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APRIL 2004


Marketing Research Review

Ethnic research

- > Hispanic marketing Q&A
- > The changing face of mass-market America

Advertising research

- > Creative awards vs. copytesting
- > Out-of-home ads work for Starbucks



2004
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Hispanics' cellular bills higher than the national average

Scarborough Research, New York, has released a study showing that Hispanics spend more on their monthly household cellular phone service than the national average. According to the study, the average monthly household cellular bill for Hispanics is \$67, which is more than 10 percent higher than the national average of \$60. Nationally, 64 percent of Hispanics live in a household with a cellular phone subscription. This is virtually equal to the national cell phone penetration rate of 66 percent.

Hispanics also report spending more on their monthly household long distance and local telephone



service bills. The average household long distance bill for Hispanics is \$33 versus \$27 for all consumers. Hispanics average \$36 per month for local service, which is slightly higher than the national average of \$34.

Nineteen percent of Hispanic consumers who said they or a member of their household subscribes to wireless service plan to switch carriers in the next year. They are 22 percent more likely than all wireless subscribers to do so.

"Hispanics are consuming products and services at a rate equal to, and, in certain instances, greater than the general population. These consumers, characterized as the 'largest minority group' in the 2000 Census, are in fact a consumer force to be reckoned with," says Bob Cohen, president and CEO, Scarborough Research. "In the case of telecom, Hispanics tend to place great value on social and family ties, which makes being connected very important. This cultural nuance places Hispanics among the telecom industry's best customers."

Hispanics are 24 percent more likely than all consumers to have spent \$150 or more on their monthly household cellular bill last month. They are 86 percent more likely than all consumers to spend \$100 or more on their monthly long distance service and 41 percent more likely to spend \$100 or more on their monthly local phone service.

The Scarborough study also found local market differences when it comes to household cell phone penetration among Hispanics. Miami and New York lead local Hispanic markets in cell phone penetration. Seventy-four percent of Hispanics in Miami and 71 percent in New York said they or a member of their household subscribes to cellular service.

"The growth of the Hispanic

marketplace in the U.S. is a national phenomenon, but marketing to these consumers requires a local focus," says Cohen. "Cultural differences, shopping patterns and language preferences are important factors that distinguish Hispanic segments and these are driven at the local market level. Through better understanding Hispanics where they live, marketers can maximize their multicultural budget, make more informed media decisions, streamline the marketing process and expand their brand's reach."

Data in this report is from Scarborough USA+ 2003 Release 1. The 2003 data on switching carriers is from Release 1 and represents six months of measurements. The other 2003 data represents 12 months. For more information visit www.scarborough.com.

Suburban African-Americans an underserved market

The growth in the number of suburban Blacks between 1990 and 2000 was 2.5 times the rate of whites, according to data compiled by The Hunter-Miller Group, a Chicago research firm. These 4.6 million households have median incomes up to 48.5 percent higher than Blacks who live in central cities. Almost 50 percent of Blacks with incomes of \$75,000+ and 57 percent of those with incomes of \$100,000+ live outside central cities. Furthermore, African-Americans who have moved to the suburbs are more likely to be highly educated home owners compared to their central-city peers. They have more disposable income to spend on luxury items and other goods that show they "have made it" but marketers are not fully

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names of note

Paula Coletta has joined *Marketing Research Services Inc.* (MRSI), Cincinnati, as senior research analyst.

St. Louis-based *Maritz Research* has named **C. Richard "Dick" Pace** director of its Financial Services Research Consulting Group. He will be based in both Greenwich, Conn.,



Pace

Gordon

and Maritz' New York City office.

Omaha research firm *The MSR Group* has named **Dan Gordon** director of research development.

Duane Clement, Joe Ferris III and **R. Bruce Westcott** have been named to the leadership team of the new Cincinnati-area consumer insights division of New York research firm *Schulman, Ronca, & Bucuvalas, Inc.*

Pam Bruns has been named vice

president, client services at the new Chicago office of Canadian data collection firm *Opinion Search, Inc.*

Lori M. Blank has joined *Polaris Marketing Research, Inc.*, Atlanta, as an



Blank

Hood Garcia

account director. The firm also named **Susan Hood Garcia** project manager.

The NPD Group, Port Washington, N.Y., has named **Ross Rubin** director of industry analysis for NPD Techworld, the company's technology tracking division.

R. L. Polk & Co., Southfield, Mich., has named **Kevin McCann** to senior vice president, Asia-Pacific. He will be based in Beijing. At the firm's Long Beach, Calif., office, **Patricia Gaulin** has been named vice president, Toyota OEM team.

New York-based *TNS Media*

Intelligence/CMR has named **Lori B. Madeloff** senior vice president, product and custom services.

SRA Research Group, Inc., Jupiter, Fla., has named **Matthew Banaszynski** research analyst.



Banaszynski

Spedding

London-based *Synovate* has named **Tim Bowles** CEO for Western Europe. **Nicos Rossides** has been named head of Synovate Solutions. He will also retain responsibility for Central and Eastern Europe, Middle East and Africa (CEEMEA).

Michael Spedding has been named CEO of Synovate Healthcare. Synovate Healthcare has announced other management appointments effective April 1. Changes in the management structure draw from Isis Research, which was acquired by Synovate in September last year, and Synovate's existing health care practice. Isis will rebrand as Synovate Healthcare in October. **Marc Yates** has been named regional director Synovate Healthcare Asia Pacific. Yates will continue to be based in Singapore. **Stuart Bartlett** has been appointed director Synovate Healthcare Asia Pacific. He is currently based in Singapore. **Robert Skolnick** has been named executive vice president Synovate Healthcare U.S. Custom. Skolnick will continue in his existing role as executive vice president of Synovate Americas and be based in Tarrytown, N.Y.



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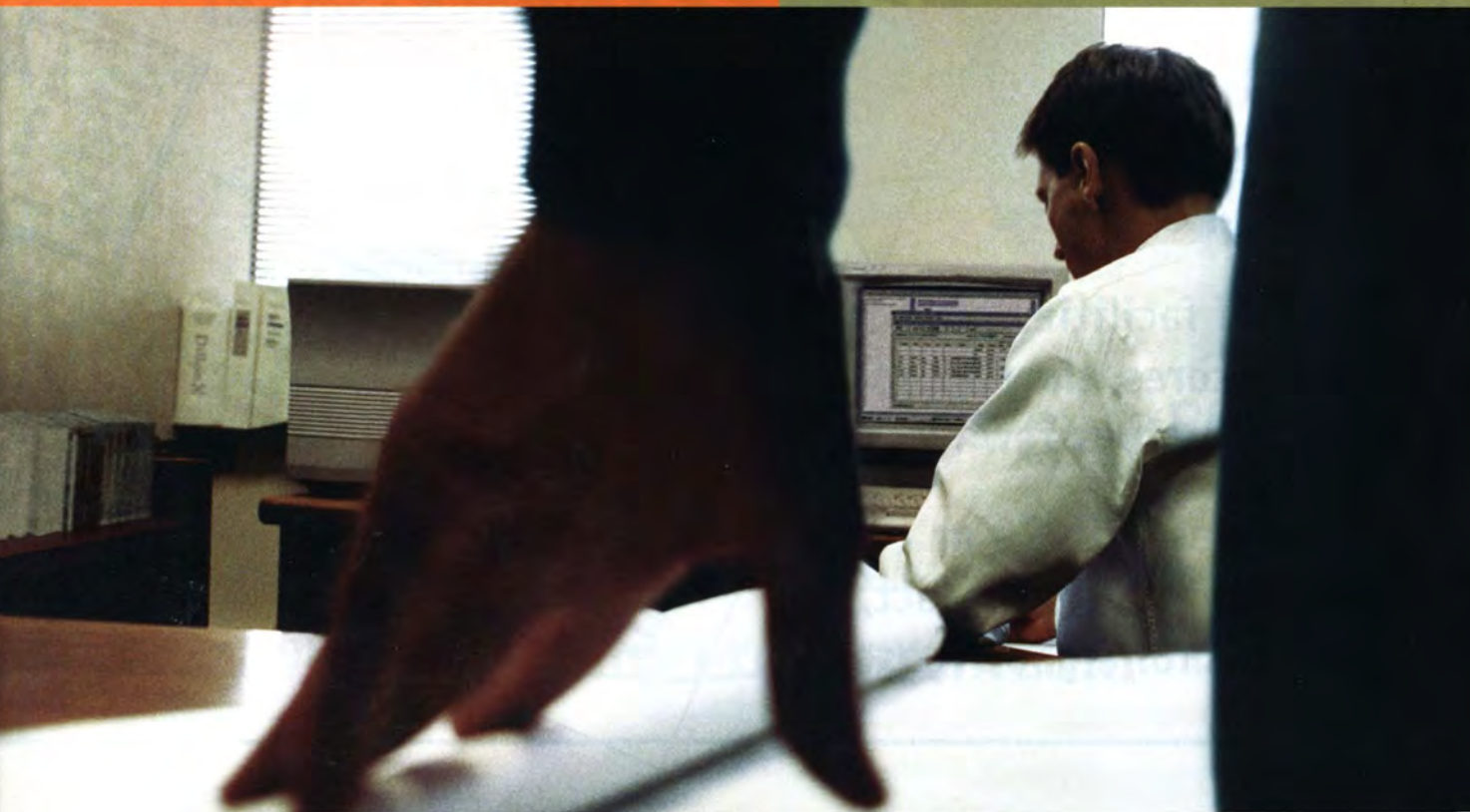
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Some consider research a snapshot.
Others, a report card.

(We contend it's a map.)



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IMPULSE SURVEY 2004 EDITION

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Strategic Marketing Services

1 Park Street, Portland, ME 04101
Contact: Patrick Murphy, Kate McCann
Local: 207 774-8226 **Fax:** 207 772-8842
Web: www.psmaine.com
Established: 1993 **Present location:** 1998
Focus rooms: 2 **Room capacity:** 20 **Viewing capacity:** 12
In-house recruiting: Yes **1-on-1 room:** Yes **Auditorium:** Yes
Location: office building **Airport:** 7 miles
Internet access: ISDN **Video/WebConf:** Yes
Recruit: medical professionals, business executives, high-tech, children,
 teenagers, seniors **Services:** usability testing, 3/4 in. videoplayer, full
 translation, note-taking, perception analyzer, internet access for clients, private client office
Hotels: Sheraton Portland 207 774-8411 **Registry:** 207 774-8200

Quality Ratings	
Overall	75
Recruit	80
Personnel	80
Facility	80
Location	80
Food svc.	80
Value	80
No. of raters	2

Maryland

Baltimore

101 E. Chesapeake Avenue, # 102, Towson, MD 21286
Contact: Carl Gorman, Kelly Dupont
Local: 410 327-2000 **Fax:** 410 327-0872
Web: www.baltimoreresearch.com
Established: 1981 **Present location:** 1991 **Remodeled:** 2002
Focus rooms: 2 **Room capacity:** 40 **Viewing capacity:** 16
In-house recruiting: Yes **1-on-1 room:** Yes **Auditorium:** Yes
Location: office building **Airport:** 30 miles
Internet access: 21 **Video/WebConf:** ActiveGroup/OverVision
Recruit: medical professionals, business executives, high-tech, children, teenagers, seniors, Baltimore
 children, client lounge, internet access for clients, private client office
Hotels: Towson Sheraton 410 327-7400 **Hurt Valley Manor:** 410 795-7000

Quality Ratings	
Overall	84
Recruit	88
Personnel	88
Facility	88
Location	88
Food svc.	88
Value	88
No. of raters	49

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Baltimore Research

8320 Bellona Avenue, Suite 100, Baltimore, MD 21204
Contact: Jay White, Ted Watson
Local: 410 583-9991 **Fax:** 410 583-9992
Web: www.baltimoreresearch.com
Established: 1960 **Present location:** 1985 **Remodeled:** 2002
Email: info@baltimoreresearch.com **Viewing capacity:** 21
Focus rooms: 5 **Room capacity:** 40 **Viewing capacity:** 21
In-house recruiting: Yes **1-on-1 room:** Yes **Auditorium:** Yes
Location: suburbs, office building **Airport:** 21 miles
Internet access: ISDN **Video/WebConf:** FocusVision/ActiveGroup
Recruit: medical professionals, business executives, high-tech, children,
 teenagers, seniors, office building, very low incidence
Services: usability testing, 3/4 in. videoplayer, closed-circuit TV, full kitchen, client lounge, s
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Hotels: Radisson Cross Keys 410 532-8900 **Sheraton:** 410 321-7400
Comments: Remodeled.

Quality Ratings	
Overall	87
Recruit	88
Personnel	90
Facility	87
Location	82
Food svc.	92
Value	83
No. of raters	7

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product and service update

New transcript tool from ActiveGroup

Atlanta-based ActiveGroup is now offering InstantTranscripts to all clients who use ActiveGroup to broadcast their qualitative research. InstantTranscripts are the real-time, textual transcripts of groups or interviews. When the ActiveGroup is being broadcast, the event is being transcribed at the same time. The transcripts and the ability to create video clips from the transcripts are available via the Internet 30 minutes after the group or interview ends. The audio feed of the event is summarized by the transcriptionist in real time. Users can view the transcripts at the same time as their event - similar to closed-captioning on a TV. They can click on any text in the transcript and the video of that moment will play. All InstantTranscripts are ActiveNotes-compatible, allowing users to immediately create video clips of any transcript items they like. Clients can save the transcript file as a Microsoft Word document and can access the video and create the clips from the Word document (Internet access required). For more information visit www.activegroup.net.

Raosoft updates EZSurvey

Seattle-based Raosoft has released EZSurvey 2004, the seventh version of its electronic data collection program. Users can build either simple or complex questionnaires on Web sites and distribute them over the Internet, intranets, any standard e-mail system, and now Pocket PCs, Palms, tablet PCs, and mobile phones (SMS). The improved GUI is designed to make designing an electronic form easier, more straightforward and faster with more automatic wizard guidance. For advanced users, more options are available. The Standard package contains most of the new advanced features, including live previewing on the new EZSurvey Personal Server.

The Professional adds improved ODBC connectivity and advanced scripting. Enterprises can customize and extend both versions by writing plug-ins in JavaScript. For more information visit www.raosoft.com.

Free stat testing utility

DataStar, Inc., Waltham, Mass., is offering an online statistical testing utility, Starware/Stat, on its Web site at www.surveystar.com/i_starstat.htm. Starware/Stat was originally introduced in 1995 as a statistical testing utility designed to perform significance tests commonly used by survey researchers. These same tools are now available online, free to use for individuals or businesses of any type. The tests performed include significance testing on two-sample proportions (z-test), significance testing on two-sample means (z-test), and sample precision calculator to determine overall reliability of various sample sizes. All testing is configurable to test at various confidence levels (80 percent, 90 percent, 95 percent and 99 percent), and provides details on probabilities and other pertinent statistics.

New online omnibus for Britain

London-based HI Europe, a wholly-owned subsidiary of Harris Interactive, Rochester, N.Y., has launched the QuickQuery Great Britain (QuickQuery GB) online omnibus service. It is the first expansion of a product created and developed originally in the U.S. in 1999 by Harris Interactive. HI Europe plans to extend this service to France, Germany, Italy, Spain and Belgium in the coming weeks and months. Each month, questions are added to the omnibus survey and a representative sample of about 2,000 people across Great Britain, aged 16 and over, is interviewed online. HI Europe can gather these responses in eight days or less, and the large online samples pro-

vide the ability to reach low-incidence populations. For more information visit www.hieurope.com.

Research system for product developers

Cincinnati-based Marketing Research Services Inc. (MRSI) is now offering PRISM, a research system designed to provide an easier way for market researchers and product developers to utilize marketing research to guide decision making. PRISM is composed of four stages that follow the product development process: market understanding, concept development, product development, and product management. The system utilizes MRSI's quantitative and qualitative research tools in a framework that links the individual steps involved in the research process into an integrated research system. The system is designed to enable researchers and product developers the flexibility to customize the PRISM system to their specific needs. Clients can enter or leave the system at any stage or work with MRSI throughout all stages, whichever level of research guidance they require. Numerous research tools are used throughout the four stages of the PRISM system. Tools utilized in PRISM Stage 1, Market Understanding, include qualitative research, attitude and usage studies, and segmentation. Stage 2, Concept Development, includes tools such as brainstorming, concept evaluation, and volumetric forecasting. Research tools in Stage 3, Product Development, include product testing, pricing research, and product line optimization. Stage 4, Product Management, includes research tools such as point-of-purchase, tracking, and customer satisfaction research. For more information visit www.mrsi.com.

Version 4.5 of Net-MR

Seattle-based Global Market Insite (GMI) has released Net-MR version

4.5, an update to its suite of marketing research software. The Net-MR 4.5 represents a regularly scheduled upgrade to the software product. Some features of the Net-MR 4.5 release include: an interface that is designed to improve the overall usability and functionality in the development of Flash-based questions; an enhanced Net-MR Report Publisher tool; export analysis output directly to Microsoft Excel; enhanced e-mail campaign reporting; and faster performance for large data sets. For more information visit www.gmimr.com.

Track pet health products with PetTrends

Ipsos-Insight, New York, has announced a syndicated service to track consumer purchase behavior of cat and dog health products, called Ipsos PetTrends. It tracks cat and dog owner purchasing of both prescription and non-prescription wellness products for pets through Ipsos' lon-

gitudinal and static consumer panel. Purchase behavior is tracked for treatment across a host of ailment categories for pets, including allergies, arthritis, behavior management disorders, heartworm, and external parasites like fleas and ticks. In addition to capturing purchasing of cat and dog medications and wellness products, the study looks at specialty cat and dog food purchases, specifically those foods that are purchased for a particular health condition. For more information visit www.ipsos-na.com.

WebSurveyor gets new interface

WebSurveyor Corporation, Herndon, Va., has released a new Web interface for its WebSurveyor online survey solution. The new interface enables immediate accessibility and mobility for survey administrators, who will now be able to access survey data from virtually anywhere. It eliminates the need to download and install software; instead, users can create and

publish surveys and analyze their results using only a Web browser on a variety of platforms, such as Windows, Mac or Linux. The online interface includes a new account management survey dashboard that allows users to instantly see key survey statistics, view a graphical representation of survey activity, and use a new workspace for creating and editing surveys. For more information visit www.websurveyor.com.

Data Entry 4.0 from SPSS

Chicago-based SPSS Inc. has released SPSS Data Entry 4.0, a system for data collection and survey management. The latest version offers complete integration with SPSS for Windows.

SPSS Data Entry enables occasional surveyors, data entry departments, small businesses and medium-sized organizations to create surveys and

continued on page 80

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Focusing on diversity

News notes

The St. Louis Business Journal reported in March that Bush O'Donnell Capital Partners had purchased the **Delve** consumer research business from **Maritz Inc.** Delve also has a minority investor, James Smith, who has been named Delve's new chairman. "Maritz Research is refocusing its business in order to concentrate on the areas in which it has the greatest strengths, and those which offer synergies with the larger performance management business of Maritz," said Maritz Research President Michael Brereton in a statement.

Delve plans to consolidate smaller firms in the field and is looking at businesses in Boston and New York,

two markets where Delve does not have a presence, the newspaper reported. The company has a full-time staff of 60 and another 300 part-time researchers who work at its locations around the country. The sale price was not disclosed.

Arbeitsgemeinschaft Fernsehforschung (AGF - TV research partnership), an association of the four major German broadcasting groups, ARD, ProSiebenSat.1, RTL and ZDF, has signed a new contract with **GfK Fernsehforschung** to measure TV ratings in Germany on a continuous basis. The contract between AGF and GfK Fernseh-forschung, which is now in its fifth consecutive term, begins on January 1, 2005 and will

run at least until December 31, 2011. AGF will then have the option of extending the contract for another two years until the end of 2013. The long contract term will enable GfK Fernsehforschung to offer AGF its services at virtually the same rates. The contract volume over the seven-year term amounts to more than EUR 90 million.

While the panel will operate exactly as before, technology will be introduced to improve the AGF/GfK Fernsehforschung system. The contract includes agreements to supply new software which will enable TV stations, marketers, advertising agencies and advertisers to analyze TV usage data. The upgraded analysis software will be available from mid-2006. Use of a new metering technology from 2007 will be regulated in a separate contract.

Seattle survey software firm **QuestionPro Inc.** announced the issuing of its 500th academic research grant for conducting survey research online. Under the program, QuestionPro offers free access to its Web-based survey creation and analysis software at QuestionPro.com. Qualifying institutions are allowed to generate and deploy a survey with up to 5,000 responses over a six-month period.

The program is offered to faculty and students of accredited universities worldwide, working on academic research projects that have not been funded by any outside sources. To date 500 surveys have been created, with more than 31,000 responses. QuestionPro will continue the academic research grant program in 2004.

Calendar of Events April/June

The European Society for Opinion and Marketing Research (ESOMAR) will hold its Excellence in Consumer Insight 2 conference on April 18-20 in Vienna. ESOMAR will also hold a forum on managing research for profit in Vienna on April 21. For more information visit www.esomar.org.

The Advertising Research Foundation (ARF) will hold its annual convention on April 26-28 at the Marriott Marquis, New York. For more information visit www.thearf.org.

Anderson, Niebuhr & Associates will hold a questionnaire design and use workshop on April 29-30 in Orlando, Fla. For more information call 800-678-5577 or visit www.ana-inc.com.

ESOMAR will hold a conference on public sector research on May 9-11 in Madrid. For more information visit www.esomar.org.

The American Association for Public Opinion Research (AAPOR) will hold its annual conference on May 13-16 in Phoenix. For more information visit www.aapor.org.

Anderson, Niebuhr & Associates will hold a questionnaire design and use workshop on May 13-14 in Minneapolis. For more information call 800-678-5577 or visit www.ana-inc.com.

Frost & Sullivan will hold its annual executive summit, themed "Advanced Marketing Research as a Strategic Imperative," on May 16-20 at the Hyatt Regency Miami. For more information visit <http://summits.frost.com>.

Canada's Professional Marketing Research Society (PMRS) will hold its annual conference and trade fair on May 17-18 at the Liberty Grand Entertainment Complex in Toronto. For more information visit www.pmrs-aprm.com.

The Marketing Research Association (MRA) will hold its annual conference in Boston on June 9-11 at the Sheraton Boston. For more information visit www.mra-net.org.

ESOMAR and the Advertising Research Foundation (ARF) are co-sponsoring the Worldwide Audience Measurement conference (online, outdoors/out-of-home, print, media mix, radio, TV) on June 13-18 in Geneva, Switzerland. For more information visit www.esomar.org.

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Learning to love homework

Homework: it was easy to hate it when we were young and in school. But now, as qualitative consultants, it is easy to see the value of homework when used for the right studies at the right time.

Homework refers to assignments given to respondents to be completed outside of the qualitative sessions. Homework is used quite often in longitudinal studies or those in which respondents return for multiple sessions. It can also offer great value in more traditional qualitative studies when assigned to respondents at the time of recruit – with the agreement it will be completed before the participants come to the qualitative sessions.

