p. 99)

* Indicates minority-owned firm

INTERVIEWING SERVICE of AMERICA, INC.

Interviewing Service of America, Inc.
15400 Sherman Way, Suite 400
Van Nuys, CA 91406-4211
Ph. 818-989-1044
Fax 818-756-7489
E-mail: mhalberstam@isacorp.com
www.isacorp.com
Michael Halberstam, President
Services: DC, DP, ST
African-American, Asian, Hispanic, Middle Eastern

ISA is the recognized expert in Asian-American and multicultural research. Since 1984 we have completed projects in 61 languages including Mandarin, Cantonese, Vietnamese, Korean, Tagolog, Japanese, Russian and Polish. Six of the largest Asian and Hispanic American TV networks use ISA! Of course English is still the majority of our business but with 325 positions, complete translations, in-house DP and Internet/IVR capabilities we can complete any type of project.
(See advertisement on p. 101)

Intraresearch Corporation*
9949 N.W. 32nd St.
Miami, FL 33172
Ph. 305-513-0260
Fax 305-675-0529
E-mail: info@intraresearch.com
www.intraresearch.com
Javier Sotomayor, President
Services: C, DC, ST
Hispanic

IPC

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

Comprehensive market research services specializing in international and domestic foreign-language projects. Data collection by telephone, mail, Web or personal interviews in the U.S. or abroad. Call us for your customized research needs. Not limited to large projects. Small, unusual projects accepted. Translation, tabulation and coding available.
(See advertisement on p. 99)

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, C
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

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

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.justthefacts.com
Bruce Tincknell, President
Services: FS, C, ST, T
African-American, Asian, 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., Suite 301
Encino, CA 91316
Ph. 818-501-4794
Fax 818-907-8242
E-mail: info@lafocus.net
www.thefocusnetwork.com
Lisa Balelo or Wendy Feinberg, Partners
Services: FS, FG
African-American, Hispanic

Latin@ccess*
5201 Blue Lagoon Dr., Suite 800
Miami, FL 33126
Ph. 305-716-4236
Fax 305-573-2393
E-mail: info@latinaccess.com
www.latinaccess.com
Henry Gazay
Services: FS, C, DC, DP, S, ST
African-American, Hispanic

Leibowitz Market Research Associates, Inc.
3120 Whitehall Park Dr.
Charlotte, NC 28273-3335
Ph. 704-357-1961
Fax 704-357-1965
E-mail: info@leibowitz-research.com
www.leibowitz-research.com
Teri Leibowitz, President
Services: DC, FG
African-American

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

livewire Strategy/Research*
2039 Green St., Suite F
Philadelphia, PA 19130
Ph. 917-306-4828 or 215-763-5778
E-mail: joel@livewirestrategy.com
www.livewirestrategy.com
Joel R. Johnson, Director
Services: FS, C
African-American

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. 100)

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

* Indicates minority-owned firm

Mari Hispanic Research & Field Services
2030 E. Fourth St., Suite 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

Market Ease/Urban Focus*
1229 N. Northbranch, Suite 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, Inc.
3040 W. Salt Creek Ln.
Arlington Heights, IL 60005
Ph. 847-590-7000
Fax 847-590-7114
E-mail: tpayne@marketfacts.com
www.marketfacts.com
Tom Payne, President
Services: FS, DC
Asian, Hispanic

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

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

The Market Segment Group*
201 Alhambra Circle, Suite 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: FS, C, DC, DP
African-American, Asian, Hispanic

Market Study International, Inc.*
9700 Richmond Ave., Suite 108
Houston, TX 77042
Ph. 713-952-1400
Fax 713-952-2444
E-mail: marketstudy@pdq.net
Ahmad Namakforoosh, Office Manager
Services: FS, DC, FG
Hispanic

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

Marketing Matrix International, Inc.*
2566 Overland, Suite 675
Los Angeles, CA 90064
Ph. 310-842-8312
Fax 310-842-7212
E-mail: moran@markmatrix.com
Lynn Walker Moran
Services: FS
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

