QUIRK'S
Marketing Research Review

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April 2003

Ethnic research issue

- Solving the multicultural marketing paradox
- Charting the change in Asian-Indian eating habits

Segmentation in B2B markets

2003 Ethnic Research Directory

QUIRK'S Marketing Research Review

Volume XVII Number 4 April 2003

Illustration by Jennifer Coppersmith

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Publisher Emeritus
Tom Quirk

Associate Publisher
Evan Tweed

Editor
Joseph Rydholm

Production Manager
James Quirk

Directory Manager
Steve Quirk

Directory Assistant
Shawn Hardie

Marketing Manager
Dan Quirk

Advertising Sales
Evan Tweed 952-854-5101
Lane E. Weiss 415-461-1404

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More than 10 million African-Americans are online

New York-based Nielsen//NetRatings reports that the African-American Internet audience has grown to more than 10 million surfers, comprising almost 8 percent of the total home-and-work-combined online population. The African-American Internet population spent a total of 44 hours on the Web, initiated 42 sessions, and viewed 1,186 pages online in January 2003. In comparison, the total online population spent more than 50 hours surfing the Web, logged 52 sessions and viewed 1,444 pages during the same month.

Overall, the top 10 sites include a variety of cultural, entertainment and educational themes. BlackPlanet.com was the top online destination for African-Americans (see table). The site garnered the highest concentration of African-Americans, with 75 percent of its traffic, or 892,000 unique visitors, being of African-American descent. Following closely, music site Zjamz.com was the second-most visited destination, with a 71 percent concentration of African-American surfers. In third, BET Interactive garnered a unique audience of 554,000 African-Americans, representing 63 percent of the site's total traffic.

Nielsen//NetRatings Top 10 Online Destinations Most Visited by African-Americans, January 2003 (U.S., home and work)

Brand/Channel	Composition (percent)	Unique Audience (000)
1. BlackPlanet.com	74.8	892
2. Zjamz.com	70.6	221
3. BET Interactive	63	554
4. Epic Records	26.6	337
5. NBA	18.1	626
6. Columbia Records	17.3	223
7. U.S. Office of Personnel Management	17.2	296
8. U.S. Federal Student Aid	15.8	344
9. FastWeb	15.8	353
10. U.S. Dept. of Education	15.5	642

Source: Nielsen//NetRatings, January 2003

"African-Americans surpassing the 10 million unique visitor mark points to the continuing maturation of the online medium," says Charles Buchwalter, vice president of client analytics, Nielsen//NetRatings. "And the emergence of strong sites with a high concentration of African-American visitors gives marketers ample opportunities to target their messages to a qualified, growing audience."

According to the latest Nielsen//NetRatings NetView data, nearly one-third or 32 percent of the African-American Internet audience in the U.S. logged onto the Internet through a high-speed connection, an increase of 55 percent from January 2002. "A factor contributing to this growth is the accessibility of high-speed bandwidth. Just a year ago, many major markets could not provide surfers with the option of broadband service, but with increased competition and higher demand for speed many of these markets are now fully wired," says Buchwalter. "This double-digit growth rate may point to broadband technology breaking through the various segments of the population in an effort to become the standard technology used to access the Internet in the U.S." For more information visit www.nielsen-netratings.com.

U.S. Hispanics heavy users of online services

The size of the online Hispanic population is growing rapidly, according to results from the U.S. Hispanic Cyberstudy from America Online, Inc. and RoperASW. Hispanic consumers report spending more time online than total U.S. online consumers — nearly 10 hours a week at home (9.5) vs. 8.4 hours for all U.S. online consumers and 13.8 hours a week at work vs. 9.6 hours for all U.S. online consumers. In addition, Hispanics surveyed spend 16 percent more time online per week (15.7 hours home/work combined) vs. total U.S. online adults (13.5 hours home/work combined). Hispanics surveyed spend 12 percent more time online per week from home (9.5 vs. 8.4 total U.S. online adults) and 44 percent more time online per week from work (13.8 vs. 9.6 total U.S. online adults). Hispanic online consumers surveyed want bilingual online service — with 83 percent saying access to English content is very or

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Burke, Inc., Cincinnati, has promoted **Tara Perigo Marotti** to vice president. At the firm's Boston office, **Andrew Bernard** has been named senior account executive.

Portland, Ore., research firm *Bardsley & Neidhart* has named **William J. Hruby** director - consumer research. In addition, **Amanda Olson** has been named senior project manager - technology research.


Hruby **Olson**

Danvers, Mass., consulting firm *The Hale Group, Ltd.* has named **Bruce Yergler** principal. He will specialize in assisting agribusiness clients with strategy development, channel management and marketing/research strategies.

Qualitative Insights, Sherman Oaks, Calif., has named **Linda Giniewicz** director of operations. In addition, **Jennifer Von Schneidau** has been named vice president, account services. The firm also announced three promotions: **Sonia Felix** to project manager in training; **Arthur Mntsakanian** to manager, telephone recruiting facility; and **Eric Kaplan** to full-time database manager.

Foxboro, Mass.-based *Invensys* has named **Amy Burns** vice president of marketing for the company's manufacturing and process solutions business unit. She will be responsible for overseeing strategic marketing, business planning, marketing research, training and competitive analysis.

As part of a reorganization of its U.S. Media Services division, New York-based *Arbitron Inc.* has promoted **Brad Feldhaus** to the new position of vice president of radio product management and client services. Additionally, **Ed Cohen**, vice president of domestic radio research, will now report to Owen Charlebois, president, U.S. Media Services. **Pat Duggan**, manager of client services, retired in March. Separately, the firm promoted **Linda Dupree** to the new position of senior vice president, Portable People Meter.

Strategic Marketing Corporation, Bala Cynwyd, Pa., has promoted **Christine Corner** to managing director of its London Office. In addition, **Kathryn Gallant** has been promoted to director of the firm's Qualitative Institute and **Alice Liftin** has been promoted to senior vice president.


Layne **Graham**

Scott Layne has joined *Bellomy Research, Inc.*, Winston-Salem, N.C., as president.

John L. Graham has been named president of the Newspaper Association of America's Research Federation for 2003. This federation represents the interests of more than 450 newspaper researchers across the U.S. and Canada who are members of NAA. Graham currently works as manager of marketing and research services for Paddock Publications in Arlington Heights, Ill.

Greenfield Online, Wilton, Conn., has named **Andrew (Andy) Ellis** vice president, client development.

Tanya Koshechkina and **Nick North** have been named directors of *GfK Media Ltd.*, the newly-launched U.K. media research arm of Germany-based GfK Group.

New York research firm *Ziment* has named **Tim O'Rourke** director of multivariate services.


Kinitsky **Chakrapani**

NFO WorldGroup, Greenwich, Conn., has named **Larry Kinitsky** president of NFO Financial Services, its financial sector research company.

Millward Brown North America has appointed **Chuck Chakrapani** to the newly created position of chief executive officer of Millward Brown Goldfarb, the company's Canadian division. In joining Millward Brown Goldfarb, Chakrapani will merge his consultancy practice, Standard Research Systems, into the Millward

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Product & Service Update

Arbitron study profiles buying power of Black Americans

New York-based Arbitron Inc. has released The Arbitron Black Consumer Study 2003. The study profiles the spending power of Black consumers by providing information on their buying habits, home ownership rates and media preferences in the Top 100 Arbitron markets for the African-American population. The study also highlights marketing opportunities relating to this consumer segment and provides tips on how advertisers can reach Black Americans more effectively.

The Arbitron Black Consumer Study 2003, a follow-up to the Arbitron Black Consumer Study first released last year, draws data from the Spring 2002 Arbitron Radio Market Report Reference Guide and Scarborough USA+ Release 1, 2002. The full study is available as a free downloadable PDF file by clicking "Free Studies" in the Radio Stations or Ad Agencies sections of the Arbitron Web site at www.arbitron.com.

MegaPanel from Nielsen//NetRatings

New York-based Nielsen//NetRatings announced its plans to launch the MegaPanel service. Complementing Nielsen//NetRatings' consumer panels, the MegaPanel service provides a global market research solution based on a sample of more than one million Internet users measured worldwide. MegaPanel delivers e-commerce transaction capabilities, granular analysis of smaller sites, and survey capabilities to understand consumer attitudes and behavior.

Scheduled to debut in the second quarter of 2003 in the U.S., and already established in France, Germany and the U.K., the Nielsen//NetRatings MegaPanel service measures a broad cross-section of Internet users. For more information, please visit www.nielsen-netratings.com.

Predictive analytics package from SPSS

Chicago-based SPSS Inc. has released SPSS PredictiveMarketing, an automated predictive analytics application designed to help marketers improve customer targeting and increase response rates.

SPSS PredictiveMarketing uses analytics that sift through customer data to find revealing patterns. A Web-based interface provides the results in visual formats that enable marketers to predict which customers will respond, purchase and churn. The product is designed to accommodate a range of user skill levels.

Pre-built, customizable templates help marketers use customer data to anticipate which customers are likely to respond to a particular offer, what they are likely to purchase, when they are likely to leave and other business problems. The templates are designed to be readily revised for new campaigns and customer analyses. SPSS PredictiveMarketing extends traditional approaches, such as recency, frequency and monetary (RFM) analysis, by combining multi-dimensional customer behavior and demographic characteristics.

SPSS PredictiveMarketing is a standalone application that can be integrated into organizations' campaign management, sales force automation or CRM systems. Its open, standards-based architecture enables it to be customized to work within a company's

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Research Industry News

News notes

Chicago-based **Information Resources, Inc**. has retained the investment banking firm of William Blair & Company to assist the company in its exploration of strategic options. "We have been working with William Blair for a few months. We are exploring a variety of strategic alternatives, including the sale of all or parts of the company, joint ventures, restructuring and capital infusions in order to enhance stockholder value and to better serve our customers," said Joe Durrett, chairman and CEO of IRI, in a company press release. "Our plans are to continue serving this industry for the long term."

As part of a new brand strategy, **Catalina Marketing Corporation**, St. Petersburg, Fla., has brought subsidiaries previously branded as Health Resource Publishing, Market Logic and Alliance Research under the Catalina Marketing brand. Health Resource Publishing becomes Catalina Health Resource, Market Logic becomes Catalina Marketing Direct Marketing Services and Alliance Research becomes Catalina Marketing Research Solutions. The new brand strategy includes a new corporate logo.

Lionville, Pa.-based **West Pharmaceutical Services, Inc.** has

Research Calendar

The Advertising Research Foundation will hold its annual convention on April 9-11 at the New York Hilton. For more information visit www.arfsite.org.

Sawtooth Software will hold its annual conference on the acquisition and analysis of market research data on April 15-17 at the Hyatt Regency Hotel in San Antonio, Texas. For more information contact Marilyn Stanford at 360-681-2300 or visit www.sawtoothsoftware.com.

Canada's Professional Marketing Research Society (PMRS) will hold its annual conference on April 27-29 at the Empire Landmark Hotel and Conference Center in Vancouver. For more information visit www.pmrs-aprm.com.

The Qualitative Research Consultants Association (QRCA) and the Association for Qualitative Research (AQR) will hold a joint conference on April 30-May 2 at the Sheraton Lisboa Hotel & Towers in Lisbon, Portugal. For more information visit www.qrca-aqr-conference.info.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its Latin American Conference on May 4-6 in Punta del Este, Uruguay. For more information visit www.esomar.nl.

The New York/Northeast and Philadelphia chapters of the Marketing Research Association will hold a joint chapter spring seminar on May 8-9 at the Park Hyatt Bellevue Hotel in Philadelphia. For more information visit www.mra-ny.org.

Anderson, Niebuhr & Associates will hold a questionnaire design and use workshop on May 1-2 at the Holiday Inn Select - International Airport, Bloomington, Minn., and again on May 15-16 at the Holiday Inn - On the Bay in San Diego. For more information call 800-678-5577 or visit www.ana-inc.com.

The American Association for Public Opinion Research (AAPOR) will hold its annual conference on May 15-18 at the Sheraton Music City Hotel in Nashville, Tenn. For more information visit www.aapor.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold "Managing Research for Profit 2 - The Client's Perspective," a cross-industry forum, on May 18-20 in Brussels. For more information visit www.esomar.nl.

The Marketing Research Association (MRA) will hold its annual conference in San Francisco on June 4-6 at the Hyatt Regency Embarcadero. For more information visit www.mra-net.org.

The European Society for Opinion and Marketing Research (ESOMAR) and the Advertising Research Foundation (ARF) are co-sponsoring the Worldwide Audience Measurement conference (radio, TV, media mix, print, online, out-of-home/ambient) on June 15-20 in Los Angeles. For more information visit www.esomar.nl.

The Council of American Survey Research Organizations (CASRO) will hold its annual technology conference on June 19-20 at the Roosevelt Hotel in New York. For more information visit www.casro.org.

Target Marketing of Santa Barbara, Calif. will hold E-Metrics Summit 2003, an exploration of Web analytics, at the Four Seasons Biltmore Hotel in Santa Barbara on June 23-26. For more information visit www.emetrics.org.

sold its Indianapolis-based consumer health care research business to **Concentrics Research, LLC**. The consumer health care research business, previously a component of West's Drug Delivery Systems Division, conducts customized contract research primarily for Phase III, Phase IV, Rx-to-OTC switch and product line extensions. Concentrics Research is a new company formed by the management team of West's consumer health care research business and Bindley Capital Partners, LLC.

Wilton, Conn.-based **Greenfield Online** has announced its investment in Confirmit, a Web survey and feedback software product licensed by Future Information Research Management - FIRM. Greenfield Online will integrate Confirmit into its online survey systems.

New York-based **Nielsen Media Research** announced a rollout schedule for bringing continuous, overnight demographic ratings into the top 10 television markets in the U.S. Nielsen said it would launch electronic People Meter ratings service in Los Angeles, New York, Chicago and San Francisco next year.

People Meter service will be expanded to include Philadelphia, Washington, D.C., Detroit and Dallas-Ft. Worth in 2005, and Atlanta the following year. Nielsen announced support from NBC, ABC, Comcast, Time Warner Cable in N.Y. and Los Angeles, and Adlink in Los Angeles for the local People Meter service.

The Nielsen People Meter will replace the current meter-diary measurement system in the top 10 markets, which include nearly 32 million TV households, or 30 percent of all U.S. television households. More than $8 billion is spent just on local television advertising in the top 10 markets.

At the same time, Nielsen Media Research announced it intends to nearly double the size of the National People Meter Sample over the next four years. The National People Meter Sample produces the ratings that are the currency for all broadcast and cable networks and national syndication sales.

Acquisitions

U.K.-based **Quæstor Research & Marketing Strategists** has been acquired by **eq group plc**, a U.K. marketing services group.

Beverly Hills, Calif.-based **Creative Artists Agency** (CAA) has acquired New York- and Los Angeles-based market research firm **Youth Intelligence**.

Alliances/strategic partnerships

New York-based firms **Arbitron Inc.** and **Nielsen Media Research** announced an expansion of their agreement that increases Nielsen's involvement in a joint research program to evaluate the Arbitron

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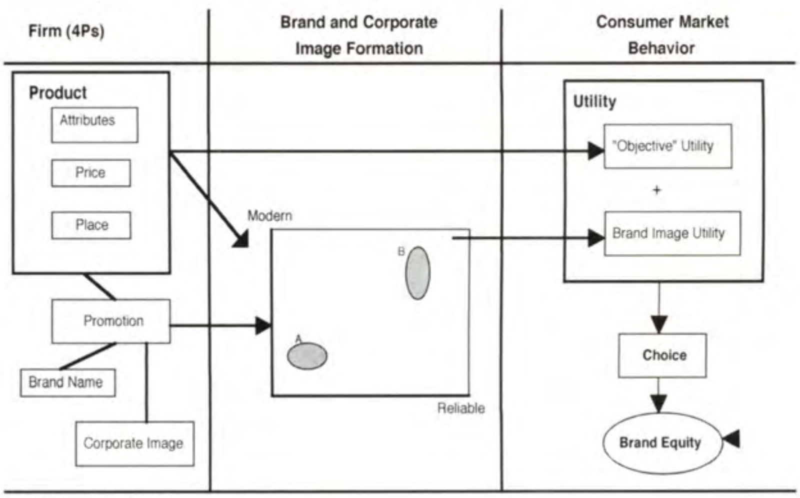
Using discrete choice models to measure brand equity

By Michael Lieberman

Editor's note: Michael Lieberman is founder and president of Multivariate Solutions, a statistical and market research consulting firm. He can be reached at 212-656-1711 or michael@mvsolution.com.

Brand equity is one of the more popular concepts in marketing today. It is also one of the most overused and misused terms in marketing research and the subject of much "fuzzy" thinking. In fact, there are several definitions of brand equity, all of which stem from the concept of "brand."

Figure 1



Source: Joffre Swait

A brand is the sum total of all that is known, thought, felt and perceived about your company, service or product. Branding, then, is the process of making products and companies into brands — the consistent and disciplined way a company communicates a brand's essence to the public (according to Martin Thoma of Thoma Thoma Creative). Consumers' response to the brand revolves around the brand's image. This makes the concept an essential input

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Solving the multicultural marketing paradox

By Gary Berman

Editor's note: Gary Berman is CEO of Market Segment Research, Coral Gables, Fla. He can be reached at gberman@marketsegment.com.

Multiculturalism is a comprehensive, company-wide strategy that is too often measured using the next quarter's results. No matter what you call it — multiculturalism/diversity/urban/ethnic/Hispanic/targeted...(you get the idea) — it is an emotionally-charged issue whose funding is often driven by factors such as avoidance of sanctions rather than growing the bottom line. Consequently, asset allocation decisions of time and money are not always made using a dispassionate, objective analysis of the organization's business and competitive environment. Multicultural marketing is a long-term project that's typically looked at from a short-term perspective. And therein lies the paradox.

'm need, rt-term fix'

What is the solution to the paradox? Research. Objective and analytically forward-thinking models designed to drive decisions regarding multiculturalism.

Companies seeking to grow their business by enhancing their focus on multicultural and other targeted segments must answer the following frequently-asked ethnic and segment marketing questions, an indispensable exercise for marketers seeking direction in this area.

1. Which segments should I target (so I don't dilute my efforts)?

One needs first to identify quantifiable "attractiveness criteria" in order to score segments, relative to one another and to the mass market. Research must assess, among other factors, the extent to which potential segments are sufficiently sizeable and growing (size and growth here include the absolute population; the percentage of some broader total represented by the segment; historical population growth; future growth potential, and current share, by key product); the extent to which potential segments are identifiable (the ability to score a database, to procure lists, and to access through community-based organizations); the extent to which potential segments have distinct needs or are inaccessible via existing general/mass market strategies (language, unique product needs or purchase motivators, unique channel preference array, and unique media and communications vehicles); the extent to which potential segments are reachable (availability of traditional and new media, and media consumption by vehicle); and the extent to which potential segments are profitable (current monthly spending, other category-specific measures of profitability).

Questions must be incorporated into the survey device to answer all of the above questions. The categories and criteria therein must then be weighted (based upon their relative importance in determining a potential segment's attractiveness) before a final recommendation relative to segment selection is possible.

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American masala

How acculturation changes the eating habits of Asian-Indian immigrants

By Hy Mariampolski, Ashish Joshi, Manish Gupta and Sattiraju Chandrashekhar

Editor's note: Hy Mariampolski is managing director of QualiData Research, San Francisco. He can be reached at hy@qualidataresearch.com. Ashish Joshi is associate consumer insights manager at Clorox, Oakland, Calif. He can be reached at ajoshi2@hotmail.com. Manish Gupta is assistant research manager at Colgate-Palmolive, New York. He can be reached at mgupta11@hotmail.com. Sattiraju Chandrashekhar is marketing research analyst at Boehringer-Ingelheim Pharmaceuticals, Inc., Ridgefield, Conn. He can be reached at shekhar72@hotmail.com.

America's 1.9 million Asian-Indian immigrants are a highly educated and upwardly mobile segment. The U.S. Census 2000 offers several interesting insights into this group: The median household income of Indian-Americans is $48,320, over 50 percent higher than that of U.S.-born households. The mean Indian-American household income is $65,381, the highest of any ethnic group in the U.S. Eighty-nine percent of Indian-American families are two-parent households. Half of Indian-Americans own their own home. Less than 2 percent of Indian-Americans under 65 receive public assistance.

Sixty-five percent of Indian immigrants have a bachelor's degree or higher, vs. 20 percent for U.S.-born individuals and higher than any other immigrant population. Five percent of all physicians in the U.S. obtained their primary medical degree from India. Fifty-nine percent of Indian-American women are employed. Forty-three percent of Indian-Americans are employed in managerial/professional jobs. More than 5,000 Indian-Americans are faculty members at American universities.

Acculturation

Like all immigrants, however, acculturation — the compromising of orig-

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inal cultural norms in order to conform to the host society — is a pervasive fact among Indian-Americans. Some changes are forced by new lifestyle demands; others are a result of attraction to alternative options in the immigrants' new home and, therefore, are more voluntary.

Acculturation drives changes in many aspects of immigrants' consumer behavior. It particularly influences adaptation in diet and food consumption customs. That is the focus of this study.

Based on intensive interviews and ethnographic observations of several Asian-Indian households in the southeastern United States through the process of preparing and eating food, it is apparent that:

— Asian-Indian immigrants quickly conform to American trends of using convenience foods, unlearning the formal eating habits of India and shifting mealtime roles.

— These early changes are primarily driven by the needs of a changed lifestyle that involves time pressures and changed sex roles.

— Changes not driven by necessity evolve slowly along pathways that favor cultural familiarity.

The main themes that circumscribe Asian-Indian adaptation to American cultural norms include the following changes:

• *Asian-Indians adapt to informal eating habits*

Asian-Indian-Americans have accommodated to American mealtime patterns in terms of content and timing. Breakfast, for example, is always elaborate in India, consisting of paranthas, idlis, dosas, upmas, poha, etc. (i.e., crepes, bread stuffed with vegetables, rice dumplings, etc.). In contrast, here breakfast either is not eaten or is limited to cereals, energy bars, crackers etc., along with a glass of fruit juice. The availability of alternative breakfast foods in the U.S. seems irresistible to Asian-Indian-Americans.

Lunch patterns follow breakfast. Among our respondents, we observed consumption of leftovers from the night before, items prepared quickly in the morning, such as sandwiches, noodles etc., a snack from the vending machine or a quick lunch with colleagues at restaurants.

The Indian scenario, in contrast, would have involved either a packed lunch in the office, an elaborate lunch at home or a meal at the college cafeteria. All these meals would have a full Indian spread and would be prepared fresh — leftovers are not considered appropriate at lunchtime in India.

Time pressure is an important reason for this change. However the desire to have an Indian lunch is greater than the desire to have an Indian breakfast. This gets reflected in the leftover dinner being used for the next day's lunch. Also, lunch is a more social occasion than breakfast. So the American practices of having a lunch out of the vending machines or grabbing a quick bite from an eatery have been adopted by our informants as well.

• *Asian-Indians adopt changes in meal timings*

The time for dinner conforms to local practices and has moved from 8-10 p.m. to 6-8 p.m. The small or nonexistent breakfast and relatively light lunch makes respondents feel hungry earlier.

