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Marketing Research Review

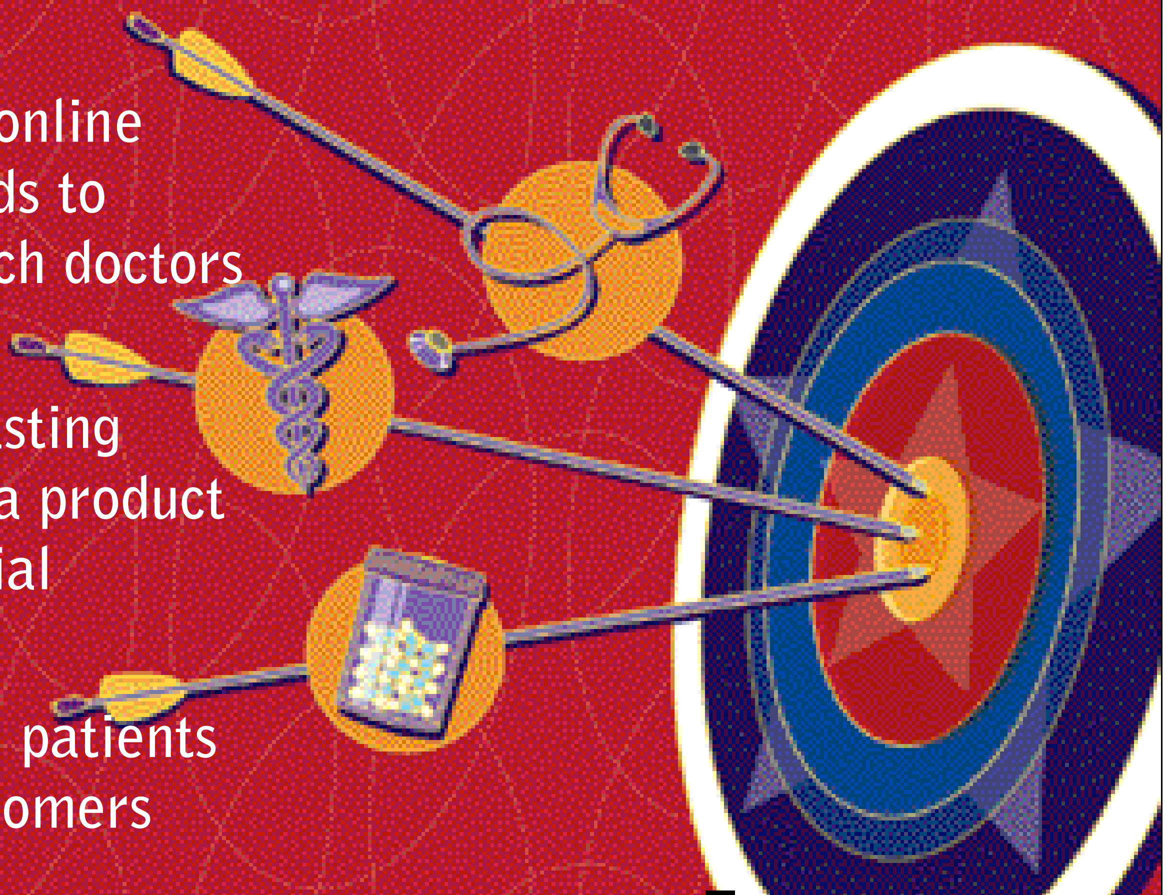
JUNE 2005

Health care research issue

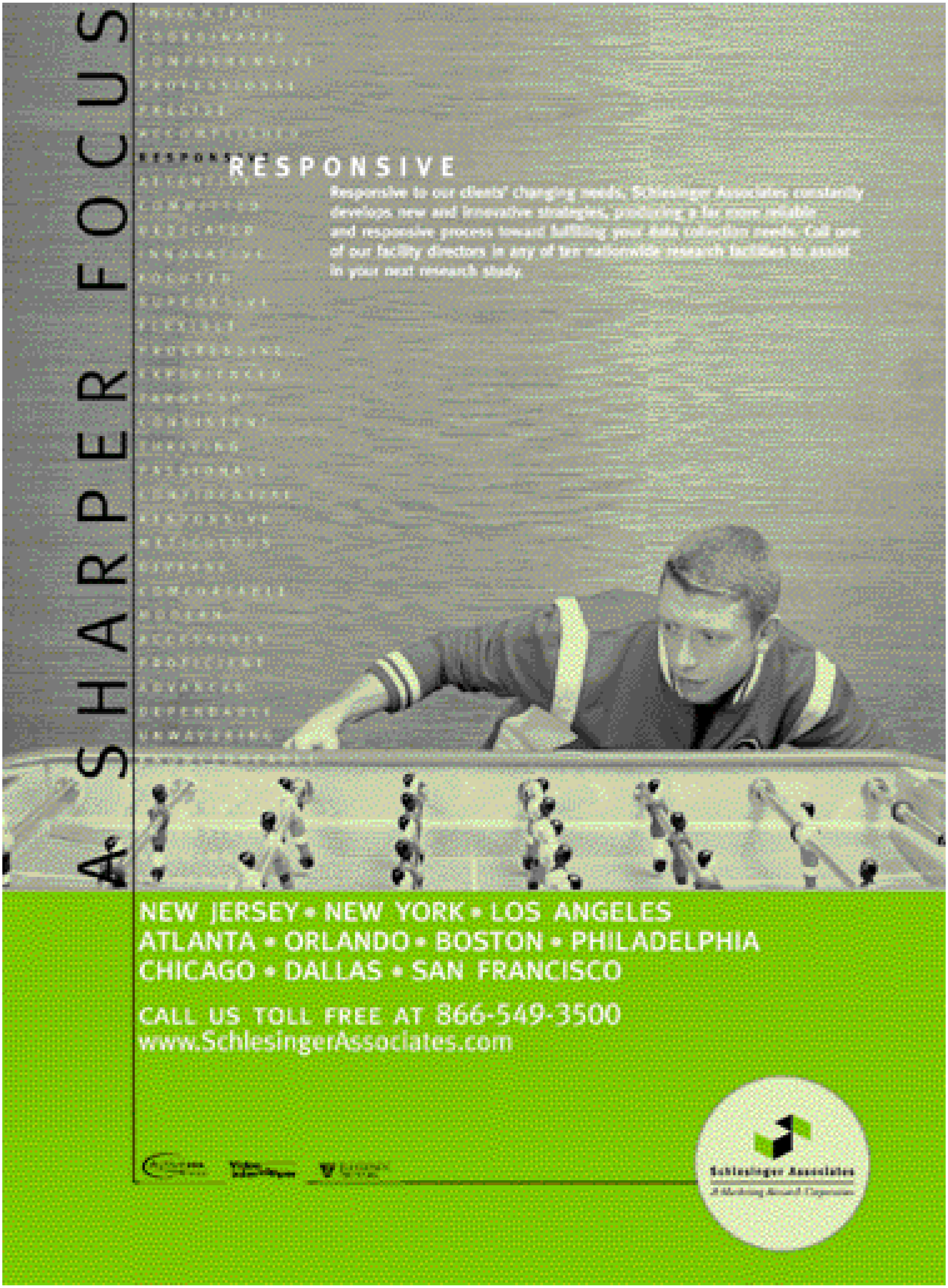
> Using online methods to research doctors

> Forecasting pharma product potential

> Seeing patients as customers



2005 Ethnic Research Directory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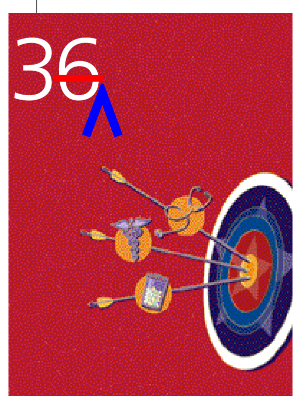
contents

techniques

columns

departments



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In case you missed it...

news and notes on marketing and research

A dispatch from the media measurement front

An April *New York Times Magazine* article by Jon Gertner offered a thorough and thoughtful examination of the current state of media measurement, chronicling the efforts of Arbitron, Nielsen and little-known ErinMedia to create and perfect the next generation of technology to monitor what we watch, hear and read. It will be fascinating to see not only which system, if any, wins out but also to watch the impact that the numbers have on marketing and programming budgets. The article raises a number of questions: Will measuring viewership via cable TV set-top box trump the People Meter approach? Will out-of-home ads gain greater importance as technology allows Portable People Meters to show that consumers were exposed to them? Will Arbitron and VNU's Project Apollo, which measures the media we are exposed to and the products we buy, be the Holy Grail that proves advertising's effectiveness (or lack thereof) once and for all? Stay tuned.

"Our Ratings, Ourselves," *New York Times Magazine*, April 10, 2005

Research department as bellwether?

The 2005 Marketplace Survey of market research professionals by Stamford, Conn.-based MarketResearchCareers.com found that one-third of corporations anticipate hiring new market research employees in 2005, typically at the entry or manager level.