This type of pre-session homework is most beneficial for exploratory projects when there is no need to mask the topic and the purpose of the project is to explore attitudes, beliefs, habits and practices. Homework allows respondents to think about the topic before they come in – interviewing others or re-living experiences as necessary.

For example, we have asked respondents to...

- visit stores when examining shopping habits at major mass merchandisers;
- conduct mock purchases of antiperspirants when exploring purchasing habits and practices relating to deodorants;
- develop brand imagery collages;
- reflect on key experiences related to antibacterial products;
- observe and interview family members as they perform habitual tasks, such as washing dishes or diapering babies.

Pre-session homework offers many benefits to clients as it enhances the study in several key ways:

- It essentially lengthens the groups. Time-intensive techniques such as collages might be assigned as homework, which frees up valuable time during the session. It also allows respondents to get warmed up to the topic even before they enter the room.
- It increases the involvement of

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respondents.

— By investing some quiet time thinking about a topic before being put on the spot, respondents often volunteer a greater breadth and depth of thoughts and feelings.

— Respondents also seem more committed to their points of view and less likely to quietly acquiesce to the thoughts of others in the group.

— They enter the room ready to talk. Their investment in the homework makes them willing to share. They want to show others what they have accomplished.

- It seems to allow the group to gel more quickly. The homework represents a shared experience. Group participants are intrigued to find out what others have discovered and developed.

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- Show rates seem to be greater when homework has been assigned. People are more likely to attend the session after completing homework because they: are more familiar with the study and have a better sense of what is going on and what will be

Facilities should know up front that respondents will be asked to do pre-session work. Incentives increase commensurate with the time required by the respondent to complete the task.

discussed; and already have some investment in the process.

There are some things to consider when assigning homework.

- Facilities should know up front

that respondents will be asked to do pre-session work. Incentives increase commensurate with the time required by the respondent to complete the task. (Homework generally takes 10 to 30 minutes for in-home work and 90 minutes for away-from-home “outings.”)

- Respondents should commit to homework as part of the screening process.

- Assignments need to be given and/or sent at the time of recruit to give respondents plenty of time to work on them.

- Instructions should be clear and concise. The homework should look inviting. After all, this is respondents’ first introduction to the study.

- If possible, respondents should be given alternative ways to convey their thoughts via homework. For example, in one study, participants were asked to recall a meaningful past experience relating

to fragrances. They were told they could develop a collage, write a story or draw a picture as a means to describe this experience. This choice allowed them to use the technique with which they were most comfortable.

- Time must be allowed to discuss homework during the session. Respondents have invested their time, and that should be acknowledged. However, the amount of session time spent discussing homework must be managed by the moderator-consultant in keeping with objectives and discussion-guide flow.

Another way

Homework is a qualitative tool that allows respondents another way to bring their unique insights and personality into the session. It enhances the process and, as a result, increases the value of the research. It should be considered, when appropriate, as a part of the qualitative process. | Q

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A definite impact

In the summer of 2002, Starbucks wanted to answer this question: Does Starbucks' out-of-home media (such as billboards, kiosk ads, vehicle wraps) reach and affect people as efficiently as Starbucks' investments in television, radio and print advertising? As our research showed, the answer was yes, it was as efficient as the other media.

To manage advertising effectively – and make the right decisions on how much and what kinds – you need to know how advertising is really perform-

ing. To do this, Starbucks uses a recognition-based tracking program¹, which we feel avoids the elements of risk inherent in alter-

native methods:

Dissimilar audience measures: Traffic by the site is good to know, but how many of those people actually notice your billboard? How does the value of a million people driving by your billboard compare to the value of a million people sitting in front a TV set while your commercial is playing? We know it is different, but how different? And as everyone is aware, the accuracy with which the industry measures either audience is open to some debate.

Out-of-home ads work for Starbucks

Editor's note: Ann L. Breese is marketing research director for Seattle-based Starbucks Coffee Company. She can be reached at abreese@starbucks.com. Donald E. Bruzzone is president, Bruzzone Research Company, Alameda, Calif. He can be reached at donbruzzone@bruzzone-research.com. This article is adapted from a presentation made before the ARF/ESOMAR Worldwide Audience Measurement conference in June 2003.

Overlap: A second advertising medium makes a lot more sense, and is a lot more valuable, if it reaches people who were not reached by the first medium. The readily available audience data doesn't tell you anything about how much of what you are buying is duplicated overlap and how much is new and un-reached.

Inaccurate measures of reach and affect: Those who take the first two blind spots seriously will usually turn to tracking studies, which are custom studies to determine the number reached and affected by the advertising they are conducting. But what kind of study? Recall-based telephone trackers are still the most popular. But we found when you ask if people

recall any of your recent advertising, and they say yes, they may well be thinking of advertising you conducted last year, or they could even be thinking of your competitor's advertising. But when you show them the advertising and ask, "Do you remember seeing THIS before?" you get a massive increase in accuracy.² Added to that was a situation that may be unique to firms in Starbucks' situation. The Starbucks brand is so large in this country, and the coffee shops are so widespread, people expect Starbucks to advertise, and we find substantial numbers saying they recall Starbucks advertising during periods when there has not been any.

Online study

The tracking study conducted by Bruzzone Research was designed to measure the effect of Starbucks advertising during the summer of 2002. The Starbucks name had not been closely associated with summertime drinks. One of the objectives of the summer advertising was to change that.

It was done with a before-and-after study conducted online. The online population was getting close to matching the total population, but still with somewhat of a younger, more upscale skew. That made it a good fit for most Starbucks products. Doing it online enabled us to show each respondent virtually every piece of advertising Starbucks used over the sum-



Out-of-home ads in the form of vehicle wraps, kiosks and billboards did a good job of promoting Starbucks' line of summertime drinks.



Figure 1

mer. We did it as illustrated in Figure 1. A total of 24 items were shown in the same manner. A feeling for the other items in the campaign is provided by Figures 2 and 3. For the radio commercials respondents clicked on a speaker symbol to hear an excerpt. When respondents recognized any of the ads they were asked additional questions. More about that in a moment. But first, how do we use that recognition data?

Recognition is what tells us if a respondent noticed an advertisement. We use that to see if those who noticed a particular advertisement showed higher levels of awareness, favorable impressions and buying behavior. But we needed to avoid that classic problem of post-only studies. People who always had more favorable reactions are the most likely to notice the advertising. So we surveyed almost 800 individuals across the country both before

and after the advertising. That met the need to see if an actual change had taken place among those who noticed an advertisement. However, that first interview can sensitize people and make them more likely to notice that brand's advertising in the future. So we also surveyed another 800 after the advertising who had never been interviewed before. It was the results from this control group that were used to determine how much

change had taken place overall in awareness, perceptions and behavior. In short, we used full experimental design to get the most conclusive evidence possible.

As for response rates, 1,453 of the first-wave respondents were invited to participate in the second wave and 53 percent did. Another 4,708 invitations were sent to a cross-section of the online population drawn from Survey Sampling's SurveySpot panel. Eighteen percent completed the survey, providing 851 replies from people who had not been surveyed before. The response rate was well within the range normally encountered in this type of online research. Validation of this approach is included in the references describing the four years of parallel studies Bruzzone Research conducted in its annual testing of all Super Bowl commercials.³

What we learned when respondents were asked additional questions about the advertisements they recognized is illustrated in Figure 4.⁴ For one set of products it compares how the best-remembered and the least-remembered adver-



Figure 2



Figure 3

tisement compared in the words respondents checked as describing them. It provides a picture of the strengths and weaknesses that account for the difference in attention-getting power. The advertising shown for this set of products was masked. Anything that could identify the advertiser was retouched, bleeped or removed so we could ask "Do you remember who that was for?" That also revealed wide differences. These diagnostics provide creative feedback on the approaches to use again in the future - and the ones to avoid.

The impact of the advertising was measured at a variety of levels ranging from changes in awareness and improvements in reactions to the number that bought the product in the latest period. For calculating return on investment in the most meaningful way, there is no better base than the number of respondents buying the product. So

for the decisive measure of effectiveness, we looked to see if the number of recent buyers was higher among those who recognized the ad. Different amounts were spent to run each of the 24 items, and some of them were run in different areas. To cover that we used

two key measures for evaluating all of them:

- The number reached (per 1,000 respondents) for each cent spent (per capita).
- Additional buyers (per 1,000 respondents) for each cent spent (per capita).

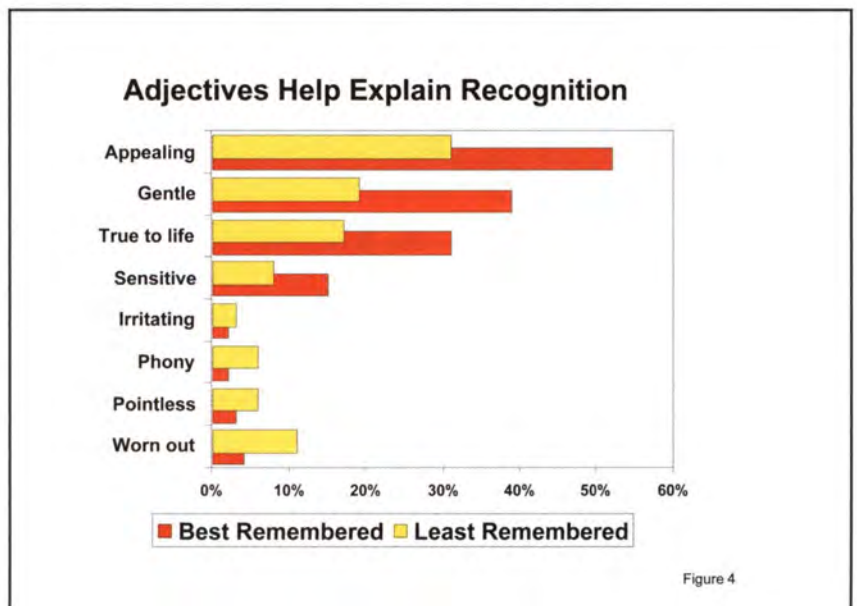


Figure 4

Number Reached and Affected by Each Item in the Campaign

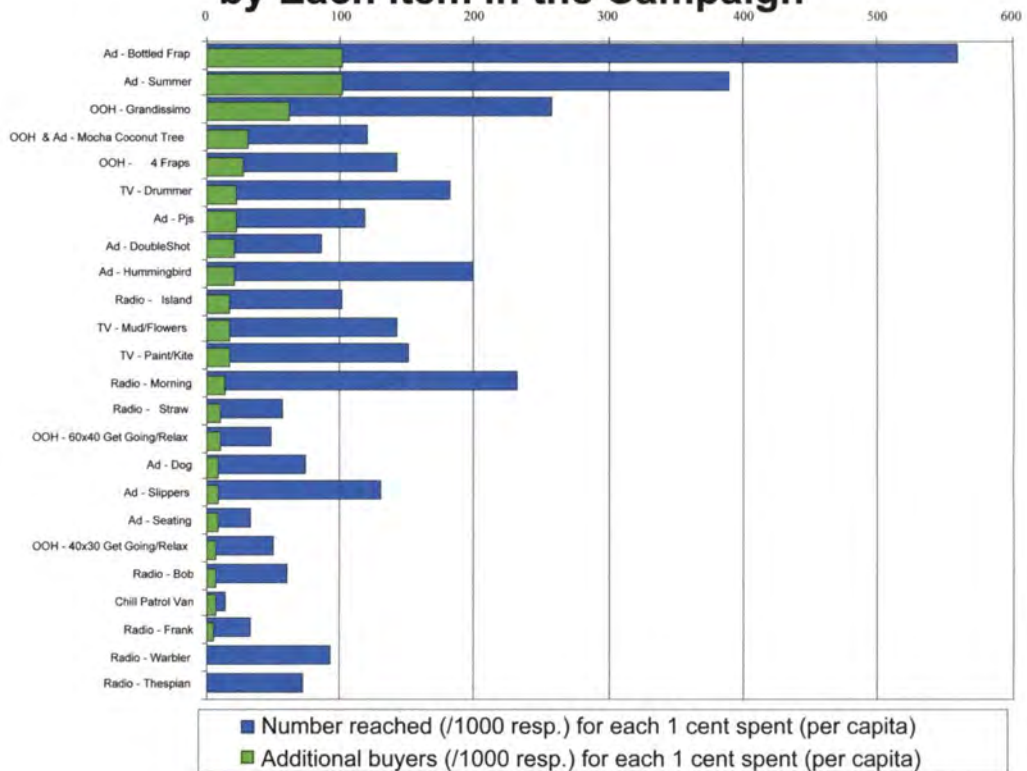


Figure 5

The key point to be made here is that these measures are directly comparable for all media - including out-of-home (OOH). People either recognized the advertising or they didn't. And among those who did, there was either a higher number reporting recent purchases or there was not.

Figure 5 shows both measures for each of the 24 items. They are ranked by the number of additional buyers. The long bars show the number reached was much greater than the number affected.

Comparisons of the number affected - the short bars - are critical, so Figure 6 shows the same data plotted on a log scale that magnifies the short bars and compresses the long ones.

The chart shows there were wide differences in the return on the investment made in each piece of advertising. How did out-of-home fare in this comparison? It is the red bars on the chart. Three of the OOH items in the test bunched up



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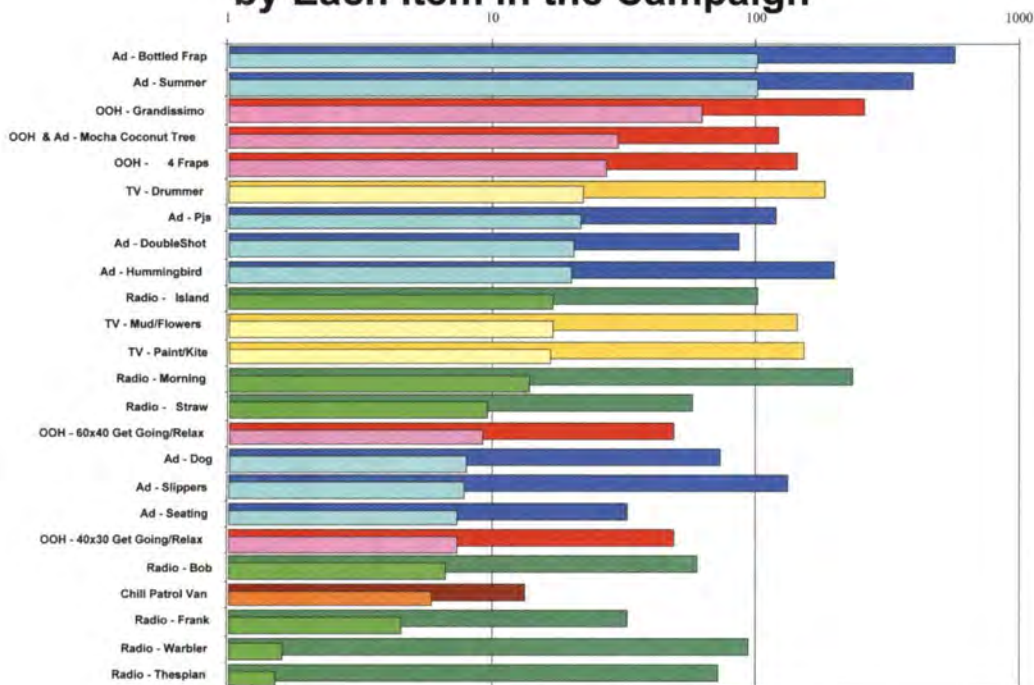
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Number Reached and Affected by Each Item in the Campaign



(Dark bar) Number reached (/1000 resp.) for each 1 cent spent (per capita)
(Light bar) Additional buyers (/1000 resp.) for each 1 cent spent (per capita)

Figure 6

near the top. The rest spread out down the bottom half of the chart. The blue bars show where the eight magazine ads fell. The seven radio commercials that were tested are green, and the light yellow bars show where the three TV commercials fell. The van is the brown bar near the bottom. OOH was competitive. No other media was clearly better.

Ignore at your own risk

What we had found at this point was that we could measure OOH and all the other media in terms of additional buyers produced and the cost to do it, and we found OOH compared quite favorably.

However, these charts may be conveying an even more important message. Whatever media you are in, the most effective execution reached and affected a lot more people than the least effective execution. This evidence shows that you ignore differences in the quality of the creative at your own risk.

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We found those differences to be of a magnitude that could completely offset the differences we found between media.

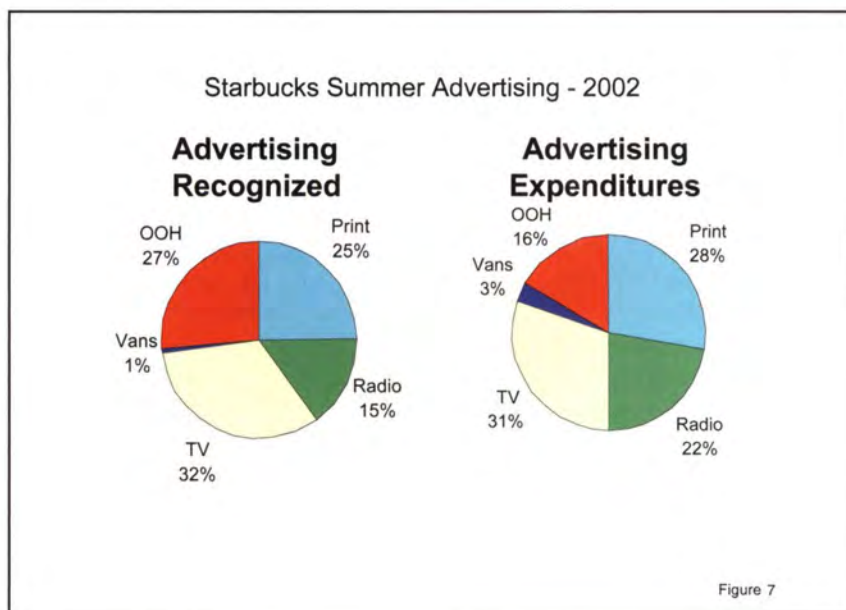
Figure 7 shows another, simpler way of comparing the efficiency of the media in reaching people. When we added together all the times respondents reported recognizing Starbucks advertising the pie chart on the right shows how the media compared in getting noticed. It shows their share of the items recognized. The pie chart on the left shows how the amount spent on each media compared. Comparing the two shows OOH was the most efficient at reaching people. It accounted for 27 percent of the advertising recognized, but only 16 percent of the cost.

Finally, let's look at some of the information we obtained on a factor the usual audience measures don't tell you anything about: over-

lap. Figure 8 shows which did the best job reaching people who were not reached by other media. It has three sets of bars showing which media did the best job reaching those not reached by TV, radio and print respectively. In each case, it

was OOH that reached the greatest number of those not reached by other media.

Looking at overlap another way, which of the media contributes the most when it is added to a mix of other media? Are there differences





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in synergy? Figure 9 shows one of the ways we measured that. It also shows another strength of the OOH Starbucks used in the summer of 2002, and the large sample that enabled us to look at sub-

groups that had exposure to various combinations of media. When each of the media was added to a mix of the other media, one that included all possible combinations of the remaining media, the one that contributed the most, measured in terms of additional buyers,

was OOH.

The advertising worked

So what did all of this mean to Starbucks and what conclusions can be reached from this type of research? First, it showed that virtually all of the Starbucks advertising worked. When people noticed any of it they ended up buying more of the summer drinks being advertising than people who didn't notice the advertising. It also showed some of the advertising worked a lot better than other advertising. Here are a few examples of the conclusions we reached looking at the differences in how the advertising performed, and the diagnostics we had on that advertising.

- Reminding people of the appropriateness of Starbucks' cold drinks during the summer worked well.
- Simply announcing what

Overlap
OOH Reached People the Others Missed

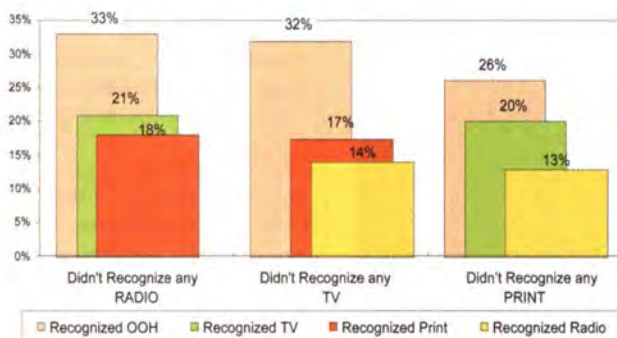


Figure 8

OOH Provided the Most Synergy

Average lift in additional buyers when each medium is added to every possible mix of the remaining three media

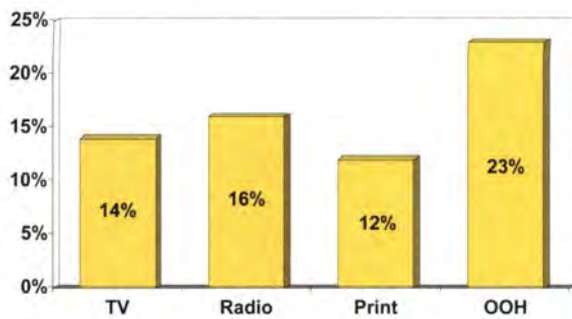


Figure 9

products were now available, and where, did not work as well.

- Simple illustrations of the drinks with palm trees, beaches and blue sky worked well.
- More complex “what is this?” graphics did not work as well.
- The depiction of gratification was

critical. The results showed specifically what conveyed gratification and what didn't.

- Starbucks' green straws, featured in some advertising, produced mixed results.
- Limits need to be set on the amount spent on a single execution,

and the results helped show where to set the limits. We found a number of cases where spending more did not produce more buyers.

In summary, we not only found we could directly compare the ROI of out-of-home with other media, we also found many of the factors driving the effectiveness of advertising in other media were having the same effects on our out-of-home advertising. **IQ**

Footnotes and references

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Creative awards vs. copytesting

Many advertising creative directors who distrust the value of copytesting research view winning creative award shows as an important validation of the quality of their work. The creator of an ad is more likely to accept the verdict of his/her peers over the performance measures devised by researchers. The feeling is that research all too often either “measures the wrong thing” or rewards formulaic advertising at the expense of more original executional ideas. Indeed, the director of one of the major award shows, whom we initially approached with an offer to conduct research on their award-winning ads, rejected the offer outright on the grounds that research was “antithetical” to what they were doing.

On the client side, many managers are suspicious of creative awards, viewing them as self-congratulation by the creative community, or as a public relations vehicle for new business pitches by agencies rather than an indicator of good performance on their accounts. In fact, when we approached several advertisers for permission to reproduce their award-winning ads in this article, we were more than once informed that the agencies that had created the advertisements had been fired because their advertising “wasn’t working.”