The Indian custom of a late afternoon snack with tea or coffee has been discontinued in America. Only informants who were still conforming to eating a late dinner at around 8-10 p.m. continue having this evening snack.

• *Switch to convenience and alternative foods — expansion of food/beverage types*

Ingredients that never were part of a meal in India have been added to the menu. One major addition in the diet is cheese. All informants had a large variety of cheese in their refrigerator. They were also using cheese in traditional Indian dishes that did not have cheese in them. It was added like a dressing to quite a few Indian subzis (vegetable stews).

The other change is enjoying soft drinks with the meal instead of using just water. In India consumption of soft drinks is restricted to outside the home, unlike the U.S., where they may be used with meals. The refrigerators of the respondents are filled with soft drinks.

Salads as eaten in the U.S. are very different from salads in India. Here salads are consumed at the beginning of the meal rather than along with the meal. All the ingredients are raw. The nutritional value of salads is highly motivating as a reason for consumption. Therefore some informants make a point of eating salads several times a week.

Enjoying the cuisines of other cultures is a prominent American habit reinforced by the availability of prepared dishes and ingredients at supermarkets and restaurants. Indian-American immigrants have made unique adaptations to this custom. Because of similarity to Indian cuisine, adopting Mexican and Italian dishes is very prominent. Respondents describe regularly preparing tacos, burritos, tostadas, spaghetti and cut pasta for their families. These foods are seen as convenient, tasty, quick and easy to make while adding variety to the menu.

In addition to outright adoption of other cuisines, there is also considerable adaptation to personal tastes. One of the informants describes making curry-flavored pasta with sambhar masala. Another adds regular Indian spices to noodles to suit her Indian taste buds.

• *Asian-Indians use quicker modes of cooking*

None of our informants owned microwave ovens in India but in the U.S. this appliance is being used extensively. Microwaves are used for heating food, baking potatoes and in some cases also for making rice.

Use of baking ovens has also increased. Unlike India, the availability of cake mixes encourages baking. Conventional Indian cooking uses an Indianized version of the baking oven that is called a tandoor. It is however not usually found in the homes but at the restaurants. So the traditional Indian home meal does not have too many items from the baking oven. But Indians in the U.S. seem to be open to baking cakes.

• *Asian-Indians eat out more often*

How this study was done

We conducted this research among a sample of Indian-American families now living in Athens, Ga., who had come to the U.S. within the last 15 years. Research was completed while Messrs. Joshi, Gupta and Chandrashekhar were students in the Masters of Market Research Program in the Terry College of Business at the University of Georgia where Dr. Mariampolski was serving as a member of the advisory board.

Informants agreed to invite researchers for a meal at their homes along with their families. Respondents let us observe them as they prepared and consumed meals. We talked to them as they cooked and also later as we all ate. We did a detailed audit of their refrigerators to content-analyze the food items in it. We also captured the food, kitchen equipment and the refrigerator contents on a photographic camera. For each family this whole process lasted for at least three hours. Note-taking, audio-recording and photography were the three methods of registering information.

Almost all our informants report a greater incidence of eating out both with family and with colleagues. Quick office lunches, elaborate family dinners and celebratory get-togethers with friends are all occasions for eating out in conformity with the American pattern.

• *Asian-Indian men also cook and help in the household!*

Buying groceries, cooking and other kitchen chores in India are mostly the responsibility of the women in the house. In America, however, that strict definition of gender roles seems to have become relaxed. The Indian-American male head of household gets involved in buying groceries, doing chores like cleaning dishes and kitchen surfaces and also cooking. Occasionally, the man takes charge of cooking a whole meal alone. This would be a very rare occurrence in India.

It is not just the high labor force participation of Indian-American women that causes this change in gender roles. It is a profound cultural adaptation. Even if the wife were employed, men would feel uncomfortable about cooking and cleaning in India because of the adverse reaction it would draw from friends and relatives. The pressures in the U.S., in contrast, favor egalitarianism.

• *Asian-Indians develop an increased awareness of nutritional value of food*

Nutritional aspects of the diet exert increasing influence on food choices for Indian-Americans. For example, respondents consume milk that is low in fat and have become aware of fat content in various product categories

— even learning about polyunsaturated fats and monosaturated fats and their impact on cholesterol levels. Usage of sugar has receded. Even the amount of spices — despite the preference for highly spiced foods in India — has started to conform to less seasoned American patterns.

• *Changes in eating customs*

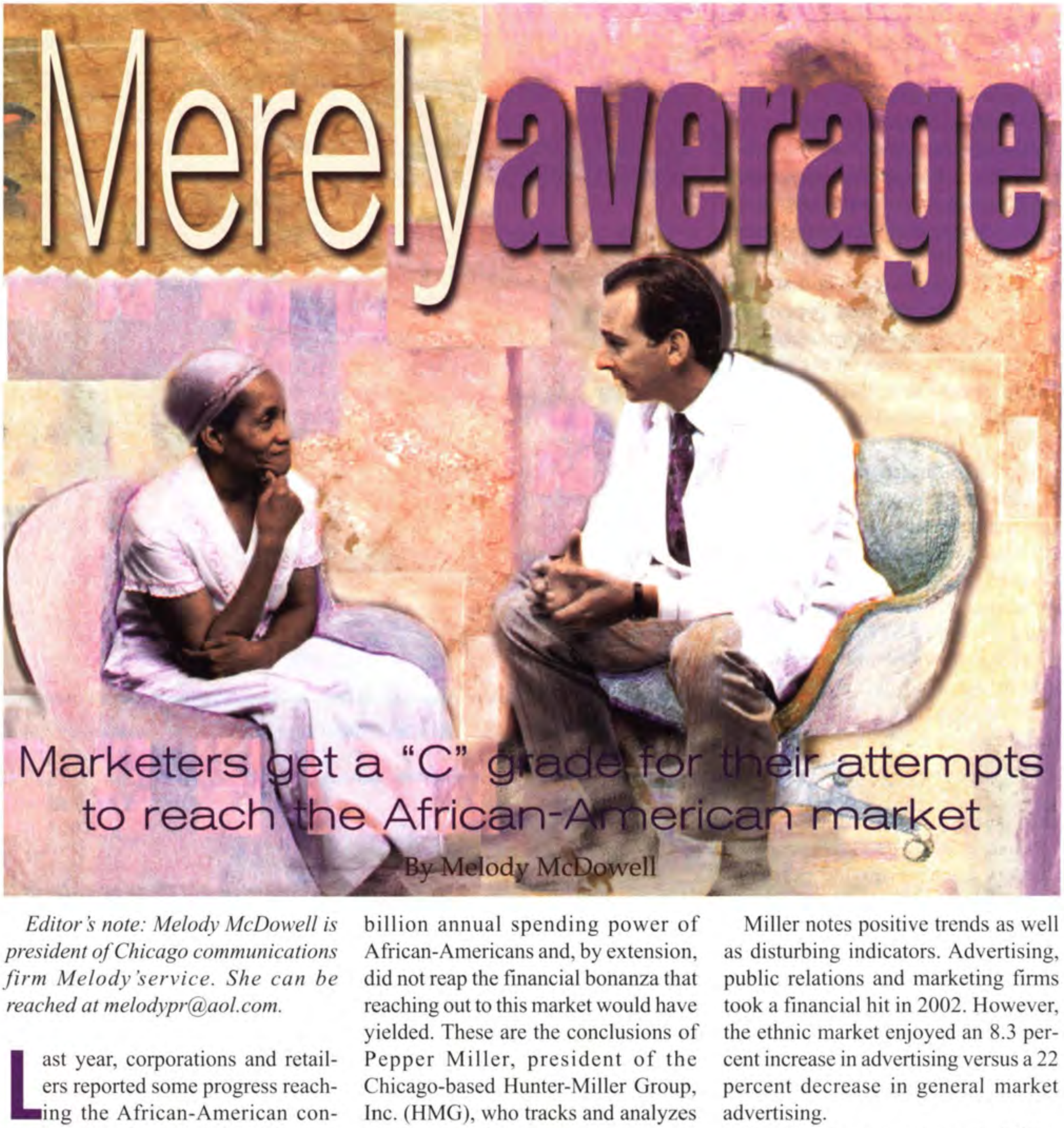
Another interesting change is the adaptation to American customs while eating food. Most respondents acknowledge that unlike in India, where they ate most of their food by hand and spoon, they had started using knives, forks and paper napkins in the U.S. Surprisingly, this change in the manner of eating food is not limited to formal settings or when eating non-Indian food but occurs also while eating an Indian meal with their family members. Many regard the use of knives and forks as central to their gradual acculturation process and something that they must adopt as soon as possible.

One of the informants also described how his habit of regularly praying to God before eating his meal in India had faded away over time. He attributed this mainly to time constraints.

Implications of this study

Asian-Indian immigrants are going through a very profound period of acculturation. Marketers trying to target this small but relatively affluent population may have opportunities in meeting their unique cultural adaptations. Convenience foods and products with a Mexican or Italian heritage may reach a receptive audience here, particularly if they suggest options with an Indian flavor.

Acculturation is a two-way street, however, as immigrants share their own foods and customs with the larger society. Marketers may also cultivate opportunities in adding Indian flavors to their product mix. Bringing in well-known Indian brand names may give these products a seal of authenticity. Eventually, curries may be thought of as just as American as bagels and pizza.



Merely average

Marketers get a "C" grade for their attempts to reach the African-American market

By Melody McDowell

Editor's note: Melody McDowell is president of Chicago communications firm Melody'service. She can be reached at melodypr@aol.com.

Last year, corporations and retailers reported some progress reaching the African-American consumers but, in the main, failed to devise compelling strategies to reach this market. This occurred, in part, because marketers did not identify and/or exploit industries where African-Americans either dominate or display high activity; nor did they effectively cultivate market segments that spend money and wield enormous influence. Consequently, many marketers were unable to tap into the $572 billion annual spending power of African-Americans and, by extension, did not reap the financial bonanza that reaching out to this market would have yielded. These are the conclusions of Pepper Miller, president of the Chicago-based Hunter-Miller Group, Inc. (HMG), who tracks and analyzes ethnic marketing trends.

Miller gauged corporations' advertising and marketing trends and strategies geared at the African-American marketing during the past year and, for their limited efforts, awards them a "C" grade. Miller concludes that more comprehensive market research, and the deployment of more relevant strategies, would yield significant peaks in corporations' bottom lines in the future.

Miller notes positive trends as well as disturbing indicators. Advertising, public relations and marketing firms took a financial hit in 2002. However, the ethnic market enjoyed an 8.3 percent increase in advertising versus a 22 percent decrease in general market advertising.

Despite the upward trend, Miller maintains that this figure is somewhat deceptive. "While the ethnic market recorded an overall 8.3 percent increase in spending in 2002, monies were funneled in disproportionate numbers to the Hispanic market," she says, attributing this to Census 2000 figures that reported a whopping 58 percent population boom among Hispanics.

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However, Miller found it encouraging that, although the amount was slight, there was some increase in funding within the African-American market as contrasted with the dramatic falloff within the general market.

This may be due to demographic trends pertaining to African-Americans revealed by Census 2000 data: they are becoming better educated, they are earning more money and, 50 percent of African-American adults are between the ages of 18 and 34 — the younger age group that ad agencies strive to reach.

She also attributes increased spending in 2002 to a heightened segment buzz. This resulted in monies being pumped into the ethnic/urban/multicultural segment primarily by new industry participants.

Miller, however, observed a disturbing trend in 2002: a continuing tendency by "old guard" major marketers to devalue the African-American market.

HMG also noted a variety of indicators that could factor into a devaluing of the segment and possibly a slashing of African-American marketing budgets in the future. These signs were:

1) The explosion of the hip-hop culture. Hip-hop is a powerful means of expression for ethnic musicians. However, its overall image has also pigeonholed the entire African-American Gen-X (18-34) segment as "hardcore hip-hoppers." According to Yankelovich, 27 percent are African-American Gen-Xers who are "thrillseekers," while 20 percent are defined as young professionals who earn high incomes, are well educated, and live upscale lifestyles yet are habitually overlooked by marketers.

2) The emergence of the Hispanic population. As marketers prepare their budgets, the dramatic increase in the Hispanic population prompted them to reevaluate their marketing schemes to African-Americans.

3) The assimilation of the African-American market into the general market culture. According to the 2000 Census, African-Americans are mainstreaming into the general market and a new profile of African-Americans has emerged: African-Americans are living in suburbia, traveling abroad, earning graduate degrees and earning upwards of $75,000 in household income. Because this lifestyle mimics the general market, marketers have decreased budgets to the African-American market and turned to general market strategies to reach this emerging market. Miller says marketers fail to understand that, despite their elevated status, Blacks remain true to their African-American culture and are prompted to buy products whose messages appeal to their traditional values.

Additionally, says Miller, corporations and retailers eager to reach the African-American market failed to capitalize on genuine opportunities to reach African-Americans by not identifying fertile industries where African-Americans' buying habits and lifestyle tilt heavily. This prevented marketers from reaping a marketing bonanza. For example:

• Retailers — It is widely held that African-Americans drive fashion trends at every spectrum of the societal ladder from moderate to upscale buyers. According to the Yankelovich African-American Monitor, 60 percent of African-Americans use shopping as a form of entertainment versus 35 percent of whites. They are willing to pay more to maintain their fashion edge. However, retailers have not "fashioned" an effective campaign to effectively reach this shopping-conscious market.

• Health and beauty aids (HBA) — General-market HBA advertising campaigns that simply replace white models with African-American models miss the opportunity to talk about HBA issues relevant to African-American beauty needs. African-Americans spend almost $200 million a year on hair care alone and more than three-fourths of that is spent on hair-care products, a $173.9 million industry.

• Finance/investments — While banks and insurance companies increased their ethnic marketing outreach, there has been little activity from investment firms. Census data reveal that African-Americans are now earning more and, by extension, are valuable investment prospects. However, says Miller, marketing strategies in this industry continue to be dominated by messages aimed at the general market.

• Technology — Studies show that young and upscale African-Americans are active users of online services and heavy purchasers of computers and other technological products and services. In fact, African-Americans have a stronger desire than whites (73 percent to 66 percent) to learn more about and keep up-to-date on the latest technologies. However, corporations fail to acknowledge this heavy use by African-Americans in their marketing messages.

• Pharmaceuticals — Despite revelations that African-Americans are medically challenged in disproportionate numbers to their population numbers, pharmaceutical companies failed to tailor messages to African-Americans. Miller says Pfizer and Merck are two exceptions because these firms crafted marketing strategies geared to African-Americans. Miller predicts that this type of outreach will yield positive results.

• Travel — Even though the Sept. 11 disaster devastated the entire travel industry and put it in peril across the board, African-Americans continue to outpace other ethnic groups as travelers. Yet marketers failed to exploit this trend.

Additionally, HMG found that marketers did not cultivate the following emerging segments:

• Black females — According to HMG, black females are active, involved consumers who are brand-centric. Compared to white females, African-American females have higher life aspirations in terms of the importance of education (52 percent vs. 28 percent), being entrepreneurs (38 percent vs. 15 percent), having the latest technology (41 percent vs. 18 percent) and perceiving themselves to be more sophisticated and sexier (36 percent vs. 12 percent and 34 percent vs. 9 percent).

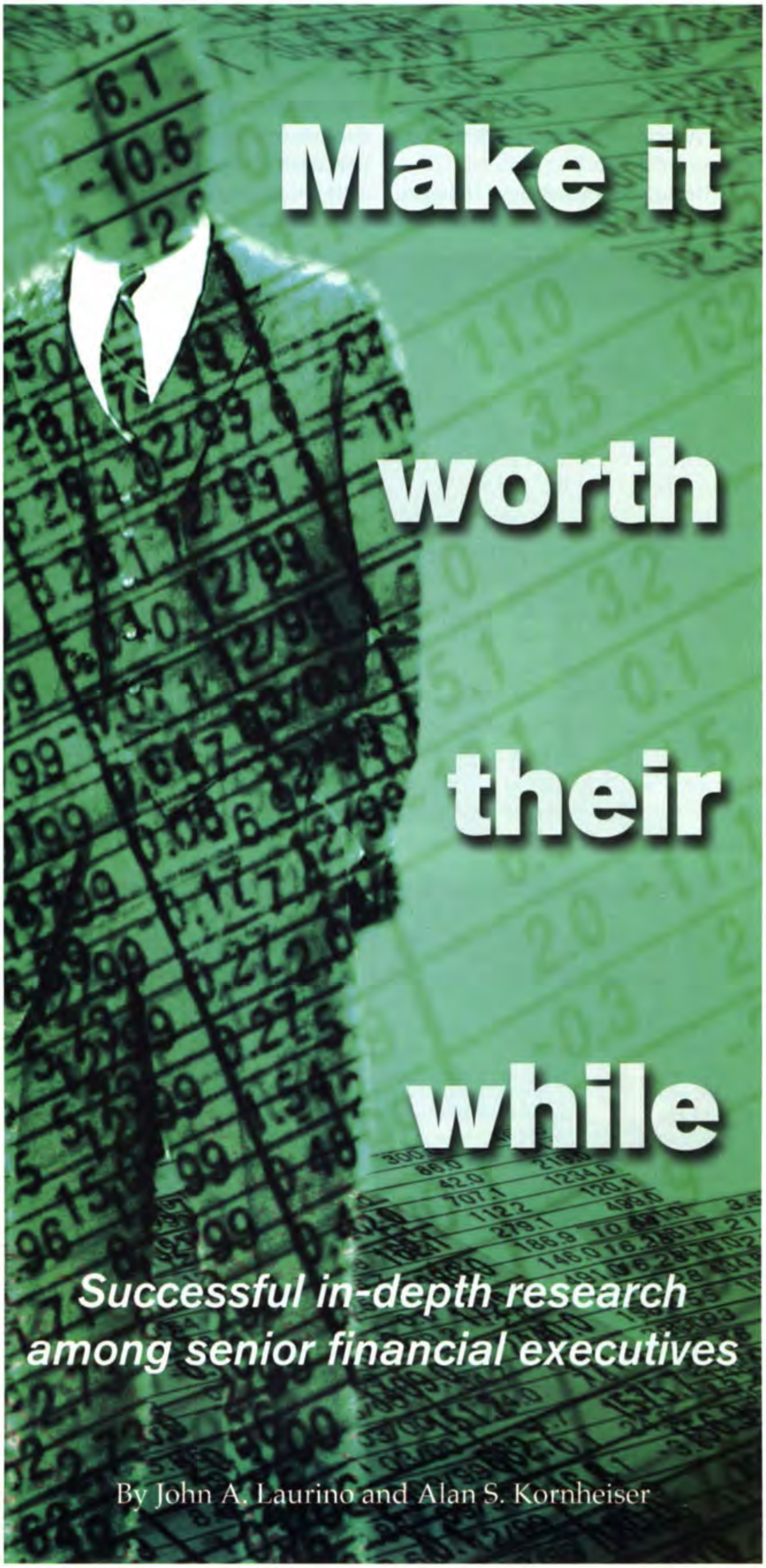
• Black Baby Boomers (35-54) — This powerful segment represents the highest income segment of all African-American consumer groups and has a spending power of $200 billion.

• African-American GLBTs (gays, lesbians, bisexuals and transgenders) — With higher incomes and a spending power of $64 billion, skewed younger, and being more politically active, this is a segment that merits a standalone outreach campaign.

Gotten it right

While the 2002 effort yielded only a "C" grade, Miller singled out Wal-Mart, Coca-Cola, McDonald's, and more recently, State Farm Insurance, as companies that have gotten it right in reaching out to the African-American market. "These companies are good corporate citizens who respect the African-American market and have among their marketing team African-American agencies that have the pulse of the African-American market. They earn an 'A' grade."

Miller also praised new industry entrants, like pharmaceutical companies, the finance industry and not-for-profit cultural institutions, for seeing value in the segment by seeking out new opportunities within the African-American market. She predicts that, if marketers heed the advice of market researchers and others who understand the dynamics of the African-American community, they will be able to reach, penetrate and grab a significant share of this valuable market.



Make it worth their while

Successful in-depth research among senior financial executives

By John A. Laurino and Alan S. Kornheiser

Editor's note: John A. Laurino is managing director of Westport Consulting Group Inc., South Norwalk, Conn. He can be reached at 203-866-6200 or at jlaurino@westportconsulting.com. Alan S. Kornheiser is research director at Westport Consulting Group, Inc. and also principal and research director of sophisticated market research, North Salem, N.Y. He can be reached at 914-669-6705 or at akornhis@optonline.net.

It is notoriously difficult to conduct effective market research among senior financial executives. Not only are they hard to recruit, they are notoriously apt to cancel meetings because of the press of other business and — despite their best intentions — often lapse into platitudes when one wants specifics. Nor can simple financial incentives break through this wall: the CFO of a Fortune 5000 company simply makes too much money to be swayed by the incentive amounts a researcher can afford to offer.

Given the difficulties in obtaining such interviews, it is especially unfortunate that so many of them provide minimally useful information. If one is paying significant money for senior interviews, one does not want a simple snapshot of current thinking: there are other, much less expensive ways to get such data. Ideally, one wants complex, considered, in-depth evaluation of such key questions as:

• What are your worst current problems?

• What could be done to help you resolve those problems?

• Would something like this be helpful?

• How could it be improved?

• What would it take to get you interested in such a product or service?

It is the rare individual who can answer such questions helpfully when approached cold. It is probably the unique individual who can give you a measured answer, one that also reflects

what he's learned from talking with you, in a way that is both useful and actionable. Yet that is what is needed from most high-level financial services interviewing.

Why indeed should this be, given that most such executives are well educated, pleasant, extremely competent people with excellent interpersonal skills? Probably because we ask the wrong people the wrong questions, often at inopportune times, in the wrong ways.

We do not claim that we always ask the right people the right questions or have developed an easy set of solutions for such problems; research in this area will always be difficult, subject to a variety of influences beyond our control and expensive. However, over the years of Westport Consulting Group's focus on the financial services industry, we have developed a methodology for obtaining rich, actionable, and timely data from senior financial executives. The procedure is described in more detail below. There are eight key rules:

1. Insure your client's complete cooperation and involvement in the process. Let them assist in identifying and recruiting key respondents, whenever this is appropriate.

2. Make it inordinately convenient for the senior executive to participate. Flexibility in venue is paramount.

3. Insure that the participant will learn as much about your topic as he (or she) will contribute.

4. Be generous in spending money and time on the people and facilities involved with recruiting.

5. Send preliminary materials for review prior to the interview.

6. Use two interviewers with complementary, not identical, skills; ensure that they have a working (not a superficial knowledge) and some credentials related to the topic.

7. Obtain post-interview questionnaires.

8. Stay focused on learning real information that cannot be obtained through other means.

A caveat: The reader will note that this article focuses on in-person interviews. Naturally, interviews can also be done via telephone or even via the Web, and we have used these techniques as well. However, the value of senior executive interviews lies in a full understanding of their beliefs and intentions, neither of which can easily be obtained without face-to-face contact. Nor can we usually obtain sets of pre- and post-interview questionnaires without individual contacts as motivation. Accordingly, we prefer to limit our use of telephone and Web interviews to occasions with simple, highly focused questions.