To understand current trends in corporate market research, including hiring plans, budgets and research methods, the opinions and behaviors of 335 corporate researchers were captured in an online survey conducted by InsightExpress in January 2005. Key findings include:

· Two-thirds of market research professionals anticipate their jobs becoming more difficult in 2005. Reasons cited include budget concerns, time management, and "not having enough staff to get the jobs done."

· The most common source of market research information is survey data, used by 94 percent of companies surveyed. Other sources include: syndicated research (78 percent); focus groups (74 percent); company sales data (67 percent); and scanner data (16 percent).

· Eighty-eight percent of corporations use online methods to conduct survey-based market research. Sixty-five percent of those surveyed agree that the speed of online research has helped accelerate the pace of their business. Half of all online research dollars are spent on projects transitioning from traditional (i.e., telephone, mail, etc.) research methods.

Philip Reeve, president of Reeve & Associates, a recruiting firm specializing in the market research industry, agrees there's a high demand for market research professionals across all levels. "Companies tell us directly and through this study it is challenging to find experienced market research staff to handle all the projects planned," he says. "This is a sign of a strong economy, and over the years, we have seen a direct correlation between the growth of market research departments and the performance of the U.S. economy."

Canadians support market research

Eighty-seven percent of Canadians believe that market and survey research serves a valuable societal purpose, but deceptive telemarketing practices by unscrupulous direct sellers and fundraisers remain a threat to the goodwill that Canadians have for survey research, according to a national poll by the Marketing Research and Intelligence Association (MRIA), a Canadian industry association.