Undoubtedly the judgement of successful advertising practitioners, as summed up by the major award shows, must count for something.

Indeed, it could be argued that creative award shows are themselves an early form of copytesting, developed long before the advent of modern copytesting methods as a way of informing advertisers what defines quality in creative work.

You could even argue that copytesting is a reasonable substitute for the combined opinions of a group of masters of the advertising craft. In making the decision about whether an ad is good enough to run, a hypothetical client could call

up a friendly list of creative directors on the order of, say, Jay Chiat, Hal Riney and Steve Hayden and ask their opinions about the work. Or, that hypothetical client could, somewhat less expensively and more practically, simply commission a research study to find out the same thing. This view would lead one to expect that, on average, if the research is well-designed it should produce results that are the same as the judgments of creative award shows.

The contrarian position is that professionals, because they are professionals, look at advertising in a fundamentally different way than ordinary



By Charles Young
and Larry Cohen

Is one a better predictor of an ad's success?

Editor's note: Charles Young is president of Ameritest/CY Research, Albuquerque, N.M. He can be reached at 505-856-0763. Larry Cohen is president of Seminarts, Evanston, Ill. He can be reached at 847-328-7907.

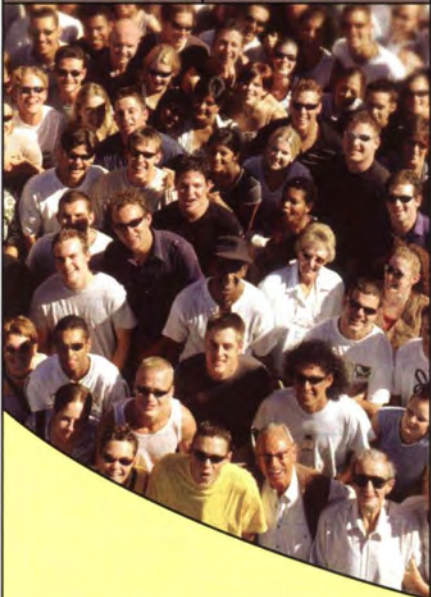
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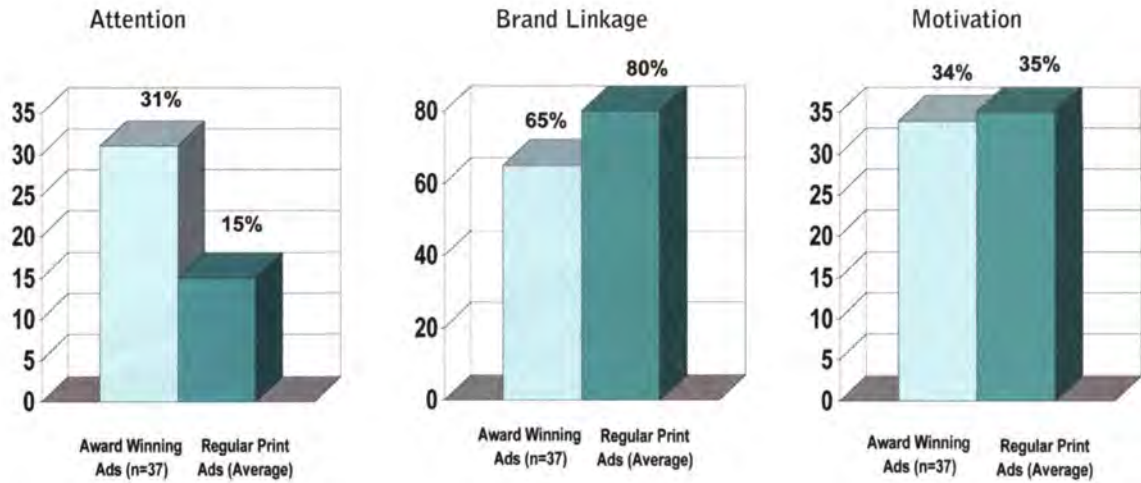
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Figure 1



consumers do. Since the true test of advertising quality is whether or not a consumer audience will notice the ad and buy something because of having seen it, advertising research among consumers may frequently produce results that are not only different but are superior in some ways to the judgments of creative award shows.

We enter the debate by contributing a piece of research on research where we asked the question: Does the fact that a print ad won a major award show tell us anything about how that ad is likely to perform in research tests among consumers? And, as a corollary: What does winning an award show not tell us that may be critical to understanding the true potential of the ad to generate sales in the marketplace?

The sample of award-winning print advertisements we chose to include in this study were national winners of major award shows, with the majority of ads drawn from the pool of national winners of either a gold or silver medal from the One Show. Several additional ads were drawn from the winners of the Kelly Show, the Art Directors Show and the Athena, for a total of 37 award-winning ads.

All the ads were tested in Ameritest and compared to our norm base for categories corresponding to the award winners. In general, the average ad in our database is not an award winner, but rather is representative of “regular”

advertising.

The three key copytest scores produced by Ameritest are attention, brand linkage and motivation. Attention is a measure of the stopping power of the advertisement in a clutter book with other ads competing for the reader’s attention. Brand linkage is measured by coding the verbatim responses to the attention question for the percentage of respondents who recall the ad with interest and use the brand name as the top-of-mind handle for describing the ad. Motivation is collected after a second exposure of the test ad by itself, without the clutter environment, and is measured by a simple five-point probability scale for

rating consumer intentions. This scale varies depending on the category being advertised (from “definitely will buy/consider/visit” to “definitely will not buy/consider/visit”). Finally, other diagnostic measures were also included in the test.

More stopping power

How do award-winning ads perform on the copytest? The performance of the ads on the three key evaluative measures are shown in Figure 1. On average, we see that award-winning ads have more than twice the stopping power of regular or non-award-winning ads. However, award winners are significantly less well-branded com-

Figure 2

Diagnostics	Award Winning (n=37 ads)	Regular ads (Ameritest Norms)
<i>Overall, I liked the ad</i>	57	53
Entertainment:		
The ad is a lot of fun	54	39
The ad is different	67	36
I like the images	52	54
Relevance:		
The message is believable	44	50
The message is important	25	27
I can relate to the people	26	33
Negative:		
The ad is confusing	37	19
The ad is irritating	20	15
I don't see what I read or saw had to do with the brand	29	15

pared to regular ads. And, award-winning ads are no more motivating than non-award-winning ads.

These results confirm that award shows are telling us something important about the potential performance of an advertisement: the judgments of creative award shows appear to be highly correlated with the ability of an ad to break through clutter and get noticed. Intuitively, this makes sense. One of the most important reasons that advertisers hire advertising agencies is to get someone who has the talent to create an execution that is particularly clever or entertaining or unique so as to capture the attention of a large audience.

The finding that award-winning ads are no more motivating than non-award-winning ads also has face validity. In general, identifying a selling proposition that has real strength in motivating consumers usually requires a deep understanding of the product category based on a substantial amount of strategic research into consumer's attitudes, perceptions and current behavior. Typically, the information needed to make a critical judgment as to whether or not a particular message will be persuasive is proprietary and is not submitted along with the entries to creative award shows. As a result, the judges of creative award shows do not have access to relevant information to effectively discriminate among the various entries on the basis of motivational impact. Award shows are about executions, not strategies, so it should not be surprising that the key to winning award shows is the attention-getting power, not the motivational power, of the ads that are entered.

The weakness in brand linkage in award-winning ads is more of a problem. Strategic insight is not required to make a judgment about how strongly a particular execution is branded. One possible reason for this finding is that award shows tend to reward ads that break the rules, viewing this rule-breaking as an indicator of creativity. Certainly, clearly communicating the identity of the brand in an ad is a classic rule of advertising. Defining creativity in iconoclastic

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Performance	Award Winner	Revised Ad
Attention	28	55*
Brand Linkage	71	91*
Motivation	39	67*
<i>Diagnostics:</i>		
Confusing	48	29*

*Sig > 90%

Award Winner



Revised Ad



Adding the headline reduces confusion.

terms might lead some award show judges to implicitly prefer executions that challenge assumptions about traditional branding rules, as illustrated by this comment from the legendary advertising exec Bill Bernbach: "There will be a time when no headline is proper; there will be a time when a headline is proper. There will be a time when using a logo is the worst thing in the world you can do."

It is likely that the finding of weak brand linkage reflects an underlying philosophy of how to create advertising that is effective in today's cluttered advertising environment. Many creatives today appear to believe that to get past the psychological defenses that consumers have raised against the continuous bombardment of selling mes-

sages an ad should not look like an ad. With this line of creative reasoning an ad needs to lure a consumer in with intrigue, sleight of hand or entertaining dissimulation in order to get past their guard to deliver the sales message.

The logic of this creative philosophy is that for many types of executions there is an implicit trade-off between consumer attention and brand linkage. And for award-winning ads, this trade-off appears to be a good deal. On average, compared to regular ads, the substantial increase in stopping power more than makes up for the slight decrease in brand linkage.

Creative ads are more entertaining, but more confusing
Diagnostic ratings are shown in Figure

2. Award-winning ads are rated significantly higher than regular ads on being a lot of fun and being different from other ads. Consistent with the attention-getting philosophy of award shows, the focus of award-winning executions is on entertainment value and executional uniqueness.

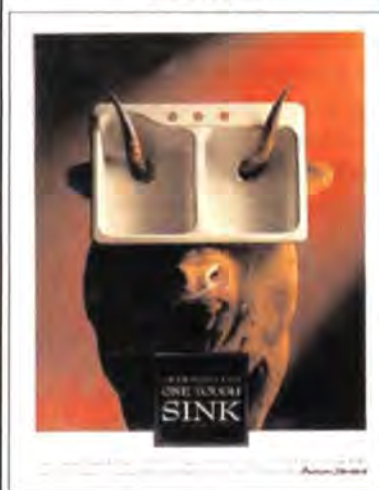
Award-winning executions are also rated significantly higher in terms of confusion and irritation. This suggests that award-winning ads are likely to be the products of creative risk-taking, a willingness to break conventional rules of advertising communication and push the edge of reader sensibilities.

From a client perspective, however, award-winning ads might appear to be less effective. The messages con-

Performance	Award Winner	Revised Ad
Attention	35	36
Brand Linkage	48	44
Motivation	58	34*
Diagnostics:		
Interested in continuing to look after 1/2 second	79	49*
Interested in continuing to look after 1 second	63	46
Interested in continuing to look after 4 seconds	50	32*

*Sig> 90%

Award Winner



Revised Ad



The revised headline makes the point too obvious.

veyed by award-winning ads are rated less believable and the consumer audience has a hard time relating to the characters or people shown in the ad. Consistent with the weakness in brand linkage, the integration of the brand into the execution is not as clear with award-winning ads, as shown by the higher ratings on the statement "I couldn't tell what the brand had to do with what was said and shown."

In general, the diagnostic ratings confirm the results of the evaluative performance measures. Award shows such as the One Show appear to tell us a great deal about the kind of advertising executions that are likely to attract the attention of an audience. On the other hand, they appear to tell

us nothing about the strategic effectiveness of the award-winning advertisements, either in terms of branding or their ability to clearly communicate motivating messages.

Small changes, big differences

Malcolm Gladwell's book *The Tipping Point* presents an illuminating story about the importance of non-linear processes in marketing. A non-linear process is one where the size of an outcome can be drastically affected by relatively small changes in the inputs. Clearly advertising is such a process. Marketers recognize that getting creative executions right can sometimes magnify the effectiveness of a given level of media spending weight many fold.

As every good creative director knows, God is in the details. Our purpose in this part of the research is to demonstrate that advertising executions are indeed non-linear variables in the marketing process where the judgment of experienced creatives (particularly those immersed in the client's business) regarding the details of executions is of paramount importance. By taking several award-winning ads from our test sample and making a relatively small change to the execution with Photoshop and re-testing the ads, we wanted to see how it would affect the overall performance of the ad in a significant way.

For the client perspective, we also wanted to demonstrate that winning a major creative award is not necessarily

proof that the ad is optimized from an overall advertising effectiveness standpoint. In particular, we wished to show that there is not necessarily a trade-off between attention-getting power and other dimensions of advertising performance.

First case: improving an ad's performance

The first case, shown in Figure 3, is an ad for *Time* magazine, a Consumer Arts winner. The ad shows a little boy wearing a camouflage uniform and holding a rifle, with the red rectangle of the *Time* logo outlining his face. There is no headline. The body copy says, "Make sense of anything. Almost." This is a childhood picture of a future high school killer.

This ad scores above average in terms of stopping power, outperforming the average by a factor of two. But it is only average in terms of brand linkage, average in terms of motivation. The reason for this performance becomes apparent when we look at the diagnostics: Nearly half of respon-

dents found this ad to be confusing. With probing, it became clear why. Seeing the *Time* box containing only the boy's face but not the uniform or rifle, many respondents were left with a confusing interpretation that *Time* leaves important information out of its stories!

Reflecting on Bernbach's dictum we thought that this might be one of those times where the ad does need a headline. So in the revised version of the ad we added the headline, "Time tells the whole story." As a hypothesis, we felt that this change might shift how the image would be perceived. By reassuring readers that the magazine does not leave important information out, we felt that respondents might look at the image in a more three-dimensional way - seeing the face on the cover with the implication that the rest of the information is "behind" the cover or inside the magazine.

The performance of the revised ad was even more positive than the original. The level of confusion was cut in

half. Consequently, the stopping power, strong to begin with, doubled. Brand linkage increased. And motivation doubled to an above-average level. This was clearly a case where there was no trade-off operating between the attention-getting power of the advertisement and other key dimensions of performance.

Second case: hurting an ad's performance

The second case, shown in Figure 4, is an ad for American Standard, another award winner. The ad depicts a bull with its horns stuck through the drain pipe holes in a double sink. The headline is "Introducing One Tough Sink." The ad is an attention-getting execution, with a stopping power twice the average. It is also above average in terms of motivation.

In this case the striking visual was by far the dominant creative element in the ad and the headline appeared to play a supporting role, merely as a caption for the visual. In our revision, the headline was changed from the

People have always talked with their hands.



rather clever original to the more literal "Introducing a Sink as Tough as a Bull." In other words, our revision was designed to represent the kind of change that many creatives fear – those a literal-minded client might ask for.

While it is unchanged in terms of stopping power and brand linkage, the revised ad is significantly weaker than the original in terms of motivation. The reason for this can again be found in the diagnostic information that was collected.

One of the key diagnostic measures of our firm's methodology is a measure of stickiness, which is the construct of how long an ad will hold a reader's interest once he or she has stopped to look at it. In this test stickiness is measured attitudinally after controlled time exposures of the ad when the respondent is asked to report interest in "continuing to look at or read the ad." You'll note in Exhibit 2 that the stickiness of the American Standard ad is significantly reduced as a result of the revision

made to the original.

Evidently, the change we made to the headline makes the point too obvious! The original, award-winning ad is thought-provoking and engages the consumer's mind in thinking about the durable properties of the sink. Our flat-footed revision, by making the point obvious and not worth spending time on, turns the claim of durability into a more expected, and less persuasive, piece of advertising puffery. Agencies may have a point, therefore, when they argue forcefully with clients for the creative elements in ads. Small changes in executions can make a big difference in advertising performance.

The lesson?

What is the lesson of this research? It teaches us two things. First, that agencies are right when they celebrate the importance of creative judgement about advertising. But second, that clients are also right when they express concerns about

the requirements that advertising executions must fulfill in order to be effective at generating sales.

Winning creative awards is hard, but making effective advertising is harder still. This research shows us that creative awards do tell us something important about the power of advertising to break through a cluttered media environment. But awards do not teach us everything we need to know about how an ad will work. Effective advertising is more likely to come from the collaboration of creative and client, working with the discipline of research to produce breakthrough advertising that also builds brands and motivates sales. | Q

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Why do you have a multicultural ad budget? To fend off political activists? Because “it’s the right thing to do”? How committed is your company to multicultural advertising? Is the media budget underfunded? When times get tough, is the multicultural budget the first to get cut? Who tells you whether your multicultural advertising is any good – whether it is engaging or offending its target audience? Your multicultural agency? Your multicultural employees?

This article identifies the right business reasons for implementing and committing to multicultural advertising campaigns. It details with normative copytesting data why and how targeted multicultural advertising has the inherent potential to be more effective than general-market advertising. It also details how you can be assured that your multicultural advertising is effective, culturally sensitive and relevant through the use of a consumer feedback protocol specially designed to assess not only the performance dimensions of advertising in general but also the dimension of cultural sensitivity that is unique to multicultural advertising.

There are several legitimate reasons for advertisers to consider targeted multicultural advertising. The 2000 census documented the number and importance of ethnic consumers within the U. S. population. Today ethnic subcultures are more likely to maintain their distinctive mores such that America is no longer a melting pot but an ethnically diverse “salad bowl” of distinctive cultural values, norms and behaviors. Ethnic consumers often exhibit different usage patterns and/or attitudes toward products or services versus the main-stream, another viable rationale for targeted multicultural advertising.

Many marketers consider multicultural advertising for its PR value. These marketers reflect the real-world cultural diversity within their advertising and/or utilize multicultural media within their media mix because, as good corporate citizens, it

is the right thing to do or, more cynically, to preempt or react to boycotts and any other unfavorable action promulgated by political activists.

Yet the best reason to utilize targeted multicultural advertising is to capitalize on its inherent greater effectiveness versus general-market advertising that is merely adapted to the ethnic market. The fact that targeted multicultural advertising is, indeed, inherently more effective may be surprising to some marketers. However, this conclusion can be supported both theoretically as well as empirically.



By Dan Murphy

The case for really good multicultural advertising

Editor's note: Dan Murphy is vice president of Insights Marketing Group, a Winston-Salem, N.C., research firm. He can be reached at dan@insights-marketing.com.



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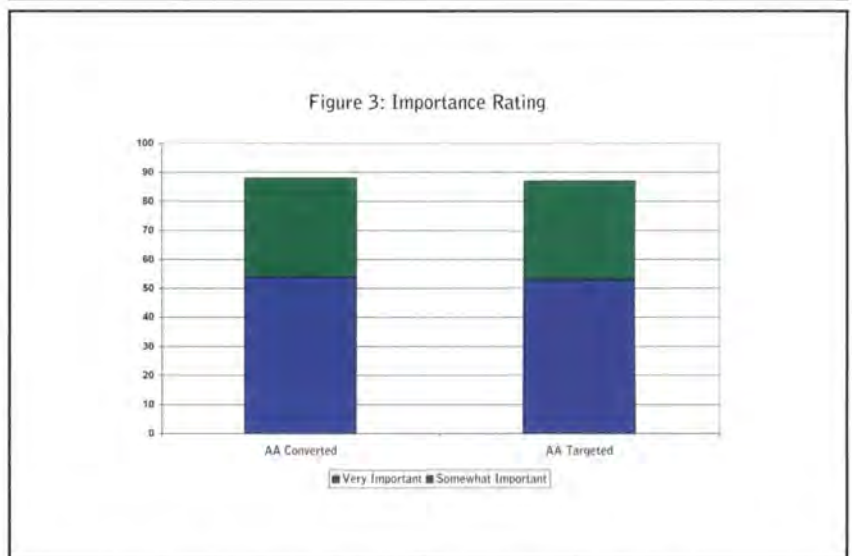
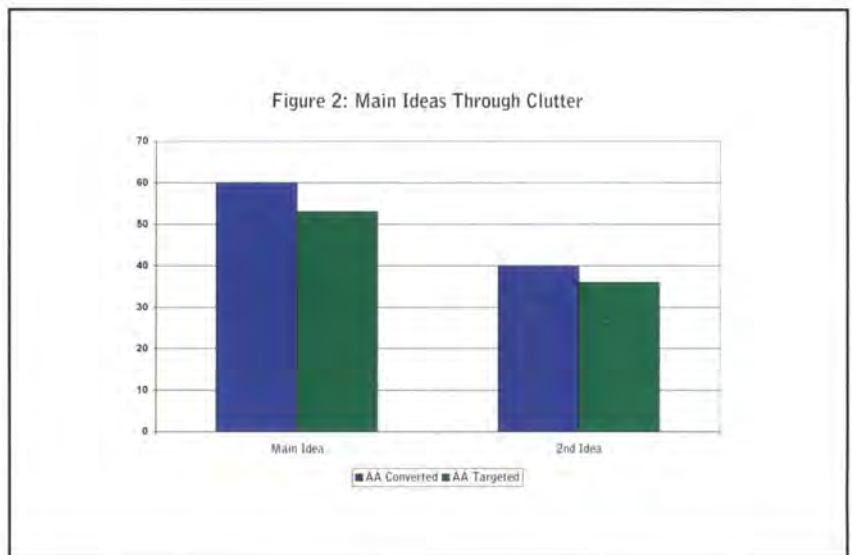
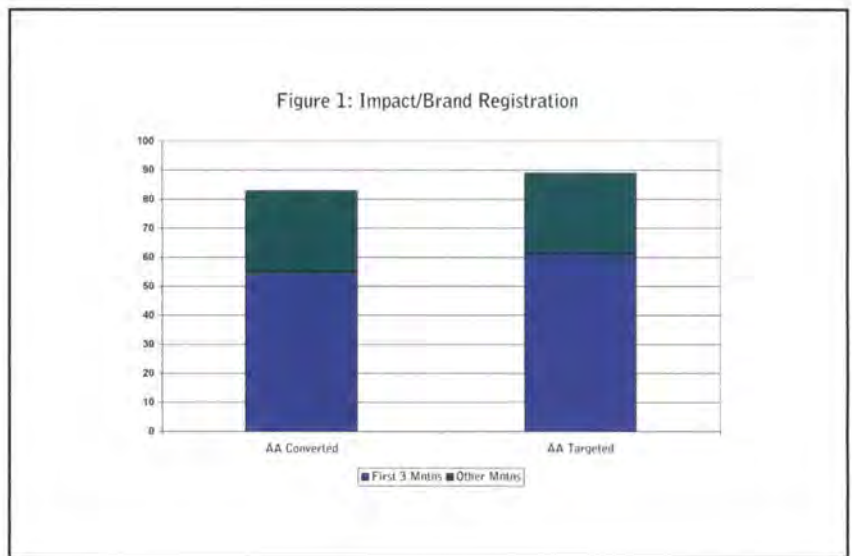
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Distinctiveness theory denotes that “a person’s distinctive traits in relation to other people in the environment will be more salient to the person than more common traits” (McGuire 1984; Grier & Deshpande 2001). Speech accommodation theory postulates that communicators can improve communication by making themselves more similar to the receivers of their message (Giles, Coupland and Coupland 1991). These theories suggest that targeted multicultural advertising will not only reach more of the target audience due to its greater saliency but that the quality of message registration will also be enhanced. Moreover, there are practical considerations that underlie ethnic subcultures’ heightened receptivity to advertising, in general, and targeted advertising, in particular. First, while brand selections for most basic products are established within mainstream cultures, they are more frequently reevaluated within ethnic subcultures, whose members use advertising to aid in determining how to best satisfy product/service requirements within more limited budget constraints. Moreover, ethnic subcultures have greater trust in/dependence on brands, especially premium brands, often utilizing them as a badge to establish their status in a society that sees them as second-class. Finally, for unacculturated immigrant subcultures, advertising is an important source of information about products and services that are new to their lives.