Obtaining the interview

First, determine to whom exactly you want to talk. While the CFO or head of IT may indeed make the final purchasing decision, he may be unable to talk about it in a useful way. Senior financial executives are expected to be comfortable with numbers and technology, but they have earned their jobs through their management, organizational and interpersonal skills. If you are interested in how a firm handles its long-term planning, finds and develops good managers, allocates resources, and integrates multiple demands, the CEO or CFO is probably the person to talk to. However, if you have a much more specific goal — how HR software is chosen, how the funds are consolidated across multiple currencies and time zones, how to make electronic treasury management more user-friendly — you probably want a senior staff person whose nonbinding "recommendation" is actually the purchase decision.

Think this through. Hard. Then personally get on the phone and recruit someone. Talk with that person long enough to be sure he's the right one. Retrace your steps so you know how he was found. Only then are you ready to hand off the recruiting to your associate or to a skilled recruiter.

Even when your target is not the CEO, senior financial executives cannot be "bribed" into interviews. Although we always provide thank-you presents — which may be Palm Pilots, leather passport cases, or fairly generous checks — senior decision makers will not provide the 45 minutes or more a detailed interview entails solely for cash or other equivalent honoraria. Rather, it is necessary to convince the person being interviewed that the interview actually will be valuable to him (or her) by providing explicit reasons for participating and following up with very specific benefits.

To begin with, after you've clearly identified your target, all recruiting starts with a "credibility letter": a letter from the client, on letterhead, from a known person, asking for assistance and assuring the prospective interviewee of complete confidentiality, the importance of the research in improving the products and services currently provided in the relationship, and the gratitude of the writer. Such a letter may have to go to as many as a half-dozen people within a company to ensure that the right person receives it. The letter describes the study, explains why it is being conducted, why the person being addressed is vital to the study's success, and promises a phone call within days to set up an interview. (We also include a toll-free number [or similar] and e-mail address so that the respondent can call to set up the interview, but almost invariably we must actually make the call.) We pay special attention to the quality and professionalism of the letter; it always goes out personally addressed. The effort is worth it. While whenever possible we also supplement the written letter with an e-mail follow-up, we have found that much unsolicited e-mail goes unread.

Second, we use only executive interviewers, who have been thoroughly briefed on the topic — including things like nomenclature — to set up interviews. There is (unfortunately) no substitution for intelligence; the interviewer must be able to explain to the respondent why the interview is important and what it entails. Accordingly, the recruiter must be as fully briefed as a normal interviewer would be and capable of discussing the project — its purpose, scope, and needs — in convincing detail.

At this point, the recruiter must sell the interview to the respondent; the respondent must be assured that the interview is of value to him. A summary of the research, with proprietary data removed but still reasonably actionable, is the best thing to offer. Lacking that, the respondent should be assured that the interviewer will share what he has learned with him during the interview. It is also usually helpful if one names the client, especially when the client is a major force in the marketplace. Even if the client firm does not do business with the respondent's company, most respondents will be eager to know what it is planning and considering. The knowledge that, say, Deutsche Bank is actively researching an area and would like a respondent's opinion about it is itself highly flattering as well as motivating.

Finally, it is often useful to schedule interviews outside of normal business hours. Interviews conducted before 9 a.m., during lunch hours, or after 5 p.m. are not on company time and, as such, help respondents avoid ethical problems. A check for $250 offered for a 10 a.m. interview may be considered inappropriate, while an equivalent offer for a 6 p.m. interview may be considered "free money" and a chance to learn something interesting. Locations that are most convenient to business centers also help get people to step out of their office for a brief discussion (see below).

The pre-interview

Walking into an interview cold, whether the interview is conducted in-person or via telephone, is a horrible waste of time and money. A respondent should always receive a package well before the interview, describing what will be discussed; providing key data for the discussion; and asking for background information about the respondent and his point of view concerning those topics. In addition, any materials that will be needed for the interview (e.g., potential advertising campaigns) should also usually be included.

We have traditionally done this by mail, using express mail services to send information and questionnaires in advance of our interviews. However, e-mail can also be an effective way to send information (although we have found, to our surprise, that many of our prospective interviewees make little effective use of it), as can faxes.

We strongly recommend including a simple questionnaire with the introductory material. The goal of the research, after all, is usually to determine what the respondent would do if certain things changed (e.g., if a new product or service were available). Accordingly, providing a questionnaire at the beginning, before the new product has been presented, allows us to obtain basic information without wasting precious time collecting this data during the interview.

The questionnaire should immediately establish basics: respondent's name, title, company, company size; other key variables of interest in the interview. However, it should be non-invasive, not trivial (ideally you should have some basics before beginning), and very friendly. After all, you wish to use it to start a relationship. (Note that only minimal information about the respondent's company need be requested; presumably that information is already available and was used to choose the respondent.)

This questionnaire should also establish a few key baselines if the interview will provide any sort of demonstration. For example, in a recent study of financial software, the initial questionnaire asked respondents to:

- list vendors who provided software meeting this specific financial need;
- evaluate the importance of a range of relevant software descriptors (e.g., cost, efficacy, ease of use); and
- evaluate key vendors on how well they met those needs.

Interviews concerning improved consumer banking might ask for:

- key things the bank is doing better than its competition or other providers; and
- key things it's doing less well and ways to improve.

We should emphasize that although this sounds very similar to the type of questionnaire one might administer in a segmentation analysis, its purpose is very different. We are not trying to do a detailed analysis, and — to be frank — our sample is too small and our questions often too broad to make a quantitative analysis of much value. Rather, we wish to focus our respondents' attentions on the areas of interest to us and to determine, before beginning an interview, our respondents' general attitudes toward the area we are researching and the goods, services, and vendors relevant to it.

As should be clear, these questionnaires are brief. They can be filled out in minutes without any difficulty.

We collect these questionnaires at the beginning of each interview. (We also make multiple telephone calls and send e-mails to ensure that the questionnaires have arrived and have been filled out.) Because having respondents send us back completed questionnaires before the interview is a logistical nightmare and likely to inhibit the completion of the interview, we rarely ask that they be returned to us before we arrive for the interview. For situations where the senior executive is unusually highly motivated (e.g., an existing client who has agreed to participate in what might be considered a beta or pilot test), having a more detailed questionnaire and providing an express-mail return envelope has proven quite successful.

When interviews are conducted via telephone, we do request the materials be sent to us, and in such cases rely as much as possible on e-mail to make the process as easy and as fast as possible.

The interview

- *Who conducts the interview?*

We strongly recommend conducting senior interviews in-person, using two interviewers. Two interviewers greatly increase the efficiency of an in-depth interview with a senior financial services executive and — given the difficulty involved in setting up such interviews — are a worthwhile expense overall.

This emphatically does not mean that "more is better" or that two similar interviewers are better than one. Rather, we use a pair of complementary experts to conduct the interviews. One might be an expert interviewer well versed in the topic under discussion but not a true banking expert, while the other might be a professional banker with extensive interviewing experience. In such a case, the expert interviewer would lead the discussion, with the banking expert supplementing the interview with key queries about specific technical issues. Or we might use two skilled interviewers, one stronger on technology and the other stronger on finance, to fully explore the implications of new financial software. For a project with a strong consumer orientation (e.g., improving a bank's branch operations), we might even let one interviewer focus on the consumer's point of view and let the other focus on the bank's point of view.

Interviews like this, while not easy to do, provide incredibly rich data. There are no "dead" periods; both interviewers are working from the same structured discussion guide, allowing one to take notes while the other speaks directly to the respondent; the respondent can always find someone to identify with; and we can be sure of getting every minute's worth of value from the interview.

In addition, the expertise and "credentials" such interviews provide inevitably encourage discussion. When one can truthfully tell a bank CFO or IT director or senior insurance underwriter that "I understand your problems…after all, I've sat in your desk," the respondent is far more likely to respond in depth than if he feels that he is speaking to someone unfamiliar with his field.

Although such in-depth interviews usually imply a single respondent, we've found that it is often fruitful to conduct paired interviews — that is, with a respondent and someone a level above or below him in the reporting chain. If done correctly, with questions aimed at respondents' expertise and not at their internal reporting structures, such interviews can provide more and better data than can individual interviews.

• *How to conduct the interview*

All interviews need to follow an agreed-upon discussion outline, with key probes, vitally needed information and timing clearly indicated. However, questioning can never devolve into simple question-and-answer probing. Rather, it is vital to turn the interview into a comfortable conversation, focused on key areas of interest.

We have no secret ways of making this happen. Knowledge of the respondent's company and his role in the company is helpful, as are general ice-breaking questions directly relevant to the respondent's needs. We can only suggest that the interviewers focus on a "we're all in this together" approach, emphasize the value to the respondent of the research, and demonstrate an awareness of the respondent's problems and opportunities. Clearly, one obvious aid in this respect is the information in the pre-interview questionnaire.

Any key materials that need to be reviewed must have been sent ahead of time. There is no time in such an interview for the interviewer to sit, waiting, while the respondent examines new text, ideas, or illustrations. However, key demonstrations — particularly of new technologies — are often appropriate. Respondents must have been made aware of this beforehand and know what they will be seeing and why they will be evaluating it.

Demonstrations can be conducted using experts from the client organization. Such experts can help the interviewers appear "neutral," which they must be at all times: it is their role to act as honest scribes recording unvarnished opinions, not to "sell" on behalf of the client. If the respondent believes that the process is in his or her best interest and can act as a conduit influencing a real outcome, especially one that he or she has some vested interest in, the resulting data can be remarkably rich.

• *Where to conduct the interview*

The best place to conduct an interview is within a respondent's office, or in a meeting room in the respondent's place of employment. It is far easier to obtain an interview under such circumstances and respondents are invariably more comfortable, and more open, in such surroundings.

However, good results can be obtained if one uses one's client's office. Interviews for, say, an IBM or Citigroup project can often be conducted within an IBM or Citigroup facility. Especially if some sort of demonstration is needed, the resources of the client corporation can be very helpful.

Perhaps surprisingly, there are few "bias" problems in such a setting; a large corporation (such as, in our example, IBM or Citigroup) is part of the respondent's mindset in any case. In many instances, there will be a preexisting business relationship of some sort between the respondent and the client, making recruiting easier. Even if no such relationship exists, that the research is backed by a large corporate client gives it greater face validity and (as noted above) facilitates recruiting: a respondent doing no business at all with Citigroup will typically find it prudent to be aware of what new ideas it is developing.

Lacking a corporate setting — either the respondent's or the client's — probably a hotel room or (better) reserved business center in a hotel is the best option. Such facilities are convenient, can be set up ahead of time, and appropriately furnished. Private clubs are also well received if an appropriate membership or sponsorship is available. The usual default location, a focus room or similar research facility, should be the last choice. Such facilities are geared to handle large numbers of consumers at minimum cost and rarely offer the level of professionalism that will put a senior manager at ease.

The post-interview

All executive interviews end with our leaving behind four things:

1. Our most gracious and sincere thanks for the respondent's time.

2. A generous and (ideally) personalized gift.

3. A post-interview questionnaire to be filled out and returned to us.

4. A self-addressed, pre-paid express mail envelope.

Oddly, the most important of these is probably the last: even today, a FedEx envelope draws attention. That we have taken the trouble to include one says how important we feel the questionnaire is; that we hand this over along with our thanks and our gift creates a strong willingness to fill out the questionnaire.

This is the questionnaire that matters. The pre-interview questionnaire helps provide an overview of the respondent but it is necessarily brief; a respondent is unlikely to fill out a lengthy one. It is designed to lay a baseline for expectations.

Although nonquantitative, the interview notes provide a recording of the immediate reaction to an idea or concept. They are excellent at assessing mood and immediate reaction, but they cannot measure how the idea will "sit" with the respondent.

The post-interview questionnaire ties it all together. To begin with, it can be a good deal longer than the pre-interview questionnaire, since a sense of obligation has been established. (Obviously, it cannot be too long or too complex, but anything that can be finished in five minutes or a bit longer will almost always be completed and returned.) In it lies the ability to trap net "impressions" that remain after the interview is long over. When data from all three sets of observations are compared, it is often possible to observe priorities within the respondent's comments and separate a casual reaction from a more-deeply held point of view.

The questionnaire invariably asks for two things: 1) how has our interview changed how you think about (whatever we talked about)? and 2) what second thoughts and additional insights have you had since we spoke? Ideally, it should also echo questions asked in the pre-interview questionnaire, to establish what changes, if any, have occurred as the result of the interview.

This questionnaire is also the opportunity for a range of ranking and rating scales that do not belong in the actual interview. While it is often of great value to be able to attach some sorts of numbers to a respondent's feelings, asking for such ratings during an interview wastes precious time and destroys the conversational mood one needs for a good interview.

Keeping focused

The risks in any such study are inevitably the paired ones of trying to do too much and settling for too little. Probably the second is the worst problem: it is easy to focus on getting the answer to one or two key questions and feel you have done your job. What's more, probably getting such answers *is* having done your job. Unfortunately, "answers" in this case have to include a full and rich understanding of context, of ideas you didn't have going into the interview, and complex reasons behind the answers. One must probe, ladder from simple answers to the underlying motives behind the answers, and double back to completely exhaust the key areas under discussion.

Doing all this without giving offense isn't always easy. It must be done in a conversational format, and as a result it is possible to become too vague, to engage too extensively in what amounts to corporate chitchat, and thus learn very little about very many things. This is also to be avoided.

The pre- and post-interview questionnaires provide the key bulwarks against these dangers. An appropriate pre-interview questionnaire provides much of the introductory material needed for an interview; one can establish rapport and focus on key issues very quickly without the necessity of wasted time. More importantly, the post-interview makes the most annoying types of probing unnecessary. Because it will provide solid, considered evaluations, the kind of information that is valuable to have but tedious to obtain in actual interviews (e.g., "I find this idea very good but not outstanding in terms of its price, especially as compared to..."), the interviewer need not worry that he has omitted extremely specific probes and can focus instead on more subtle issues.

No one way

We are good at what we do, but we claim no unique expertise in our interviewing style, nor do we believe that there is only one good way to conduct an interview. However, we do believe that the combination of pre- and post-questionnaires, using interviewers with whom senior executives can identify, double-teaming interviews, and establishing strict limits for what is done within the interview (supplemented by the questionnaires) all result in executive interviews that are far more effective than those commonly done.

Loyalty research in B2B contexts

Companies must talk to customers in disciplined, systematic ways

By Doug Grisaffe

Editor's note: Doug Grisaffe is vice president, chief research methodologist, at Walker Information, Indianapolis. He can be reached at dgrisaffe@walkerinfo.com.

Loyalty. It has received lots of press in recent years. Definitions and prescriptions for measurement vary substantially depending on which expert one asks. I'll argue here for a particular conceptualization of loyalty and explain why it is so fitting for business-to-business contexts. I'll also integrate those thoughts into a logical checklist of design considerations for creating new loyalty research programs, or revisiting the quality of existing programs. My hope is that "producers" and "consumers" of B2B loyalty research find food for thought and natural applications in their own respective practices.

Business-to-business contexts

Business-to-business contexts have broad similarities with business-to-consumer settings (e.g., the buyer's desire to solve a problem or satisfy a want or need, an exchange of resources, "value" produced for buyer and seller, etc.). But the detailed specifics of B2B often differ in marked ways. Unique characteristics exist for buyers, sellers, and the interactions between them. Important implications for loyalty research emerge from consideration of these characteristics.

For B2B buyers, purchases may be for their own organizational use, for reselling, or for reprocessing and then reselling. This usually creates a more complex set of decision considerations than in a basic B2C purchase. Dollar amounts are often bigger in B2B than in B2C. Purchase decisions may be more technical in nature. More detailed considerations of specifications may be required. These factors substantially raise the purchaser's level of involvement. Often there is a competitive bid process, involving comparison of several potential suppliers. Multiple decision makers may be involved, requiring consensus and approval through multiple levels of organizational hierarchies. Finally, B2B buyers require highest-quality service elements, as their ability to succeed depends on the seller's delivery times, technical assistance, after-sale service, and so on.

For B2B sellers, there also are unique characteristics. For example, demand is sometimes "derived," not depending directly on the buyer, but on third parties who purchase from the buyer. Often the potential pool of B2B customers is smaller than in B2C situations. Multiple seller representatives may be required, bringing into play special interpersonal cross-functional dynamics and complexities. The buyer's competitive bid process and multiple levels of hierarchy and approval influence the seller's processes too. Finally, sales and marketing may be more technical, requiring special seller expertise in knowing and explaining the value proposition.

Then, beyond isolated buyer and seller elements, different interactive dynamics may exist in B2B exchanges (e.g., mutual dependencies). Buyers cannot succeed unless suppliers are able to deliver the right product/service at the right time for the right price to meet schedules and production. Sellers often come to depend heavily on a small proportion of largest/best customers who sustain the supplier's prosperity. Thus both parties are motivated to become partner-oriented, to engage in longer and more complex negotiations, to include reciprocal purchase agreements, to execute deals, and to act cooperatively and collaboratively.

These dynamics become even more unique in B2B services where exchanges are particularly social, personal, and "intangible." Key customer-facing employees shape the total offering and customer experience. Familiarity, personal recognition, friendship, individualized service, and special treatment are common. Some service exchanges are so relational that interpersonal terminologies are even borrowed to discuss the dynamics — e.g., "forgiveness" in response to service failures.

My sketch of B2B contexts is partial, and there are many varied types of B2B situations. However, one thing is clear: we are not dealing with routinized customer behavior toward low-cost, low-involvement, fast-moving packaged goods. Rather we are dealing with bigger, more interpersonal and relational exchanges. Thus, a higher vocabulary applies to B2B, including words like "relationship," "partnership," "dependence," "power," "trust," and "commitment," among others. Even against a backdrop of increasingly electronic transactions, these unique B2B characteristics hold.

Loyalty in B2B settings

Framing loyalty in B2B should take into consideration these unique characteristics. If loyalty in B2C brand contexts has been argued by academics to involve not only repeat buying behavior, but that which wells up from underlying psychological affinities, how much more must psychological elements come into play for B2B, given the more complex, interpersonal, high-involvement, collaborative, relational exchanges? Thus we find some academic B2B researchers using concepts like "commitment" (typically described as a pledge of relational continuity) to describe psychological bases of repeat business. However, I believe even more is needed to conceptualize loyalty in

B2B. Some of the most miserable marriage partners pledge relational continuity. Some very disgruntled employees hate their jobs but are unequivocally committed to staying. The pledge of continuity is there. But does that really capture the essence of loyalty? Somehow, loyalty seems loftier. The word loyalty makes me think more about a young soldier willing to fight and die for his country. There, I see clear alignment between underlying psychology and behavior.

I like the clarity brought by professors John Meyer and Natalie Allen (see their book *Commitment in the Workplace* (1997), Sage Publications). In the employee realm, Meyer and Allen argue conceptually and empirically for three different types of underlying psychology that may lead to continuation behavior — the desire to continue (want to), the need to continue (have to), or the obligation to continue (ought to). All three may involve pledges of continuity. But only employees who "want to" stay, are expected to be the best, most aligned, productive, bought-in workers. "Need to" and "ought to" cases are not the type of "loyalty" a company really seeks.

Transferring back to B2B, sellers who are pleased because they have repeat purchase behavior from their customers could well be deceiving themselves. A number of factors could be creating undesirable "have to" or "ought to" scenarios (e.g., lack of available alternatives, contractual obligations, high perceived risk of switching, high cost of changing current systems/processes, interpersonal obligations, etc.). Consider a multi-year contract where the first-year experience falls miserably below a customer's expectations. Though they will continue through the end of the contract (because they have to), could anyone rightly call that customer loyal? Certainly, we would expect some very non-loyal behaviors, like negative word-of-mouth, search for alternative suppliers, openness to future competitive bids, and total aversion to expanding volumes or purchasing additional products/services. "Have to" customers can be downright negative! "Ought to" customers can be ambivalent. Only "want to" customers embody true loyalty. Only they will continue out of the kind of psychological attachment that leads to the highest levels of business-enhancing advocacy behaviors (e.g., positive word-of-mouth, increased volume, etc.).

Building true loyalty in B2B

B2B is a fertile seedbed for generating ongoing "want to" psychology given all the special characteristics I previously described (e.g., more complex, technical, interpersonal, high-involvement, collaborative, relational exchanges, etc.). The key is proper management of those unique characteristics, and excellent supporting B2B business fundamentals at the individual customer/account level. For example, the product or service itself must be perceived as differentiated and superior. Since the buyer's technical experts are likely to be evaluating the seller's technical specifications, there can be no competitive deficiency in the core offering. The quality of people on the seller's sales and service team(s) must create strong assurances of credibility and competency with the multiple organizational decision-makers on the buyer's side. Relational strength and chemistry essential to good working relationships must exist in the web of associations between key players on both sides, particularly in B2B services.

In short, all the "must have" B2B essentials need to be in place with excellence and competitive differentiation. That alone can create true underlying "want to" customer psychology and desired continuity. Any scenario missing that level of seller output, and/or that level of buyer response, falls short of earning the label "true loyalty." Clarifying the "want to" basis of continuity raises the bar for the seller, and distinguishes "have to" and "ought to" repeat buying from true loyalty.

Implications and considerations for B2B loyalty research

Companies interested in researching and managing the true loyalty of their B2B customers must do more than simply track periodic purchase behaviors and sales amounts. Certainly those metrics can indicate patterns of purchase continuity. But in isolation, they reveal nothing about the underlying psychological dynamics. They cannot speak to "want to" continuity. Further, they look backward across time only to what has happened, not forward to what will happen in the future. Perhaps the shortcomings of this kind of backward-looking-behavior-only measurement help explain some of the disappointment and dis-empowered promises of expensive CRM systems!

This is where survey-based B2B loyalty measurement and research adds crucial value. Only by talking to customers in disciplined, systematic ways can we learn — at the individual customer/account level — whether or not there is a pledge of relational continuity based on an underlying "want to" psychology. Only through such research can we learn about customer perceptions on fundamentals that build "want to" continuity relative to competition: value, price, quality and other corporate and performance dimensions. Wherever the company falls short on such metrics, clear guidance from customers themselves now exists to target improvement efforts. Behavior alone cannot be so diagnostic. Finally, actionability of that customer information is most supercharged when the information is widely distributed and accessible throughout the organization, so that all appropriate individuals and functions can understand specific shortcomings reported by particular customers, and act to create the best possible total experience for each individual B2B customer/account.

To implement the points of this article in creating or modifying B2B customer loyalty research programs, I offer the following summary list of critical considerations:

1. Does the program/design rely only on observations of behavior to infer customer loyalty? If so, consider special B2B characteristics that call for measurement of the psychological dynamics underlying continuity. Particularly strive to understand the "want to" basis of true loyalty.

2. Is the program/design capturing

perceptions and experiences regarding unique B2B complexities like budget approval processes, technical considerations, and competitive bid procedures, etc.?

3. Are there metrics designed to assess competitive differentiation and superiority on core fundamentals like products/services, pricing, people, and corporate credibility — essential components of value perceptions?