"Canadians overwhelmingly maintain a high regard for survey research as a forum for providing input and feedback to corporate and government decision-makers," says Don Mills, president of the MRIA. In fact, 87 percent of respondents in the MRIA survey agreed that research serves a valuable purpose by allowing them to voice their opinions on important issues related to products, services and public policy.

"Unfortunately, Canadians continue to be plagued by fraudulent marketers and fundraisers who use the survey research industry's good reputation to sell goods or services or solicit money under the guise of a legitimate marketing research survey. Alarmingly, our study shows that more than half of Canadians continue to be subjected to deceptive direct selling and fundraising practices each year," Mills says.

These practices, known in the industry as mugging (marketing under the guise of interviewing) and sugging (soliciting or selling under the guise of interviewing), are illegal in Canada. Yet, 53 percent of respondents reported being contacted for a survey that actually turned out to be an attempt to sell a product or service, while another 27 percent had received survey calls whose true purpose was to raise funds for a charity or similar organization. "Respondent rights are at the core of our industry, and the violation of respondents' rights by those who pose as survey researchers under false pretenses is a serious issue," says Mills. "MRIA has been working closely with Canadian legislators to address this issue, including operating the Canadian Survey Registration System to track our members' research projects."

Canadians continue to hold a very positive attitude towards the research industry. The study indicates that the participation rate in surveys significantly increased over previous years, indicating that respondents do not associate legitimate researchers with fraudulent practices. In 2004, 52 percent of Canadians had participated in a survey in the previous year, as compared to 45 percent in 2001 and 42 percent in 1995.

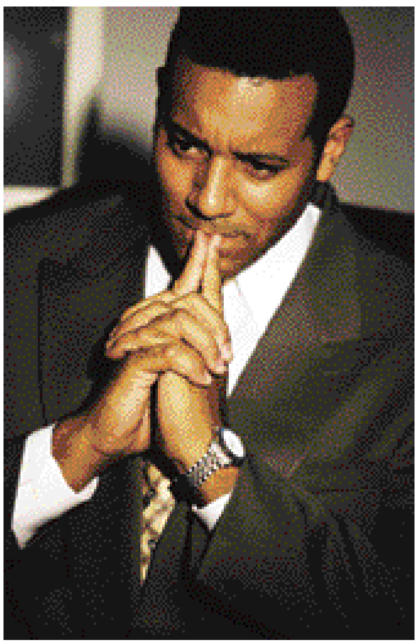
Target innovates again

Target has long touted its practice of using design to improve lives. Now it's using design to possibly save them. The new Target-red ClearRx containers, which debuted May 1st, boast a host of user-friendly features aimed at making prescription medicine usage safer and easier. The palm-sized vials, which open on the bottom rather than the top, have a squarish shape which allows for flat fronts that place all the necessary information right where the patient needs it. Color-coded rings are available to identify and personalize each prescription. Detailed information on a drug (its common uses, side effects) now comes on a card that sits tucked behind the label. A separate, more extensive education sheet comes with three punched holes so it can be saved in a binder for reference.

The new bottles may not catch on with consumers and draw business away from the Walgreens of the world, but there's no doubting the genius of taking a mundane yet vitally important item like a prescription bottle and rework ing it into a brand differentiator.

African-Americans active, interested investors

The Hunter-Miller Group, a Chicago research firm, has released a report on the investment habits of African-Americans compiled from a number of primary and secondary research sources. Many are pursuing saving and investment strategies to support their household needs and wants, retirement and the unexpected. However, the saving and investment habits of blacks tend to differ from those of whites, particularly at lower income levels, due to financial differences as well as a lack of knowledge and confidence regarding options. With the increasing affluence of African-Americans and an interest in fiscal planning, a tremendous opportunity exists for financial organizations to approach this underserved market in culturally appropriate manners to build wealth within the community.



The growing affluence of African-Americans is evident in:

• Their $723.1 billion in spending power in 2004, a 127.2 percent increase from 1990. It is expected to increase 33.4 percent to $964.6 billion by 2009, according to the Selig Center for Economic Growth.

• Their estimated wealth transfer value of $1.1-$3.4 trillion between 2001 and 2055, which will primarily be passed on to younger generations, according to the Center on Wealth and Philanthropy. Aggregate black household net worth was $1.1 trillion in 2001.

• The fact that 33 percent of black families had income of $50,000+ and 16 percent had income of $75,000+ in 2002.

• Their median income increasing 88 percent between 1987 and 2001, outpacing the 62.1 percent growth for whites.

However, their saving and investment activities tend to be unique given overall financial differences compared to whites and less knowledge of and/or confidence in the many options:

• Home ownership, a step in asset building, has been on the rise from 47.7 percent in 2002 to 49.1 percent in the 4th quarter of 2004. And 61 percent view real estate as the best investment overall compared to 51 percent of whites.

• 68 percent had money invested in the stock market in 2004, up from 61 percent in 2003 but still down from 74 percent in 2002, compared to 80 percent of whites, per Ariel/Schwab.

• They are becoming more confident and knowledgeable about the stock market. Forty-one percent of non-investors intended to invest in the stock market compared to 28 percent of white non-investors, per Ariel/Schwab.