Empirical evidence also supports the notion that targeted multicultural advertising outperforms general-market advertising. Through our license with Diagnostic Research to conduct multicultural copytesting, we analyzed their historical database. In comparing the performance of the average of 15 general-market TV motor vehicle ads which were adapted to the African-American market through the use of integrated or African-American casting to 52 African-American-targeted ads tested among African-American respondents, it is evident that multicultural advertising generally scores higher than general-market advertising



in each of the four critical areas of advertising performance: impact – the degree to which the ad stands out in clutter; comprehension – the degree to which the desired message is clear, credible and compelling; appeal – the

likeability of the ad and its key elements; motivation – the degree to which the advertising establishes positive attitudes toward the advertiser and moves the viewer toward buying behavior. The following will detail

Figure 4: Message Uniqueness

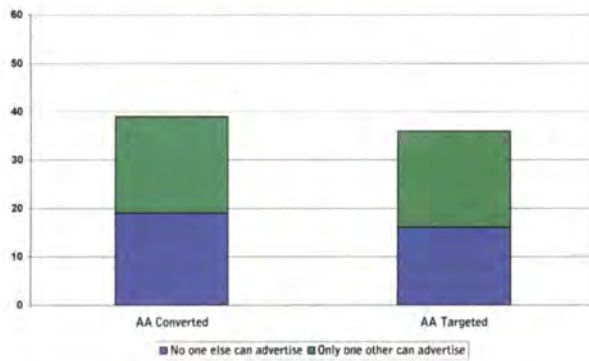
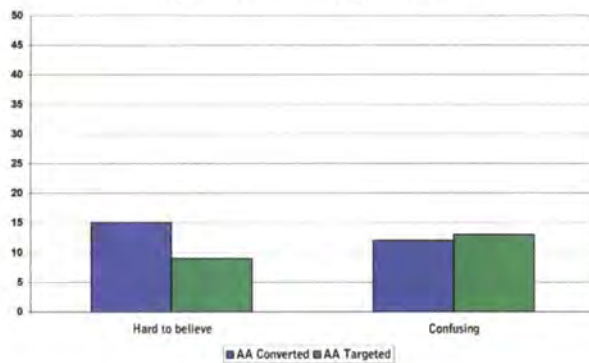


Figure 5: Believability & Confusion



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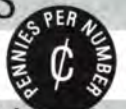
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results of the Diagnostic Research copytest data. We use the term “converted” to describe the general-market advertisements that were adapted for the African-American market through casting, and “targeted” to describe advertisements created in-culture for the African-American market.

Impact/brand registration (Figure 1): Impact, measured by unaided recall of the test ad in the first three mentions after exposure to the ad in the fourth (middle) position of an exposure to seven commercials, and brand registration, measured by total unaided recall of the test ad after the clutter, are somewhat enhanced for targeted African-American advertising relative to converted general-market advertising.

Comprehension (Figures 2-5): While product messages are less likely

to be played back in targeted versus converted ads, those messages are comparable in importance, uniqueness and clarity and are more credible in targeted advertising.

Appeal (Figures 6-7): As one might expect, African-American audiences are more attracted to how the message is presented in targeted versus converted ads since targeted ads generally contain cues and symbols unique to African-American culture. Their greater focus on presentation elements in targeted ads explains their lower playback of product sales messages noted above. Overall, targeted ads are more appealing to African-Americans than converted general-market ads.

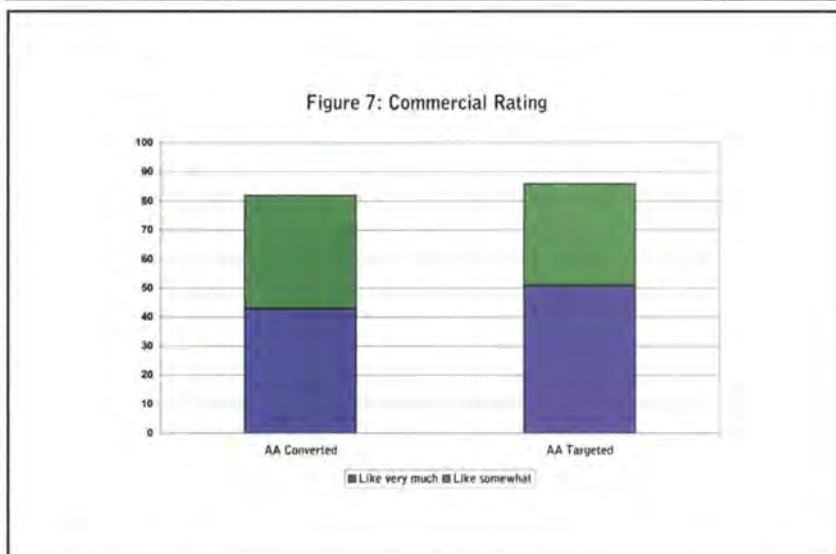
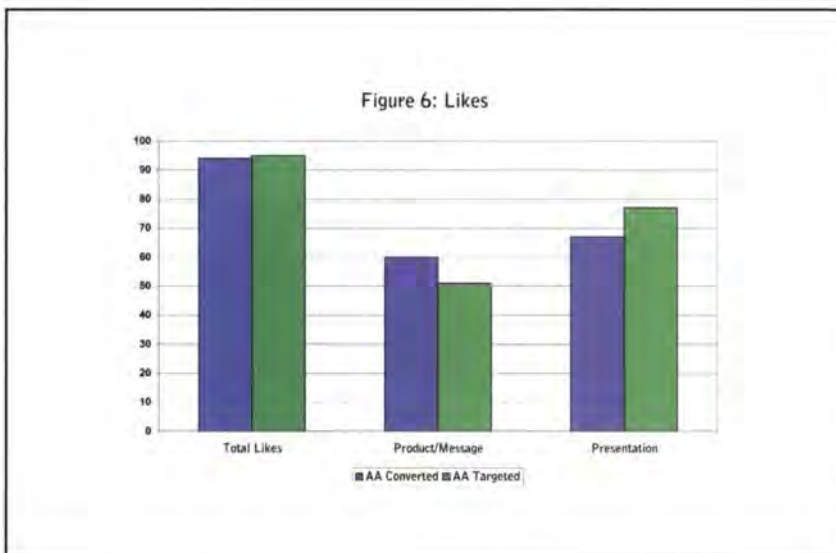
Motivation (Figures 8-10): African-American audiences rate brands in targeted advertising more favorably and appear to be more motivated to

action by targeted advertising than converted general-market ads.

While both theoretical and empirical evidence indicates that targeted multicultural advertising has the potential to be more effective than converted general-market advertising against its target audience, that potential inherent strength is not always realized. In developing multicultural advertising, advertisers are advised to follow the same discipline utilized in the development of general-market advertising. They must have full knowledge of their target and their target's relationship with their brand. They must know their own product/service and what separates it from its competitors. Out of this knowledge, they can then craft a selling message and deliver it in advertising that is 1) impactful, 2) communicates in a compelling, clear, believable manner, 3) is appealing and 4) is persuasive.

Another dimension

Beyond these four considerations, creatives must recognize that there is a fifth performance dimension for multicultural advertising: cultural relevance. Cultural relevance relates to the degree and quality of cultural accommodation within targeted advertising such that the target audience recognizes that the advertising is uniquely about them. Cultural relevance is what separates multicultural from general-market advertising and is the key that unlocks the potential enhanced efficacy of multicultural advertising. As indicated above, subculture consumers respond more favorably to communication that accommodates the distinctive traits of the specific subculture. Presumably the greater the degree of accommodation, the more effective the advertising will be. Perhaps a useful way for marketers to come to grips with the issue of accommodation is to envision multicultural advertising within a two-dimensional matrix like the one shown in Figure 11. The first dimension delineates the degree of accommodation while the second dimension delineates the quality of the accommodation.



The degree of accommodation dimension ranges from low to high based on the degree to which the target audience's distinctive identity/culture is evident. For example, in targeting African-Americans, the low end of the spectrum would include ads that merely integrate African-Americans into the cast of an existing general-market ad. Higher on this spectrum would be advertising that integrates African-Americans in a prominent position in the cast. Higher still would be the conversion of a general-market ad to an all-African-American cast. Highest on this dimension would be advertising that not only utilizes an African-American cast but also depicts unique aspects of the African-American culture relevant to the specific African-American target. This dimension reflects the degree to which the

advertising authentically captures the subculture's life experiences.

The quality of accommodation dimension ranges from positive to negative. The range reflects the degree to which the subculture is perceived to be depicted in a positive or negative light. Positive depiction might be described as uplifting, empowering, cool or flattering while negative depiction might be described as stereotypical, condescending or even offensive. Note that the effectiveness of advertising that is positioned high on the degree of distinctiveness dimension can be undermined by poor performance on the quality of distinctiveness dimension.

Hypothetically, the most effective targeted advertising is that which is positioned highly on both the degree and quality of accommodation dimensions.

Figure 8: Image Scan

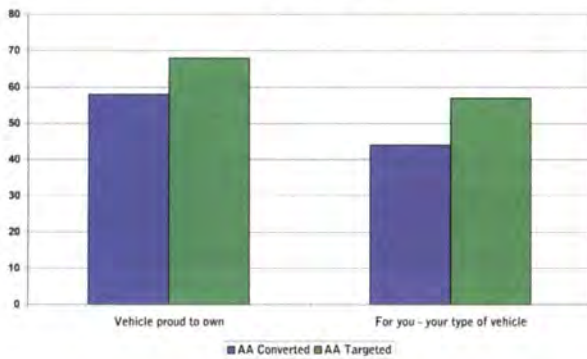


Figure 9: Interest Increased

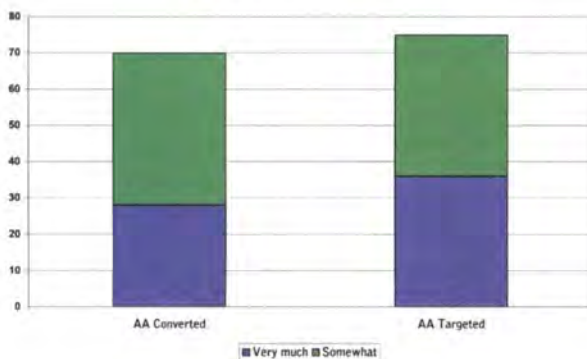
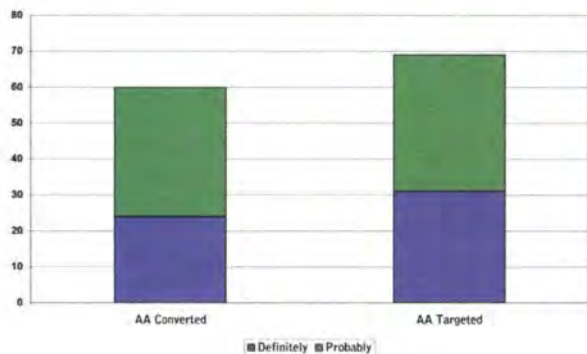


Figure 10: Intent to Visit Dealership



While the above theoretical construct can be helpful in thinking about the task of developing multi-cultural advertising, there is no formula to follow that will yield optimal advertising. Every situation is differ-

ent, consisting of a unique product/service as well as a unique target distinguished by its specific relationship with the product/service, demographics/psychographics, degree of acculturation, strength of ethnic

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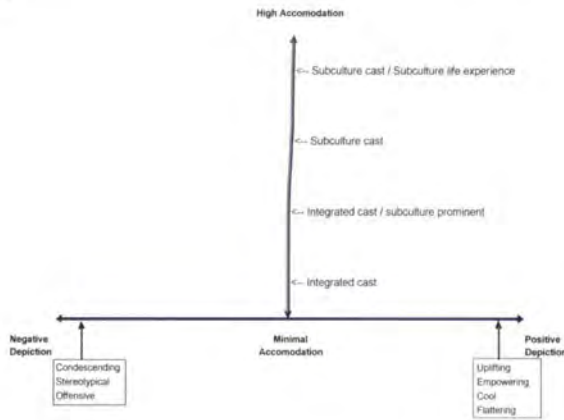
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Figure 11



tive to multicultural communication issues. The end result of this target consumer feedback protocol is informed decision-making with respect to whether airing the advertising is warranted as well as direction for refinements/ revisions to the advertising.

Enhanced potential

In sum, the case for multicultural advertising is based on enhanced business potential associated with an inherent potential for more effective performance of the advertising. This more effective performance is achieved through a disciplined approach to creative development that recognizes the power of cultural relevance for multicultural audiences. The more effective performance is assured through a comprehensive consumer testing protocol that measures the basic ad performance dimensions plus the key dimension of cultural relevance. The end result is good multicultural advertising and more business. | Q

identity, etc.

To be assured that any specific multicultural ad is optimally effective, you must obtain comprehensive relevant consumer feedback on the performance of the ad within the target audience. The ideal consumer feedback protocol should include an in-depth assessment of the ad's performance on the four basic dimensions of impact/brand

name registration, comprehension, appeal and motivation, as well as the critical fifth dimension of cultural relevance. Results of the testing should be benchmarked against norms that account for the inherent strength of multicultural advertising – not general-market advertising norms. In addition, the results should ideally be analyzed by researchers who are experienced with and sensi-



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Hispanic marketing Q&A

Marketers who start to conduct market research and marketing programs in the U.S. Hispanic market often have pressing questions. Some of those questions have answers that are fundamental to achieving success in this important market. Here are some typical questions followed by answers based on long-term experience.

Q: Will my Hispanic research and marketing efforts alienate the general market?
Overall this concern is unfounded, for three main reasons:

- Most Hispanic campaigns are in Spanish, in media outlets that the general market does not access much or at all. The few non-Hispanics that access such media are self-selected Hispanic sympathizers who would not mind a dedicated effort made to communicate with Hispanics.
- Being Hispanic has become cool, a statement with which 91 percent of Hispanics agree, according to the 2003 Yankelovich Multicultural Study. As the overall culture has grown to admire Hispanic trends, fashions, art, media, food and other cultural manifestations, advertising to Hispanics can actually persuade non-Hispanics. These non-Hispanics have increasingly adopted tastes and looks that have been traditionally associated with Hispanic cultures. Perhaps some advertisers should be concerned at this point that their general-market campaigns may alienate Hispanics. And if they alienate Hispanics they may in turn be alienating those who now follow in Hispanic cultural steps.
- There is an assumption in the marketing creed that states that positioning needs to be uniform across different targets for a product brand combination. The rationale is that uniformity creates a consistent image that enhances the brand. While it is true that there ought to be a consistent brand personality it is not true that the positioning needs to be the same. Cultural insights that lead to positioning are likely to be different across cultures. The objective of the marketer is to reach the consumer by literally and figuratively speaking their language. Thus positioning must be different when merited by consumer insights. The reason a Hispanic consumer serves rice at home is different from the reason an Anglo-

Saxon consumer serves it.

Saxon consumer serves it.

Seventy percent of Hispanics agree that “there should be more television or other commercials directed specifically to Hispanics,” according to the 2003 Yankelovich Multicultural Study. Marketers would be hard pressed to ignore this cultural imperative. A small minority of culturally prejudiced non-Hispanics is always likely to object to diversity in the marketplace as they do in the workplace. Still a large majority of African-Americans (95 percent), Hispanics (90 percent), and non-Hispanic whites



By Felipe Korzenny

Tips on reaching and researching Hispanic consumers

Editor's note: Felipe Korzenny is professor of advertising and integrated marketing communication, Florida State University, Tallahassee, Fla., and co-founder of Cheskin, a Redwood Shores, Calif., research firm. He can be reached at fkorzenn@fsu.edu.



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(88 percent) "think that the media should be doing more portray 'African-Americans/Hispanics/people of all races/ethnicities' in a positive light" according to the Yankelovich Multicultural Study. Thus the overall population is now more open than ever to multiculturalism and pluralism of messages in the media environment.

The fear of alienating the so-called general market may be not only unfounded but perhaps ill-conceived.

Marketers ought to feel more fear from not catering to emerging markets that will constitute their bread and butter in the future.

Q: Are Hispanic market research and marketing different from marketing to the general market?

The U.S. Hispanic market should be low-hanging fruit for many marketers, but they do not know it. Marketers make assumptions about the U.S. Hispanic market based on hearsay and

assumptions that in many cases are flawed. Marketing to Hispanics, particularly Spanish-dominant Hispanics, requires going beyond marketing routine and making a proactive effort.

Reaching Hispanics in Spanish has been shown to make an important difference, particularly when reaching those who prefer to communicate in Spanish (that is 60 percent of those 18 years of age and older). According to the 2002 *People en Español* HOT study (conducted by Cheskin), a third of all U.S. Hispanics indicate they "get more information from advertisements that are in Spanish." Also a fourth of all U.S. Hispanics state they "prefer to purchase brands that are advertised in Spanish." Thirty-six percent of all U.S. Hispanics, in addition, state that they watch Spanish-language television because "it is more reflective of my life and culture." The Spanish language, then, gives a strong competitive edge to advertisers that have learned how to communicate to Hispanics in the context of the culture and language.

There are other areas that can make strong contributions to the bottom line of marketers searching for Hispanic opportunities. Many marketers whose products are not currently used by Hispanics make the often erroneous assumption that Hispanics must not like their product or brand. Basic baseline research many times uncovers a common phenomenon: A large number of Hispanics are just unaware of the product category and/or brand. For example, a majority of U.S. Hispanics are unaware of refrigerated dough products. It is not that they do not like these products but that they have passed by them many times at the store without understanding what these round cardboard containers have inside. If a marketer took the time to show the Hispanic consumer what the product is about s/he could easily add customers.

Many Hispanics come to the United States with brand loyalties and expectations. They know that cereal is Kellogg's and that toothpaste is Colgate. This does not mean that these consumers reject the offerings of



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other brands; they just don't know about them. Take the example of the cereal brand Kix. This brand was virtually unknown to the Hispanic consumer until it was introduced in the WIC program (the Special Supplemental Nutrition Program for Women, Infants, and Children) and now the brand is one of the most successful brands in the market.

The most productive allocation of resources is many times in areas that are easy and simple to address, but sometimes these areas are difficult to perceive. Our assumptions many times blind us to the obvious and the simple.

Q: What is the role of corporate responsibility in Hispanic marketing?

Hispanics are very sensitive to the actions that corporations take to show interest in the U.S. Hispanic community and also in Latin America. Hispanic consumers repeatedly mention that they favor companies that become involved in furthering Hispanic causes in the U.S., and also in their countries of origin. Thus if Coca-Cola sponsors soccer games for youth in Latin America, that benefits those on both sides of the border because of the strong ties that Hispanics maintain with their countries of origin.

There is no one specific action that gets more recognition in particular. It is the overall sense of how the corporation behaves towards Hispanics. If it hires Hispanics, establishes a dialogue with Hispanics, supports Hispanic causes and shows a genuine determination to pursue the Hispanic market, then Hispanics tend to be appreciative. This appreciation is many times manifested as reciprocity and respect. Hispanics are loyal to companies that are good to them. This value for reciprocity and respect is traditional in the culture. The same way in which older people, teachers, priests and leaders are held in very high respect, companies that go out of their way to establish their leadership are also conferred a high level of respect and loyalty.

The needs of the Hispanic community are multiple. The following are examples of priority issues that corpo-

rations should address:

a. Education in its many forms, from scholarships to educational campaigns to help consumers make sense of their environment. Clearly, supporting formal education is a priority. But many other forms of information and education are also extremely important. Hispanic consumers benefit from campaigns that educate them on consumer issues of many types, such as how to buy a home, how to choose car and home insurance, how to save for a child's education, how to save for retirement, how to become politically involved or how to shop for health care.

b. Youth development and recreation. As Hispanics have many children and the Hispanic population is about 10 years younger than the overall U.S. population, Hispanic youth need to have avenues for channeling their energies in productive ways. This includes sports, after-school activities, youth employment and also parental guidance on dealing with youth issues.

c. Community development efforts

to improve services and organization in neighborhoods. This is a particularly important need in the more humble neighborhoods where newer immigrants live. In this context, crime prevention is a key priority.

d. Employment guidance and training. This is crucial as many Hispanic immigrants become underemployed after transitioning to the U.S.

e. Health is another most important issue that can be supported by many corporations.

The above are overlapping examples of the many areas in which corporations can make contributions and expect consumer recognition for them. Ultimately the best guidance can be obtained by including more Hispanics on corporate boards, and by employing more high-level Hispanics in these corporations. The outward actions of a company need to be oriented by a well coordinated internal effort.

Q: Is there a print opportunity in the Hispanic market?



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Hispanic print constitutes an up-and-coming medium in the United States. Print has been underdeveloped for two key reasons: poor distribution and lack of availability of relevant content. Other obstacles to development of print media have included low literacy levels in some strata. Illiteracy, however, has been subsiding and that is why now the opportunity arises for those who can provide the content and distribute it widely. Now there are many examples of successful print outlets in the U.S. Hispanic market. *La Opinion*, *El Nuevo Herald*, and *El Diario La Prensa* are successful dailies. Magazines such as *Healthy Kids en Español*, *Ser Padres*, *People en Español*, *Latina*, and *Selecciones del Reader's Digest* have listened to the consumer and created and reinforced content Hispanics appreciate.

Hispanics are catching up with non-Hispanics in their time of exposure to newspapers. According to the 2002 People en Español HOT study, Hispanics who read newspapers spend 4.1 hours per week reading them

compared with 4.78 hours by non-Hispanics. In the case of Hispanic magazine readers they are already reporting they spend more time with magazines than their non-Hispanic counterparts (3.9 vs. 3.5 hours per week). So, once Hispanics acquire the taste for a medium they become relatively assiduous.

Still, on the other hand, Hispanic magazine and newspaper readership trails that of non-Hispanics. Forty-five percent of Hispanics read newspapers, compared with 85 percent of non-Hispanics. And 39 percent of Hispanics read magazines, compared with 77 percent of non-Hispanics. But here is precisely where the media opportunity appears to reside. Since there is so much room for growth and so much need for information in the Hispanic market, marketers who cultivate the reading habits of Hispanics are likely to reap important profits.

Q: How is Hispanic purchase decision-making unique?

Marketing to the Hispanic consumer

has at its core the establishment of a relationship between the seller and the buyer. Hispanics are particularly sensitive to the establishment and maintenance of that relationship.

While clustering all Hispanics in one large category is difficult, because of the many groups that compose the market, there are trends that can be highlighted.

1. Purchasing decisions among many Hispanics are driven by familiarity or lack of familiarity with brands. The bulk of Hispanic consumers, particularly those who are Spanish-dominant, buy products that they recognize and know about. There are great opportunities for marketers that have not communicated with the Hispanic market. Simply communicating product attributes and uses can create demand because many Hispanic consumers do not know about many of the available products and brands in the U.S. marketplace.