4. Is there a comprehensive understanding of specific customer requirements regarding the sales process, delivery times, customer service, technical support, post-sales follow up, etc., and have explicit measures been designed to capture customer opinions about quality on these dimensions?

5. Does the program/design capture elements of the spectrum of interrelationships on both sides, especially multiple sales and service team members and the multiple decision makers and influencers on the buyer side?

6. Are there measurements of the unique interpersonal, partner-oriented, collaborative, relationships common to many B2B settings? If it is a service context, are there metrics on critical "intangibles" represented by and provided by customer-facing employees?

7. Is there built-in ability to examine customer loyalty information and metrics at an individual customer/account level? In B2B settings where a smaller set of powerful, high-involvement relationships are more the norm than the exception, this "one-to-one relationship marketing" concept should be applied.

8. Are there systems planned or in place to leverage technology so that all key service and support personnel have access to up-to-date customer/account information from B2B loyalty measurement programs. Voice-of-the-customer information is most valuable when it is timely and available for ready use by those externally and internally involved with specific customers/accounts.

Right mix of fundamentals

B2B contexts have definitive characteristics that must be understood and managed to create ideal customer experiences. The quality of customer experiences, and customer perceptions about the company relative to competition, all work together to create an underlying psychological state in the B2B relationship. Only the right mix of competitive B2B fundamentals can create "want to"-based continuity. Other forms of continuity do not imply true loyalty. Gathering customer information to measure, understand, and manage customer relationships to achieve this "want to" continuity means more than simply tracking customer behavior. It means intentionally collecting detailed voice-of-the-customer inputs, and acting in targeted ways based on that information. When carefully designed and executed in light of B2B characteristics, drivers of "want to" continuity can be measured, understood, and managed at the customer/account level to build true B2B customer loyalty — the ultimate goal of B2B loyalty research.

Divide & Conquer

Segmentation in B2B markets

By Paul Hague and Arie de Boer

Editor's note: Paul Hague is director of B2B International Ltd., a U.K.-based research firm. He can be reached at nickh@b2binternational.com. Arie de Boer runs Netherlands-based Marketing & Management Consultancy Services BV. He can be reached at deboerah@tref.nl.

Satisfying people's needs and making a profit along the way is the purpose of marketing. However, people's needs differ and therefore satisfying them may require different approaches. Identifying needs and recognizing differences between groups of customers is at the heart of marketing. We cannot do everything, we cannot satisfy everybody; resources do not stretch that far. This means we have to be clever in targeting our offers at people who really do want and need them, and we have to be strong in setting aside those who do not. We have to choose our target audience on the basis of our capabilities or just our strengths. In other words, we have to choose our own battlefield where we our confident we are more attractive than our competitors. This early observation is fundamental, as it requires us to think as hard about where we don't want to sell our product as where we do.

This brings us to the consideration of the difference between marketing and selling. Selling focuses on the product in hand and our pressure to get rid of it, almost regardless of the needs of the customer. It is clear that brutal selling may leave a customer with a product they wish they had never bought and therefore, they may never return as

a customer again. Marketing takes a longer-term view. The matching of customers' needs and suppliers' resources may take more time and effort but the customer is more likely to be comfortable with their decision and be loyal.

The fundamentals of marketing are the same fundamentals of segmentation. Know your customers, know how they differ, and have a clear proposition that lights their fire. We will return to these issues but first we will examine the differences between consumer and business-to-business markets, as our challenge is to arrive at a business-to-business segmentation.

The difference between consumer and business-to-business markets

Business-to-business markets are characterized in a number of ways that make them very different to their consumer cousins. The number of customers supplied by a chemical company is likely to number in the hundreds or small number of thousands in contrast to consumer companies that ultimately address markets of many thousands or millions.

Business-to-business customers range wide in their consumption of products. A few customers dominate followed by a long trail of customers with a comparatively miniscule consumption. Private individuals have physical limitations in the amount of product a single person can consume. Companies, by comparison, do not.

The selection of a supplier in business-to-business markets is more complicated. Since people are buying on behalf of their organization rather than themselves, there is (at face value) a greater pressure to be objective and rational about their decision. In business-to-business markets the buyers and specifiers may well know as much about the products purchased as the companies that supply them. Also, it is unlikely in a business-to-business situation that just one person will make the buying decision. A specifier may test and approve the product; a production manager may run it through trials; a board of directors may impose an overriding structure on the source of supply; a buyer will almost certainly negotiate the price. Compare this with an item of clothing or personal care or food, where an individual will have most sway, occasionally influenced by another member of the family.

The aim of segmentation in consumer markets is to bring the focus to manageable groups of like-minded individuals who have a high disposition for a product. Coca-Cola has customers who want low-cost drinks for consumption at home. It has customers who want a mixer or a non-alcoholic drink in a bar. It has customers who are hot and thirsty and want a cool refresher outside the Duomo in Florence. The same consumers may at various times join one of the segments and when they do, they will see the product in a different light and value it in a different way.

In business-to-business markets the aim of segmentation is similarly to arrive at clusters of like-minded companies. There is a very strong pressure to use segmentation in business-to-business markets to win a competitive advantage as there is often little to differentiate one product from another. Segmentation therefore links strongly with a strategy to achieve a sustainable differentiated position.

How to segment

The benefits of segmentation are not hard to grasp. The challenge is arriving at the most effective groupings. In consumer markets, segmentation is almost always according to need, i.e., the cola customers who need a drink at home or a mixer in the bar or a cool drink on vacation. However business-to-business customers have more complicated needs, which can make a needs-based segmentation both difficult and even dangerous. There is a saving grace in business-to-business markets — people who buy steel lintels in Japan use them in very similar ways to buyers of steel lintels in Germany. These similarities in the use of products have led many business-to-business marketers down the road of convenience segmentation, i.e., a group of customers in France would be treated the same as a group of customers in

Spain, except that the first group is spoken to in French and the second in Spanish. In other words, language is the criteria for segmentation and not needs. There are numerous examples of business-to-business companies segmenting their customers merely on the basis of their location in the north, midlands or south of England — a convenience for their sales force.

A variation to the segmentation philosophy in business-to-business markets is to apply a segmentation based on company size. We have seen that the consumption levels of business-to-business customers are so widely different that this often makes sense due to large companies usually thinking and acting differently than small ones. A further sophistication may be to classify customers into those who are identified as strategic to the future of the business, those who are important and therefore key, and those who are smaller and can be considered more of a transactional typology.

These demographic segmentations, sometimes referred to as firmographics in business-to-business markets, are perfectly reasonable and may suffice. However, they do not offer that sustainable competitive advantage that competitors cannot copy. A more challenging segmentation is one based on behavior or needs. Certainly large companies may be of key or strategic value to a business but some want a low-cost offer stripped bare of all services while others are demanding in every way. If both are treated the same, one or both will feel unfulfilled in some way and be vulnerable to the charms of the competition.

Needs are, of course, one of the most difficult things to assess. There are many questions that must be answered:

• Whose needs? Those of the production team or the customers? Those of the purchasing team? Those of the health and safety executive?

• And how consistent are those needs? Will they change from being price-driven to technology-driven as the buying negotiations proceed or if the customer develops a new product or hits production problems?

Treating a company as a price buyer when it needs technical service could frustrate both the customer and supplier. Recognizing a switch from one classification to another may be easier said than done. The sales force may not be the best arbiters on this decision as there just may be a bias in favor of believing price to have a higher influence than is the case. The marketing team may not have their fingers on a sensitive enough pulse.

Figure 1: The Road to a Needs-Based Segmentation

It is not easy to jump straight into a fully-fledged needs-based segmentation. Most companies are starting with some history of involvement in segmentation, even if it is only a north/south split of its sales force. Companies move down the road of segmentation learning all the way (Figure 1).

There may be problems in developing a needs-based segmentation but this is at least an aspiration to drive towards. The question is, how?

The starting point of any business-to-business segmentation is a good database. A well-maintained database is high on the list in any audit of marketing excellence in a business-to-business company. The database should, as a minimum, contain the obvious details of correct address and telephone number together with a purchase history. Ideally it should also contain contact names of people involved in the decision-making unit, though this does present problems of keeping it up-to-date.

Management is frequently blissfully unaware of the poor state of their databases as they are never involved in inputting and maintaining data. Sometimes the best database in the company is the Christmas card list held close to the chest of every sales person.

A comprehensive and up-to-date database is only the start of the segmentation process. A mechanism is now needed for determining every need of every company on the database. The commonsense approach may appear to be to ask them. However, what questions would you ask and could you be sure of the answers? It is not that people lie but they may not be able to acknowledge the truth;

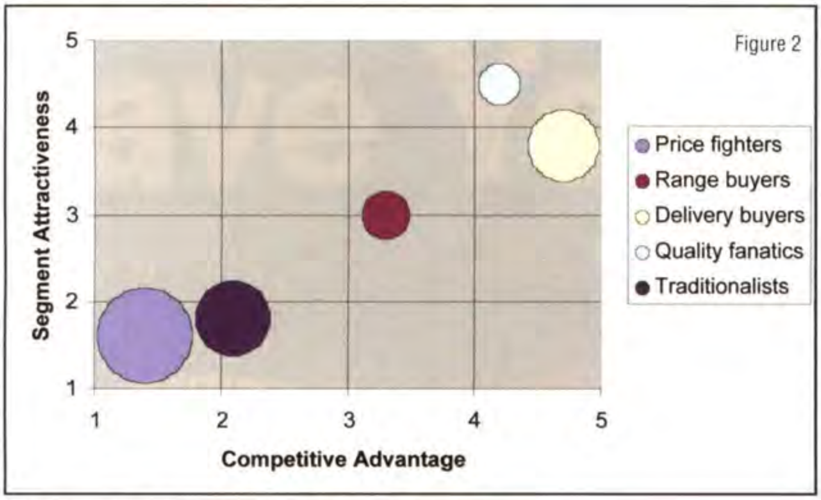
• Do people really buy a Porsche for engineering excellence?

• Do people really choose an Armani suit because it lasts so well?

• Do people who say they buy their chemicals purely on price never require any technical support or urgent deliveries from time to time?

Sometimes the simple question and the straightforward answer is enough. At other times a more sophisticated approach is required. Statistical techniques (specifically factor analysis) can be used to show the association between the overall satisfaction with a supplier and satisfaction of that supplier on a whole range of attributes that measure the customer's needs. It can be determined that any individual attributes receiving high satisfaction scores must drive the overall satisfaction score and therefore be an important reason for choosing that supplier. In other words, instead of asking what factors are important we can derive them. Buyers of Armani suits may show a strong link between overall satisfaction with the suit and attributes related to the brand and so point to the importance of the brand in the buying decision.

The next step is to run the same data through more statistical processing (specifically cluster analysis) to see if there are groups of customers with common needs. It is best



The Directional Policy Matrix Used To Select (and De-Select) Segments

to limit the clusters to a manageable number, such as four, five or six, otherwise there are too many segments to address.

Will the segmentation work?

By whatever means the segmentation is arrived at, be it by judgement, by classifying the database or by statistical techniques, the segments must pass a four-question test:

1. Are they truly different in a meaningful way? If not, then they are not a segment and should be collapsed into one of the others. In determining if and how segments differ from one another, it is helpful to give each a characterizing nickname, i.e., price fighters, range buyers, delivery buyers and whatever else is suitable. The name will ultimately become the shorthand description used in the company that immediately identifies the customer typology.

2. Are the segments big enough? If they are not, they will require too many resources and too much energy.

3. Can companies be easily positioned in one or another of the segments? A company cannot be in more than one segment. This is unlike consumer segments where one week I may fit into an airline's business-class segment and another week fit into low-cost.

4. Can you communicate with them, i.e., can you find them? If you cannot, the segmentation will merely be a nice piece of academic work.

By plotting the different segments on an X-Y grid[1] it is possible to determine which are worth targeting and, equally important, which are not. The two factors that influence this decision are the attractiveness of the segment against the supplier's competitive position within that segment. In this way it is possible to identify targets that justify resources in targeting and development. In Figure 2, it may be thought that the price fighters offer no margin and are not worth targeting, even though they form a large segment. However, the traditionalists may be worth working on to see if they can be moved north and east to join a more attractive segment such as the range buyers, quality fanatics or delivery buyers.

Segmentation is the first crucial step in marketing. It is often the mix of "where, what, who and why" (the benefit or need) which is driving the segmentation. The grouping together of customers with common needs now makes it possible to set marketing objectives for each of those segments. Once the objectives have been set, strategies can be developed to meet the objectives using the tactical weapons of product, price, promotion, and place (route to market).

[1]The recommended tool to use here is The Directional Policy Matrix based on the methodology of Professor Malcolm H. B. McDonald of the Cranfield University School of Management.

Research Pulse

By Merrill Dubrow

What do the next few years hold for the industry?

Editor's note: Merrill Dubrow is vice president, client development at Harris Interactive, Boston. He can be reached at 978-409-2525 or at mdubrow@harrisinteractive.com.

At the time of this writing in February, the country stands at the brink of war. The stock market has generally been in the dumps, bogged down by pre-war jitters and uncertainty. Businesses seem to be in two camps: they're either standing pat and waiting to see if things pick up or they're slashing costs and cutting jobs. To be sure, some industries are doing fine. Those whose companies aren't tainted by financial scandal are quietly expanding, providing some welcome good news.

The research business certainly isn't immune to all of these worries. To get a clearer picture of what the future may hold, I contacted eight experienced researchers by e-mail and posed a number of questions to them on topics such as the effects of emerging technology, the changing roles of various research methodologies, etc. A selection of their responses follows.

* * *

Based on what I've been reading, they are predicting that with the tight economy, marketing dollars cannot be wasted. Marketers are going to have to make very smart decisions. This will fuel an even bigger reliance on research as a decision-making tool. (Good news for all of us!)

More and more companies are going to be doing their own side-by-side comparisons of telephone or personal data collection methodologies vs. Internet to determine whether or not they can take studies online. The excessive cost and long timelines to do some studies by telephone and/or in-person are creating this big push. If findings are consistent, companies will be moving more studies online.

— Michelle Elster, vice president, Rabin Research, Chicago

The future will bring more scrutiny/layers of approval needed before dollars are spent. There will be more online research as Internet users become more reflective of the general population and sample of e-mail addresses becomes easier to obtain. There will be possibly more online custom panels and clients will continue to want everything faster and cheaper.

— Sharyn Kail, senior group manager, TNSI, Paramus, N.J.

I think the biggest change over the next couple of years will be that Internet will replace RDD telephone as the "primary" data collection method. This will be driven as much by developments within the Internet data collection arena as by events in the RDD arena. The increasing refusal rates (50-60 percent) and call screening/blocking technologies are making me ever more concerned about the validity of data we collect using RDD. I am rather surprised that there isn't greater alarm voiced in the research community over this issue.

To my mind, the only long-term solution is having high-quality respondent panels. And I feel that Internet is a more effective and cost-efficient way to manage panels. I believe that adoption of Internet data collection methodology has been somewhat slow to date because we researchers tend to be a rather conservative lot — we would rather stick with a known devil than pick an unknown one. However, I am beginning to sense a growing acceptance of the legitimacy of data collected over the Internet. I think we may have already crossed the "acceptance" hump and that the risk/reward needle will swing in favor of Internet pretty soon, although it is hard to pinpoint the timeline. This phenomenon is akin to an economic recession: it can be verified only long after it has actually occurred. However, in order to become the standard bearers, respondent panels would need to be recruited and managed a bit more carefully than what is being done now. Having a panel of eight million out of which about five million never respond to a survey raises the same concerns as RDD. Perhaps we might move to more direct incentives — pay respondents for each survey (central location test model) rather than the sweepstakes/points model presently used.

— Ravi Raina, director of client services, MMR, Atlanta

I guess the only thing I'd say is that it seems from my perspective that we're facing a crisis of confidence. Clients have less confidence in traditional phone interviewing. They can't imagine themselves responding to a survey call and so don't believe that "normal" folks agree to respond. At the same time, clients look askance at online methods. Concerns about response rates in the online medium abound and, again, the solidity of the data is questioned. I think the next two years will be all about "research on research." The industry needs to take a hard look at different methodologies and assess how "good" resulting data really are. When are data predictive of actual behavior? In what circumstances might conclusions be biased? When and under what conditions is nonresponse likely to skew findings? I think the only way to address clients' concerns in this realm is with solid evidence.

— Lynne Mobilio, partner, Lewis, Mobilio & Associates LLC, San Francisco

Across the board, and especially from the boardroom, there is recognition that informed decisions are better at creating success than those decisions from the gut. Decisions that use data from research can be superior. Notably, there are more instances of less concern with where the data comes from, as long as it is there when needed and didn't really cost a hell of a lot. But that's not always true. Here is an extreme prediction of where research is heading:

From my vantage point research in the future appears to be settling in two streams of activity. 1) Research that is tactical — answers are needed soon or yesterday, for immediate or short-term decisions. 2) Research that is strategic — decisions that have long-term effects or planning for years to come that have major corporate investments or major risks associated with them.

For strategic research, there is often an interest; in fact, it may have been initiated at the highest levels of management. Cost and time parameters of research can be correlated with the significance of the decision. Traditional research approaches in terms of methodology and execution will continue to play a strong part of this. Data collection methods will include historical approaches along with the Internet, but the method selected will be based on the appropriateness for the intended use of the study results. Insight, thoroughness, financial/investment impact, and soundness of decision-making support will be the criteria used to evaluate professional researchers who conduct strategic research.

For tactical research, the pressure will continue to provide data and/or insights fast and cheap with less emphasis on quality of research design and appropriateness for decisions and comprehensiveness. Indeed, wherever possible, buyers of research will be looking for Internet solutions that are simply sufficient. Less thought will be given to validity, reliability or thoroughness. More requests for proposals will be focused on timing and budget needs and less on deliverables related to corporate objectives. The reality is that decisions can be made this way, and those decisions won't always be wrong. However, there will be less concern, much less time taken for an over-the-shoulder review of the relationship between the research, the decisions made and the outcomes. Speed, low cost and articulation of results will be the criteria used to evaluate professional researchers for tactical research.

Bottom line: There will be more dependence on fast-and-cheap research for tactical issues, while there is more investment for long-term strategic insight. Overall, there will be less research that was and is now in between the two.

— Joan Treistman, senior vice president, Roper ASW, New York

I think from my perspective the MR industry seems to move very slowly when it comes to adopting technology and I think that for major research firms to maintain their market share they will need to move into the CRM and predictive analytics space. Become more solutions-oriented instead of project-oriented. The end-users like the P&Gs of the world want research suppliers to add value beyond providing survey results. For example, how can I use attitudinal and behavior data along with customer information to predict future events? That's where I see the focus should be.

Also, I think that the Internet is here to stay and that research will continue to grow in the area as the increase to broadband continues to grow. We will need to be creative in gaining respondents beyond sweepstakes in order to maintain response rates.

— Mary Wang, eastern regional sales manager, SPSS MR, New York

I believe that we'll see more partnering relationships for smaller firms like mine in the future. Marketing is difficult these days, taking much more effort than in the past to land good projects and new clients. Also, clients are less loyal; they're shopping around for the least expensive supplier because of their own cost-cutting initiatives, and many are bringing functions in-house that were done on the outside in the past. Technology is making this easier for them. I have a client who recently purchased online survey software and is now doing his own online surveys. He would never have done this in the past.

So I've been looking for partnerships with firms that can land the clients because of their larger size and contacts. I sub-contract my services to them. For example, I'm working with two firms that are telemarketing/data collection services. They have clients that conduct surveys and then need someone to do the analysis and write a report. I also partner with a management consulting firm that offers my services as one of the many services that they have. I partnered with the Millard Group, a direct marketing list services firm. They want to offer marketing research services to their clients, and I do those projects for them. In some cases, I work anonymously or as an employee of my partnering firm, rather than as MindSearch. This way, the client believes that they are getting the research directly from the company they contracted with, oftentimes a company they would trust much more readily than someone they don't know.

I know a few other small marketing research firms like myself who are also reaching out to establish partnerships with larger firms. So while I can't say that this is a market trend, it seems to be one within my limited scope and experience. The advantage for larger firms who partner with small companies like me is that they have a pool of capable professionals out here that can provide the research that they need. I think it works to the advantage of everyone.

— *Julie Shaylor, president, MindSearch, Boston*

I think the industry, with the use of technology and the Internet, has made some big changes and will continue to do so. Due to all the do-not-call lists and issues recently, I believe the industry is going to see an even greater decline in the traditional telephone surveys. Many research companies, even with the increase in online surveys, have not seen a large change in the amount of telephone surveys they conduct.

However, that is going to start to change in the next few years. Not only has the Internet opened up another means of gathering data but telemarketing calls have increased and consumers have increased their ability to screen calls through Caller ID, etc. Clients have seen quicker turnaround from the Internet and more and more people are accessing the Internet, making the pool to draw from that much larger. As the Internet keeps getting larger and larger and people become that much harder to reach via the phone, I believe that the Internet is going to become more of the norm in reaching respondents.

While traditional focus groups still seem to be the most preferred method of qualitative research many clients do see the need for online focus groups or the use of video streaming. Clients prefer to travel less and less these days and that may soon have an even larger impact on the industry. I also believe that the world events will help to change qualitative research in the next few years. Thus, depending upon what is to happen with wars and terrorism, it will greatly affect qualitative research in that clients and moderators will not be able to or want to travel.

I do believe the main thing that will keep shaping research will be our ever-changing and evolving technology. I do believe that we will probably even be conducting research via cell phones one day in the near future. Technology is changing so quickly, especially with cell phones, that it will only help to enhance the means by which to reach respondents quickly and efficiently.

I also believe the economy has and will continue to shape how research is conducted. I believe that clients will begin to really sharpen their focus in general and conduct research that is much more geared at satisfying consumer needs and the critical issues. Research costs may become more of an issue in upcoming years. Research methods may need to be less expensive.