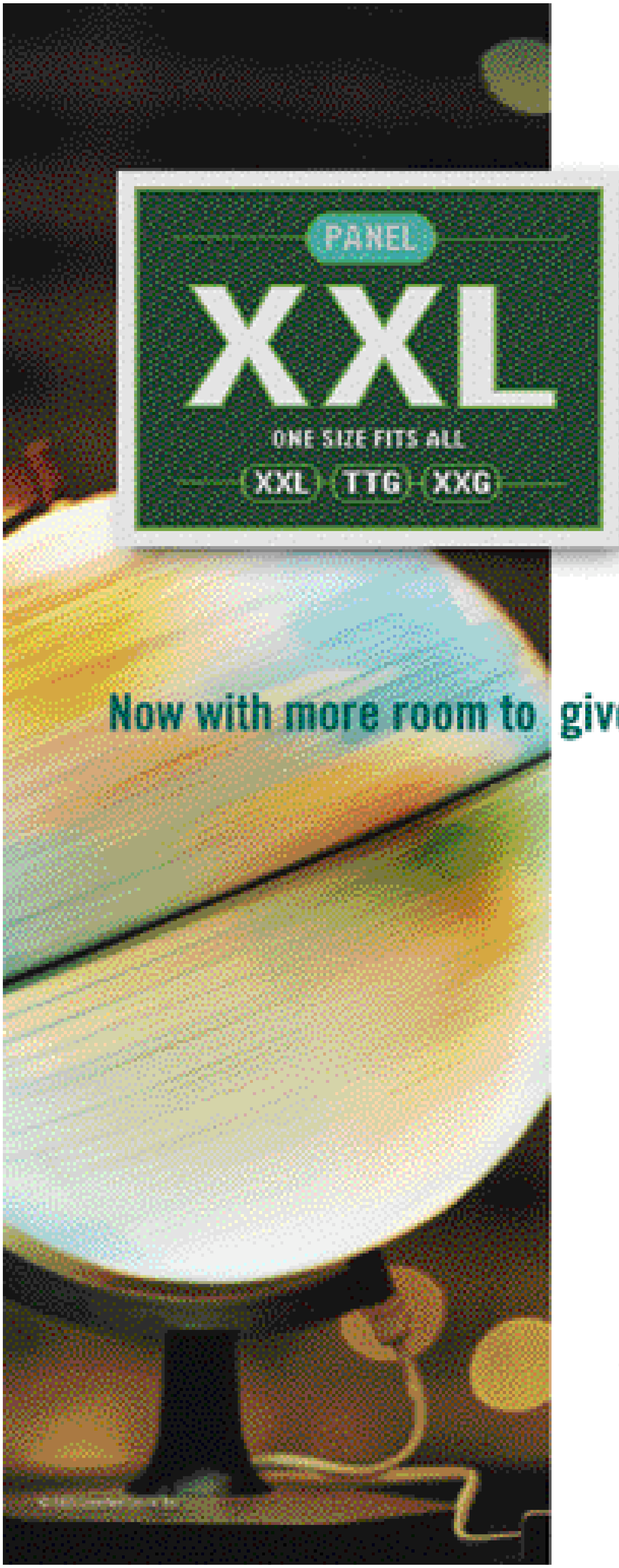
• Although the net worth of blacks is increasing, they have less money in long-term investments compared to whites with similar incomes, primarily due to lack of knowledge.

• 59 percent of black workers or their spouses have saved for retirement compared to 71 percent of all workers, according to the 2003 Minority Retirement Confidence Survey (RCS). Their average IRA balance was $20,688 in 2002 compared to $27,873 for whites and their average 401(K)-type plan balance was $20,338 compared to $35,808 for whites, per EBRI. For those with annual incomes of $100,000+, 66 percent of blacks

continued on page 62

2003 Selected Financial Product Ownership	Blacks*	Whites*
Bank savings account	86%	86%
401K retirement plan	72%	66%
Whole life insurance	64%	49%
Stock or bond mutual fund	53%	63%
Individual stocks	41%	52%
IRA	37%	44%
Money market accounts	36%	45%
CDs	34%	33%
Individual bonds	30%	25%
Fixed or variable annuities	29%	27%
Education IRA	22%	17%

* *Percentage of those surveyed with annual incomes of $50,000+, from Ariel/Schwab (2004)*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names of note

New York-research firm *Find/SVP* has named **Frank Dudley** vice president of marketing.

The New York-based *Advertising Research Foundation* has named **Caryn Brown** vice president of events and **Lisa Malone** vice president - director of marketing.

Brown

Malone

Consumer Pulse, Inc., Birmingham, Mich., has named **Tracey Edwards** manager of its Baltimore - Columbia Mall office.

Observation Baltimore has named **Karen Hernandez** project manager.

Julie Cox has joined *Market Probe, Inc.*, Milwaukee, as vice president and head of the data acquisition services division.

Connetics Corporation, a Palo Alto, Calif., pharmaceutical firm, has named **James A. Trah** vice president, marketing. Marketing research will be among his new responsibilities.

EQuesta, the online division of U.K.-based *Fieldwork International*, has added **Lyndon Woods** to oversee the development of its physician panel.

Lightspeed Research, Basking Ridge, N.J., has named **Nadine Faure** account director - France. She will head up the firm's new Paris office.

Karen-Marie Eaton has joined *Decision Analyst*, Arlington, Texas, as director of medical research.

Separately, **Diane Brewton** has been tapped to direct the firm's new syndicated research group.