2. Once the obstacles of awareness and knowledge are overcome, then there is the issue of relevance. If the message used in positioning a product is relevant to the needs and culture of Hispanic consumers then purchasing decisions occur. This issue of relevance is complicated because it is composed of cultural compatibility in the first place, but it also consists of life stage and lifestyle compatibility. The joint impact of these different relevancies/compatibilities is what accounts for a large part of the prosperity of brands in the Hispanic market.

3. Cultural relevance includes language. The construct of culture includes language as a fundamental element. Language is not just the explicit code for communication but the way in which emotions and experiences are shared. The Spanish language connotes emotion far beyond the explicit code. Advertising relies on emotion because emotion is what ultimately differentiates products in a crowded marketplace. The emotion communicated via the Spanish language makes the product relevant to the consumer. This is beside the fact that for many in the market, the use of the Spanish language is just a prereq-

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uisite for understanding a message at all.

Q: How do Hispanics experience grocery shopping?

It catches everyone's attention that the current spending power of the U.S. Hispanic market is around \$600 billion per year, and eyes grow wider when marketers contemplate that it will be about \$1 trillion less than eight years from now. What most grocers have not yet mastered is how to maximize the grocery shopping experience for these profitable consumers. In areas of high Hispanic density the bottom line of grocery retailers can be greatly enhanced by knowing how to cater to this distinct cultural group.

It is true that not all Hispanics are the same and that preferences and tastes do vary by country of origin. Still there are considerations that make this market highly targetable:

- Over 65 percent of U.S. Hispanics are of Mexican origin and are highly concentrated in California, Texas, Illinois, and now widely spreading to other areas. Puerto Ricans constitute about 10 percent of this segment and they are concentrated in the East Coast. Cubans make up about 4 percent of the market and they are still strongly represented in Florida, particularly Miami.

- Their tastes for groceries, as determined by country of origin, are well-defined and identifiable.

- Hispanics in general tend to share a series of cultural dispositions that clearly define how they prefer to be served and treated. Also, their grocery shopping behaviors are relatively homogeneous and identifiable.

- Despite the popular belief that Hispanics mostly shop in small ethnic stores (known as *tienditas* in the west and *bodegas* in the east), the reality is that most grocery shopping happens in supermarkets. The smaller stores are used for complementing cultural shopping needs that larger stores do not serve.

There is more than product availability to make the shopping experience compelling to U.S. Hispanics. Most Hispanic adults prefer to communicate in Spanish when given the



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opportunity. However, clerks and cashiers that speak Spanish in supermarkets are not yet commonplace. In particular these consumers crave personal attention and service. They like asking questions and obtaining guidance as they shop for many items but particularly at the meat/seafood and deli counters, and at the bakery.

Having the attitude and the language available to serve these consumers is fundamental to achieve success.

There are other aspects that are still evidently missing from many stores that could capitalize on this market. They include:

- bilingual signage;
- point-of-sale materials suggesting uses and recipes that are culturally relevant to the consumer;
- entertainment for children, since the family is likely to go shopping as a group;
- produce and meat/seafood displays that resemble the open market where the enticing variety becomes a sensual experience;
- welcoming promotions and events

that show that the grocer is truly interested in catering to this market. The moral of the story is that most grocers in areas that cater to Hispanics can dramatically enhance the shopping experience of these consumers, gain their loyalty and attract more of their dollars. It just takes getting to know the consumer better!

Q: What works better in communicating with the Hispanic market, a culture-general or a culture-specific approach?

There is no one universal solution to successfully communicating with Hispanics as there is no universal approach to reach any other specific cultural group. Social classes, countries of origin and other areas of experience determine what messages will be effective or ineffective in reaching a market. Nevertheless, Hispanics do share a large amount of common cultural and social experience that makes it possible to create “pan-Hispanic” messages.

Consider that Celia Cruz was originally from Cuba but that most of her

career flourished in Mexico. Her Caribbean music and fame was consolidated in Mexico. Music, movies, food and other aspects of specific Latin American countries travel freely throughout the continent. One can listen to mariachi music in Buenos Aires and to tango in Mexico City. Salsa clubs sprout everywhere in Latin America with great success. Shows from Televisa, the Mexican TV giant, are seen in many countries, the same is true of Brazilian Globo TV productions.

If these popular art forms from the different Latin American countries can cross political boundaries easily, why should advertising be very different, particularly among U.S. Hispanics? Hispanics share the cultural heritage from Spain that includes the language, religion and multiple experiences that shape their perceptions and values. One message can work across Hispanic groups and there are multiple examples of successful advertising campaigns that work well in a pan-Hispanic fashion. Ads for Folgers, American Airlines, Toyota, Pepto-Bismol and Colgate have worked extremely well across the different clusters that compose the Hispanic market.

Still, it must be said that depending on the specific product and objective one message may not work well for all Hispanics. If the product has a very clear Mexican tradition and heritage, then communicating it to Mexicans would need to be different from communicating it to Caribbean Hispanics. The popular brand of Mexican soft drink Jarritos could not be communicated the same way to Mexicans and non-Mexicans because Mexicans know the product and associate it with specific experiences. For non-Mexicans Jarritos would need to be introduced as a new product.

Consumer research is fundamental in determining whether or not a common message can be effective across Hispanic cultures. Once product and category perceptions are understood, then one can proceed with a universal or a specific strategy. **IQ**

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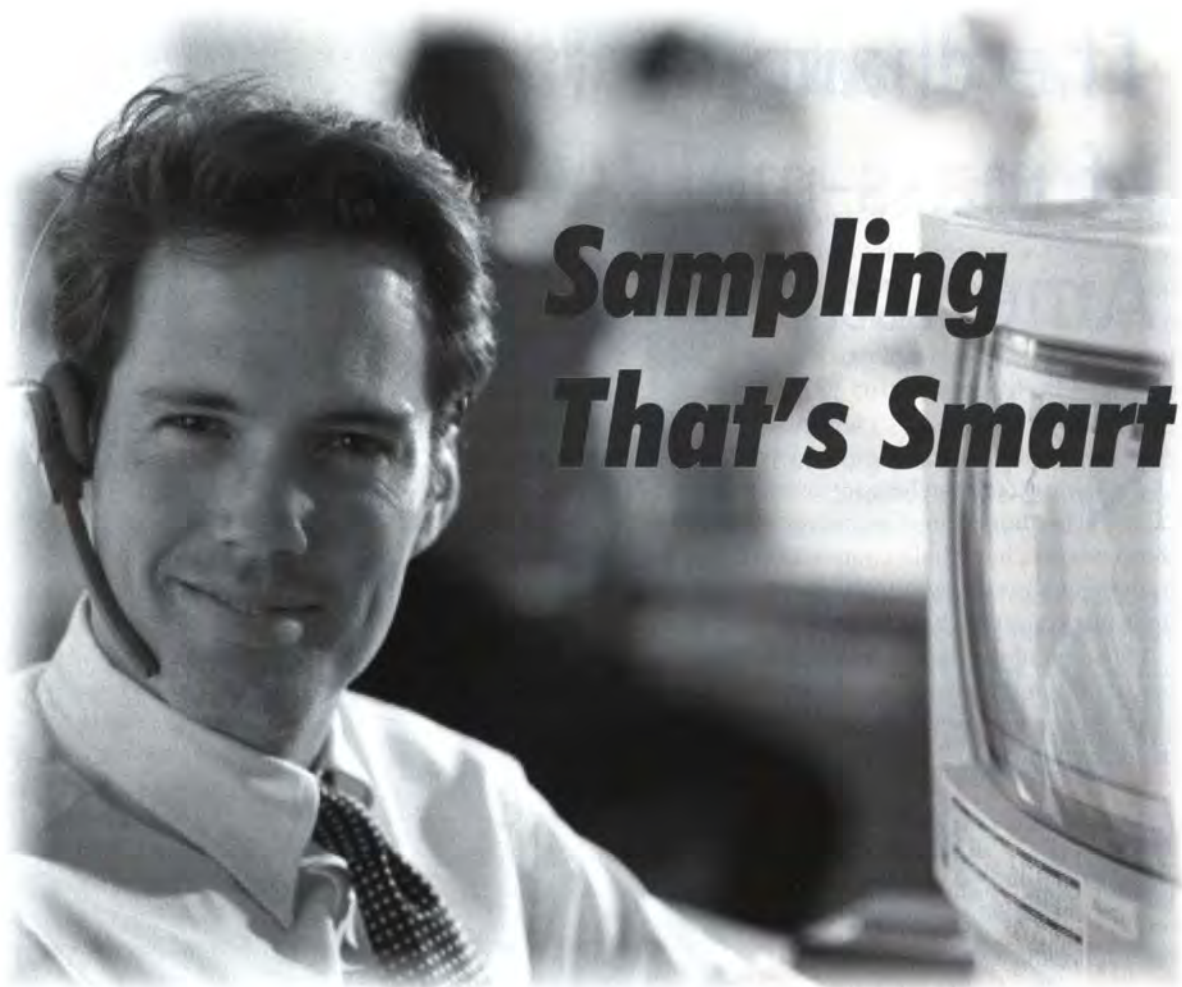
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The changing face of mass-market America

No question, American society is changing. Marketers and market researchers are aware that the U.S. population has become dramatically more diverse over the past decade. At the same time, household composition has continued its shift away from the traditional two-parent structure towards a variety of formations that constitute “family” in the 21st century.

Thus, one of the most compelling business issues today is how to best approach this changing marketplace, whether one is considering a niche campaign for the first time or looking to fine-tune a long-standing multicultural marketing program.

A look at the numbers

Increased ethnic diversity, coupled with significant shifts in the composition of American households, has had a tremendous impact on the U.S. mass market. These two forces are changing the United States from a dominantly white, traditional family society into a multiracial one where family and community are still of paramount importance, but where families will come in all different sizes, shapes and configurations.

In 2002, the total population reached 288.4 million people versus a total population of 248.7 million people in 1990. All told, non-

Hispanic whites still comprise the vast majority of the population, with 68.3 percent of the total population or 196.8 million people in 2001. But this represents a significant decline from the 76 percent in 1990.

In contrast, major ethnic groups have grown rapidly:

Hispanics: According to the Census Bureau’s 2001 population

estimates, there are 38.8 million Hispanics in the United States, accounting for 13.4 percent of the total population. The number of Hispanics is growing rapidly, up 9.8 percent in the 2002 estimates vs. the 2000 census, far outpacing the 2.5 percent general population growth rate. Further, the Hispanic population grew a significant 57.9 percent between 1990 and 2000, as a result of both immigration and higher birth rates for Latinos.

While Hispanics have lower median household incomes (according to the Current Population Survey March 2001, \$33,447 for Hispanics



By Deborah Alessandro

Dos and don'ts in ethnic marketing and market research

Editor's note: Deborah Alessandro is director, consumer goods and services practice at FIND/SVP Strategic Consulting and Research Group, New York. She can be reached at dalessandro@findsvp.com.

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vs. \$42,148 for the total U.S.). Hispanic consumer units are larger than those for the general population (3.4 vs. 2.5 for the total population) and have more children (1.2 vs. 0.7). Thus, they spend more than the average household, in absolute dollars, on food (cereal, beef, pork, poultry, fish, fresh fruits and vegetables), apparel (especially for kids), furniture and cleaning supplies.

African-Americans: According to the 2002 population estimates, African-Americans comprise 12.7 percent of the U.S. population with 36.2 million persons. This represents a 2.9 percent growth since the 2000 Census, slightly faster than the 2.5 percent overall population growth.

African-Americans, like Hispanics, have lower median household incomes than does the population at large (according to the Current Population Survey March 2001: \$30,439 versus \$42,128). However, this does not prevent African-Americans from spending more in absolute dollars than the average household on certain food products (cereal, beef, pork, poultry, fish, eggs), footwear, children's apparel and telephone service.

Asian-Americans: According to the 2001 population estimates, Asian-Americans comprise 3.9 percent of the U.S. population, with 11.3 million people. This represents a 9.2 percent growth rate from the 2000 Census figure of 10.2 million. Most significantly, Asian-Americans have high median incomes. According to the Current Population Survey March 2001, Asian households, as a whole, have higher median incomes (\$55,521) than any other U.S. ethnic group, including whites (\$45,904), which make targeted marketing strategies worth pursuing!

Still, pursuing the Asian market can be more complex than targeting Hispanics, for example. While Latinos have different countries of origin, they share a common language and, often, a common religion. Asians are defined by geo-

graphical contiguity and often represent entirely distinct and unrelated cultures. The culture of India, for example, has little in common with that of China. These divergent ethnic profiles make marketing to Asians more challenging.

Multiracials: The 2000 U.S. Census was the first census that allowed respondents to identify themselves as multiracial and gave evidence of societal transformations. Simple demographics make it clear that this segment will be more important over time, because over half of the multiracial population is 24 years old and younger. The growing multiracial segment is the result of interracial marriage. For instance, half of all U.S.-born Asian women and one-third of all U.S.-born Hispanic women marry outside of their race or ethnic group. In 2000, there were one million interracial married couples or 1.9 percent of all married couples, according to the Census Bureau. While these numbers are small, their impact will grow over time.

Same-sex couples

In August 2001, the Census Bureau released data stating that there were 601,209 gay, lesbian, bisexual, transgender (same-sex) partner households in the U.S. This number is understated, due to some wariness regarding self-identification, but still shows astounding growth since 1990, when there were 145,130 such declared households. As with multiracial individuals, the potential societal impact is greater than the actual numbers.

Although data on the number of same-sex couples with children has not been gathered, this number is believed to be growing. On July 1, 2003, Jane Brody of *The New York Times* reported that according to the authors of *The Gay Baby Boom: The Psychology of Gay Parenthood*, there are as many as 14 million children who are being raised by at least one parent who is gay or lesbian.

Single-parent households

Single-parent households also contribute to an altered social fabric, with distinct needs, wants and spending patterns. Further, their growth speaks to the fact that our nation is becoming more diverse, in more ways than one.

Single-parent households numbered 12 million in 2000 – moms headed 10 million and dads headed two million. This contrasts dramatically with 1970 figures – there were only three million single-mother families and 393,000 single-father families. Due to their smaller size, such households rarely outspend two-parent families. Still, marketers may be able to benefit by tapping into their distinct needs, which may vary given the wide social spectrum they represent. The Bureau of Labor Statistics' Consumer Expenditure Survey shows that single-parent households spend a great proportion (if not more absolute dollars) on the basics of life: food, shelter and apparel. Beyond that, anything that can add convenience to a more hectic-than-average life is a good bet. Services may also find a niche here.

Me, myself and I

In addition to single parents, the Census Bureau identified 10.7 percent of households as men living alone and 14.8 percent as women living alone – that's over one quarter of all households! The needs of this group will vary, since it comprises disparate lifestyle segments – singles, divorced men and women, and widows and widowers – as part of the mix.

When is culture-specific marketing appropriate? Given this American mosaic, marketing campaigns that target specific population segments are often appropriate. Culture-specific niche marketing is called for when a significant percentage of a brand's users (or its most loyal users), or a lucrative yet overlooked segment, belong to a certain subgroup best reached through targeted marketing commu-

nications. This often, but not always, occurs when:

- language and/or significant cultural barriers exist;
- a product's perceived benefits and key features are different for a given, substantial subgroup than they are for the general market;
- a brand's budget is large enough to accommodate niche campaigns along with a general marketing campaign, or conversely;
- a brand's budget is so limited, or a product so specifically targeted, that it could not make a dent in the general market, so it is best to go after a given societal segment or niche market, which in turn creates a positive, proactive image for a brand or its parent.

Potential pitfalls in culture-specific marketing

Language barriers, strong core appeal, loyalty and cultural resonance, are all reasons to consider culture-specific marketing. But there are some potential pitfalls:

1. Forgetting marketing basics.

There can be nothing as exciting as feeling that you've identified a new market, with as-yet-untapped spending power. However, in the long run, a strong market research program is essential for success. Too many times, niche marketing plans are built without asking basic questions that would NEVER go unanswered in a general market launch. Does my brand have a current base in a given group? If not, do certain features or benefits of my brand appeal to certain groups? How large is that group?

2. Going cheap.

While culture-specific media may cost a fraction of what mass-market media costs, this is because it obviously has a lower, though more targeted, reach. However, market research still needs to be sufficiently thorough, with the correct sample sizes, culturally appropriate approaches and interview structures. This can often mean costs that are equal to general market research.

After all, if you want a campaign to succeed and to represent your brand well, you cannot depend on cut-rate inputs, especially as your competitors increase their culture-specific spending.

3. If there's not a network, I can't market, right?

The presence of national Spanish-language television networks certainly makes Hispanic campaigns easier to launch, but it doesn't mean that other ethnic groups are impossible to reach. In the Asian market, for example with its print-based cultures and generally high literacy rates, many Asian subgroups have daily and weekly newspapers in those cities where their population is well represented. And while print may not have television's big bang, and takes some coordination, it can be a very cost-efficient spend.

4. Stopping with advertising.

While advertising is important for awareness and brand equity, other forms of communication build credibility with a given segment. But

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Every month, Corporate Research International will be conducting free market research studies for random companies and posting the results in Quirk's magazine. The full interactive study results will also be available at www.mysteryshops.com/quirks. This month we were asked questions by Papa John's International and Hardee's Food Systems, Inc. Both companies were interested in the perceptions of possible customers that are watching their carbohydrate intake.

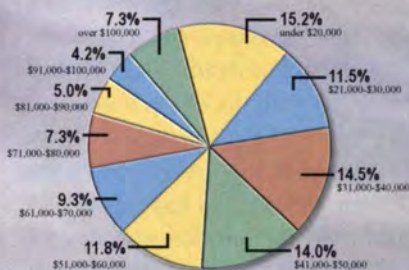
Can **FAST FOOD** compete in the **LOW CARB** craze?

Corporate Research International will be using many of its available tools to conduct the research study each month, and it will be dependant on the type of questions that are asked by companies. For this month's project, we have decided to utilize our instant survey tool to gather the raw data required to answer the questions. The instant survey tool is a product that allows us to create a questionnaire, release it worldwide to select demographics, and produce the statistically significant data for our clients, all in less than one day.

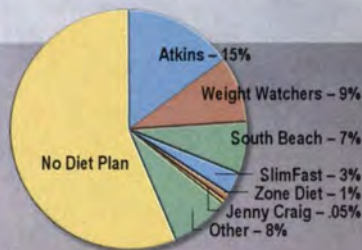
On Wednesday, February 25, 2004, Corporate Research International produced the instant survey at 8 a.m., released it nationally to all demographics at 10 a.m. and had completed

surveys from 12,919 participants by 3 p.m. when the survey ended. The raw data was then available to analyze by 4 p.m. via Corporate Research International's website www.mysteryshops.com. The survey had 20 questions, some of which will remain confidential for Papa John's International and Hardee's.

The spread of income ranges for the survey participants was as follows and their geographic distribution was even:



The survey demonstrated that 37% of all participants are watching their carbohydrate intake with only 25% of participants under age 30 watching their intake. Twice as many people were watching total carbohydrates as opposed to net carbohydrates. When asked if they are participating in any specific diet plan they answered as follows:



Participants were also asked about eating preferences and 23% of participants preferred a sandwich wrapped in a low carb tortilla as opposed to 12% that preferred a wrap in lettuce. They also preferred a low carb chicken sandwich to a low carb burger by a ratio of 69% to 27%. When analyzing the data for people that are watching their carb intake, the

number stayed relatively the same with only slight gains in favor of a low carb burger. There was a 59% response stating that fast food products can be a healthy part of their diet with a strong emphasis on sub sandwiches. Other responses to improvements over the past year were as follows:



When participants were asked about products they would like to see on a fast food menu:

- 88% ...more fruits and vegetables
- 84% ...more low fat products
- 78% ...lower carb items
- 45% ...more soy-based products

These numbers remained relatively the same when compared to participants watching their carbohydrate intake.

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A large, semi-transparent globe of the Earth is centered in the middle of the page, showing the continents of North and South America. In the foreground, the lower right corner shows a woman with dark hair wearing a headset with a microphone, smiling. The background behind her is dark and out of focus, suggesting an office or call center environment.

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with event marketing in particular, brands should be prepared to invest on a multi-year basis. No product can expect to develop a Cuban-American following, for instance, by merely showing up at Miami's Calle Ocho festival once. It takes time and an ongoing commitment.

5. Hit and run.

As with events, so with campaigns as a whole; culture-specific marketing is not a one-time promotion that will boost profits right away. Rather, it is an investment in a core segment of the American community that will reap profits over the long haul. Of course, few businesses can tolerate extended payout horizons in today's competitive environment. You will need goals and benchmarks. And you will need a research plan to verify if those objectives are being met or to show what course-corrections are needed. If you cannot afford to take a loss, plan accordingly. You can always start with a market or two and go from there, building your investments

over time.

6. It's more than language.

Marketing is not Berlitz. You cannot simply translate a discussion guide, questionnaire or advertising message into another language. One must consider cultural cues such as body language, modes of speech, interpersonal interactions, modes of dress, and colors. This may mean you have to engage multiple research suppliers to conduct general market and niche studies. If you are concerned about the costs and coordination involved, focus on one new niche at a time, building business as you go.

Mosaic marketing

As discussed, marketers can benefit by reaching out to previously overlooked segments. However, because there is so much diversity, it is not always necessary to address each cultural group as if it is separate from the mass market. Consider that the common denominators that have defined mass consciousness have themselves

changed due to societal diffusion. We often are able to reach disparate groups through mass marketing campaigns that transcend boundaries. We call this mosaic marketing.

Any time a product or service is addressing mass-market America, a mosaic campaign is likely to be appropriate. Regardless of race, ethnicity, cultural heritage, sexual orientation or marital status, most individuals and families have basic needs and desires in common, be it safety and financial security or clean laundry and a satisfying meal.

Although minorities and subgroups are a part of the mass market, one must not make the mistake of thinking that they will be completely assimilated into society. It is their diversity that makes for the mosaic rather than the outdated melting pot concept. Thus, campaigns should reflect the common attitudes, values or needs that span across cultures, but demonstrate them with distinctive cultural cues specific to key groups. To

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feature a homogeneous view of America in brand communications is to risk alienating the collective spending power of African-Americans, Hispanics, Asian-Americans, gays, lesbians and others.

Potential pitfalls in mosaic marketing

As with culture-specific marketing, mosaic marketing is not the solution for every marketing challenge. Because it is an evolution of traditional, homogeneous mass marketing, the potential pitfalls are fewer. Here's what to watch out for:

- Just showing the faces. Somehow you can tell when an ad has taken a short cut to diversity by just putting a bunch of actors from different races and cultural groups together. Just as in an ethnic campaign, other cultural cues should fit. You want to reflect a world, not a quota system.
- Being over-conscious of multiculturalism. As exemplified in some of the most successful campaigns, appearing natural is important. Reflect American society in all its richness, but don't dwell on it for its own sake. Your brand should still be the star.