— *Stacey Hurwitz, president, Strategic Business Horizons, Needham, Mass.*

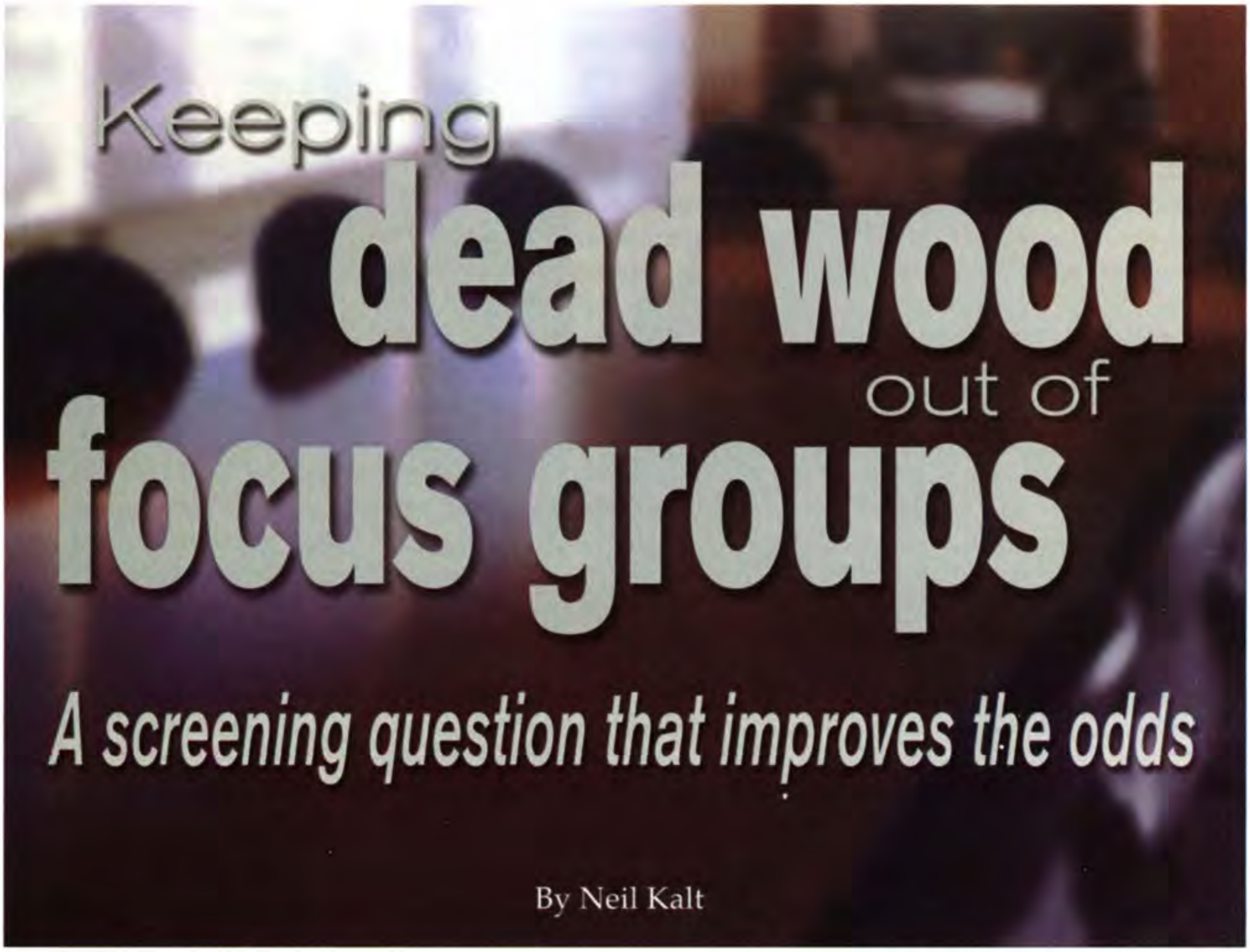
* * *

Now that you have read the thoughts of eight fellow researchers, let me add my own two cents.

The Internet is definitely here to stay but I think a new technology will emerge, something like the handheld BlackBerry devices that have Internet access. This will result in many more mixed-methodology studies. Wouldn't it be interesting if a client awarded a project of 500 completes and the data collection company used the mall, phone and Web to complete the quota?

My hope is that clients will not be as price-sensitive as they are today. Recently, I have had two clients mention that even though our quality and service might be better, they needed to award the project to the lowest cost vendor.

None of us has all the answers but I hope you enjoyed reading other researchers' viewpoints. Please let me know your thoughts by calling me at 978-409-2525 or e-mailing me at mdubrow@harrisinteractive.com.



Keeping dead wood out of focus groups

A screening question that improves the odds

By Neil Kalt

Editor's note: Neil Kalt is president of Newtown, Conn.-based research firm Neil Kalt & Associates. He can be reached at 203-364-1024 or at neilkalt@bestweb.net.

As anyone who's moderated or observed focus groups knows, all respondents are not created equal. At one end of the continuum are people who are intelligent, imaginative, insightful, involved, and clearly able to express their thoughts and feelings. At the other end of the continuum are people who are neither intelligent nor insightful, who have considerable difficulty expressing their thoughts and feelings and who, if present in sufficient numbers, weigh on a group like a ball and chain. If you're lucky, most of the respondents in your groups will be drawn from the favorable half of the continuum. The problem is, it takes more luck than most people have to continually defy the laws of probability. Which is why more than a few moderators try to build a litmus test into their screening questionnaires — often an open-ended question that's designed to separate the dead wood from the live. For example, "If you could speak with anyone who ever lived, who would you choose to talk to, and what would you talk about?" Or, "Think about a movie or a book that you really liked, then tell me what made it special."

Shortcomings of open-ended questions

Does this type of question work? In the absence of data, we don't really know. However, there are several reasons for feeling that if it does work, it's not nearly as often as we'd like:

• At least some of these questions may be fairly easy for sizable numbers of people from both halves of the continuum to answer. If they are, their answers can't tell us who is likely to contribute to the discussion and who is not.

• Everyone recognizes a highly articulate, insightful answer when they hear it. However, opinions begin to differ as one moves away from the favorable end of the continuum and toward its center. When is an answer not sufficiently articulate and insightful? Unfortunately, it depends on the perceptions and expectations of the recruiter who's doing the listening.

• This type of question may have a good chance of being taken seriously when the screening questionnaire is short and the incidence of eligible respondents is high. However, as the length of the screener increases and/or the incidence declines, it seems increas-

ingly likely that recruiters will "stretch" their definitions of "sufficiently articulate and insightful," perhaps enough to include all but a handful of people. Pressed by the constraints of time and money, recruiters want to find people who meet the project's "real" eligibility requirements, get them to agree to participate, then move on to the next job.

Separating the taciturn from the talkative

Uncomfortable with using open-ended questions in an attempt to weed out the dead wood, some moderators prefer a closed-end question that's designed to separate the shy and uncommunicative from the outgoing and talkative. Although what constitutes an acceptable answer is no longer left to the discretion of recruiters, I suspect that this type of question is no more effective than its open-ended brethren. There are at least two reasons why. The first is social desirability. Most people prefer to see themselves in a socially favorable light. Accordingly, they'll tend to choose socially desirable answers, even if these answers are less than true. The second problem with questions of this kind is the increased risk of recruiting people who love to talk but have little or nothing of value to say. Indeed, because they take time off the clock, these people can be more detrimental to a group than respondents who are inarticulate.

A new paradigm

What's to be done? To heighten the probability that it will work, a question that's designed to separate the wheat from the chaff should meet two criteria: it should have answers that are unequivocally right or wrong, thereby taking the discretion to decide out of recruiters' hands; and it should be answered honestly by respondents.

• To have answers that are unequivocally right or wrong, the question must be closed-ended.

• To be answered honestly, the effects of social desirability must be marginalized. One way to accomplish this is to make the attributes that lead to termination as appealing as the attributes that lead to an invitation to participate.

Let's look at some studies in which this paradigm was used.

Example 1

In a study that sought to shed light on the imagery of a leading brand of women's shampoo, we wanted to recruit women who were open, intuitive and imaginative. Not surprisingly, we felt that women who were measured, rational and matter-of-fact would not fit the mold. In an attempt to discriminate between these two types, we presented each woman who was screened with five pairs of attributes. In every pair, both attributes were considered to be favorable. Taken together, the attributes that are asterisked below described the kind of woman we wanted to recruit. The other attributes described the kind of woman we did not want to recruit.

The women were asked to indicate "which attribute in each pair comes closer to describing you." To qualify, a respondent had to select at least three of the five attributes that had an asterisk (respondents were read one pair at a time and asked to make a choice):

Artistic	( )*
Level-headed	( )
Efficient	( )
Perceptive	( )*
Spontaneous	( )*
Sensible	( )
Practical	( )
Intuitive	( )*
Emotional	( )*
Rational	( )

It seemed to work. Most of the women recruited were open, intuitive and imaginative, which led to richly articulated insights into the imagery of the brand.

Example 2

Let's look at another, more elaborate example. In a number of studies that called for creative people — people who were open to as well as capable of generating new ideas — 12 pairs of attributes were used. In nine of these pairs, one of the attributes was chosen because it seemed to describe creative, imaginative, insightful people. The other attribute in each of these pairs was chosen because it appeared to meet two criteria: it was appealing and was unrelated to creativity. To further mask this question's intent, three pairs of favorable attributes in which neither attribute was related to creativity were added to the mix. In order to qualify, respondents had to say that at least six of the nine creativity-related attributes came closer to describing them. Not wanting to force respondents to choose attributes that weren't reasonably accurate descriptors, they were given a third choice: "Neither." Some of the pairs that comprised this question are as follows (qualifying attributes are asterisked):

Persistent ( )	Fair-minded ( )
Imaginative ( )*	Enthusiastic ( )
Neither ( )	Neither ( )
Resourceful ( )*	Inquisitive ( )*
Independent ( )	Disciplined ( )
Neither ( )	Neither ( )

Two findings suggest that this question is working. In every one of the projects in which it was used (all of which employed elaborate screeners), a fair number of people terminated on this question, implying that recruiters treated it as they would any other screening question. Moreover, many of the people that were recruited did appear to be insightful and imaginative.

In addition to being closed-ended and making every answer socially desirable, one reason why this question may work is that it gets rid of the dead wood indirectly — that is, it doesn't try to identify people who have little or nothing to contribute. Instead, it seeks to identify and recruit people at the other end of the continuum, people who make focus groups glitter. The people who are dead wood are terminated along with everyone else who falls short on this question.

Benefits

It seems fair to conclude that the benefits of this approach are considerable:

• Deciding who qualifies isn't left to the discretion of recruiters.

• This approach is flexible; that is, the attributes can be tailored to the requirements of the project.

• By presenting respondents with pairs of favorable attributes, this approach lessens, and may even minimize or negate, the effects of social desirability. In so doing, it increases the likelihood that respondents will answer honestly.

• Because the tasks that are presented to the group dovetail with the characteristics of the people who have been recruited, low levels of involvement and expressiveness are much less likely to occur.

Despite its benefits, this approach is not foolproof. A lot depends on the attributes that you choose. For example, to what extent do these attributes capture the psychological profile of the people you want to recruit? And to what extent are the attributes that they're paired with as socially desirable? Prudence dictates that you re-screen at the door, and send home any dead wood that managed to slip through the net.

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somewhat important, and 58 percent saying the same of Spanish content.

Hispanic online consumers report heavy usage of the online medium to communicate, using e-mail, instant messaging and sharing photos to pass on important news and to stay in touch with old and new friends and acquaintances.

• More than two-thirds (69 percent) of those surveyed regularly or occasionally send pictures to and receive pictures from family and friends online.

• Two-thirds of those surveyed regularly or occasionally (66 percent) use online instant messaging to communicate, a significantly higher proportion than the total U.S. online consumer population (48 percent).

• Approximately three-quarters (76 percent) of U.S. Hispanic online consumers surveyed regularly or occasionally use the online medium to communicate with friends or family members.

• More than the total U.S. online consumer population (31 percent), over four in 10 Hispanic online consumers (43 percent) surveyed report they provide only an e-mail address as the preferred means of staying in touch with someone they just met. In comparison, 19 percent of online Hispanics surveyed provide new friends with only a telephone number.

• Seven in 10 (69 percent) Hispanic online consumers surveyed believed that being online has helped them stay in touch with people in their lives. One-third (36 percent) also said being online has helped them reconnect with someone they lost contact with from their past.

• Nearly half (48 percent) of the Hispanic online consumers surveyed have sent or received an e-mail announcing major personal news, such as the birth of a child, a wedding or a new job.

The survey also revealed that online Hispanics emerge as more avid consumers of entertainment-related online features and activities than total U.S. online consumers, with music, in particular, shown as a strong online activity. It also indicates that Hispanic online consumers purchase tickets for entertainment-related events and more consumer electronics. Key findings include:

• Hispanic online consumers surveyed report being more active in online entertainment activities than their total U.S. online counterparts, with half (50 percent) reporting they regularly or occasionally "listen to music like you do on the radio" (compared with 40 percent of total U.S. online consumers), 44 percent reporting "downloading music files" (vs. 33 percent), and 36 percent reporting "watching video clips" (vs. 29 percent).

• Hispanic online consumers surveyed who have made purchases online report spending an average of $439 over the past three months, on the heels of the generally more mature total online U.S. shoppers with a reported average of $543. Additionally, more than one-third (37 percent) of online Hispanics surveyed reported they expect to increase their number of online purchases.

• Hispanic online consumers surveyed who have shopped online are as likely as total U.S. online consumers to say they regularly or occasionally purchase the following items online: concert, event or movie tickets (42 percent vs. 38 percent); CDs or DVDs (40 percent vs. 37 percent); but are significantly more likely than total online shoppers to purchase consumer electronics online (40 percent vs. 30 percent) and to have groceries delivered to their home (13 percent vs. 5 percent). Additional purchases made by Hispanic online shoppers include clothing, shoes or apparel (40 percent vs. 50 percent); and computer hardware and software (38 percent vs. 44 percent).

• A majority of Hispanic online consumers surveyed say that going online is the best way to: start the process of learning about a product and/or service they might want to buy (61 percent); learn about features and benefits of a specific brand of product and/or service (52 percent); learn about different brands of product and/or service that are available (50 percent); and compare prices of the product and/or service (50 percent).

• A significant portion of Hispanic online consumers surveyed find online advertising informative (41 percent), a greater percentage than total U.S. online consumers (24 percent).

• More than half (53 percent) of Hispanic online consumers surveyed who have ever made a purchase online report that they have recommended a specific shopping Web site to a friend or family member.

• More than four in 10 (43 percent) of Hispanic online consumer parents surveyed report their children have asked them to purchase something they saw online.

Hispanic online consumers surveyed who have not yet made a purchase online agree that concerns about security of credit card information (58 percent), lack of a 100 percent satisfaction guarantee (56 percent) and lack of free shipping (44 percent) are impediments to shopping online.

The study underscores the belief in the importance of children being online, with two-thirds (67 percent) of Hispanic online consumers surveyed stating that it is important for children today to know how to go online and use the Internet. In addition, the study found:

• Hispanic online consumer parents also believe being online has a positive effect on their children: two-thirds (66 percent) of Hispanic online consumer parents surveyed said it has had a positive effect on their skills for entering the job market one day and approximately eight in 10 (77 percent) believe it has had a positive effect on the quality of their child's homework.

• More than half (59 percent) of Hispanic online consumer parents surveyed use some kind of parental control feature/method of automatically limiting places children can visit online. Moreover, an overwhelming majority (79 percent) set rules for their children's use of the medium. Among those who set rules, the top rules include the following: requiring they do not give out personal information online (95 percent); limiting the amount of time they can spend online (93 percent); restricting areas they can visit (91 percent); and letting them go online only when their homework is done (86 percent).

• More than half of Hispanic online consumer parents surveyed (56 percent) require that an adult be present when their children go online. An overwhelming majority of Hispanic online consumer parents surveyed (85 percent) have gone online while sitting together with their children.

Hispanic online consumers surveyed expressed interest in many of the new or emerging online activities asked about in the Cyberstudy. For example:

• Six in 10 Hispanic online consumers surveyed (60 percent) said they are very or somewhat interested in renewing or already do renew their driver's license online.

• Approximately half of Hispanic online consumers surveyed are also interested in registering or already have registered to vote/voting online (50 percent) and have received/paid their household bills online (47 percent).

• About four in 10 Hispanic online consumers surveyed (43 percent) are interested in or already engage in ordering prescription medicine online, checking voice mail messages using a computer (43 percent), and getting a teacher to help their child with homework online (39 percent).

The AOL/ RoperASW Hispanic Cyberstudy was conducted via telephone among a random sample of 301 Hispanic home Internet/online subscribers. Bilingual interviewers were used and respondents were given the option of conducting the interview in English or Spanish. The interviews were conducted from October 1, 2002 to October 28, 2002. The margin of error is ±6 percent for the total sample. For more information visit www.roperasw.com.

Food portions getting larger

Between 1977 and 1996, portion sizes for key food groups grew markedly in the United States, not only at fast-food restaurants but also in homes and at conventional restaurants, a study shows.

The observation is one more indication of broad changes in the way Americans eat and another reason for the widespread rise in obesity among U.S. children and adults, University of North Carolina at Chapel Hill researchers say. It is believed to be the first documentation that at any given meal, on average, the typical American eats more than he or she did only a few decades ago.

A report on the findings appeared in the January 22 edition of the Journal of the American Medical Association. Authors are doctoral student Samara Joy Nielsen and Dr. Barry M. Popkin, professor of nutrition at the UNC schools of public health and medicine and a fellow at the Carolina Population Center.

"Many people have thought that portion sizes might be on the rise, but until now, there have been no empirical data to document actual increases," Nielsen says. "We think this is important information not only because it documents this trend, but also because obesity presents a growing health threat both in the United States and abroad."

The research involved analyzing nationally representative data from the 1977-78 Nationwide Food Consumption Survey and three separate Continuing Surveys of Food Intake by Individuals. The sample consisted of 63,380 people ages 2 and older.

Nielsen and Popkin calculated the average amounts of specific foods eaten in both calories and ounces at home, in restaurants and in fast-food restaurants for each survey year.

"Portion sizes varied by food source, with the largest being consumed at fast-food establishments and the smallest at restaurants," she says. "Between 1977 and 1996, portion sizes increased for salty snacks, desserts, soft drinks, fruit drinks, french fries, hamburgers, cheeseburgers and Mexican food."

Such increases were large, Nielsen says. "The quantity of salty snacks increased by 93 calories or 0.6 ounces, soft drinks by 49 calories or 6.8 ounces, hamburgers by 97 calories or 1.3 ounces, french fries by 68 calories or 0.5 ounces and Mexican food by 133 calories, or 1.7 ounces," she says.

"There hasn't been enough focus on the sizes of portions, and that includes soft drinks and fruit drinks as well. Sometimes a conflict even exists between good nutrition and economics such as when you can get a significantly larger-size portion of french fries or soft drink for a very small extra cost."

When combined with less physical activity than in decades past, greater energy consumption significantly raises the risk of heart disease, stroke, hypertension, diabetes and other health threats, Popkin says. Related recent UNC findings were that all age groups ate more restaurant food — including fast food — than a generation ago. "Dietary patterns are rapidly shifting in the United States, and these changes are important contributors to the growing epidemic of obesity and diabetes facing Americans," he says. "Clearly the problem is that Americans are eating too much food. The shifts in where we are eating, as well as the types of food and how much, are critical."

UNC researchers also earlier found large increases in snack eating. In 1977, for example, snacks produced 11.3 percent of the average American's energy intake, while by 1996 that figure had climbed to 17.7 percent, which is more than a 50 percent increase. "Although the elderly still snack the least, with 14 percent of their energy coming from snacks, they have had the largest jump in snacking, up from 7.7 percent in 1977, which is almost double," Nielsen says. "Among people under age 39, pizza and salty snack consumption rose as much as 143 percent."

The U.S. Department of Agriculture supported the surveys, which involved interviewing Americans about what and where they and their children had eaten over the previous few days and where the food they ate came, from such as stores and vending machines. For more information contact Samara Nielsen at 919-966-1734 or samara@unc.edu.

America's most-loved brands

Carefree, Ariz.-based NameQuest has released its list of America's top 20 most-loved brands, based on its research, which sought to measure consumers' preference for selected brands based on factors that contribute to building consumer-brand relationships. In addition, the research examined the correlation between brand preference and advertising spending.

NameQuest's proprietary Preference Index suggests that factors such as trust, quality and value are more potent than advertising spending in contributing to consumers' brand preferences. NameQuest compared high and low spenders in seven brand categories with consumers' high and low brand preference scores and found there is no correlation between brand preference and advertising expenditures.

The list of 130 brands was tested using the NameQuest Online survey research tool. The brands researched were selected from *Advertising Age*'s 2002 Exclusive Ranking of The Nation's Top Spenders and 100 Leading National Advertisers list. The sample size was 2,600. For more information visit www.namequest.com.

Brand Preference Ranking of the Top 20 of the 130 Most-Advertised Brands

1. Hershey's
2. Betty Crocker
3. Pillsbury
4. Kellogg's
5. M & M's
6. Kleenex
7. Nabisco
8. Clorox
9. Nestle
10. Coca-Cola
11. Keebler
12. Windex
13. Campbell's
14. Oscar Mayer
15. Quaker
16. Kraft
17. Life Savers
18. Snickers
19. Sara Lee
20. General Mills

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Portable People Meter (PPM). The two companies are exploring the feasibility of using the PPM as a data collection tool for television audience measurement. Arbitron and Nielsen first announced an agreement in June 2000 to test jointly the PPM in Philadelphia.

This latest agreement expands this relationship to include a number of research initiatives that will be supported, in part, by increasing the financial involvement and commitment of resources from Nielsen Media Research.

Statability, an Atlanta Web-based reporting company, and **SyncSurvey**, an Alpharetta, Ga., research firm, have formed a strategic alliance to give SyncSurvey customers access to Statability's data packaging abilities.

New York research firms **Millward Brown** and **Dynamic Logic** announced a strategic partnership. Millward Brown will use Dynamic Logic's AdIndex system to enhance its online advertising and brand evaluation research programs. The partnership will also provide Dynamic Logic with access to Millward Brown's advertising and branding abilities. The firms will work together in North America under a nonexclusive agreement to support the development of industry standards for online advertising and marketing effectiveness metrics. In addition, they will develop new product offerings for measuring the effectiveness of multichannel marketing efforts, using online and offline media vehicles.

San Mateo, Calif.-based **ePocrates**, a provider of clinical information at the point-of-care, and **Techneos Systems,** a Vancouver, B.C., developer of mobile survey software, are collaborating to offer point-of-experience data collection to the health care market research arena. EPocrates believes that the response rates it observes for its Web-based surveys will hold true for handheld data collection as it will simplify participation in patient encounter studies and other appropriate point-of-experience surveys.

New York-based **NPD Group, Inc.**, and **Parkod Europe**, a Paris developer of European selective beauty product classification and in-store retail point-of-sale systems, have signed a memorandum of understanding that will lead to a strategic partnership between the companies. NPD and Parkod Europe will deliver retail sales information to selective beauty retailers and manufacturers. France is the first step in the partners' European rollout of selective beauty POS tracking. Discussions are underway to expand the partnership's beauty industry market tracking to include Italy, Germany, Spain and the United Kingdom. The service of the joint venture will be modeled after NPD BeautyTrends, NPD's U.S.-based retail tracking service.

Association/organization news

The European Society for Opinion and Marketing Research (ESOMAR) has become a partner of the **United Nations Environment Program** (UNEP), whose mission is to provide leadership and encourage partnership in fostering poverty eradication and preventing environmental damage by inspiring, informing and enabling nations and peoples to improve their quality of life without compromising that of future generations.

The focus is on policies and practices that are cleaner and safer, making a more efficient use of natural resources and reducing pollution while incorporating environmental costs and reducing risk. Within its role of improving decision making in business and society worldwide, ESOMAR wants to promote research-based "responsible marketing."

The partnership involves stimulating research on consumer attitudes and behavior, providing background information on sustainable consumption by consumers and corporate buyers. It will bring together professionals from governments, industries and marketing and research. The goals are: to share experience, define issues and develop joint initiatives and follow-up. ESOMAR and UNEP are in the process of developing a detailed action program for 2003-2004.