Harris Interactive, Rochester, N.Y., has hired **Aled Morris** as managing director of its HI Europe UK operations.

Arbitron Inc., New York, has named **Carolyn Clark** senior account manager within the company's national radio services department.

Jim Babiak has joined *Product Evaluations, Inc.*, a La Grange, Ill., research firm, as a client services coordinator.

AllPoints Research, Inc., Winston-Salem, N.C., has named **Andrew Stern** market research strategist.

U.K.-based research firm *ESA* has named **Joanne Dunlop** senior project executive within the client service projects team and promoted **Kimberley Maidment** to project executive, also within the projects team.

Dunlop

Maidment

Millward Brown has announced a number of staff promotions: **Bob Coppola** to vice president, client service, in the Detroit office; **Charles Foster** to managing director, Millward Brown South Africa; **Greg DePalma** to vice president, market development, Fairfield, Conn.; **Doreen Harmon** to vice president, client service, Fairfield, Conn.; and **Jackie Parkinson** to group account director, Millward Brown UK. In addition, **Nitin Nishandar** has been named director, Millward Brown Taiwan, and **Warwick Nash** has been appointed managing director, consultancy services, Millward Brown UK. **Elaine Holland** has been appointed senior vice president, global human resources, and a member of Millward Brown's main board. She will be based in the Naperville, Ill., office.

Randa Bell has been named vice president of *ASDE Survey Sampler*, Gatineau, Quebec.

Anita Frazier has been named entertainment industry analyst for *NPD Funworld*, Port Washington, N.Y.

Research International has named **Nicky Buss** client services director of its U.K. company.

Opinion Research Corporation, Princeton, N.J., has named **Philippe Monnier** managing director of its Mexico operations.

Tony Cardinale has joined the *Bravo* TV network as vice president, program research.

Santa Cruz, Calif., research firm *Evans Data Corporation* has named **John F. Andrews** chief operating officer and director.

Michael Bryan has joined *Claritas Inc.*, San Diego, as senior vice president, strategic resources, in the company's Arlington, Va., office.

Ingather research-denver has promoted **DJ Jerkes** and **Abby Radbill** to database manager and call center supervisor, respectively.

Stamford, Conn.-based research firm *InsightExpress, LLC*, has named **William E. Lipner** chairman and CEO and **Patrick G. Healy** vice-chairman.


ONE WORLD, ONE CALL

product and service update

Translation transmission from ActiveGroup

ActiveGroup, Norcross, Ga., has launched DAT or Dual Audio Transmission, an enhancement to the ActiveGroup video streaming service. DAT can be used when the respondents do not speak the same language as that of the event viewers. Typically in these cases a translator is on-site at the facility. The translator listens to the respondents and translates the conversation into the requested language. Before DAT, off-site viewers would hear this translated audio in the video stream. Other viewers may prefer to hear the native language being spoken by the respondents. Prior to DAT, the only way to accommodate both types of viewers would be to video stream one audio feed and then place a telephone in the group room to broadcast the native language via phone. All off-site viewers who wished to hear the native language would have to dial into a conference bridge to hear the audio feed.

The DAT technology lets viewers select between either of the two languages available - and do it all over the Internet. Clients log on to the event as they normally would and open the ClientLounge viewer interface. Under the video window are two icons. Click one and the native audio from the focus group room will be broadcast; click another icon and the translated audio will be broadcast. If desired, the clients can switch back and forth to hear either audio feed. The two feeds are available during the live and on-demand viewing. For more information visit www.activegroup.net.

New Hispanic research service

Cincinnati-based Marketing Research Services Inc., has introduced Enfoque, a three-step Hispanic marketing research solution designed to simplify the research process for companies marketing to Hispanics in the United States. Enfoque, meaning "focus," is comprised of three steps: discover, explore and grow. Each step uses a mix of quantitative and qualitative research tools. Step one, discover, focuses on helping clients understand which Hispanic consumers to target. Step two, explore, determines the best communication and product strategies. Step three, grow, helps clients measure the impact of marketing initiatives on the Hispanic market and identify ways to further increase market share. For more information visit www.mrsi.com.

Net-MR 5.0 from GMI

Seattle-based Global Market Insite, Inc. is now offering Net-MR 5.0, a new version of its suite of online survey software. The product includes improvements to Net-Panel and Net-CATI, plus a new survey authoring application, Design Studio. Net-MR 5.0 enables market research organizations to survey global panels and process questionnaires that can be used simultaneously for data collection by the Internet, CATI and CAPI.

Net-MR was enhanced with increased capacity and performance, as well as improved panel management capabilities to scale with companies' needs. Net-MR 5.0 can integrate with legacy systems and companies' existing software, such as incentive management and customer relationship management applications.

GMI added new features to help users manage huge volumes of information, such as: a "household" concept within the Net-Panel application, which groups data from survey panelists who share similar attributes, and the new Question Library to store survey questions over time.

Leveraging the flexibility of the Web services model, Net-MR is designed to simplify the process of sharing and transferring data between offline and online applications. For instance, the enhanced Net-CATI application now lets customers integrate telephone interviewing into their Internet-based solution, while the Design Studio provides a single interface for designing both online and offline surveys. The Design Studio supports multi-mode data collection, allowing a market researcher to use a single surveying tool to run surveys that are based on Web, telephone and personal interviewing. For more information visit www.gmi-mr.com.