Marketing Semiotics, Inc.
1560 Ashbury Ave.
Evanston, IL 60201
Ph. 847-864-1555
Fax 847-864-7515
E-mail: loswald@marketingsemiotics.com
www.marketingsemiotics.com
Services: FS, C, DC, T
African-American, Asian, Hispanic

Marketing World*
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
www.mktg-world.com
Swaran L. Saxena, President
Services: FS, C
Asian

Mars Research
1700 N. University Dr., Suite 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
Joyce Gutfreund, Director of Operations
Services: FS, C, DC, DP, FG, ST, T
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., Suite D
Chula Vista, CA 91911
Ph. 619-424-4550
Fax 619-424-4501
www.mdiis.com
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

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Index of Advertisers

Trade Talk

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Driven Product Definition methodology as a framework for showing readers how to truly incorporate the voice of the customer into their new product efforts. But Mello has avoided penning a book-length commercial and instead has packed 224 pages with advice on using the Kano method, establishing metrics, conducting customer visits, and seeing through the customer's eyes.

First Among Equals – How to Manage a Group of Professionals (288 pages, $26), by Patrick McKenna and David Maister, is published by The Free Press/Simon & Schuster, New York.

Stakeholder Power — A Winning Strategy for Building Stakeholder Commitment and Driving Corporate Growth (258 pages, $28), by Steven Walker and Jeffrey Marr, is published by Perseus Publishing, Cambridge, Mass.

Defining Markets, Defining Moments — America's 7 Generational Cohorts, Their Shared Experiences, and Why Businesses Should Care (364 pages, $24.99), by Geoffrey Meredith and Charles Schewe, with Janice Karlovich, is published by Hungry Minds, New York.

The Great Tween Buying Machine — Marketing to Today's Tweens (224 pages, $47.50), by Dave Siegel, Tim Coffey, and Greg Livingston, is published by Paramount Market Publishing, Ithaca, N.Y.

Customer-Centric Product Definition — The Key to Great Product Development (224 pages, $34.95), by Sheila Mello, is published by Amacom, New York.

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Trade Talk

By Joseph Rydholm, QMRR editor

Some new possibilities for your library

With spring in the air, it seems like a good time to clean off the old bookshelf, so here are quick-hit reviews of five of the more noteworthy books to cross my desk in the past several months.

First Among Equals – How to Manage a Group of Professionals, by Patrick McKenna and David Maister, isn't about research but could certainly come in handy to researchers or anyone in the business world who needs to lead a team of co-workers, whether it's on an ongoing or one-time basis. The book is comprehensive: the authors show how to define your role as a leader, how to deal with many types of people (the prima donna, the underperformer, etc.), how to clarify group goals, and how to measure the group's success. If you don't want to take your role as a leader seriously, don't bother picking this book up. But if you do, there's a lot to work with here.

Leadership of another kind is the focus of *Stakeholder Power*. To show other interested businesses how they might assume a corporate leadership role, authors Steven Walker and Jeffrey Marr of the Indianapolis research firm Walker Information take the reader inside a number of companies that have aligned their quest for corporate integrity with corporate success. Walker and Marr argue that by conducting business at every level with integrity and fostering and sustaining an image of good corporate citizenship, a motivated company can achieve the newest business-world Holy Grail: customer loyalty.

Two other books focus on market segmentation. *Defining Markets, Defining Moments* paints portraits of seven American generational cohorts (Depression-era, World War II, Postwar, Leading-Edge Baby Boomer, Trailing-Edge Baby Boomer, Generation X, and N Generation) by examining the cultural and historical experiences that have shaped each group's outlook. There's not too much new here – most of the advice on how to market to the different cohorts is (or should be!) of the common sense variety. Still, the book is an entertaining read and provides a solid overview of the American consumer, making it a good reference for marketers trying to bring a specific age group into focus.

Selling to and understanding 8-12-year-olds is the subject of *The Great Tween Buying Machine*, a thorough look at one age group's fears, hopes, likes/dislikes, and media and consumption habits. The book's later chapters give battle-tested advice on how to reach tweens with advertising and marketing campaigns and how to develop new products.

Product development is the sole focus of our last book, Sheila Mello's *Customer-Centric Product Definition*. Mello, managing partner of Product Development Consulting, Inc., uses the phases of her firm's Market-

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