Growing influences

American society today is now a diverse mosaic. At one point in our history, each of the diverse cultural groups discussed herein was on the periphery of mainstream society. Today, they are U.S. society. Our media, popular culture and consumer product selections are all beginning to reflect the growing influences that have reshaped the nation. And younger generations see diversity as simply "the way it is."

Marketers must acknowledge this dynamic or risk losing not only prospective customers but also their place in the fabric of this evolved society. Each of the groups and households discussed has significant buying power to tap into, so it is crucial to know how to target them with appropriate messages and in the appropriate media. And today's youth represents the multicultural nation of the future. They already readily

engage in cross-cultural borrowing, and if marketers can show them now that they have adjusted to this societal shift, they can avoid facing a future stigma of being perceived as archaic brands that did not change with the times.

In the end, multicultural marketing is like any other part of the marketing plan. You need to know your brand; know your consumers; and figure out

the best way to reach them with the most relevant product offering and communications. There are new things to learn to execute these plans correctly, but no more so than with new media or other breakthroughs. At the end of the day, multicultural marketing can reap great rewards, and help your agency, company or products become part of the remarkable mix that is the United States. | Q

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A complete recipe

The ad certainly seems Hispanic. Slickly produced, it features Latino-looking characters dancing to salsa rhythms and members of a large family speaking animatedly in Spanish as they enjoy the fiesta - all the right cultural touches. But the ad was a failure. Despite an enormous budget to place it in every prime-time Hispanic TV program, it had no impact on the company's sales, nor did it help the company's position among U.S. Hispanics.

What happened? The creators of the ad didn't follow one of the basic tenets of advertising: creating a strong and engaging ad does not mean just focusing on cultural or ethnic nuances.

After measuring the effectiveness of hundreds of U.S. Hispanic-targeted and non-targeted advertising on more than 20,000 Hispanic respondents nationwide, what emerged from our research was this simple but powerful reminder to marketers: Hispanic-targeted ads that work best are not just culturally relevant, or the ones that exhibit in-culture elements, but those that are memorable for their target and strongly integrate the brand and the intended message.

So why was the original ad *un fracaso*? The ad's creators forgot that producing convincing Hispanic advertising is much more than just making a "Hispanic version," more than merely translating English ad copy to Spanish, filling the spot with Latino actors, or lifting an ad from the company's Latin American offices. Even the tried and true practice of hiring a Hispanic celebrity won't be effective unless the ad is built upon

an interesting and involving creative idea first - and then combines the brand and its message within the context of the cultural environment of Hispanics in the United States.

How have the ads that work done this? Using the information garnered from several case studies, and from a thorough analysis of Millward Brown's database, we've established some guidelines for ads that will have a better chance of performing successfully in the U.S.

Hispanic market.

- First, develop a Hispanic marketing strategy. You will need to do some homework before even thinking of advertising. Establish an integral plan and identify your opportunities. Research should tell you how, to what extent, and why U.S. Hispanics consume or purchase your product/brand, the purchase drivers, vacant brand positioning, etc. By proceeding this way (i.e., doing the right research in order to have a



By Diego Bonardi

Ads targeting
Hispanic consumers
can't rely solely on
cultural nuances

Editor's note: Diego Bonardi is vice president of Millward Brown's multicultural practice. He can be reached at diego.bonardi@us.millwardbrown.com.

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clear strategy/positioning toward the Hispanic target) you will exponentially increase the likelihood of successful advertising and hence the ROI on your Hispanic marketing initiatives.

- You have to have the right insights in order to deliver good advertising. Balance the appeal to Hispanic emotions, with the key rational message, the role of the brand and the quality of the creative idea itself. All these components are important pieces of the puzzle.

- We need targeted benchmarks/norms when copytesting Spanish-language ads. We did some data mining among Millward Brown's copytesting database and learned that U.S. Hispanic respondents tend to react more positively to rating questions (top box/pleasing the interviewers) compared to general-market respondents, especially when evaluating Spanish-language TV ads. Therefore, there is a need to use a separate set of Hispanic norms when copytesting the creative idea of a

Spanish-language TV ad. Otherwise the interpretation of the results on a Spanish-language ad, if compared to general-market ad norms, would be misleading by overestimating the real performance (i.e., Spanish-language ads will generally outperform the general-market norms).

- Make use of but do not abuse Hispanic cultural references in the creative. Because Hispanic cultural drivers (i.e., family, friendship, Hispanic celebrities, Latin music, etc.) are all common knowledge to advertisers, the differentiation point is the creative idea that sustains the use of those elements. To illustrate this point, around 80 percent of the ads in our Hispanic copytesting database contain one or more of the above-mentioned cultural drivers, but less than half of these ads tested are strongly memorable for the Hispanic target. We copytested ads that were very family-oriented with a Hispanic cast or with a Hispanic celebrity and they did not break through.

- Communicate and repeat only one or two key benefits. Too many messages will just slip through the net. Also, make sure the benefits that are communicated are relevant for your target audience (e.g., "saving time when preparing dinner" may not be perceived as a benefit by Hispanics, who find cooking a way to show they care about their families). Some of the ads that we have copytested are just too ambitious with the number of messages they intend to convey to the Hispanic target. Some advertisers want to communicate many key benefits all in one ad for the sake of cost efficiency (i.e., a change in the brand name, a new product benefit, three new flavors/fragrances, an enhanced emotional bonding, a line extension, etc.). For the Hispanic target and general market consumers alike, this is too much information and too confusing.

- Make the brand integral to the story of the ad. The brand should be the centerpiece of the creative, not a

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secondary actor behind the cultural values. When copytesting Hispanic ads, we ask respondents to describe the story behind the ad they have just seen. In order to diagnose how well the brand is integrated, it is important to see how and how often the respondents include the brand name in their descriptions of the ad. There are also some brands that have successfully built branding through long-term investment/consistency (e.g., Kellogg's Tony the Tiger character). Developing these brand cues can benefit multiple ads, and branding is solved with a strategic approach rather than a case-by-case one.

Branding devices can be things such as a character, music, campaign format, slogan or anything in the creative that consumers learn to link uniquely to a specific brand throughout time.

- Tell a simple story. No matter what language you use, make the copy and the key message direct and easy to understand. Elements should be related, not independent images. Especially for the less acculturated U.S. Hispanics - a relatively less educated audience - there is a need to avoid metaphors as much as possible and to get straight to the point. One of the ads we copytested wanted to communicate traditional Hispanic values by showing only animal interaction in the creative. The Hispanic audience did not understand the intended connection/link between the animals and the "traditional Hispanic values."

- Educate the U.S. Hispanic audience. Many Hispanics, especially those who have recently arrived in the United States, lack information in Spanish or are not familiar with certain products, such as financial services or frozen foods. Marketers of these types of products should consider demonstrating and describing their product details to this audience when necessary.

We copytested a Spanish-adapted version of a household product's general market advertising campaign. The ad did not test well because the Hispanic respondents seemed to misunderstand the bene-

fits of this product. The advertiser conducted additional research and realized that the audience did not understand how to use the product. As a result, the advertiser developed a campaign that included an educational advertising approach. The new campaign tested much better and was successfully aired. This learning applies for product categories when the Hispanic market may be in a dif-

ferent stage/product life cycle than the general market.

Don't forget the marketing

In summary, if you want to do more than just follow a trend (and see a much better return on your investment), don't forget the advertising and marketing elements when you decide to create Hispanic-targeted marketing communications programs. | Q

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Discovering organizational diversity thresholds

Over the past 20 years, most large companies have instituted varying types of diversity programs. In the beginning, many companies did so primarily to be in compliance with the law. As time has passed and evidence of benefits from these programs has been examined, many have found that there are solid business reasons to foster diversity within their organizations. Through this process, careful implementation of successful diversity programs rests on the quality of the organizational research.

Diversity programs, defined as “any effort to acknowledge, educate and promote respect among co-workers with disparate characteristics,” have proven to make the workplace more productive, less conflict-prone and a better place to work. These workplace characteristics, seen as direct consequences of functioning diversity programs, also serve to attract the best talent in the employment marketplace.

Diversity programs have become increasingly important for all corporations and organizations as businesses become even more global in nature. Even for smaller, localized companies current demographic trends almost guarantee that they will eventually recruit and hire from a diverse group of candidates.

While some of the value of creating a respectful and inclusive workplace is intrinsically recognized, what has not been as universally established is the process for creating and implementing these programs and evaluating the success of their outcomes.

Tracking the reduction in employee conflicts and increases in the rate of productivity are broad-stroke measures that have been applied to diversity program evaluation. But before diversity actions can be effectively implemented and the effects of these efforts demonstrated, there are specific forms of employee research

that should be done in order to establish the openness of the environment and subsequently the types of actions that can be initiated without backlash.

Only by examining the organization’s readiness to accept and embrace diversity can we create successful outcomes.

Measuring the organization’s openness and the threshold of diversity

Obviously, not all organizations are alike in terms of their homogeneity, tolerance of differences and their understanding of the benefits of an inclusive workplace. Organizations with workforces that have been tra-



By Fred Bové

Research plays a key role in the process

Editor’s note: Fred Bové is president of Mariposa Group, a San Francisco research firm. He can be reached at fred@mariposa-group.com.

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ditionally homogenous (by social demographic characteristics), may have hidden barriers to change that must be considered. Attempting large-scale and/or radical introduction of any form of change can lead to feelings of resentment and alienation directed at both the company and toward those who are seen to represent minority groups within the organization.

Prior to the implementation of any diversity program, the depth of toler-

ance for a corporate diversity effort should be plumbed. We refer to the boundary at which even modest change can be introduced in a formal, programmatic way as the threshold of diversity. This is determined empirically on a number of characteristics that are indicative of behaviors and attitudes at all levels of the organization and surrounding community.

The first step in measuring the organization's openness or resistance to active diversity programming is to

conduct personal interviews at all levels of the organization followed by a limited-scale but representative quantitative survey of employees. Areas of inquiry include: employee versus community composition, the perceived role of diversity in the company culture, the perceived advantages/ disadvantages of diversity in one's personal life and the impact of diversity programs on one's own work situation.

Outside of the general employee perceptions, it is critical to measure the attitude of senior management and the of the communities within which the company does business. If senior management does not perceive the benefits of diversity or is not supportive of the long-term goals of the program, the level of the organization's openness will be low and the probability of success diminished. Likewise, if the community within which the company operates is not open or supportive of diversity in business, culture and inhabitants, the overall environment may not be fertile enough to support the seeds of internal change.

These measurements are used to determine not only the level of openness, but also the level of "permission" with which varying levels of change are possible. If there are significant barriers to formal diversity actions does this mean that the company should do nothing? No, it simply means that the type and scope of actions must be commensurate with the environment in which the changes are to take root. In the study of organizational behavior, this conditional step is traditionally known as "unfreezing attitudes" before more substantive programming is instituted.

Even in organizations with an apparently varied and mixed workforce, the level of openness to diversity should still be measured. Sometimes the mix is compartmentalized and the organization is not as ready for change as the demographic statistics might imply. For example, one group within a corporation may be seen by others as providing a less important function, service or product offering compared to other groups. That group may also contain a

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Threshold of Diversity	Organizational Profile (from research findings)	Example Program Recommendation
Not Open	Traditionally homogenous workforce in a community with little exposure to diverse cultures and ideas. Management sees little concrete benefits and is only slightly supportive. Fear of change is high. Perceived personal risk stemming from changes in current workforce is high.	<ul style="list-style-type: none"> • Small, informal steps without a great deal of diversity "policy" • Introduce diverse cultural ideas/events and create dialogue • Track interactions and communicate support for "agents of change"
Low	Mostly homogenous workforce in a community undergoing demographic change. Management is interested in diversity, but is cautious in commitment. Fear of change is moderately high. Perceived personal risk is moderately high.	<ul style="list-style-type: none"> • Small, more formal steps with some degree of "policy" • More formal meetings and events to discuss change and benefits • Create positions for "agents of change"
Medium	Semi-mixed workforce, but with little social interaction. Diversity exists in certain areas, but not uniformly spread. Management is open to change and perceives some social benefits. Community is demographically mixed and generally capable of supporting diverse cultures. Fear of change is moderate. Fear of personal risk is moderate.	<ul style="list-style-type: none"> • Introduce more decisive policy-based programs that communicate a commitment to diversity • Regularly communicate concrete benefits • Associate senior management with process
High	Mixed workforce uniformly spread across the company. Management is open to change and itself reflects diversity. Community is open and supportive. Fear of change is moderately low. Fear of personal risk due to diversity programming is low.	<ul style="list-style-type: none"> • Continue to institutionalize diversity in all areas of the company • Link performance evaluations to diversity goals • Senior management communicates successes

concentrated number of racial, gender or sexual orientation minorities to which these characteristics are also ascribed - either overtly or subconsciously. By uncovering and acknowledging the existing belief system, and pegging it to scaled question batteries, the researcher is able to benchmark the organization's correct level of openness to expanded diversity

efforts.

The chart shows the varying levels of diversity program acceptance along with typical organizational profiles that indicate this level and example recommendations based on research.

Naturally, these are very sensitive topics. And when sensitive topics are being researched it is imperative that

the employees' responses be held in confidence and that there is no threat of employer retribution for expressing any opinion.

Working with the employer and the diversity training group, the researcher plays a key role in setting the process in motion, and keeping the program functional. Periodic reassessment of diversity openness and program outcomes can be achieved via an abbreviated form of the benchmark employee survey. This instrument should focus on the broad perceptions of the outcomes of the program as well as specific areas of concern identified in the initial research. Revisiting the measurements that originally established the level of organizational openness to diversity is key to this process. Programs that overshoot the level of diversity openness will result in uncomfortable and resistant employees. Undershooting it can result in the perception of tokenism or lack of corporate commitment. Both outcomes eventually reduce the overall program effectiveness. | Q

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Beyond the usual

The estimated 40 million Hispanics in the U.S. represent an incredibly lucrative market for providers of products and services ranging from wireless telecommunication products to personal finance. More and more research clients acknowledge this market and are trying to find ways to tap it.

However, clients are finding that the currently accepted research methods they use in the general market are not as easily adapted to Latino research. Language is one obvious barrier and unfamiliarity with technology is another.

While younger Latinos are straddling the bilingual divide with ease, many older Latino men and women have no need to speak English or surf the Internet. They get their news from Spanish-language television and newspapers. Spanish soap operas, game shows and musicals satisfy their need for entertainment. Computers generally are not an integral part of their lives.

Are technical tools working?

This creates a conundrum for market researchers. How do we serve our clients and meet their demands for increased utilization of technology-based survey tools to reach a market segment hesitant to use or uninformed about those very tools?

With large and diverse Hispanic populations, Chicago and Miami represent pivotal markets for recruiters and moderators. What are they seeing and hearing? How are they using technology to reach Spanish-dominant respondents? Or, are they using it at all? I asked several Latino moderators and recruiters in these two markets what part technology plays in their work. Each of them has a slightly different take on the topic of if, when or how technology-based research gathering tools and techniques can be used to get the information clients are clamoring for.

In terms of using technology to reach Spanish-dominant respondents, one Miami-based moderator was

basically pessimistic, yet had also experienced the possibilities. "As a rule, the average income for Hispanic families falls below that of the general market across most areas. As a result, few Hispanic households have computers," she says. "Therefore, as a group they tend to be less computer savvy. The Internet hasn't made as big an impact on Hispanics in the U.S., particularly in the 40+ age group, as the general market."

Are out-of-the-box qualitative approaches needed to reach the Hispanic market?



By Claire Rose

Editor's note: Claire Rose is qualitative manager at The Blackstone Group, a Chicago research firm. She can be reached at 800-666-9847.

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This same moderator, however, had experienced the Internet's potential as an effective interview tool. "I was contracted by a British firm to conduct an online focus group with men in Argentina, Colombia and Mexico who had logged-on to the firm's Web site and registered. We e-mailed this universe of names and asked if they would participate in the online group. I had entered the discussion guide beforehand so when I was ready for the next question, I didn't have to type it, which saved time. During the online surveying, as I was 'talking' to the respondents, the client in the U.K. was looking at what we were typing. They could send me messages and I could 'talk' to them, as well as the technical support team located in Seattle, on a different screen. By the end of the session, I had a transcript of the entire conversation to print and translate for the client. Although our response wasn't spectacular, it was an interesting experience. Respondents received an online gift certificate."

Hispanic Internet use growing fast

Another researcher from Miami had a much more optimistic view. "Hispanic Internet usage is growing fast. Hispanics tend to be more honest with their personal information and their opinions tend to be less polarized than the general market. Hispanics feel honored to be asked their opinions and they value sweepstakes and prizes more than the general market.

"Depending on the project, we use different approaches. For regular focus groups, we provide a laptop for each respondent, give general instructions, let them navigate, and discuss normally about clearness, user-friendliness, content, graphics, etc. We hook up a laptop to a projector and one person navigates according to others' instruction, then we discuss normally. We instruct respondents to navigate the site at their homes, beforehand, so they come with their impressions and comments ready to go."

For quantitative studies, this researcher uses one of three different approaches. "We send e-mails to respondents from a list, ask them to complete the attached interview and

send it back, with the promise of an incentive. We send e-mails and instruct respondents to click a link that takes them to a Web site we've set up with the survey. Or, we work with the client to include a link or a pop-up screen on their company Web site so surfers are taken directly to the survey. Better lists are a must for Internet focus groups. Group surveying will grow, but slowly."

Blending traditional and technological

The most successful use of technology was accomplished by blending traditional random pulse-taking and helper-assisted laptop surveying.

According to a very optimistic Chicago-based recruiter, "We recently were quite successful in conducting an all-male, technological-based survey on a street corner in a heavily Hispanic Chicago neighborhood. We set up several sidewalk stations for laptops on which a self-administered online survey was loaded. There were no open-ended questions and no typing was required—all respondents had to do was highlight a 'yes' or 'no' answer and click.

"We found that English-speaking participants generally agreed to take the survey without hesitation. Spanish-speaking-only participants had more difficulty, but were still interested in participating. We kept the process simple. If respondents couldn't read or didn't understand English, a helper assisted them. They were read the questions and instructed to either click 'yes' or 'no.' Many of them were scared to death, but once they were walked through the process, they were patient, wanted to do it right, enjoyed it and were very proud of themselves once they'd completed the survey. We ended up surveying 40 participants. I think this same type of set-up could easily be conducted in an office setting."

Time for out-of-the-box thinking

So what's the answer for using technology to reach and expand the Spanish-speaking market? Maybe it's time to encourage out-of-the-box thinking. We need to be looking at approaches like:

- Allowing younger English-speaking relatives to accompany and help

older respondents in focus group or quantitative survey situations. Respondents may feel more comfortable with their younger counterparts present to help them through the process. This method should only be used if technology is not the focus of the study, merely the vehicle through which data is collected. Minimum age requirements, education levels and English-speaking skills of the relatives should be approved by the client.

- Partnering with Hispanic community centers and religious institutions to offer educational sessions on how to use the Internet as a premium for participation. The research process will be strengthened by a partnership with trusted community leaders and institutions. This approach to data-gathering would offer mutual benefits to all. The research provider would gain greater acceptance of marketing research in the Hispanic community and learn more about the community by partnering with a community institution. The community centers and institutions would benefit financially and perhaps gain more contacts in the community. And, of course, participants would learn something new or have a chance to increase their computer skills.

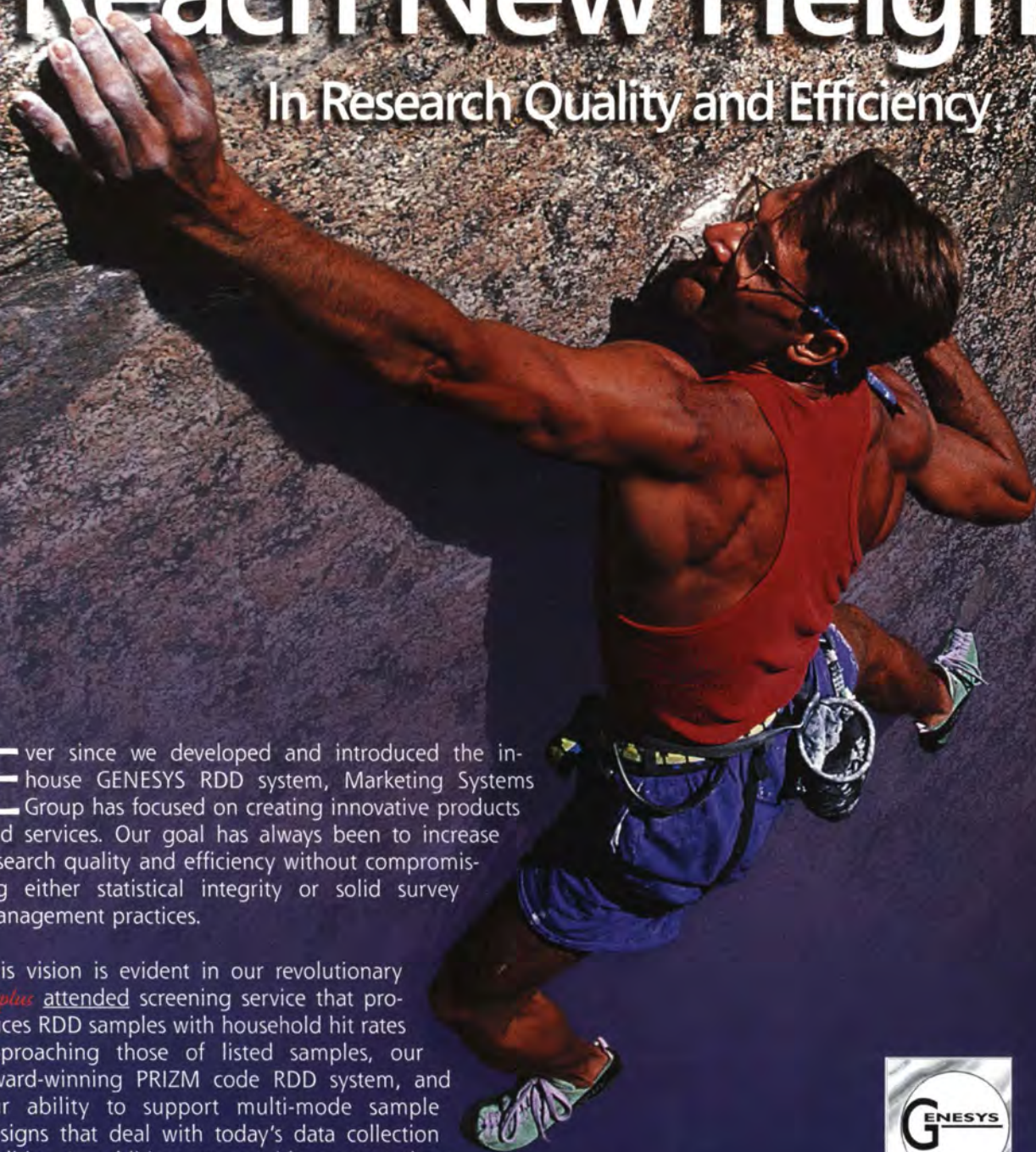
- Hiring programmers and Web site designers who know about the cultural differences between the Hispanic communities. Knowing what is aesthetically and linguistically pleasing to a Latino of South American descent versus one of Puerto Rican descent, for example, is a sensitivity that is difficult to teach and even more difficult to demonstrate on a Web site. The goal would be to develop appealing Web sites designed specifically to speak to one of the communities or designed to speak to all the communities, depending on the requirements.