Monitor price issues with IRI service

Information Resources, Inc. (IRI), Chicago, is now offering the IRI Cross-Border Pricing solution. Available as part of IRI's Consumer-driven Enterprise Management Solutions suite, IRI's Cross-Border Pricing monitors and manages actual prices market-by-market, providing a set of tools to anticipate and reduce pricing issues across markets.

Using IRI or any other point-of-sale data, it enables users to determine how price changes and other actions aimed at reducing exposure are expected to affect volume, revenue and profit. Once decisions have been made, a series of workflows enable manufacturers to push the price adjustments out to the field teams, and then help measure results against plan to track performance over time, ensuring price stays within the set corridors.

IRI Cross-Border Pricing also works to support improved relations between manufacturers and retailers. Its continuous collection of granular transactional data and use of automated rules and models provides a foundation for discussing prices and their impacts with retail partners. Using

continued on page 70

News notes

Information and media firm **VNU** confirmed that in early March one of its offices and five of its subsidiary ACNielsen Company's offices in Europe were visited by officials of the European Commission, Directorate General for Competition, with requests for information. Based on a complaint by ACNielsen competitor Information Resources, Inc. (IRI), Chicago, the commission sought documents concerning ACNielsen's contracting and pricing practices in Europe. In a press statement VNU said it is cooperating fully with the commission and is confident that its practices fully comply with European law. IRI's U.S. antitrust lawsuit against ACNielsen was dismissed in February 2005 for failure of proof by the U.S. District Court for the Southern District of New York.

Figures released by the **British Market Research Association** (BMRA) reveal that overall U.K. market research industry revenues grew by 5.4 percent in 2004 to a value of £1.29 billion ($2.45 billion), delivering growth significantly above inflation after two nearly flat years. (The industry size estimate is based on returns from BMRA members accounting for around two-thirds of the total sales of the association's member firms. Due to restrictions under U.S. Sarbanes-Oxley legislation, WPP companies [BMRB, Millward Brown and Research International] are not permitted to submit returns of unaudited 2004 results. BMRA, however, included them in the total industry estimates by applying growth at the average rate of the reporting members.)

The overall result marks a sharp difference between the performance of U.K.-based market research companies in domestic and international markets. The domestic sector, which makes up 73 percent of the market, grew by 3 percent on the previous year – just above the rate of inflation. By contrast, the international sector, which makes up 27 percent of the market, grew by 12.8 percent on 2003, delivering strong recovery after the previous year of decline.

The results indicate the continued support for market research by U.K. businesses and organizations. The market research agencies' performance suggests that the medium-sized and smaller companies have taken greatest advantage of the favorable economic conditions to increase their share of the market. On average, BMRA-member companies with 2004 sales of less than £10m grew by 11 percent over 2003, while those with sales in excess of £10m in 2004 delivered year-on-year growth of only 4 percent.

"We believe the overall performance reflects confidence and strength in the U.K. economy in general," says Ivor Stocker, chairman of BMRA. "At the same time, the relative strength of continental European markets and the euro's performance against the pound may have given a boost to research budgets and commissions from outside the U.K.

"Looking forward, as long as the global economy doesn't lose its nerve, there is every reason to expect the international market to hold up. However, we are unlikely to return to double-digit growth for the whole industry in the foreseeable future, simply because the 2004 result reflects recovery from a weak 2003 position. The performance of the domestic mar-

continued on page 72

Calendar of Events June-October

The American Marketing Association will hold its annual Advanced Research Techniques forum on June 12-15 at the Coeur d'Alene Resort, Coeur d'Alene, Idaho. For more information visit www.marketingpower.com.

The Travel and Tourism Research Association will hold its annual conference, themed "The 3 R's: Research, Results and Rewards," on June 12-15 at the New Orleans Marriott. For more information visit www.ttra.com.

Canada's Marketing Research and Intelligence Association will hold its annual conference and trade fair on June 19-21 in Halifax, Nova Scotia. For more information visit www.mria-arim.ca.

ESOMAR and the Advertising Research Foundation are co-sponsoring the Worldwide Audience Measurement conference (online, outdoors/out-of-home, print, media mix, radio, TV) on June 19-24 in Montreal. For more information visit www.esomar.org/wam2005.

ESOMAR will hold its annual congress on September 18-21 in Cannes, France. For more information visit www.esomar.org/congress2005.

Klein Associates will hold its next cognitive task analysis workshop, "Putting Cognitive Task Analysis to Work: Understanding Users, Customers, and Experts," on September 20-22 in Fairborn, Ohio. For more information visit www.decisionmaking.com.

The American Marketing Association will hold its annual marketing research conference on September 25-28 at the Marriott Copley Place in Boston. For more information visit www.marketingpower.com.

The Council of American Survey Research Organizations will hold its annual members-only conference on September 28-30 at the Four Seasons Hotel, Toronto. For more information visit www.casro.org.

The Australian Market and Social Research Society will hold its 2005 national conference on October 9-11 at the Sydney Convention and Exhibition Centre, Darling Harbour. For more information visit www.amsrs.com.au.

The Qualitative Research Consultants Association will hold its annual conference on October 19–22 at the Beverly Hilton Hotel, Beverly Hills, Calif. For more information visit www.qrca.org.