New accounts/projects

Schaumburg, Ill.-based **ACNielsen** U.S. announced that it will provide syndicated sales information and consumer insights for The Great Atlantic & Pacific Tea Company, Inc.'s U.S. A&P operations. A&P U.S. operates more than 500 supermarkets in 15 states and the District of Columbia.

British grocer **Tesco** has commissioned U.K.-based **ORC International** to develop a customized survey management system that will enable the company's HR team to design, process and analyze data from various employee research projects in-house. The Internet portal tool will allow Tesco to customize Viewpoint — its annual survey of around 215,000 employees in the U.K. and Ireland — from the creation of questions through to the delivery of individual reports to managers.

Taylor Nelson Sofres has won a contract with Belgian broadcasting companies **VRT** and **VAR** to research the listening and viewing habits of the Flemish community.

Nielsen Media Research has reached a seven-year agreement with **NBC** to provide audience measurement services to all of NBC's national and local television businesses. These include the NBC television network; cable networks Bravo, CNBC and MSNBC; Telemundo; the 14 NBC-owned-and-operated television stations, and the 13 Telemundo television stations.

Also, NBC has agreed to support the expansion of Nielsen's National People Meter Sample.

ForeSee Results, an Ann Arbor, Mich., online customer satisfaction management firm, announced that global staffing provider **Kelly Services** has selected the company's online customer satisfaction management solution for its public and private Web sites. After using ForeSee Results' solutions to analyze customer satisfaction scores for job seekers, Kelly now plans to implement the solution to measure satisfaction with its Kelly eOrder online ordering process and its internal Web sites.

New companies/new divisions/relocations/expansions

Colwell & Salmon Communications, Inc. has signed an agreement to lease an additional 4,500 square-feet of space at its corporate headquarters in Albany, N.Y. The additional space will house administrative offices, a training facility equipped with videoconferencing capabilities and an expanded lunch facility.

Herndon, Va.-based **WebSurveyor** has expanded its operations and moved into a larger office facility at 505 Huntmar Park Drive, Suite 225, in Herndon.

Germany-based **GfK Group** has launched GfK Media Ltd., a U.K.-based media research company.

Company earnings reports

Paris-based **Ipsos** generated revenues of EUR 538.5 million in its financial year ended December 31, 2002. This represents an increase of 12.1 percent on the 2001 figure of EUR 480.2 million. The euro's rise affected the pace of Ipsos' growth. Had exchange rates stayed the same, revenues would have risen by 18.1 percent to almost EUR 570 million. At constant scope and exchange rates, Ipsos' revenue growth was 8.0 percent in 2002. In the fourth quarter of 2002, Ipsos' revenues totaled EUR 164.9 million, up 12.0 percent with respect to the 147.3 million achieved in the year-earlier period. At constant scope and exchange rates, fourth-quarter growth was 8.3 percent, slightly higher than the recorded rate of the third quarter (8.0 percent). Revenues grew very strongly in North America as well as in Latin America, while revenue growth remained moderate in Europe.

WebSurveyor Corporation, Herndon, Va., announced record revenues for the 2002 calendar year. Revenue grew by more than 100 percent, marking the fourth consecutive year of revenue growth at 100 percent or more for the company.

Germany-based **GfK Group** reported preliminary figures indicating that 2002 sales rose by 10.5 percent from EUR 505.8 million to EUR 558.8 million. Earnings before interest and tax (EBIT) including income from participations increased by 53.2 percent to EUR 50.1 million (previous year: EUR 32.7 million). The margin rose from 6.5 percent to almost nine percent.

GfK saw a 10.5 percent increase in sales to EUR 558.8 million and a sharp rise in EBIT including income from participations of 53.2 percent to EUR 50.1 million. Sales are 1.6 percent lower than the figure forecast in autumn 2002. This is essentially due to the strong euro and the fact that clients postponed some of their orders due at the end of the year until the new financial year. There has been an above average increase in the volume of orders received in January 2003 which are up 8.4 percent to EUR 105.6 million.

For financial year 2002, GfK's annual accounts will be reported under U.S. GAAP for the first time. In order to make the special features associated with the change in accounting transparent and to facilitate comparison with the previous year, GfK is also publishing pro forma statements which include the results of the five companies that would not have been consolidated in 2001 under U.S. GAAP. These are G+E Marketing Research S.A. and Emer-GfK S.L., both in Spain, GfK Marketing Services and Metris, both in Portugal, for the full 12 months of the previous year, as well as Intomart GfK Benelux in the Netherlands for the first six months of the previous year. From January 1, 2002, all five companies fulfilled the U.S. GAAP requirements and accordingly were fully consolidated from that date onwards. The pro forma financial statements for 2001 below are intended for comparative purposes.

Following organic growth of 2.3 percent in the first nine months of 2002, GfK almost tripled this figure in the fourth quarter of the year. For 2002 as a whole, organic growth amounted to 3.5 percent. Net of the fixed volumes from long-term contracts, the figure stands at 5.3 percent. GfK has therefore achieved its goal of growing faster than the market research sector as a whole, which, according to experts, grew by just under three percent over the same period. Acquisitions contributed 7.7 percent of growth. Exchange losses, particularly in Asia and the Pacific and America, reduced growth in sales by 0.7 percent.

United Business Media released 2002 financial results for its various marketing research holdings. Revenue at NOP World increased by 9.3 percent to £213.0 million. Adjusting for the effects of acquisitions and foreign exchange, underlying revenue decreased by 10.6 percent. Profits decreased by 25.4 percent to £17.9 million, or by 21.0 percent on an underlying basis. The U.K. operations, the U.S. continuous media and the automotive businesses performed strongly and contributed all of the profits in 2002. The health care and custom businesses in the U.S. experienced sharp downturns in revenue, which has necessitated extensive cost reduction programs. Profit margins reduced from 12.3 percent to 8.4 percent. NOP World Health was particularly impacted by the major market research trend to rapid growth in online data collection. At Market Measures/Cozint (MMC) this grew from $7 million in 2001 to over $30 million in 2002. Much of this has been cannibalistic, as traditional forms of data collection in the core custom business have switched over to the Internet. This has had the effect of reducing the margin on custom research. At the same time as this transformation was taking place, the pharmaceutical industry experienced slower growth, fewer product approvals from the FDA and an increasing number of patent expirations. This reduced market research expenditures in areas which supported new product development and led to clients taking lower-cost options. The effect in 2002 of these changes has been a decline in underlying revenues in the old MMI business, a reduction in margin on custom research and considerable investment in next-generation product. Although NOP's U.K. revenues were in line with last year's, profit increased due to strong revenue performances from the business and health care divisions and margin improvements in both automotive and mystery shopping. Mediamark Research (MRI) maintained its growth record with improved revenue and profits and success in renewing all of its multi-year contracts. RoperASW's revenues were reduced by client budget pressures and competitive pricing. Profitability was reduced by the investment in new product introductions. Both Allison-Fisher (AFI) and NOP Auto U.S. achieved increased revenues and profits. AFI's syndicated sales and new additional custom business boosted topline growth. NOP Auto's U.S. revenue was boosted by the opening of a new office in California. Investment in new product initiatives reduced profit by £2 million.

St. Petersburg, Fla.-based **Catalina Marketing Corporation** reported revenue in its research operations increased 8 percent compared to the third quarter of the prior year. The research operations are conducted by Alliance Research. Catalina Marketing Research contributed approximately $0.01 per company common diluted share during the quarter.

SPSS Inc., Chicago, announced results for the fourth quarter and fiscal year ended December 31, 2002. Revenues increased 12 percent to $54.0 million in the quarter ended December 31, 2002, as compared to $48.2 million in the same period in 2001. Pro forma diluted earnings per share (excluding non-recurring charges and including the effects of the adoption of SFAS No.142 concerning goodwill and other intangible assets) totaled $0.20 for the quarter ended December 31, 2002, as compared to $0.25 for the same period in 2001. These results were achieved with the effects of an increase of 15 percent to the weighted average shares outstanding for the quarter to 17,249,000, as compared to 15,016,000 for the same period in 2001.

On a reported basis, diluted earnings (loss) per share for the quarter ended December 31, 2002, was ($0.13) compared to ($0.73) in the same period in 2001. Such reported results include non-recurring charges and the effects of the adoption of SFAS No.142.

For the fiscal year ended December 31, 2002, pro forma diluted earnings per share and revenues were $0.48 and $209 million, respectively, compared to pro forma diluted earnings per share and revenue of $0.56 and $187.4 million, respectively, in the same period the previous year. Such pro forma results exclude acquisition and other non-recurring charges, as well as the company's consolidated non-core investment in Illumitek Corporation, and include the effects of the adoption of SFAS No.142 (goodwill and other intangible assets). On a reported basis, diluted earnings (loss) per share and revenues were ($0.56) and $209.3 million, respectively, compared to diluted earnings (loss) per share and revenue of ($1.52) and $176.6 million, respectively, in the same period in 2001.

Opinion Research Corporation, Princeton, N.J., announced financial results for the fourth quarter and fiscal year ended December 31, 2002. After a $5.9 million charge for goodwill impairment, the company experienced a net loss for the year of $2.9 million, or ($0.49) per diluted share, versus net income of $1.6 million, or $0.27 per diluted share in 2001. Because the goodwill impairment charge is a non-cash expense, it does not affect cash flow from operations. For 2002, cash flow from operations was $10.5 million, up from $9.4 million in 2001. This cash was used primarily to reduce debt. At December 31, 2002, total debt was $46.9 million, a reduction of $8.5 million, or 15 percent, since December 31, 2001.

Revenues for the fourth quarter were $44.7 million, versus $44.0 million in the corresponding quarter last year. Social research revenues were $28.4 million, versus $24.5 million last year. U.S. and U.K. market research revenues were $13.5 million, up from $13.1 million in the prior year. Teleservices revenues were $3.2 million, down from $5.3 million last year.

Revenues for the full year were

$175.3 million, versus $176.9 million in 2001. Social research revenues were $105.5 million, versus $95.3 million last year. U.S. and U.K. market research revenues were $52.0 million, down from $59.6 million in the prior year. Teleservices revenues were $15.6 million, versus $18.5 million last year.

Net loss for the fourth quarter was $5.3 million, or ($0.88) per diluted share, versus net income of $0.2 million, or $0.03 per share, in last year's fourth quarter. Excluding a $5.9 million goodwill impairment charge, net income for the fourth quarter would have been $0.7 million or $0.11 per diluted share. This is below the company's previous guidance of between $0.9 and $1.1 million, primarily due to lower than expected teleservices results and a higher than expected tax provision.

For the full year, the net loss was $2.9 million, or ($0.49) per diluted share, versus net income of $1.6 million, or $0.27 per diluted share in 2001. Excluding the goodwill impairment charge and the cumulative effect of an accounting change, net income for 2002 would have been $3.3 million or $0.55 per diluted share.

Jupitermedia Corporation, New York, reported results for the quarter ended December 31, 2002. Revenues for the fourth quarter of 2002 were $11.7 million compared to revenues of $10.9 million for the same period last year. Net income for the fourth quarter was $458,000, or $0.02 per share, compared to a net loss of $5.0 million, or ($0.20) per share, for the same period last year.

For the year ended December 31, 2002, revenues were $40.7 million compared to $44.0 million for 2001. Net loss for the year ended December 31, 2002 was $511,000, or ($0.02) per share, compared to a net loss of $102.2 million, or ($4.03) per share for the prior year.

IMS Health, Fairfield, Conn., reported full-year 2002 diluted earnings per share from recurring operations of $0.98, a 9 percent increase over 2001 results and consistent with guidance.

Revenue in 2002 grew to $1.4 billion, up 7 percent, and net income from recurring operations totaled $279.8 million, a 3 percent increase from a year earlier.

For the quarter ended December 31, 2002, IMS reported diluted earnings per share from recurring operations of $0.28, a 27 percent year-over-year increase. Fourth-quarter 2002 revenue totaled $381.9 million, up 9 percent constant dollar and 12 percent on a reported basis. Constant-dollar growth eliminates the impact of year-over-year foreign currency fluctuations. Net income from recurring operations was $78.3 million, a 17 percent increase from the year-earlier quarter.

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into marketing strategy since a positive, strong brand image will lead presumably to higher sales. In addition, it is known that image drives brand equity.

Brand equity is a way to describe a brand and measure its total value. Brand equity can be illustrated by a hierarchy (Figure 1) incorporating the four Ps (product, price, place, and promotion [advertising]) of marketing.

The crucial point of this framework is that brand equity only exists as a function of consumer choice. It comes when the consumer chooses a product. The characteristics of the product are evaluated and then they are translated into "objective" utility, the value the consumer places on the brand. The communication efforts of the company to market its brand contribute to building brand image (e.g., consumer confidence in the brand due to quality perceptions, price, etc.). But how much is brand image worth? An effective way to place a dollar value on brand equity is by using a discrete choice model.

How is brand equity measured?

There are a number of approaches to measuring brand equity that are useful to brand managers. In the brand hierarchy model in Figure 1, equity is the public perception of brand loyalty. Obviously, building loyalty is the goal and mission of advertising and public relations efforts, which arise out of brand strategy development, which is a conscious effort to create a brand "culture" and thus a brand identity. An example of this is shown in Figure 2, which we call a brand image chart.

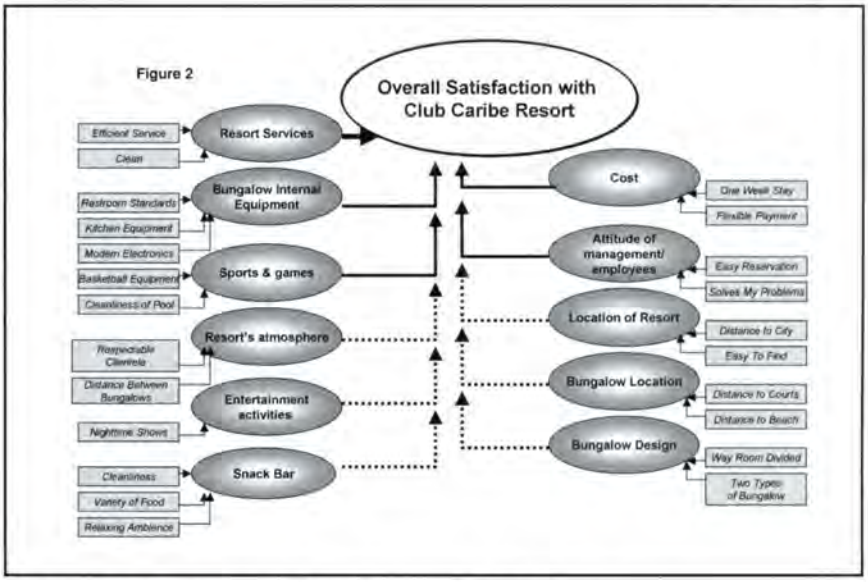

Figure 2

It shows a key association regression of the service elements that contribute to overall customer satisfaction with Club Caribe, a fictional resort that wanted to measure its brand equity for communications purposes. The solid lines display the significant factors that contribute to the brand equity of Club Caribe, which are its services, prices, bungalows, management, and sports offerings. The secondary level — the sub-attributes — are what drives the main service elements of the resorts.

This measure of brand equity is not a dollar function, but rather one which illustrates the service elements that can best be used to promote Club Caribe. The theory is that the significant club services explain the primary motivators of why guests visit Club Caribe, and what makes them happy during their stay.

Another approach is to measure the dollar value of the brand's objective utility. In other words, how much are customers willing to pay for that brand? Years ago the company where I was employed attempted to develop a brand equity model that could be then sold off-the-shelf to clients as a "product." As I recall, the idea of brand equity was the additional money people were willing to spend on a branded product over the exact generic product. The problem with the model was that it required a generic price to be established. The author of an article on the subject suggested a panel of experts should be asked to set the generic price. Of course, on a by-project basis that was not a feasible solution.

There is a better way: choice modeling.

Discrete choice models — the basics

Discrete choice analysis consists of a series of questions that ask respondents to choose between two or more hypothetical products or services. These models operate under the assumption that demand is the result of several decisions of each individual in the population under consideration.

Discrete choice analysis is used to simplify a description of reality and to provide a better understanding of how consumers make product decisions. The model can predict future states of the market, show where the market's behavior can be influenced, and indicate how a product's performance in the market can be optimized.

A discrete choice model uses a multinomial logitistic regression technique that produces coefficients for each level of service and, in turn, likelihood percentages to estimate market share or choice probabilities. The model yields exponential utility scores that can be used to produce the desired output — in other words, optimal pricing, market share, and brand equity measurements.

A spreadsheet is set up with the output from the model whose values from the regression results are identified. A series of trials is then generated, each one of which represents different versions of the product. Choice probabilities are calculated to fit a given choice scenario, or can

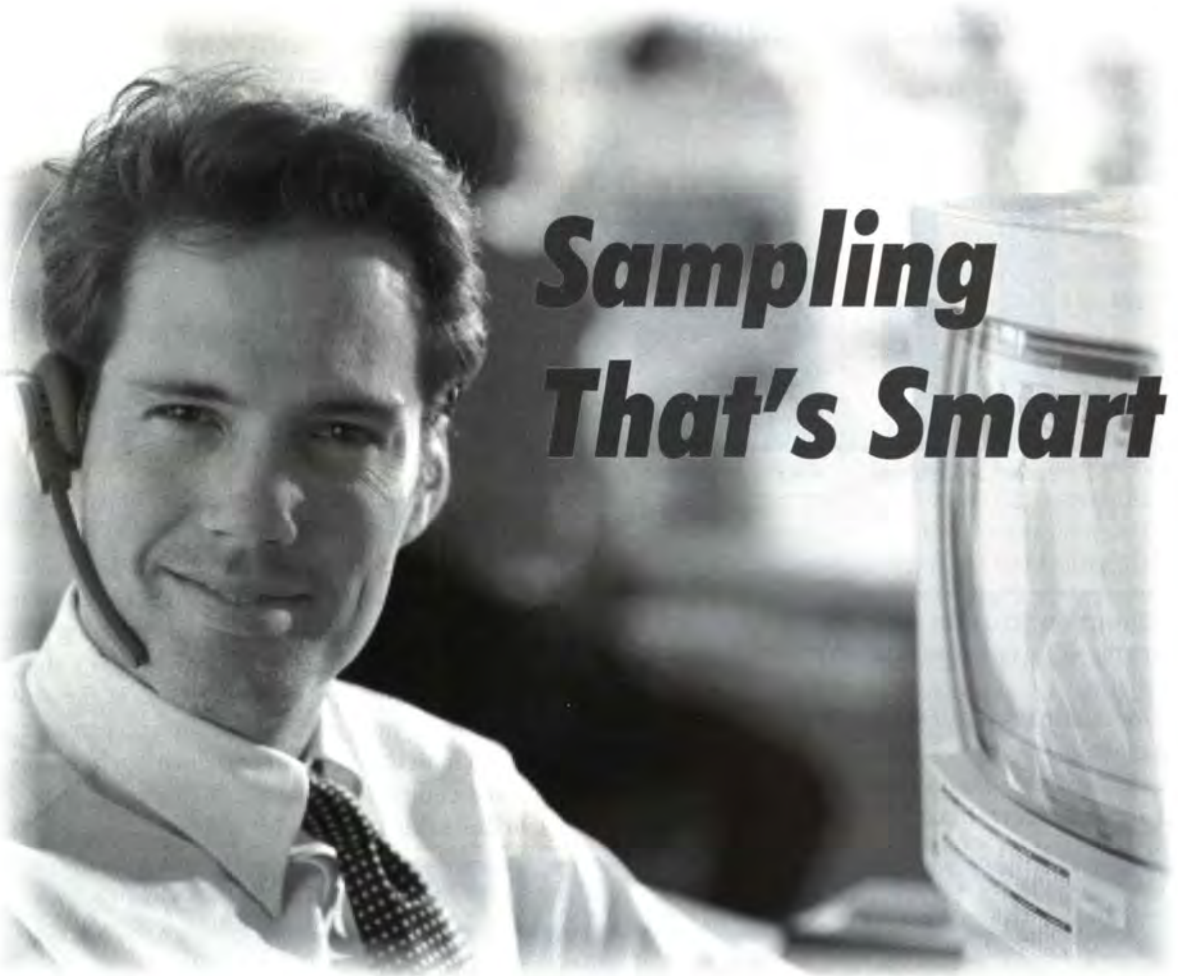

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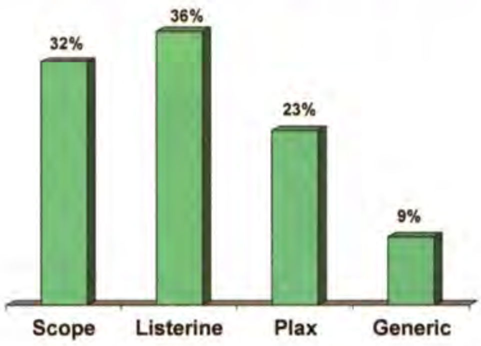
Figure 3



be easily adjusted to construct a market share forecast.

The strengths of a well-constructed discrete choice model are that it:

- allows for multiple what-if scenarios within the context of the model;
- can be used easily to optimize price or brand positions within existing market realities;
- takes into account the "non-purchase" by a customer;
- gives customers real-world choice since competitive brands are included, and they can have different prices;
- can target specific competitors, if desired, with products designed to take share specifically from them.

The discrete choice segment of the survey instrument would contain a question like the following:

Please choose from one of the following mouthwash brands:
1) Scope brand at $2.49
2) Listerine brand at $2.49
3) Plax brand at $1.99
4) Generic brand at $1.49
5) None of the above

A respondent might rate nine of these scenarios, each with the price levels changing, though the numbers vary according to the number of brands and/or other factors that might be included.

This is not a technical article; nevertheless, a basic understanding of how the market share is calculated is necessary. Probabilities for an individual brand and a particular price point are the quotient of its output — utility scores — divided by the utilities of all brands in the equation or included in the simulation.

The results can be shown graphically (Figure 3). This is the projected market share if all four brands in the survey were priced at the same level, $1.99.

Of course, the model allows for immediate calculation of market share given different price levels. A common deliverable that our firm provides to its clients is a simulator, an Excel spreadsheet programmed to instantly calculate market share when the price goes up and down, or when a given brand is taken out of the equation by placing a 0 in the included column (Figure 4). The simulator is what is used to calculate brand equity.

Fitting the model specifically to measure brand equity

Joffre Swait[1] writes of equalization price (EP) as a measure of brand equity. He says that EP is made up of three contributing parts: 1) the market price for the brand; 2) the dollar value of the "objective" component of utility; and 3) the dollar value of the brand image. EP, he continues, can be calculated for an individual consumer (which can be mapped and used for equity segmentation). However, it is the aggregate dollar value of the brand image that interests us.

One way to look at EP is to calculate the market share given equal prices for all the mouthwash brands in the survey. Another is to measure at what point a brand has equal market share with the generic brand, the inclusion of which in the above example was for this purpose.

We have the simulator to accomplish this task. Let's say we want to calculate Scope's brand image dollar value. For this exercise, put a 0 next to Listerine and Plax so they are not included in the simulator's calculation.