Help us to respond

Creative thinking, respect for the many cultures represented by the Latino community, and educating ourselves about cultural dislikes and preferences to incorporate into our research methodologies to make them more appealing and interesting will help us respond to our clients' growing awareness of the importance of this market. IQ

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Survey Monitor

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acknowledging the strength of this segment and addressing it appropriately, a Hunter-Miller report maintains.

Demographically, suburban African-Americans: were nearly 14 million strong in 2000, with 5 percent growth between 1990 and 2000 compared to a 2 percent increase for whites moving to the suburbs (almost four out of every 10 Blacks [39 percent] live in the suburbs); represent 4.6 million households, or 34.7 percent of all Black households (13.4 million); are educated and more likely than Blacks in central city areas to have advanced educational achievements, more closely tracking the general population - 16.4 percent of suburban Blacks, ages 25+ years in 2002 had a Bachelor's degree compared to 10 percent of those in central cities and 17.7 percent of all races, 6.9 percent of suburban Blacks, ages 25+ years in 2002 had Master's, professional or doctorate degrees compared to 4.8 percent of those in central cities and 9 percent of all races; are more likely to be homeowners - home ownership among Blacks with household incomes of

\$75,000 or higher is 79.8 percent, nearly double the rate for those with household incomes less than \$50,000 (39.9 percent) and significantly higher than the rate for all Blacks (47.1 percent).

Psychographically, suburban African-Americans: have moved to suburban areas with greater advantages as they have professionally advanced, much like other races; see a single-family home with a backyard and other suburban "advantages" as signs of success; generally maintain their racial identity, which can influence their purchases, contrary to the beliefs of some who think suburban Blacks completely adopt the behaviors of suburban whites; adapt to a more affluent lifestyle and purchase luxury items but remain an underserved market; want marketers to recognize their accomplishments and address them appropriately, taking into account both their racial identity and socioeconomic achievements; are more likely than other races to purchase certain branded and status symbol items which show the world that they have "made it" and have significant disposable income to acquire such items.

Many African-American tykes, tweens and teens who grow up in

predominately white suburbs are more likely than their urban counterparts to desire an inclusive (with whites) lifestyle experience versus a "Black" lifestyle experience. As a trend, most young consumers will continue to celebrate Black culture, but lifestyle and personal accomplishments now become important defining characteristics.

Demographic trends point to increasing wealth among a growing African-American population, which will result in continued migration to the suburbs. Marketers cannot assume that campaigns targeted at the general suburban market or Blacks as homogeneous group will reach this segment. They must tailor messages to recognize the achievements of suburban Blacks (young and old) while taking into account that this group maintains its racial identity. For more information visit www.huntermillergroup.com.

Major restaurant chains are leading growth

Fast-food hamburger outlets are leading the recovery in the restaurant industry, after the weakest year in more than a decade, according to data from The NPD Group, Port Washington, N.Y. The brightest spots for the industry came in the last quarter, with November, the last month in the seasonal year, being the strongest month of the restaurant year. Traffic at fast-food hamburger restaurants was up 6 percent from September-November vs. the year earlier, and dollars were up 7 percent for the same period. The year ended with overall consumer spending for the industry up one percent for the 12 months ending November vs. the same time a year ago, but traffic still declined by 1 percent for the total industry.

The NPD Group reported gains in the last quarter of the restaurant year, September-November, for the first time in five quarters. Consumer spending for that quarter (September-November 2003) was

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up 2 percent vs. the same time a year ago and traffic was up 1/2 percent. "The industry still has yet to show strong growth. We had an uptick, driven by market leaders, but it's not enough to get customers out of their homes in droves," says Harry Balzer, vice president of The NPD Group.

Major chains are fueling the growth and getting Americans back to restaurants. The big chains account for about 50 percent of the total restaurant industry and they saw a 4 percent increase in traffic for the year ending November compared to the same time a year ago. Quick-service restaurant (QSR) chains and casual dining chains led the way with an increase in traffic of 5 percent.

Americans are doing breakfast and lunch at restaurants. New product introductions and marketing support led to increases in the cheaper dayparts of the restaurant industry. For the last seasonal quarter, September to November, fast-food restaurants saw an increase in traffic of 3 percent for breakfast and 4 percent for lunch, with dinner coming in flat. Traffic at casual dining restaurants was up 6 percent for lunch and for midscale restaurants it was up 1 percent.

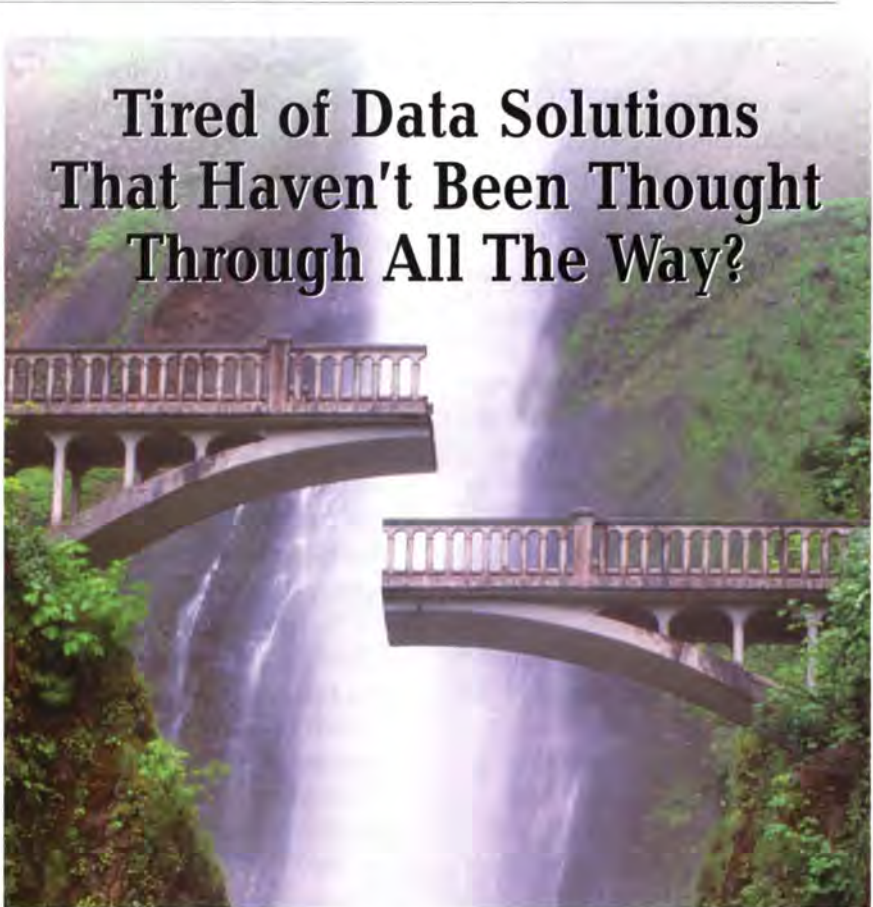
People are spending more, but not much more. Average checks at restaurants were up just over 1 percent, below the 2 percent inflation rate. This slow growth rate partially reflects consumers' shift towards visiting more often for breakfast and lunch, which are less expensive than dinner.

"This is our first indication in over a year that Americans are going out and buying meals at restaurants again. There was some concern in the last year that maybe we're moving back to our homes for more meals...that restaurant usage had peaked. While the trend is not clear, this is a good sign for the industry," says Balzer. For more information visit www.npd.com.

Young adults more willing to purchase insurance from non-agent resources

Baltimore-based Vertis announced the results of its Customer Focus 2004: Insurance study, which reveal that some consumer audiences are willing to purchase dental, health and life insurance through resources other than an agent. "With both life and dental insurance purchases,

Generation X adults [28-39] were more willing than the average adult to consider utilizing the Internet, telephone or direct mail to initiate their policies," says Therese Mulvey, vice president, marketing research, at Vertis. "The results of the study show that Generation X adults are 10 percent more likely than the average adult to purchase life insurance and 7 percent more likely to



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purchase dental insurance through channels other than the insurance agent.”

The trend continues among Generation Y (18–27) adults in their purchases of both health and dental insurance. The Customer Focus 2004: Insurance study shows that these adults are 7 percent more likely than the average adult to purchase health insurance and 8 percent more likely to purchase dental insurance without the use of an agent.

The study shows the following additional findings, which provide insight into the differences in consumers’ insurance purchase plans and trends.

Insurance interests of Generation X adults: 20 percent of this group would consider purchasing high-face life insurance, 5 percent more than the average adult; 10 percent more Generation X adults than average adults consider purchasing mortgage insurance; 5 percent more Generation X adults would consider purchasing identity theft insurance than average adults; juvenile whole life insurance is also a priority, as 15 percent of Generation X adults, compared to 9 percent of average adults, would consider its purchase; of the Generation X adults who would consider purchasing insurance products direct, over 50 percent expressed that they would consider purchasing life or dental insurance from the Internet, phone or direct mail instead of their agent; in the next 12 months 4 percent more Generation X adults than the average adult plan to get a price quote for life insurance on the Internet.

Potential insurance purchases by Generation Y adults: 44 percent of Generation Y adults would consider purchasing long-term insurance, 13 percent more than the average adult; hospital insurance, which provides for emergency cash when hospitalized for outpatient surgery, is considered by 46 percent of this

group, 16 percent more than average adults; 14 percent of these individuals are inclined to purchase insurance for their pets, 7 percent more than the average adult; of the Generation Y adults that would consider purchasing insurance products direct, over 50 percent expressed that they would consider purchasing health or dental from the Internet, phone or direct mail instead of their agent; 32 percent of Generation Y adults and 28 percent of adults with annual household incomes between \$50,000 and \$75,000 indicated that they would also consider using financial products or services from an insurance company.

The impact of insurance direct mail: 26 percent of adults with household incomes of \$50,000 to \$75,000 reported that they read insurance direct mail in 2003, reflecting an 11 percent increase from adults surveyed in 2002; 70 percent of adults surveyed indicated that they are more likely to open insurance direct mail if their name is on the front; timing, an interesting-looking package, one that conveys a sense of importance, and special offers or discounts prompt over 50 percent of adults to open insurance direct mail; weekly direct mail readership has increased 6 percent from 2002 to 2003 among adults with household incomes of \$75,000 or higher.

Services important to insurance consumers: 35 percent of adults with household incomes of \$75,000 or higher felt that a knowledgeable agent was the most important service provided by an insurance company; 20 percent of adults felt that 24-hour accessibility is most important; 19 percent of adults indicated that prompt claim payments were the most important service while 16 percent felt that courteous customer service was the highest priority; only 3 percent of adults felt that online accessibility was the most important service. For more

information visit www.vertisinc.com.

Almost half of Americans have tried low-carb diets

Forty percent of Americans have personally tried to lose weight using a low-carbohydrate diet, according to a poll by FGI Research, Chapel Hill, N.C. About 60 percent of 927 respondents indicated that they have never personally tried this kind of diet program.

Despite the current focus in the media on the Atkins diet, the majority (46.9 percent) of those who have tried a low-carb diet selected a different diet program. A small percentage had tried Atkins as well as some other program, with less than 40 percent having used the Atkins program exclusively.

More than three-fourths (79 percent) of those who had tried a low-carbohydrate diet indicated that they were successful in losing weight on this diet. Similarly, among those who have not tried low-carb diets, almost three-fourths (69 percent) said that they believed low-carb diets can help people lose weight, even though they had not had personal experience with this.

So, it would seem that the majority of Americans are sold on the idea of low-carbohydrate diets as a way to lose weight. This is a big change from even just a few years ago. However, the issue of these types of diets from an overall health perspective seems to still be on the table for many consumers: half of those surveyed indicated that the healthfulness of the diet depended upon the specific diet plan. However, just fewer than 34 percent said that they believed these diets are not healthy. Only about 16 percent believe these diets are healthy, without qualifying the statement by diet plan.

The FGI Research Poll was conducted online within the U.S. during February among a nationwide cross-section of approximately 921 adults. For more information visit www.fgiresearch.com.

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Product and Service Update

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efficient online forms. SPSS Data Entry also allows for the collection of more accurate data for analysis. The ability to create surveys in SPSS Data Entry and analyze the results in SPSS for Windows provides a full survey research solution.

The new version of SPSS Data Entry offers enhanced security options, including a new login/password feature. This ensures more secure surveys by enabling researchers to designate survey respondents. This also allows multiple respondents to take online surveys or tests at shared workstations. For more information visit www.spss.com.

Book covers 'micropolitan' areas

With the 12th edition of *County and City Extra: Annual Metro, City, and County Data Book*, Bernan Press, Lanham, Md., is offering organized

data covering the Census Bureau's newly designated "micropolitan" areas - the population clusters that make up major metropolitan areas. *County and City Extra* presents key demographic and economic data for each U.S. state, county, metropolitan area, Congressional district, and for all U.S. cities with a year-2000 population of 25,000 or more. New and updated tables in the 12th edition include a full selection of data for the 391 all-new Metropolitan Statistical Areas and Metropolitan Divisions, and population counts for the 673 new Micropolitan Statistical Areas; immigration data from the Department of Homeland Security; updated county-level crime data from the Federal Bureau of Investigation; and Census 2000 data for the 108th Congress in the Congressional Districts table. Other titles in the series include *Places, Towns and Townships*; *County and City Extra: Special Decennial Census Edition*; and *The Who, What, Where of America: Understanding the Census*

Results. For more information visit www.bernanpress.com.

Physician segmentation product from Ziment

New York research firm Ziment is now offering TAGZ, an approach to physician segmentation research that takes a physician's combined psychographic and attitudinal data for a prescription drug and links it to their historical prescribing behavior through a proprietary algorithm.

This means that physicians in a company's call deck that were not included in the original segment research can still be identified or "tagged" as to their segment membership by Ziment's algorithm and its system of data-mining and modeling techniques.

With TAGZ, reps now have a pre-determined segment identifier that links to knowledge about the physician, including their attitudinal disposition towards the market as well as to the drug itself. Sales collateral and detail pieces can be designed specifically by segment since reps will know what pieces to use with each physician. Ziment's TAGZ approach is an add-on to its PHYSICIAN SEGZ product, which is part of the company's COMPOUND-to-PROFIT group of research services. For more information visit www.ziment.com.

Briefly...

Harris Interactive, Rochester, N.Y., has developed a consumer panel to be used exclusively for automotive market research. The Automotive Insights Panel, a body of respondents identified from among its panel of online survey respondents, provides vehicle manufacturers and automotive suppliers with insight into consumer preferences, product knowledge, buying behavior and brand awareness. For more information visit www.harrisinteractive.com.

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Research Industry News

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Arbitron Inc., New York, has announced plans to revamp the offerings of its Internet Broadcast Services division. The company ceased monthly and weekly MeasureCast ratings, which measured the audiences of audio content on the Internet, as of March 28. Arbitron plans to offer a revised service for Internet broadcasters designed to be better aligned with the needs of the market.

Commenting on the announcement, Pierre Bouvard, president of Arbitron New Ventures, said in a company press release, "We remain committed to the Internet broadcast business and continue to believe in the viability of this medium and its long-term market potential. However, the investment needed to sustain the current method would have been far greater than the revenue potential for the service. By revamping our services, we hope to provide better value for our customers and a reasonable return for our investors."

Separately, Arbitron released a summary of response rates, consent rates and return rates for all 286 markets measured in its fall 2003 survey. The average metro survey area response rate declined 1.4 percentage points from 34.5 percent in fall 2002 to 33.1 percent. The return rate increased 0.6 points, from 55.5 percent in fall 2002 to 56.1 percent in fall 2003. The consent rate declined 3.2 points, from 61.4 percent in fall 2002 to 58.2 percent in fall 2003. Since spring 2003, when Arbitron announced its most recent response rate initiatives, the company has: sent larger diary premiums to Black and Hispanic households in any market or county that did not receive Black or Hispanic Differential Survey Treatment; expanded treatments targeting males 25-34 in additional markets; opened up a second Arbitron

interviewing center (in Houston); begun transmitting appropriate identifying information for Caller ID displays for all calls placed from the two Arbitron interviewing centers; permitted respondents in households that get a preplacement mailer to say "yes" to the Arbitron survey via a secure Web site. In upcoming surveys, Arbitron is planning to: improve the starting sample by removing ineligible phone numbers, such as businesses, which will allow interviewers to concentrate on valid contacts (Winter 2004); provide additional incentives for diary consent and return in 40 "low-response" markets by adding a letter and \$1 preplacement for all households, adding a \$5 postplacement premium for Black, Hispanic and young male households in the low-response markets that do not currently receive the "promised incentive" treatment, and enhancing the script for the recruiting call to ensure that respondents are aware of the incentives for return being offered to their household (spring 2004); add new incentives for consent for respondents who refuse early in the recruiting process in all markets (fall 2004). Arbitron is also continuing its program of methods research tests to devise techniques to enhance consent and return efforts in future surveys.

Kantar will consolidate its operations capabilities in the U.K. under a single management structure. This will involve all U.K. departments or functions involved in the quantitative research process from scripting through data collection to data processing. The Operations Centre will be managed by a team of senior operations professionals drawn from Kantar's U.K. businesses.

Acquisitions

London-based **Synovate** has

reached agreement to acquire **Symmetrics Marketing Corporation**, a customer loyalty measurement and management research and consulting business. Headquartered in a Scottsdale, Ariz., Symmetrics has offices in Indiana, California and Texas and employs 53 staff. The company was founded in 1996 by Lawrence Crosby.

Nuremberg, Germany-based **GfK Group** has acquired **Arbor Inc.**, a Media, Pa., research firm, effective retroactively from January 1. Newly named GfK Arbor, the firm specializes in communication and brand research and executes tracking surveys on brand value and brand dynamics. With 92 employees, Arbor generated sales totaling \$24.9 million in 2003. The managing directors of Arbor, Martin R. Lautman, John Wittenbraker and Joseph C. Zoll, will continue the management of the new company.

Harris Interactive, Rochester, N.Y., has acquired **Novatris S.A.**, a Paris-based online market research firm with \$3 million in revenue. The addition of the one million Novatris panel members to the current Harris Interactive European panel of 700,000 will create a combined online research panel of 1.7 million members. Novatris will become part of Harris Interactive's wholly owned subsidiary, HI Europe. Novatris will also serve as HI Europe's service bureau to provide online data collection to other market research firms.

Alliances/strategic partnerships

Sandelman & Associates, a Villa Park, Calif., research firm, has renewed its contract with Las Vegas research firm **Datascension International**. This renewed contract will generate revenues in

excess of \$3.5 million for Datasension. Sandelman & Associates utilizes Datasension to conduct research surveys on behalf of its food industry clients.

WebSurveyResearch, New York, and **DataTactics, Inc.** have signed a letter of intent to deliver online physician surveys.

Research firms **Millward Brown** and **Invoke Solutions** are broadening their existing relationship in North America. The two companies, who joined forces in July, 2003 will now enter into an exclusive partnership within the marketing communications arena. Millward Brown currently uses Invoke Solutions' Dynamic Survey software to drive its AdSelector offering.

Strategies, a market research and online communications company in Jordan, has become the newest member of the Rochester, N.Y.-based **Harris Interactive's** global network.

Association/organization news

In March, Ted Vonk left his position as director general of **ESOMAR** (the European Society for Opinion and Marketing Research). He will continue to contribute to a number of ongoing projects. Management team members Anna Alù and Wilfred van der Lee will

continue to be responsible for ESOMAR's ongoing operations. A search for a new director general is in progress.

Britain's **Market Research Society (MRS)**, the **British Market Research Association (BMRA)**, and the **Association of Users of Research Agencies (AURA)** have agreed to enter discussions about how membership services and representation on behalf of both individuals and organizations can best be delivered in the future. The discussions will also address the structure of the market research associations. The discussions will include working groups looking at various aspects of what existing members require as well as consultations with others who are not in membership. Areas for review will include: standards, legislation, training and education; events, publications and communications; industry statistics, membership marketing and services.

The Mystery Shopping Providers Association (MSPA) recently passed the 12,000 mark of certified mystery shoppers. Several MSPA Gold Certification Workshops have already been held in 2004 and more have been scheduled through mid-year; approximately 24 of the workshops will be held during 2004. To attend the Gold Certification Workshop, registrants must first obtain their

Silver Certification through a Web-based educational program and pass an exam. In November 2002, MSPA introduced a new Shopper Certification program. The first phase is an online educational program. Upon completion, the shopper receives Silver Certification, which is recognized as a hallmark of professionalism by the member companies of the MSPA. To date, more than 11,000 shoppers have achieved Silver Certification status and over 900 shoppers have achieved Gold Certification status.

Awards/rankings

Indianapolis-based **Walker Information** was named a finalist in the 12th annual CIO Enterprise Value Awards for the development and implementation of the Walker SmartLoyalty System - an Internet-based customer loyalty management solution. These awards recognize companies that demonstrate how changes, adjustments or additions to their information technology systems have provided positive results for their businesses. The Enterprise Value Awards recognized 15 companies as finalists - including 10 winners and five runner-ups - from a group of nearly 150 applicants in multiple industries. In the final stage of judging, Walker Information was selected as the runner-up in the professional services category.

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New accounts/projects

New York-based **Arbitron Outdoor** has signed **Lamar Advertising Company** to its Scarborough USA+ consumer service.

The New Jersey Hospital Association (NJHA) has increased its use of Herndon, Va.-based WebSurveyor's online survey solutions for its member satisfaction surveys. The NJHA has been a WebSurveyor customer for three years, but demand for the online survey tool has caused the association to double its survey capacity.

New companies/new divisions/relocations/expansions

In March, Paris-based **Ipsos** moved into new premises at 35 rue du Val de Marne, Paris 13ème.

Resource Systems Group has opened an office at 205 West Wacker Dr., Suite 615, Chicago, Ill., 60606, to house its market integrated business solutions practice. The phone number is 312-673-3320.

Seattle-based **GMI** (Global Market Insite) has opened a regional office in Honolulu, Hawaii. The office, located in the Executive Centre complex in downtown Honolulu, will provide additional support for GMI's Asia and Pacific-Rim business as well as late-evening project management support for customers located in North America.