ESOMAR will hold its annual Latin American conference on October 23-25 in Buenos Aires. For more information visit www.esomar.org/latinamerica2005.

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By Sylvia Nieto-Vidal

Fielding ethnic research? The success is in the details

As the U.S. marketplace continues to realize the value and importance of the ethnic markets, we are seeing an increasing number of research firms offering multicultural research services. Buyer beware! Before you select a research partner to conduct research for you in the multicultural marketplace you need to make sure they know the nuances of fielding these projects.

Several market research firms are opening up ethnic divisions by hiring one or two multicultural employees to head up their efforts. Keep in mind that while a research agency may be top-notch in conducting your general-market research projects this does not qualify them for superior performance in handling multicultural research. There are many important operational details that are important and that come with years of experience in intercepting, telephoning and speaking with these multicultural consumers.

• *Designing the questionnaire*

While many of the same components go into designing a questionnaire for a multicultural project as well as for a general-market study, it is important that the research firm be aware of how to define your multicultural target and be aware of the nuances that apply to these segments. Not all consumers process and understand information in the same way. For example, some multicultural consumers tend to be more literal in their interpretation of copy and advertising. If a concept test or copytest is being conducted, this needs to be taken into account when designing the battery of questions and appropriate probes.

• *Sampling plan*

Let's assume the methodology and questionnaire have been designed and finalized for a telephone study and it is now time to field your multicultural research project. What is the sampling plan for this project? How is your research partner insuring that your sample is random and representative

Editor's note: Sylvia Nieto-Vidal is managing partner, operations, at Multicultural Insights, a Coral Gables, Fla., research firm. She can be reached at 305-445-2211 or at svidal@multicultural-insights.com.

of this multicultural segment? A surname telephone sample is not always appropriate. Density-based samples may not always be the best method to reach this target and truly meet your objectives. Random-digit dialing can be expensive when researching the multicultural segments.

• *Questionnaire translation*

Many researchers conducting multicultural research for the first time may not give much thought to the translation of the survey instrument. This is a mistake! Questionnaire translation is a crucial step in making sure that the data you are receiving at the end of the study truly is what you had intended to receive. Numerous times the meaning of questions is

altered during this process and when results are presented, the data might be misleading. The implications of such an error can have a tremendous impact on advertising and marketing decisions for your product or service. If the consumer does not understand what you are asking or misinterprets the questions being posed, then in the final analysis your data is skewed and your marketing efforts may be misguided.

Another important point to keep in mind when administering bilingual questionnaires is that both languages should appear on one survey instrument. This will prevent interviewers from making impromptu translations of questions which the respondent may not understand in one language. Clarification can be provided by simply reading the same question in the second language.

• *Interviewing*

Once the field briefings begin clients do not truly get re-involved until the field is completed. It is important during this phase of the research that your research firm uses interviewers that are trained and experienced in researching the multicultural segment you are trying to reach. Using interviewers of the same ethnicity or from the same country of origin may not suffice. During field briefings it is crucial that the cultural idiosyncrasies of the questionnaire be communicated to your data collection team. In some cases, multiple translations or various pronunciations of the same words can be provided to interviewers as a separate help sheet to assist them in the interviewing process.

• *Coding*

Open-ends are common in most questionnaires. Regardless of the segment being interviewed the response must be recorded verbatim. In multicultural research this would mean in the language used by the respondent. Many research firms leave the translation of open-ended responses to their interviewers. While this may be a timesaving step, since interviewers are not trained translators, you run the risk of respondent feedback being altered and skewed. Code lists should either be developed in the language stated by the respondents or developed once all open-end responses have been properly translated. This is yet another safeguard in insuring that the meaning of responses is not altered during the process.

Insure success

These are just a few things that you should keep in mind when conducting multicultural research. Using a research firm that knows these and the many additional design and execution details will insure that your multicultural research is a success. | Q

> data use

By Yilian Yuan

Forecasting new product market potential in the pharmaceutical industry

Few industries spend as much on research and development as the pharmaceutical industry. Said another way, few have as much at risk when bringing a new product to market. The top 10 pharmaceutical companies in the world each spend an average of $3.8 billion a year on R&D, and the cost of miscalculating what the return will be on that investment could be disastrous. Thus, the pharmaceutical industry has developed very sophisticated methods of forecasting the market potential for a new product. Forecasting is an integral part of pharmaceutical business planning and provides critical information so that informed decisions can be made on how to allocate R&D and marketing resources.

Depending on the situation, there are different ways to forecast new product market potential. One is analog and event-based, another is patient-based, and sometimes the two approaches are combined. This article serves as a primer on the analog-based approach to forecasting for new pharmaceutical products in development and outlines the major steps involved.

Editor's note: Yilian Yuan is director, marketing analytics, IMS Management Consulting, Fairfield, Conn. She can be reached at yyuan@us.imshealth.com or at 610-260-6657.