Figure 4

Market Share Simulator

MARKET SHARE SIMULATOR

Mouth Wash Brand Equity

	Please Indicate Brands Included 1=Included	Please Indicate Desired Price Level	Projected Market Share	Adjusted Market Share For 'None'
Market Model A				
Scope	1	2.49	31%	27%
Listerine	1	2.49	34%	30%
Plax	1	2.29	24%	22%
Generic	1	1.89	11%	10%

Figure 5

Scope Brand Equity

Market Share Parity With Generic Brand

MARKET SHARE SIMULATOR

Mouthwash Brand Equity

Market Model A	Please Indicate Brands Included 1=Included	Please Indicate Desired Price Level	Projected Market Share	Adjusted Market Share For 'None'
Scope	1	2.59	50%	45%
Listerine	0	1.99	0%	0%
Plax	0	1.99	0%	0%
Generic	1	1.79	50%	45%

Let's say that the generic brand usually sells for $1.79. Set that price.

The next stage is to experiment with the Scope brand until it reaches an equal market share with the generic brand at $1.79. We start high, say $2.99, and work our way down. As shown in Figure 5, Scope accomplishes market parity with the generic brand at $2.59. Thus, according to our theory, we can say that Scope has a brand image worth $0.80.

The power of this discrete choice model is that it also allows us to calculate brand image values for Listerine and Plax, inviting comparison. Also, once the heavy programming is done, it is a simple matter to "filter" the model by key groups. For example, perhaps the Scope people want to measure brand equity levels among men, women, young people (18-25), or by geographic area. The model can be run and a simulator can be constructed for each.

The utility of brand equity

There are many applications for the accurate measurement of brand image. It can be used to assess the extendibility of a brand name in its product category, to refine a brand's communication efforts by identifying segments in which a brand's image is strong, and/or as a way of monitoring the competition. Whatever its application, this method of brand equity measurement is a sophisticated tool that helps keep marketers one step ahead.

[1]Swait, Tulin, Louviere, Dubelaar, (1993) "The Equalization of Price: A Measure of Consumer-Perceived Brand Equity," *International Journal of Research in* Marketing, 10, 23-45).

Paradox

continued from p. 19

2. What equity does my brand have with ethnic and targeted customers, and how does that equity predict market share (so I know if my efforts are paying off)?

Various brand equity tools have been developed to help in this area. Brand equity tools should quantify the strength of brands in key target segments, help understand what drives purchase behavior for individual brands and specific categories, and help predict the impact that various marketing actions would have on a brand's standing.

3. What is the revenue opportunity associated with the ethnic and targeted segments for my brand or category (so I know if it's worth the effort)?

An opportunity-sizing tool enables marketers to estimate the total market potential of each product for all potential segments. Based upon this market potential, budget allocation decisions and relative product priority decisions may be made. The first component of this tool requires a calculation of the total number of potential segment members regardless of their purchase propensity (e.g., total number of multicultural segment consumers). The second component, derived from primary research, identifies the percentage of segment members who purchase annually within each product. The third line, then, is a calculation of the actual number of segment members who purchase each product annually (derived by multiplying line one by line two). The fourth line, also derived from primary research, identifies the dollar volume of annual purchases, by product (among annual purchasers). The final line, then, represents the total dollar market size (derived by multiplying line three by line four). That is, the dollar value represents the total value of annual purchases, by a segment, of each product. If share data is available, it may then be applied to this revenue opportunity to reflect a specific brand's total dollar volume within a segment.

4. What essence of my brand must I NOT modify from segment to segment (so I don't damage my brand by tampering with it too much)?

When a brand is positioned in (i.e., presented to) a particular market segment, all elements of the brand may be modified to appeal to that segment with the exception of the brand DNA. The brand DNA, then, is that consistent, immutable component of a brand which remains constant from segment to segment. It is altered only with disastrous consequences for the brand. The brand DNA is reflected in all strategies, advertising activities and integrated marketing activities. In primary research, each product must be rated on a variety of product attributes. It is the attributes where a brand consistently performs well (i.e., is rated highly), across all of the products, that make up the overall brand DNA. That is, these product attributes are described as being "like the brand." Running regression analysis and factor analysis-type multivariate techniques can uncover brand DNA. One of the advantages of formulating a brand DNA analysis strategy is that the analysis goes hand-in-hand with other research tools such as linear regressions that, for example, measure importance of image and brand performance.

5. What are my brand's (and my competitors') key strengths and important weaknesses, in each ethnic and targeted segment (so I can market more effectively)?

Segment members must rate key product attributes. This is an exercise that can start out as a simple quadrant analysis based solely on importance ratings of attributes which are then cross-compared with brand and competitor performance on the those same attitude statements. This analysis is a big-picture snapshot of what attributes are important (or not) and where the brand stands on each measured attribute. Such an exercise using product or service attributes identifies attributes that can then be leveraged to a company's benefit and which attributes need work due to high importance and low performance. This data then can be used for more precise and actionable data use. At the master brand level (i.e., for both included brands and core competitors), multivariate analysis can be performed to derive such factors as key drivers (product or service attributes)

regressed with purchase intent, likelihood to purchase and other input variables.

6. What portion of my customer base are brand loyalists, defectors, acquirers and rejecters (so I can target them in a meaningful way)?

Loyalty segmentation allows for highly discrete, marketing-actionable segments. It also enables marketers to develop appropriate programs for and profiles of sub-segment members, including loyalty/retention programs and win-back programs. A loyalty segmentation tool must recognize that there are four categories of customers (from a loyalty perspective), as determined by a combination of actual, past and reported future behavior: those who ARE current brand users and WILL consider using the brand in the future; those who ARE current brand users but WILL NOT consider using the brand in the future; those who ARE NOT current brand users but WILL consider using the brand in the future; and those who ARE NOT current brand users and WILL NOT consider using the brand in the future. This exercise is also an ideal analysis to use with cultural in-language segments where loyalty can be affected by acculturation levels.

7. What's the relationship between assimilation/acculturation levels and behavior as it relates to my brand (so I can target them in a meaningful way)?

Acculturation and assimilation measurement is a complex idea when it comes to marketing to cultural segments. The things that affect acculturation are many and should not only be measured based on current language usage, media usage, but also cultural factors, attitudes and even the history of what consumers bring from their countries of origin. Using acculturation scales is a good way to start in looking at acculturation levels because language is the one key, identifying factor that a cultural segment has unlike the Anglo marketplace. This gives a macro view of those who are not all acculturated, those somewhat acculturated and those who are very acculturated. This method is usually used when budgets are limited and an attempt is being made to reach the masses with in-language communications. While using acculturation scales is a good start, it is inherently limited in its scope.

The New Americas Model is one way to describe multicultural assimilation and acculturation. Instead of segmentation based solely on language, ethnicity and indirect indicators (such as length of residence and generation), which are routinely used in ethnic market research and consulting, the New Americas Model includes additional factors — ethnic tolerance and pride, need to blend, values, and ethnic preservation of attitudes — as important components. These profiles break down segments into groups with different behavior, attitudes, media consumption, lifestyles, and financial resources. Acculturation research is ever-changing, because the things that drive acculturation are not only increasingly non-static, but the way we look at them is becoming more complex.

Benchmark wave

One piece of primary research is adequate to answer all of the questions described herein. Samples may need to be split depending upon the number of products being investigated, and the survey would need to be replicated for each potential segment being considered.

Another benefit of a survey of this type (really an awareness and usage study specifically designed to answer the marketing questions posed above) is that results may serve as a benchmark wave against which segment progress may be measured in subsequent research waves.

Adjust accordingly

It is no longer news to corporate America that the demographic makeup of their customer base is changing rapidly and that they must adjust accordingly. The question of whether or not an organization should invest in a long-term multicultural business-building strategy must be resolved one way or the other by shifting the mindset from avoidance of sanctions and a focus on short-term investment to using an empirically based, rational approach to answering key questions that will support the decision.

The time to act is now, because one thing is certain: your competitors are no doubt working on their own way to solve the paradox.

Product & Service Update

continued from p. 12

existing software infrastructure. Additionally, its user interface can be easily modified, either by simplifying it or by adding more complex capabilities, to suit users' analytical skill levels.

SPSS PredictiveMarketing can also be used in conjunction with data mining tools to give marketers access to data mining results in formats that they can use, without placing additional demands on data miners or analysts. For more information visit www.spss.com/predictivemarketing.

Product helps avoid over-surveying

CustomerSat, Inc., Mountain View, Calif., has released a new version of its Enterprise Customer Experience Management (eCEM) system with new technology enabling enterprises to optimize and conserve a key resource: customer time and willingness to answer surveys. ECEM 5.0 supports advanced controls and business rules, called touch rules, that optimize when and how often customers are invited to complete surveys conducted by an enterprise's many divisions and departments.

In the course of a month, an enterprise may invite customers to complete surveys from headquarters, technical support, Web operations, market research, field service, and other divisions and departments. These surveys provide crucial information to the enterprise, but in aggregate, they can overwhelm customers.

CustomerSat eCEM 5.0: ensures that customers are asked to complete the surveys for which their feedback is most valuable; presents a consistent look-and-feel to customers for all surveys across the enterprise; ensures that sufficient customers are invited to make results statistically significant; stops surveying customers, if desired, after statistically significant numbers of responses have been gathered; and controls and automates the acknowledgement and follow-up with the customer, if applicable, after feedback is provided. For more information visit www.customersat.com.

Briefly...

FGI Research, Chapel Hill, N.C., is now offering SmartPanel, **an online panel** (100 percent opt-in) **of Hispanic consumers** in the U.S. For more information visit www.fgiresearch.com.

New York-based CMR/TNS Media Intelligence has introduced Auto Insights, an **online source for automotive industry marketing and advertising intelligence**. Available via annual subscription, the service allows users to monitor breaking automotive campaigns, track ad spending and stay abreast of market trends. Features include creative archives, data on top spenders, customized reporting capabilities and competitive industry intelligence and insights. For more information visit www.tnsinsights.com.

Names of Note

continued from p. 12

Brown Group.

Separately, **Tamas Geczi** has been named deputy managing director, Millward Brown Mainland Europe, in addition to his current position as managing director, Millward Brown Germany. **Andrea Bielli**, managing director of Millward Brown Mainland Europe, has taken on the additional role of chief client officer. At Millward Brown UK, Joint Managing Director **Sharon Potter** has taken on the additional role of director, global operations and has been appointed to the main board.

TNS Intersearch, Horsham, Pa., has named **Susan Sabanos** vice president.

Chicago-based *IRI* has appointed **Mark Tims** as group president, international operations. He will succeed **Tim Bowles**, who has headed IRI's International business since 1995, and will retire in May. Bowles will remain as chairman of IRI's international operations board (IOB) through his retirement, at which time he will become a non-executive director of the IOB. **Dave Barrett**, currently commercial director, will succeed Tims as managing director of information resources in the U.K. In addition, **Philippe Chouvou**, currently operations director, Europe, has accepted the post of director general of France, effective immediately.

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Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 952-854-5101. Fax 952-854-8191. Or visit www.quirks.com/media/moderator.asp.

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Focus Latino

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insight europe gmbh

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Marketing Advantage Rsch. Cnslts.
Synovate

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Marketing Advantage Rsch. Cnslts.

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Just The Facts, Inc.
The Research Department
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Synovate

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Insights Marketing Group, Inc.
Loretta Marketing Group
Qualitative Solutions
Utilis

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Consumer Focus LLC
Leichliter Ascts. Mkt. Rsch/Idea Dev.

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Leichliter Ascts. Mkt. Rsch/Idea Dev.

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Pamela Rogers Research, LLC

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IINTERNET SITE CONTENT/DESIGN
FOCUSED Marketing Research, Inc.

INVESTMENTS
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LATIN AMERICA
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Cultural Insights Services, Inc.
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Loretta Marketing Group

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Matrixx Marketing-Research Div.
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Paul Schneller Qualitative LLC

MODERATOR TRAINING
Market Navigation, Inc.
QualCore.com Inc.

NAME GENERATION TESTING
Consumer Dynamics and Behavioral Analysis, LLC

NEW PRODUCT DEV.
C.J. Robbins Research
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cheskin
Consumer Dynamics and Behavioral Analysis, LLC
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FOCUSED Marketing Research, Inc.
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Synovate

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Market Navigation, Inc.

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Paul Schneller Qualitative LLC

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Leflein Associates, Inc.

PUBLISHING
Cambridge Associates, Ltd.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
Market Navigation, Inc.

QUALITATIVE END-USER TRAINING
Primary Insights, Inc.

RETAIL
Design Forum
Knowledge Systems & Research, Inc.
Leflein Associates, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
MCC Qualitative Consulting
Synovate

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Cultural Insights Services, Inc.
Leflein Associates, Inc.
Primary Insights, Inc.

SOFT DRINKS, BEER, WINE
C&R Research Services, Inc.
Cambridge Associates, Ltd.
FOCUSED Marketing Research, Inc.
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Doyle Research Associates, Inc.
Fader & Associates
Focus Latino

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Leflein Associates, Inc.

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FOCUSED Marketing Research, Inc.
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FOCUSED Marketing Research, Inc.
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WEALTHY
Leflein Associates, Inc.
Leichliter Ascts. Mkt. Rsch/Idea Dev.
The Wedewer Group

YOUTH
C&R Research Services, Inc.
Leflein Associates, Inc.

2003 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 indicated 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.

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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, DC, FG
African-American

Accent on Research, Inc.*
21021 Devonshire St., #206
Chatsworth, CA 91311
Ph. 866-882-8351
Fax 818-882-8957
E-mail: accentonresearch@cs.com
www.accentonresearch.com
Services: DC, FG
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Ph. 800-784-8016 or 203-637-8563
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E-mail: sales@affordablesamples.com
James Sotzing, President
Services: S,
African-American, Asian, Hispanic, Middle Eastern

The Other Sampling Company In Connecticut™ - Quality ethnic and religious samples at affordable prices since 1991. Many selections available: African-American, Arabian, Armenian, Asian, Burmese, Catholic, Chinese, East European, East Indian, English, French, German, Hindu, Hispanic, Indian (Asian), Indonesian, Irish, Italian, Japanese, Jewish, Korean, Laotian, Malaysian, Middle Eastern, Muslim, Pakistani, Polish, Scandinavian, Scottish, Singapore, Sri Lanka, Swedish, Thai, Vietnamese.
(See advertisement on p. 32)

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
www.aimresearch.com
Linda Adams, Owner/Director
Services: DC, FG, ST
Hispanic

Complete data collection service. Large focus group facility; audio, video equipment, viewing room, full kitchen, taste tests, product placements, pre-recruited studies, 28-line telephone bank, bilingual (Spanish-speaking) interviewers available.
(See advertisement on p. 84)

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

Almiron-Caban & Assoc. Bilingual Research
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
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
Services: FS, FG
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. 85)

* Indicates minority-owned firm

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10 W. 66th St.
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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.aimresearchnetwork.com
Services: FS, DC, FG
Hispanic

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 Diamantopoulos, 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. 85)

ATKINS RESEARCH GROUP INC

Atkins Research Group, Inc.
4929 Wilshire Blvd., Suite 102
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
African-American, Asian, Hispanic, Middle Eastern, Native American

Ideal central Los Angeles location close to Beverly Hills, yet uniquely near our ethnic research specialties: African-American, Korean, Chinese and Hispanic. Spacious five-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. 85)

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Barry Leeds & Associates, Inc.
38 E. 29th St.
New York, NY 10016-7911
Ph. 212-889-5941
Fax 212-889-6066
E-mail: info@barryleedsassoc.com
www.barryleedsassoc.com
Paul Lubin, President
Services: FS, DC
African-American, Hispanic

Market research and consulting firm serving financial, consumer and service industries. Specializing in helping companies increase shareholder value while reducing risk through action-oriented research. Services include mystery shopping (African-American, Hispanic and Asian mystery shop), WebShop (Internet based reporting), customer satisfaction, legal and boardroom research, discrimination testing, multi-cultural research, focus groups, call center TeleShops™, in-store observations, brand image, concept/product tests and in-store interviews. Over 1MM mystery shops conducted at more than 80,000 branches/stores. Serving corporate America since 1977.
(See advertisement on p. 33)

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

Bethart Bilingual Research*
7600 S.W. 117 St.
Miami, FL 33156
Ph. 305-255-2170 or 305-588-9007
Fax 786-242-8029
E-mail: mbethart@yahoo.com
www.focusgroupmoderator.com
Services: FS, C, ST, T
African-American, Hispanic

BG
The Blackstone Group

The Blackstone Group*
360 N. Michigan Ave., Suite 1500
Chicago, IL 60601
Ph. 312-419-0400
Fax 312-419-8419
E-mail: info@bgglobal.com
www.bgglobal.com
Ashref Hashim, President
Vecia Ricks, Project Director
Services: FS, DC, DP, FG
African-American, Asian, Hispanic

Ethnic research is one of the Blackstone Group's specialties. We have extensive experience conducting both qualitative and quantitative studies designed to discover the valuable information from ethnic and emerging markets. We have proven success with research spotlighting Hispanic, African-American, and Asian-American respondents. Through multi-lingual moderators, interviewers, and translators, dual-language taping capabilities, and sensitivity to cultural differences, we enable your development of successful market strategies.
(See advertisement on p. 86)

BRC Field & Focus Services
1101 N. First St.
P.O. Box 13178
Phoenix, AZ 85002-3178
Ph. 602-258-4554
Fax 602-252-2729
E-mail: info@brc-field.com
www.brc-field.com
Earl de Berge, Research Director
Services: FS, C, DC, DP, FG, ST
Hispanic, Native American

C R Market Surveys*
9510 S. Constance, Suite C-6
Universal City Professional Bldg.
Chicago, IL 60617-4734
Ph. 773-933-0548 ext. 83
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 LatinoEyes

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 is a full-service research organization providing both consumer and business-to-business custom research for over 40 years. In 2002, after more than a decade of conducting research within the Hispanic consumer population, C&R dedicated our very experienced, bi-cultural research team to this dynamic market segment by establishing our LatinoEyes division, headquartered in Miami, Florida. LatinoEyes conducts both qualitative and quantitative research with genuine cultural insights and relevance.
(See advertisement on Back Cover)

Castillo & Associates, Inc.*
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
Hispanic

* Indicates minority-owned firm

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Redwood Shores, CA 94065-1404
Ph. 650-802-2100
Fax 650-593-1125
E-mail: fkorzenny@cheskin.com
www.cheskin.com
Felipe Korzenny, Principal/Co-Founder
Services: FS, C
Asian, Hispanic

Cheskin, a strategic market research and consulting firm, gives companies a fresh perspective based on a deep understanding of customers and cultures. We guide successful market innovation at every point of the product development process from branding to market development. With a diverse multilingual staff, Cheskin helps technology, life science, and consumer goods companies in Hispanic, multicultural, and general markets. (See advertisement on p. 88)

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

comScore Networks
11465 Sunset Hills Rd., Suite 200
Reston, VA 20190
Ph. 703-438-2000
Fax 703-438-2051
E-mail: dhess@comscore.com
www.comscore.com
Services: FS, C, DC
African-American, Asian, Hispanic

Consumer Research Associates/Superooms™
Park Central VII
12750 Merit Dr., 10th fl.
Dallas, TX 75251
Ph. 800-800-5055 or 972-386-5055
Fax 972-387-9915
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www.superooms.com
Bob Nance, Exec. Director
Services: FG
African-American, Hispanic

North Dallas location opened April 1998 by the highest rated facility in San Francisco. Four luxurious suites (Superooms™) featuring wraparound two-way mirrors for enhanced viewing, and adjacent client lounge areas for work or relaxation. Plus mini-priced mini-group room with comfortable six-person viewing area. Completely reliable recruiting of all market segments, including Hispanics and African-Americans, either from in-house database, client-provided lists or at random. (See advertisement on p. 37)

CQS Research, Inc.
2500 West Loop S., Suite 300
Houston, TX 77027
Ph. 713-783-9111 or 800-460-9111
Fax 713-789-2020
E-mail: cqs@cqsinc.com
www.cqsinc.com
Jo McCullough, General Manager
Services: FS, C, DP, FG, S, ST, T
African-American, Asian, Hispanic

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. 87)

Service Codes

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

Cultural Horizons Inc.*
11824 Central St.
Kansas City, MO 64114-5536
Ph. 816-941-7000
Fax 816-941-2847
E-mail: culturalhorizons@aol.com
www.cultural-horizons.com
Services: FS, C, DC
African-American, Hispanic

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
African-American, Asian, Hispanic

Our name is our passion - Cultural Insights®! This passion has led us to personally be involved in projects (both commercially and charitably) in 70 countries on five continents for 20+ years. Much of our recent work has focused on strategic and message integration solutions for multiple ethnic, cultural, and national audiences.
(See advertisement on p. 21)

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

M Davis & Co., Inc.*
1520 Locust St., 3rd fl.
Philadelphia, PA 19102-4403
Ph. 215-790-8900 or 800-842-4836
Fax 215-790-8930
E-mail: info@mdavisco.com
www.mdavisco.com
Morris Davis, President
Services: FS, C, DC, DP, S, ST
African-American

Davis & Davis Research, Inc.*
8001 N. Dale Mabry Hwy., Suite 401B
Tampa, FL 33614
Ph. 813-873-1908
Fax 813-935-5473
E-mail: davisanddavisres@yahoo.com
Irene Davis, President
Services: DC, FG
African-American, Asian, Hispanic

Delve

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

Delve is an innovative data collection partner that fosters natural environments for dialogues between marketers and customers, whether they be face-to-face, voice-to-voice, or technology-based settings like the Web. Nationwide services include: focus groups, central location tests, pre-recruits, taste tests, Web surveys, IVR, telephone interviewing and project management.
(See advertisement on p. 31)

Direct Marketing Services Group, Inc.
413 Northeast Third St.
Delray Beach, FL 33483
Ph. 800-229-4921
Fax 800-599-5688
E-mail: dmsg@silgroup.net
www.silgroup.net
Thilo Mann
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
Paul X. Izzo, Dir. Of Business Development
Services: FS, C, DC, DP, FG, S, ST
Hispanic

* Indicates minority-owned firm

Eastern Research Services
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

Ninety-station CATI facility located in El Paso. The entire staff is fluent in English and Spanish. Interviewing in language of choice. Translations 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. 91)

Ebony Marketing Research, Inc.˙
2100 Bartow Ave., Suite 243
Bronx, NY 10475
Ph. 718-320-3220
Fax 718-320-3996
E-mail: emr@interport.net
www.ebonymktg.com
Bruce Kirkland, Vice President
Services: FS, C, DC, FG, ST
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. 89)

Encuesta, 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. 88)

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
11430 Burbank Blvd.
North Hollywood, CA 91601
Ph. 818-623-2425
Fax 818-623-2429
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)

Ethnic Focus/STRC*
P.O. Box 624
Harrow, Middlesex HA1 2GF
United Kingdom
Ph. +44-20-8838-6446
E-mail: research@ethnicfocus.com
www.ethnicfocus.com
Services: FS, C, DC, DP, FG, S, ST, T
African-American, Asian, Hispanic, Middle Eastern

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 Boston, Inc.
800 South St., Suite 105
Waltham, MA 02453
Ph. 781-899-3660
Fax 781-893-5574
E-mail: info@boston.fieldwork.com
www.fieldwork.com
Maria A. Kuschel, President
Services: FG
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