Health Focus International has moved to 449 Central Ave., Suite 205, St. Petersburg, Fla., 33701. Phone 727-821-7499. Fax 727-821-7764.

New York research firm **Schulman, Ronca, & Bucuvalas, Inc.** (SRBI) has launched its consumer insights division.

Headquarter-ed in the Cincinnati area, the new division's leadership will include Duane Clement, Joe Ferris III and R. Bruce Westcott.

Canadian data collection firm **Opinion Search, Inc.** has opened a new sales office in Chicago. Leading the new office is Pam Bruns, vice president, client services.

Company earnings reports

United Business Media's **NOP World** reported increasing operating profit in 2003 by 7.8 percent to £19.3m (2002: £17.9m) on flat underlying revenue. Revenue grew in the second half despite the weakness of the U.S. dollar. Syndicated and continuous businesses such as AFI and MRI delivered strong performances and the health care business is recovering. A major restructuring program is underway to improve margins, focus the business around its core sector strengths - automotive, health care, financial, business and technology, and consumer and retail - and introduce global account management. Despite the expensing of costs associated with this major restructuring and an increased level of organic investment, operating margins rose to 9.5 percent (2002: 8.4 percent).

Paris-based **Ipsos** reported consolidated 2003 revenues totaled EUR 569.7 million, up 6 percent with respect to the EUR 538.5 million generated in 2002. Organic growth, at constant scope and exchange rates, was 9.4 percent. In the fourth quarter, organic growth was very close to the level seen in the previous nine months, at 9.3 percent. Changes in the scope of consolidation increased revenues by 6.5 percent. Most of the companies that Ipsos acquired in 2003 were consolidated either from July 1 or October 1, when their integration became effective. Currency effects

dragged down revenues by 10.2 percent.

The rise in the euro against most of Ipsos' other currencies had a major impact in 2003. In today's context, the translation of foreign-currency revenues into euros has a substantial effect. At constant exchange rates, Ipsos would have generated revenues of around EUR 625 million in 2003, up close to 16 percent with respect to 2002. However Ipsos' overall exposure to currency movements is very limited, since most of its costs are in the same currencies as its revenues. As regards industry rankings that are based on U.S. dollar figures, Ipsos' 2003 revenues will be quoted at \$644 million as opposed to \$509 million dollars in 2002, an increase of almost 27 percent.

In geographical terms, business volumes grew strongly in Asia-Pacific (particularly in China but also Australia), in Latin America and North America. Growth in Europe was 3 percent in 2003, as opposed to 1.7 percent in 2002. European growth accelerated to 5 percent in the fourth quarter, from 2 percent in the first nine months of the year, on the back of strong performance in the U.K., Southern Europe and Central Europe.

Each business line achieved firm growth, including media research, where revenues had stagnated in 2002 due to the cyclical downturn in the advertising market. Growth was high in advertising research, which, until the end of 2003, was the only specialization to have a global, dedicated and integrated organization, operating under the Ipsos ASI brand.

NetReflector, Inc. announced that it ended 2003 profitably, posting its second year in a row of profitable results. In the past two years combined, the company says it signed up more than 100 new customers and achieved a 220 percent revenue growth.

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Names of Note

continued from page 10

Synovate has also named **Jerry Brandt** head of its new media and entertainment research unit for the Americas. Brandt is based in the Synovate Los Angeles office.

NetRatings, Inc., New York, has named **Kenneth Cassar** director of strategic analysis.

Performance Assessment Network, Inc., Carmel, Ind., has named **Marc Drizin** director of surveys and workforce research.

Kjell de Orr has been named global head of strategic accounts and client development in Germany-based *GfK's* ad hoc research division. He will work from his office at the Martin Hamblin GfK premises in London.

Research International has named **Phillip Cartwright** global senior

director, Marketing Science Centre. He will share his role between Research International in France and the Group Marketing Science Centre in London. **Ivan Ventura**, CEO of Research International in Italy, has been named global managing director of Research International Qualitatif, succeeding **Malcolm Baker**. **Greet Sterenberg** has been named global director, Research International Qualitatif.

Scott D. Upham has been named senior vice president of Rochester, N.Y.-based *Harris Interactive's* automotive and transportation research group.

Canton, Mass.-based *Tweeter Home Entertainment Group* has named **Jim Bengier** vice president/supply chain. Marketing research will be among his new responsibilities.

Jeff Kerr has joined *Guideline*

Chicago as vice president.

Herb Sorensen, president of *Sorensen Associates*, a Portland, Ore., research firm, has been named as one of *Fast Company* magazine's Fast 50 innovators – individuals whose "achievements have significantly advanced their companies or industries." Sorensen invented a shopper tracking technology that is designed to help retailers and manufacturers tailor store formats and merchandising programs to the greatest areas of shopper activity.

Willie Doyle has been named vice president of applications development at Indianapolis-based *Walker Information*.

Tim Ryan has joined *MarketVision Research*, Cincinnati, as vice president.

Andrew Fenning has joined Cincinnati-based *AcuPOLL* as its new president of European operations.

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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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Ethnic Research

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BRS conducts more accurate consumer surveys through language of choice interviewing. We can conduct thousands of telephone surveys, within a few days, in English and/or Spanish because we have 100 CATI stations staffed with fully dual-speaking bicultural interviewers, supervisors, programmers, and executives. Services offered: full-service Hispanic research, telephone data collection, data processing, survey and verbatim data translations, bilingual programming, bilingual interviewing, bilingual recruiting for qualitative studies.

(See advertisement on p. 97)

The Blackstone Group*

360 N. Michigan Ave., Suite 1500
Chicago, IL 60601
Ph. 312-419-0400 or 800-666-9847
Fax 312-419-8419
E-mail: info@bgglobal.com
www.bgglobal.com
Ashref Hashim, President
Services: FS, DC, DP, FG
African-American, Asian, Hispanic

The Blackstone Group has a rich history and earned comprehensive expertise in multicultural research, enabling your development of successful marketing strategies. Sensitive to each market's cultural differences, The Blackstone Group has conducted research on highly sensitive topics such as personal

finance, health, social services and employee diversity, with a powerful combination of diverse, highly-trained, multilingual interviewers, moderators and translators. Contact The Blackstone Group to achieve your multicultural research goals.

(See advertisement on p. 95)

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
African-American, 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
Fax 773-933-0558
E-mail: info@crmarketsurveys.com
www.crmarketsurveys.com
Cherlyn Robinson, Project Coordinator
Services: DC, FG, ST
African-American, Hispanic

**C&R Research Services, Inc.**

Creative & Response Research Services, Inc.
500 N. Michigan Ave., Suite 1200
Chicago, IL 60611
Ph. 312-828-9200
Fax 312-527-3113
E-mail: info@crresearch.com
www.crresearch.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

**Cheskin***

255 Shoreline Dr., Suite 350
Redwood Shores, CA 94065-1404
Ph. 650-802-2100
Fax 650-593-1125
E-mail: jgray@cheskin.com
www.cheskin.com
Carolina Echeverria, Partner
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. 99)

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

Communications Center, Inc.

1350 Connecticut Ave., N.W., Suite 1102
Washington, DC 20036
Ph. 866-YOUR-CCI or 202-223-4747
Fax 202-223-4245
E-mail: bids@ccclientservices.com
www.ccicorporate.com
Jerry Karson, Director of Client Services
Services: C, DC, DP, FG, S, ST, T
African-American, Hispanic

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

* Indicates minority-owned firm



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*Call Eastern Research for your next project.
It's a better way to survey the Hispanic market.*

CORPORATE HEADQUARTERS

Springfield Square; Suite 208
1001 Baltimore Pike, Springfield, PA 19064
Tel: 610-543-0575 Fax: 610-543-2577
www.easternresearch.com

Service Codes

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

**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
Raul Lopez, 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. 98)

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 Vision Research

2 Wynmor Rd.
Scarsdale, NY 10583
Ph. 914-722-4240
Fax 914-472-1229
E-mail: lbella@culturalvision.com
www.culturalvision.com
Services: FS, C
African-American, Asian, Hispanic, Middle Eastern

Data & Management Counsel, Inc.

428 Exton Commons
Exton, PA 19341
Ph. 610-524-7900
Fax 610-524-7866
E-mail: datamngt@aol.com
Bill Ziff-Levine, Managing Director
Services: FS
African-American, Asian, Hispanic, Middle Eastern

**DataPrompt International***

360 N. Michigan Ave., Suite 1610
Chicago, IL 60601
Ph. 312-423-4100 or 800-468-0419
Fax 312-423-4101
E-mail: marilyn.dent@datapromptintl.com
www.datapromptintl.com
Services: DC
African-American, Hispanic

Get the answers you need fast with DataPrompt International. Companies big and small choose DataPrompt International for data collection, coding and data processing services. Ethnic market research conducted includes personal finance, health care, media, lifestyles, workplace, and purchase behavior. We provide competitive costs through our excellent in-house resources: 100+ CATI stations, in-bound 800 number, multilingual interviewing, predictive dialing, multiple sample sources, mail/Web/e-mail surveys, field management, in-person surveys, data processing, qualitative facilities. Our expertise covers all major business-to-business and consumer categories. Next time you need data without the delays, call DataPrompt International. (See advertisement on p. 45)

* Indicates minority-owned firm

formerly Hispanic Market Connections

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- Qualitative research—focus groups, one-on-ones
- Quantitative studies—phone, intercept, door-to-door, on-line surveys
- Ethnographic studies and video ethnography techniques
- Hispanic, African American, Asian American & Urban Youth markets

Call us. 213.228.0300

Raul Lopez, President, 305.716.4065, rlopez@accesscag.com

Sharmila Fowler, Director of Business Development, 630.357.8002, sfowler@accesscag.com

Jeromina Pilar, Director of Business Development, 212.987.3433, jpilar@accesscag.com

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with new opportunity.

Culture is today's challenge. Diverse segments are becoming the majority in many markets. Mainstream consumers are discovering a new sense of cultural identity. That means new influences are affecting your customers' decision—influences that can quickly build, or erode, market share.

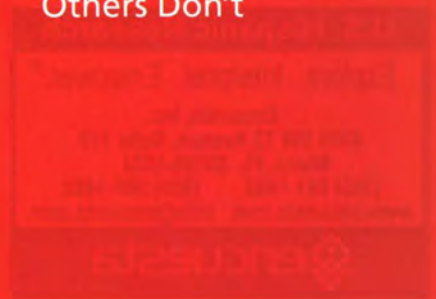
If your goal is product or brand innovation, you need a fresh perspective on how customers and cultures are shifting and which opportunities make sense. That's where we can help. Strategic research to inform your critical decisions. Consulting to translate insights into products, brands and new business opportunities. Get ready. Your brand is about to enter a whole new world.

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Service Codes

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M Davis & Co., Inc.*

1520 Locust St., 3rd floor
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

**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, FG
African-American, Asian, Hispanic

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. 57)

Directions In Research, Inc.

8593 Aero Dr.
San Diego, CA 92123
Ph. 800-676-5883 or 619-299-5883
Fax 619-299-5888
E-mail: pizzo@diresearch.com
www.diresearch.com
Paul X. Izzo, Executive Vice President
Services: FS, C, DC, DP, FG, S, ST
Hispanic

Distinctive Marketing, Inc.*

516 Bloomfield Ave.
Montclair, NJ 07042
Ph. 973-746-9114
Fax 973-783-5555
E-mail: dmiassociates@aol.com
www.distinctivemktg.com
Diane Spencer, President/CEO
Services: FS, C, DP, S, ST, T
African-American, Asian, Hispanic, Middle Eastern, Native American

**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. Two mall locations located in New York, New Jersey and three focus group facilities located New York, Washington, D.C. and Miami, all equipped with full kitchens. EMR has the range, reach and rapport to produce timely, accurate data on a wide range of specialized and mainstream markets.
(See advertisement on p. 49)

**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. 100)

**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*

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Park Royal
London, England NW10 7PN
Ph. 07000-266-587
Fax 0208-838-5731
E-mail: research@ethnicfocus.com
www.ethnicfocus.com
Services: FS, C, DC, DP, FG, S, ST, T
African-American, Asian, Hispanic, Middle Eastern

FGI Research

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Chapel Hill, NC 27516
Ph. 800-765-4344 ext. 460
Fax 919-932-8829
E-mail: info@fgiresearch.com
www.fgiresearch.com
Dino Fire, General Manager
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U.S. Hispanic Research

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(305) 661-1492 (800) 500-1492

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* Indicates minority-owned firm



fieldwork

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Chicago, IL 60611
Ph. 800-TO-FIELD or 800-863-4353
Fax 312-923-7405
E-mail: info@network.fieldwork.com
www.fieldwork.com
Services: FG
Branch Offices:

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
Bette Hayden
Services: DC
African-American

Fieldwork Chicago-North at Harmswood

5750 Old Orchard Rd., Suite 500
Skokie, IL 60077
Ph. 847-583-2911 or 800-851-3317
Fax 847-583-1996
E-mail: info@chicago.fieldwork.com
www.fieldwork.com
Sanford Adams
Services: DC, FG, T
African-American, Asian, Hispanic, Middle Eastern, Native American

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 Lane, Suite 1880
Schaumburg, IL 60173
Ph. 847-413-9040
Fax 847-413-9064
E-mail: info@schaumburg.fieldwork.com
www.fieldwork.com
Karyn Picchiotti
Services: DC, FG
African-American, Hispanic

Fieldwork Dallas, Inc.

15305 Dallas Pkwy., Suite 850
Dallas, 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, FG
Hispanic

Fieldwork East, Inc.

2 Executive Dr., Suite 800
Fort Lee, NJ 07024
Ph. 201-585-8200 or 877-993-4353
Fax 201-585-0096
E-mail: info@ftlee.fieldwork.com
www.fieldwork.com
Carol T. or Sandy S.
Services: DC, FG
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
Hispanic

Fieldwork Minneapolis, Inc.

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: FG
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
Loretta Dienzo, President
Services: DC
African-American

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@phoenix.fieldwork.com
www.fieldwork.com
Services: FG
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: FG
African-American, Asian, Hispanic

Fieldwork Phone Center

4849 N. Milwaukee Ave., Suite 500
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Fax 415-989-4506
E-mail: ffr@ffrsf.com
www.ffrsf.com
Services: DC, DP, FG
African-American, Asian, Hispanic

Foreign language/quantitative capabilities: data collection, programming and tabulation. Highly-trained, CATI proficient phone interviewers; including executive/professional/medical and eight foreign languages: Spanish, Cantonese, Mandarin, Korean, Vietnamese, Tagalog, Cambodian, Thai. On-site and remote monitoring capability. Timely and responsive execution and delivery. Matchless probing providing quotable verbatims for ad copy and presentations. Seasoned managers and supervisors with experience who can assist in questionnaire development and formatting. Adherence to MRA recommended training procedures. Pre-testing and role playing practice interviews are our standard. CATI - Sawtooth Software. Outstanding reputation for client orientation. Member - AAPOR, FocusVision, AMA, MRA, BBB, VideoInterclipper.
(See advertisement on p. 101)

Service Codes

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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

Focus Groups of Cleveland Survey Center

2 Summit Park Dr., Suite 225
Cleveland, OH 44131
Ph. 216-901-8075 or 800-950-9010
Fax 216-901-8085
E-mail: research@directdata.com
www.focusgroupsofcleveland.com
Betty Perry, Director
Services: FG
African-American, Hispanic

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 or 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 U.S. Hispanic markets. 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. 102)

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, ST
African-American, Hispanic

Focus Pointe Dallas

Park Central VII
12750 Merit Dr., 10th floor
Dallas, TX 75251
Ph. 800-US-FOCUS or 972-386-5055
Fax 972-387-9915
E-mail: BNance@focuspointe.net
www.focuspointe.net
Bob Nance, Exec. Director
Services: FG
African-American, Hispanic

Focus World International, Inc.*

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Holmdel, NJ 07733
Ph. 732-946-0100
Fax 732-946-0107
E-mail: gary@focusworldint.com
www.focusworldinternational.com
Paulette Eichenholtz, President
Services: C, DC, DP, FG, S, ST, T
African-American, Asian, Hispanic, Middle Eastern

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**

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Fort Washington, PA 19034-2706
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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. 75)

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
African-American, Hispanic

HEADFIRST market research, inc.*

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

FOCUS LATINO

QUALITATIVE CONSUMER RESEARCH

- Established 1996. Extensive marketing, advertising and research experience among Latino consumers in Mexico, Latin America and USA across multiple product and service categories.
- Our expertise, bilingual capabilities and option of male or female moderator help to better uncover consumer insights and provide value-added recommendations.
- Also coordinate reliable fieldwork for Quantitative projects.

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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 92590
 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 Access

12000 Richmond Ave, Suite 200
 Houston, TX 77082
 Ph. 713-482-6666
 E-mail: hispanic@hispanicaccess.com
 www.hispanicaccess.com
 Michael Pope
 Services: FS, DC, DP, S, ST, T
 African-American, 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.hisp-med.com
 Dr. Jose Acuna, President
 Services: FS, C, DC, FG, S
 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.**

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: consulting, secondary research, speaking events and presentations, qualitative research and quantitative research.

(See advertisement on p. 104)

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 Fax 914-834-5998
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Fax 212-343-9895
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Loretta Marketing Group (LMG) is a marketing research and consulting firm with a mission of service to the marketing needs of clients seeking to understand the U.S. Hispanic and Latin American markets by conducting qualitative and quantitative research. Call Jim Loretta at 305-232-5002 (born in Mexico and educated in the U.S.A.) to begin the process of understanding the rich Hispanic culture on either side of the Rio Grande! (See advertisement on p. 107)

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Hispanic

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Trade Talk

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(39.7 percent) of all ads served by Q4. In terms of performance, DoubleClick's new Audience Interaction Metrics, which measure interaction with rich media ads served through DART Motif, showed initial strong results. In Q4, the average amount of time a Motif ad displayed in a user's browser was 41.9 seconds and the average amount of time a user interacted with the ad was 21.9 seconds. Figures like these are intended to help marketers make comparisons with broadcast media, where a typical unit can engage a consumer for 30 seconds.

The Fortune 500 voted in favor of rich media during the year, accounting for 45.5 percent of all rich media advertising in Q1 and 38.8 percent in Q4. Cell phones led this category: SBC at 2.2 billion impressions, followed by AT&T Wireless at 1.9 billion impressions.

Pop-ups and pop-unders, which DoubleClick categorizes as a subset of rich media, are perhaps the most controversial form of online advertising. Not surprisingly, their usage did not grow dramatically in 2003. Within DoubleClick's system they account for under 2 percent of all ads served, and AdRelevance shows them as fluctuating between 5 and 7 percent of the total market. The big-brand advertisers however continue to shy away from them; Fortune 500 share of pop-up advertising is lower than industry average at 3 percent of all Fortune 500 advertising.

The other growth story of 2003 was search. But, while search is clearly hot among online advertisers, it should be noted that its impact is category-relevant. An annual survey sponsored by DoubleClick (Touchpoints II, March 2004) of over 2,000 consumers who have made purchases of particular types of products in the last six months, showed that their usage of search varied by product type. Of those who visited Web sites to learn about products and services, 58 percent of those searching for consumer electronics used a search engine and 53 percent of those looking for prescription drugs did so. But for products like telecommunications, only 38 percent did so. For credit cards and banking, only 20 percent did so. In categories with lower usage of search, consumers were more likely to guess URLs, probably because these categories have more established brand or product names. **Q**

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Online ads rebounded in 2003

With ad research as our focus this month, I've grabbed a handful of findings from press materials supplied by New York-based DoubleClick Inc. and Nielsen//NetRatings on their joint Year in Online Advertising Report for 2003.

For the report, DoubleClick supplemented its own ad-serving data with data from Nielsen Monitor-Plus (measuring offline media spending) and Nielsen//NetRatings AdRelevance (measuring online spending) to paint a fuller picture of the relative growth of ad spending both in aggregate and by industry segments.

—JR

Nielsen//NetRatings AdRelevance reported that online advertising (not including search) rose to the highest levels of the year, with 280 billion impressions in Q4. DoubleClick data, which represents publishers, marketers and advertising agencies that use third-party ad serving, showed high levels of growth: from Q1 to Q4, DoubleClick volume was up 49 percent. The Internet Advertising Bureau (IAB) reported that ad spending grew 20 percent year-over-year to \$7.2 billion.

"All indicators support that 2003 was the year online advertising rebounded," says Doug Knopper, senior vice president and general manager, advertiser and publisher solutions at DoubleClick. "The online medium outpaced certain categories of traditional media in terms of spending growth; volume is up across

categories and Fortune 500 companies renewed their commitment to interactive marketing with steady investment. In terms of driving the space forward, search and rich media are the strongest contenders, and the industry is following those performance metrics closely and with great optimism."

According to Nielsen Monitor Plus data and IAB numbers for Q1 2003 vs. Q1 2002, online spending growth (+11.3 percent) outpaced spot TV (+3 percent) and outdoor (+5.2 percent), as well as network TV (-12.1 percent). Growth slowed for online by Q3 03 to +5.9 percent over Q3 02, but still outpaced TV growth (+3.5 percent).

Automotive had the largest growth on an impression basis year-over-year (+74.9 percent). Telecommunications was a big focus for online advertising as the FCC portability ruling inspired a wealth of service offerings. It came in third, at 31.2 percent growth, year-over-year, on an impression basis. Retail is another category dramatically impacted by online and 8.7 percent of total spend is devoted to the medium. However it was the only category to show a dramatic decrease in impressions.

Online now accounts for 48.5 percent of business proposition and employment recruiting ad spend. In travel, 15.4 percent of all spending is now online. Business and consumer services (which includes credit cards and financial services) devoted more advertising to online than to newspaper, magazines or radio. This category

was clearly driven by the movement towards self-directed investing, online banking and low interest rates. In addition, a very useful indicator of the health of online media is growth in usage by Fortune 500 companies. Their usage was relatively stable during the year at an average of 28.5 percent of all online advertising.

The list of top 25 marketers in 2002 was heavily weighted towards the surviving dot-coms (Amazon.com, AOL, eDiets, X-10 Wireless, eBay, etc.). The top 25 list of 2003 was a different story. X-10 has dropped off entirely, while others have decreased spending. Strong online companies like eBay and Amazon have likely tapered off banner advertising because they have already built their brands. The telecom and financial services resurgence that drove increased online marketing investment in those sectors was reflected by SBC (+168.1 percent year over year), AT&T Wireless (+21.3 percent) and Verizon (+5.6 percent), which all made the top 25 list as did Ameritrade (+22.8 percent), BankOne (11.9 percent), Scottrade (+26.7 percent), Ameritrust (+352.7 percent), Citigroup (+3.8 percent) and LowerMyBills.com (+775 percent).

Nielsen//NetRatings AdRelevance estimates 223 percent rich media growth Q1-Q4 to 17.4 percent of all ads. Within the DoubleClick system, rich media grew to nearly 40 percent

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