* 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

Fieldwork Dallas, Inc.
15305 Dallas Pkwy., Suite 850
Addison, TX 75001-4637
Ph. 972-866-5800
Fax 972-866-5801
E-mail: info@dallas.fieldwork.com
www.fieldwork.com
Services: FG
African-American

Fieldwork Denver, Inc.
At the Tivoli
900 Auraria Pkwy., #225
Denver, CO 80204
Ph. 303-825-7788
Fax 303-623-8006
E-mail: info@denver.fieldwork.com
www.fieldwork.com
Services: DC
African-American, Asian

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

Fieldwork Los Angeles, Inc.
In Orange County
Lakeshore Towers
18101 Von Karman Ave., Suite 1950
Irvine, CA 92612
Ph. 949-252-8180
Fax 949-252-1661
E-mail: info@losangeles.fieldwork.com
www.fieldwork.com
Services: FG
African-American, Hispanic

Fieldwork Minneapolis, Inc.
Centennial Lakes Office Park
7650 Edinborough Way, Suite 700
Edina, MN 55435
Ph. 952-837-8300
Fax 952-837-8301
E-mail: info@minneapolis.fieldwork.com
www.fieldwork.com
Services: DC
African-American, Asian

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 Phoenix at Scottsdale, Inc.
6263 N. Scottsdale Rd., Suite 380
Scottsdale, AZ 85250
Ph. 480-443-8883
Fax 480-443-8884
E-mail: info@scottsdale.fieldwork.com
www.fieldwork.com
Services: DC
African-American, Asian, Hispanic

Fieldwork Phoenix, Inc.
7776 Pointe Pkwy. W., Suite 290
Phoenix, AZ 85044
Ph. 602-438-2800
Fax 602-438-8555
E-mail: info@phoenix.fieldwork.com
www.fieldwork.com
Services: DC
African-American, Asian, 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
African-American, Hispanic

Fieldwork Seattle, Inc.
5150 Carillon Point
Kirkland, WA 98033
Ph. 425-822-8900
Fax 425-822-0699
E-mail: info@seattle.fieldwork.com
www.fieldwork.com
Services: DC
African-American, Asian

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
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. Ninety telephone stations, CATI system. Interviewing/recruiting in English, Spanish and many Asian languages. Voted "One of World's Most Popular" - Impulse Survey 2001, 2002. Member FocusVision, AMA, MRA.
(See advertisement on p. 90)

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

* Indicates minority-owned firm

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
Beatriz Noriega
Services: FS, C, DC, ST, T
Hispanic

Established 1996. Specializing in Hispanic qualitative consumer research. Beatriz - a psychologist, Guy - a marketing and advertising research professional, each has over 25 years of experience working in Mexico, Latin America and USA. Bilingual and bicultural, both moderate in Spanish or English. Our expertise enables us to better uncover consumer insights and provide value-added recommendations. Also coordinate reliable fieldwork for quantitative projects.
(See advertisement on p. 92)

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
www.focusonmiami.com
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: gary@focusworldint.com
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

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
Hispanic

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. 51)

Greenfield Consulting Group
A Millward Brown Company
274 Riverside Ave.
Westport, CT 06880-4807
Ph. 203-221-0411
Fax 203-221-0791
E-mail: info@greenfieldgroup.com
www.greenfieldgroup.com
Barbara Clancy, Sr. Dir. Client Svcs.
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. 93)

Service Codes

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

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, C
African-American, Hispanic, Native American

Herrera Communications
28751 Rancho California Rd., Suite 206
Temecula, CA 32590
Ph. 909-676-2088 or 866-676-2088
Fax 909-676-2996
E-mail: eherrera@herrera-communications.com
www.herrera-communications.com
Enrique Herrera, Vice President
Services: FS, DC, FG, 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.hispanicamerica.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: hispanicfocus@aol.com
www.hispanicfocusunltd.com
Ruben Cuellar, President
Services: FS, C, DC, FG, ST
Hispanic

Hispanic Research Inc.

Hispanic Research Inc.
1 Springfield Rd.
East Brunswick, NJ 08816
Ph. 732-613-0060
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. 94)

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, T
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. 95)

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®

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

Holistic consumer understanding (mind and emotion). Image Engineering® provides state-of-the-art innovative qualitative research and quantitative research. We provide custom in-depth solutions offering fresh approaches to a diversity of business and marketing issues, including: consumer needs and motives (specialty); innovation and NPD (specialty); advertising, product and design evaluation (specialty); brand strategy and development; market models and strategy; new/emerging markets strategy and evaluation; hybrid management/consumer brainstorming using visually projective protocols.
(See advertisement on p. 21)

IMAGES MARKET RESEARCH

IMAGES Market Research*
914 Howell Mill Rd.
Atlanta, GA 30318
Ph. 404-892-2931
Fax 404-892-8651
E-mail: research@imagesusa.net
www.imagesusa.net
Deborah White
Services: FS, C, DC, DP, FG, ST
African-American, Asian, Hispanic, Middle Eastern, Native American

IMAGES Market 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 phone center with CATI system. Also a member of ActiveGroup.
(See advertisement on p. 94)

Service Codes

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

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, ST
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, C, DC, DP, FG, S, ST, T
African-American, Asian, Hispanic, Middle Eastern, Native American

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, Inc.*
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. 96)

ISA
INTERVIEWING SERVICE of AMERICA, INC.

Interviewing Service of America, Inc.
15400 Sherman Way, 4th fl.
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: FS, C, DC, DP, FG, S, 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 65 languages including Mandarin, Cantonese, Vietnamese, Korean, Tagalog, 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. 97)

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: FS, C, 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: rbrooks@ipcgroup.us
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. 97)

* Indicates minority-owned firm

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

JA Juárez and Associates, Inc.

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

Research and marketing consultants: general and Spanish-language marketing/ sociocultural research. Focus group facilities. Five-station CATI telephone interviewing system. Mail, field and mall intercept surveys. Full-service from questionnaire design through data processing and analysis. Other services include developing marketing strategies, review and evaluation services.
(See advertisement on p. 98)

Service Codes

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

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
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Fax 305-573-2393
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www.latinaccess.com
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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*
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Philadelphia, PA 19130
Ph. 267-342-5778 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*
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Miami, FL 33176
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Fax 305-232-8010
E-mail: lmg8010@bellsouth.net
Jim Loretta, President
Services: FS
Hispanic

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Fax 847-397-9016
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Martha Garma Zipper, President
Services: C
Hispanic

Mari Hispanic Research & Field Services
2030 E. Fourth St., Suite 254
Santa Ana, CA 92705
Ph. 714-667-8282
Fax 714-667-8290
E-mail: mari.h@ix.netcom.com
www.marihispanic.com
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Services: DC, ST
Hispanic

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Chicago, IL 60610
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Fax 312-654-9917
E-mail: market-eas@aol.com
Iliana R. Moran, President
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African-American, Asian, Hispanic, Middle Eastern

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Customer Satisfaction Rsch. & Consulting
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Minnetonka, MN 55345-1914
Ph. 952-933-6825 or 612-250-6562
E-mail: ata200221@msn.com
www.micgmn.com
Services: C
Middle Eastern

* Indicates minority-owned firm

Market Research & Analysis of Dallas
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Dallas, TX 75234
Ph. 972-239-5382
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www.marketresearchdallas.com
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African-American, Asian, Hispanic

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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, FG, ST, T
African-American, Asian, Hispanic

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Houston, TX 77042
Ph. 713-952-1400
Fax 713-952-2444
E-mail: marketstudy@pdq.net
Ahmad Namakforoosh, Office Manager
Services: FS, C, DC, DP, FG, ST, T
Hispanic, Middle Eastern

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

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Lynn Walker Moran
Services: FS
Hispanic

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Services: FS, C, DC, T
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www.mktg-world.com
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Services: FS, C
Asian

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Fax 954-755-3061
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www.marsresearch.com
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Services: FS, C, DC, DP, FG, ST, T
Hispanic

MBC Research Center
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New York, NY 10016
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Fax 212-251-0001
E-mail: info@mbcresearch.com
www.mbcresearch.com
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Lauren Heger, Field Director
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African-American, Hispanic

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Fax 305-292-6950
E-mail: menendezin@aol.com
Services: FS, C, FG, ST, T
Hispanic

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San Diego, CA 92110
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Fax 619-276-7330
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www.menesesresearch.com
Walter Meneses
Services: FS, C, DC
Hispanic

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Ph. 305-666-7010
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Services: DC, FG, ST, T
African-American, Hispanic

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Services: FS, C
African-American, Hispanic

Service Codes

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DP . . . . . .Data Processing
FG . . . . . . .Focus Group Facility
S . . . . .Sampling
ST . . . . . . .Survey Translation
T . . . . .Transcriptions

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Dallas, TX 75247-3715
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Fax 214-630-6769
E-mail: tveliz@aol.com
Tony Veliz, Facility Director
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African-American, Hispanic

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MRSI (Marketing Research Services, Inc.)
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(See advertisement on p. 34)

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Fax 918-252-1214
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Asian, Hispanic, Middle Eastern

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Fax 760-434-7476
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FG . . . . . . .Focus Group Facility
S . . . . .Sampling
ST . . . . . . .Survey Translation
T . . . . .Transcriptions

New York Focus
The Focus Network
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Fax 212-867-9643
E-mail: info@newyorkfocus.net
www.thefocusnetwork.com
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www.omnifacts.com
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Fax 808-538-6227
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www.omnitrakgroup.com
Alan Ellis, Vice President
Services: FS, DC, DP, FG, ST
Asian

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www.OMRdc.com
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African-American

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Piscataway, NJ 08854
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Fax 732-572-7122
E-mail: ravipara@aol.com
www.paradigmtek.com
Ravi Iyer, President
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African-American, Asian, Hispanic, Middle Eastern

Perceptive Market Research, Inc.
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Gainesville, FL 32608
Ph. 800-749-6760 or 352-336-6760
Fax 352-336-6763
E-mail: surveys@pmrresearch.com
www.pmrresearch.com
Dr. Elaine M. Lyons, President
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Hispanic

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San Jose, CA 95128
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Fax 408-251-5093
E-mail: npphase3@jps.net
Martha Mogyorossy, Director Field Services
Services: DC, FG, S, ST
Hispanic

Pioneer Marketing Research
(formerly Data Research Services)
3323 Chamblee - Dunwoody Rd.
Atlanta, GA 30341
Ph. 770-455-0114
Fax 770-458-8926
E-mail: jmitchell@pioneer.bz
www.pioneer.bz
Jon Mitchell, Exec. Vice President
Services: FS, C, DC, DP, ST, T
African-American, Asian, Hispanic

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

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Fax 248-728-6843
www.polk.com
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African-American, Asian, Hispanic, Middle Eastern, Native American

Population Research Systems
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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

Precision Research Inc.
5681 W. Beverly Lane
Glendale, AZ 85306-1879
Ph. 602-997-9711
Fax 602-997-5488
E-mail: jmuller@precisionresearchinc.com
John Muller, President/CEO
Services: FS, C, DC, DP, ST
Hispanic

* Indicates minority-owned firm

Service Codes

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

Q & A Research, Inc.*
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Fax 415-883-1344
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www.qar.com
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Hispanic

QMark Research & Polling
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Fax 808-524-5487
E-mail: bankersmit@starrtech.com
www.starrtech.com
Services: FS, DC, DP, FG, S, ST, T
Asian

QMark Research & Polling
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Ph. 702-253-0314
Fax 702-253-7993
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www.starrtech.com
Services: FS, DP, FG, ST, T
Asian

Qualitative Insights
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Fax 818-988-4057
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www.q-insights.com
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African-American, Asian, Hispanic, Middle Eastern

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E-mail: info@recruitingresourcesllc.com
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Maryanne Livia, Vice President
Services: FS, FG
African-American, Asian, Hispanic, Middle Eastern, Native American

Research Data Design, Inc.
5100 S.W. Macadam, Suite 500
Portland, OR 97239
Ph. 503-223-7166
Fax 503-223-6760
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www.rdd.info
Services: DC, DP, FG, ST, T
African-American, Hispanic

Reyes Research*
1013 Colina Vista
Ventura, CA 93003
Ph. 805-278-1444
Fax 805-278-1447
E-mail: arvind@reyesresearch.com
www.reyesresearch.com
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Services: DC, FG, ST, T
Hispanic

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1111 Parkcentre Blvd., Suite 111
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Ph. 305-620-4244
Fax 305-621-3533
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www.rifemarketresearch.com
Mary Rife, President
Services: DC, FG, ST
African-American, Hispanic, Native American

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Dallas, TX 75206
Ph. 214-750-0102
Fax 214-750-1015
E-mail: info@rinconassoc.com
www.rinconassoc.com
Dr. Edward T. Rincon, President
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African-American, Asian, Hispanic

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San Diego, CA 92120
Ph. 619-265-2361 or 800-895-1225
Fax 619-582-1562
E-mail: info@sdsurveys.com
www.sdsurveys.com
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www.thefocusnetwork.com
Heidi Flores, President
Services: FG
Asian, Hispanic

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Dallas, TX 75240
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Services: DC, FG
African-American

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www.schlesingerassociates.com
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(See advertisement on Inside Front Cover)

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Fax 813-207-0717
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www.schwartzresearch.com
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www.seaportsurveys.com
Andrea Waller, President
Services: DC, FG
African-American, Asian, Hispanic, Middle Eastern

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8351 Roswell Rd., Suite 349
Atlanta, GA 30350
Ph. 770-591-7730
Fax 770-591-5209
Mario de la Guardia, President
Services: FS
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SIL Group
413 N.E. Third St.
Delray Beach, FL 33483
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Fax 800-599-5688
E-mail: sil@silgroup.net
www.silgroup.net
Thils Mann
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www.smithmark.com
Michael Smith
Services: FS, C, DC, FG
African-American

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www.southernspectrum.com
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Southwest Planning & Marketing
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Santa Fe, NM 87501
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Fax 505-984-1393
E-mail: swpm@prodigy.net
www.swplanning-marketing.com
Bruce Poster, President
Services: FS, C, DC, DP
Hispanic, Native American

Service Codes

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

Ray Suh & Associates, Inc.*
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Atlanta, GA 30341
Ph. 770-986-9267
Fax 770-986-9485
E-mail: RAYSUH@aol.com
Ray Suh, Principal
Services: FS, C, DC, ST, T
Asian

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(See advertisement on p. 27)

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

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Arlington Heights, IL 60005
Ph. 847-590-7000
Fax 847-590-7010
E-mail: us@synovate.com
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Services: FS, DC
Asian, Hispanic

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Fax 305-643-5584
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www.synovate.com
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More often than not, this secret entity, this unknown recruiter, is given a screener chock-full of questions — sometimes clear, occasionally opaque as a dirty martini — and the spec sheet, the screener blueprint for recruiting, a now-archaic remnant.

Recruiting for focus groups is not in the guidance counselor's bible. This job is not available through your local headhunter's office and although there are courses aplenty given in most major cities by those infamous fast-food education outfits on how to become a "professional" respondent, there does not seem to be anyone out there doing a reality-based training course for recruiters. If they are, they are more secret than an al Qaeda cell.

Recruiting for focus groups is a job for odd people. It's a job you fall into, a job you get through a relative, a job you do while looking for your "real" job, a job you do for a year, then say with a eureka smile on your face, "Hey, this is a job for me!" Recruiting can be a great job if you are one of those "odd people."

Focus group recruiting is always different, often challenging, sometimes creative and, unlike government work, it has a genuine beginning, an anxiety-ridden middle, and a legitimate ending. You invoice and are off to the next case.

And although there could be 50 people involved from start to finish on one small print advertising campaign — creatives, strategists, lots of smart, sassy folk — one day out of the blue a respondent who went to a focus group six months ago will call up and say, "Thanks so much for that group I went to. I just saw an ad for blahblahblah plastered all over the busses. They picked MY idea after all! I just want to thank you. Can you imagine I got paid for giving them that idea?"

And so, recruiting is a pleasure-giving occupation. After all, what is the second-best thing a person can do after they have consumed, purchased, imbibed, traveled, gone through heaven or hell, and paid little or dearly for a product or service? They can brag about it, tell their story, share their ideas and opinions, talk endlessly about the expertise they have garnered.

The best thing is, they are going to be listened to, really listened to. In a world where almost nobody listens to anyone, a focus group may be the last place on this planet where people are "really" listening.

And oh yes, they also get paid for their opinion.

Classified Ads

Qualitatively Speaking

Thoughts on no-shows and the recruiting process

By Rhoda Schild

Editor's note: Rhoda Schild is president of Rhoda Schild Marketing Services, a New York research firm. She can be reached at 212-779-3633.

A no-show is precisely what it is, a no-show. A respondent — a humanoid evolved from the void of the universe, standing upright, thumb in opposition, brain bordered by that wonder of wonders, the cerebral cortex — who was invited and promised money to attend a focus group to give their esteemed opinion, has not shown up. Will the universe cease expanding? Hardly.

The no-show reasons are as many and as straightforward as, "The weather is frightful," there was a work emergency, a personal emergency, "I don't want to," "I have something better to do," "I forgot," and, lest we forget the most definitive reason: they have died and rudely enough, they have not called the recruiter or the facility to warn them of their no-show.

The client anticipates filling a quota, is expectant that their paid evaluator will show up and verbally give them their all, that a dialogue between client and customer will take place, that a texture will form, and mostly that this sharing will yield an alliance.

But, the truth is, almost anything big, small, relevant or irrelevant, can, will and has become more important to the invitee than a focus group.

So can you avoid no-shows? No. But you can hedge your bets, ease the moderator's angst, assuage the client's expectations and refrain from calling the recruiters nasty names. How? Provide a budget that includes enough cash for an ample over-recruit. This is the single most assured resolution to guarantee a fulfilled quota.

Be confident that your chosen recruiting provider will do their darndest. A responsible supplier will spend hours, days and weeks calling, querying and listening, eager to lasso in the client's expected groups. They send, they e-mail, they fax, they confirm, they re-confirm. To recruit well is to be on a first-name basis with the word harassment. A good supplier will replace, replicate and fill in whenever they can, but occasionally all efforts go for naught and a no-show happens. Amazingly the earth's axis remains stable.

Your supplier knows the recruiting process, can read a list, has a notable database, knows how to network, has contacts, contacts, and yes, more contacts, understands the give-and-take of a realistic incentive, and comprehends geographical diversity. Hopefully your supplier is working on your behalf to recruit the best they can using every tactic known to ensure a complete show rate.

But in the event of a no-show it negates the working relationship to call a facility or recruiter and inquire, in the castigating tone of a schoolmarm, "Did you confirm so and so?" Know for sure, they did, they did, they did. And know that the cheapest, the bestest, the ultimate resolution to a no-show is an ample over-recruit.

"Ample" for a responsible population would be 10 for eight to show; for a high-risk, busy, emergency-driven population, 10 for six to show; for an irresponsible population, 10 for five would be safer. An abundant over-recruit is security that errs on the side of caution.

The recruiter: vital link

The recruiter occupies a spot at the very bottom of the totem. They are obscure, hidden, a voice on the phone, most often lacking any information as to what the client really wants or why the client has chosen these particular respondents. Yet, when truth be told, this anonymous recruiter is possibly the most vital link in the focus group food chain. Have a bad recruit, and a moderator sprouting wings and promising everlasting life could not elicit an opinion worth writing about.

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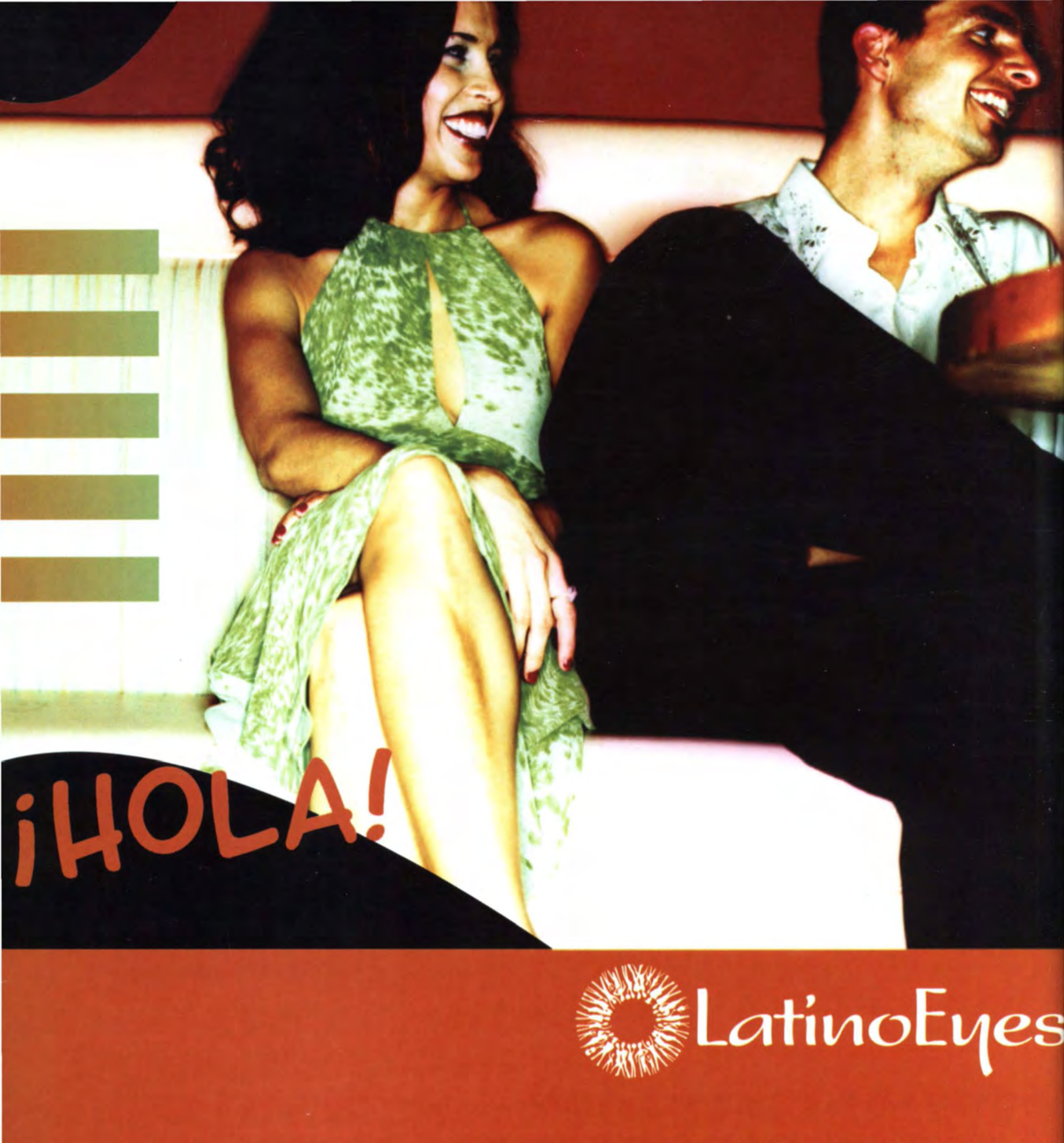

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