Market overview and situation analysis

The first step in performing any forecast is to thoroughly understand the therapeutic market in question and its competitive dynamics. This entails analyzing:

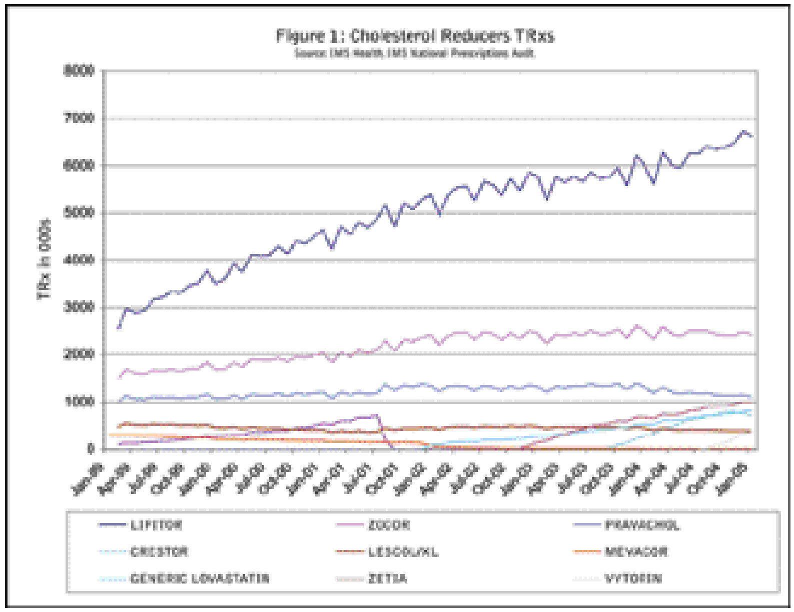
• the current competitors in terms of their prescription volume and product share trends, product characteristics, labeling information, supplemental studies and additional indications;

• the promotional mix, share of voice and pricing trends for each of the competitors in the market;

• epidemiological trends over time and any changes in treatment guidelines.

For example, to forecast product market potential in the cholesterol treatment market, it is necessary to understand current treatment guidelines and the size of the potential patient population. In 2002, according to the National Health and Nutrition Examination Survey (NHANES; 1999-2002), over 100 million Americans had total cholesterol levels of 200 mg/dL or higher (borderline high-risk). The latest guideline published by the U.S. government's National Cholesterol Education Program (www.nhlbi.nih.gov/chd) calls for even more aggressive drug treatment and a lower LDL target value.

Several drug classes are being used to manage lipid problems: bile acid sequestrants, fibric acid derivatives, cholesterol absorption inhibitors, and statins. Statins and statins combined with cholesterol absorption inhibitors are the most popular drugs to lower cholesterol levels, such that about 150 million prescriptions were dispensed in 2004 for them, according to IMS Health's National Prescription Audit. Within this subgroup of drugs, Merck's Mevacor, which was introduced in 1987, was



the first to enter the market. Mevacor lost patent protection in 2001 and now has been replaced by generics. The current leading product is Lipitor, which was launched in January of 1997 by Pfizer, and now has about 50 percent of the market share of this subgroup. Other major products are Pravachol, launched in November 1991 by Bristol-Myers Squibb; Zocor, launched in January 1992 by Merck; Crestor, launched in August 2003 by AstraZeneca; and Zetia, launched in November 2002 and co-promoted by Merck and Schering-Plough (Figure 1).

Analog selection and analysis

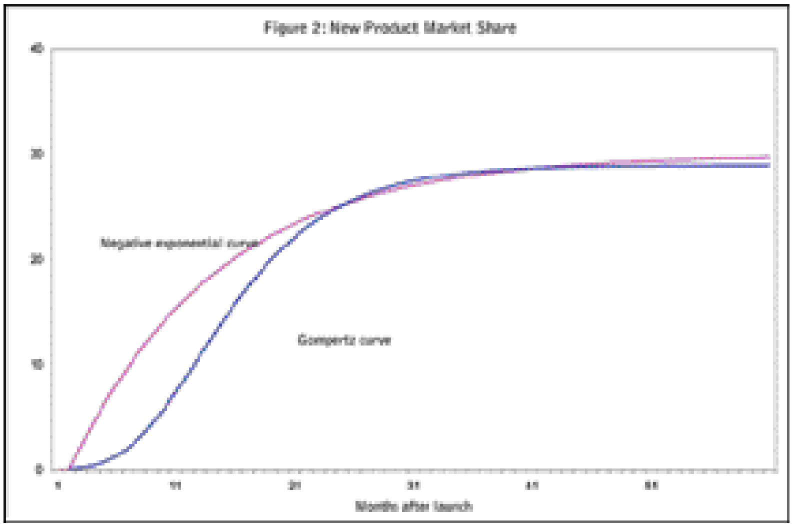
Analogs play an important role in forecasting a new product's market potential since there is obviously no performance history that can be referenced for the product of interest. The best analogs are those that are similar to the new product in terms of disease type, order of entry into the market, advantages and disadvantages over existing treatment choices (such as efficacy, dosing, mechanism of action, side effects, safety, etc.), price relative to existing drugs, and level of promotional support. However, it is almost impossible to find analogs that match the product of interest in all of these respects. The solution is to combine several analogs in order to create a baseline forecast for a new product.

Baseline forecast

The baseline forecast is developed in two stages. The first stage involves estimating the growth in prescription volume within the therapeutic class based on historic levels and assuming that the future will be like the past. The second stage entails analyzing the performance of the analogs and developing a forecast for the market share of the new product accordingly. Because it is very hard to find analogs that precisely match the product of interest in terms of market environment or product attributes and differentiation, it is often necessary to modify the share curves of the analogs in order to fit the situation at hand.

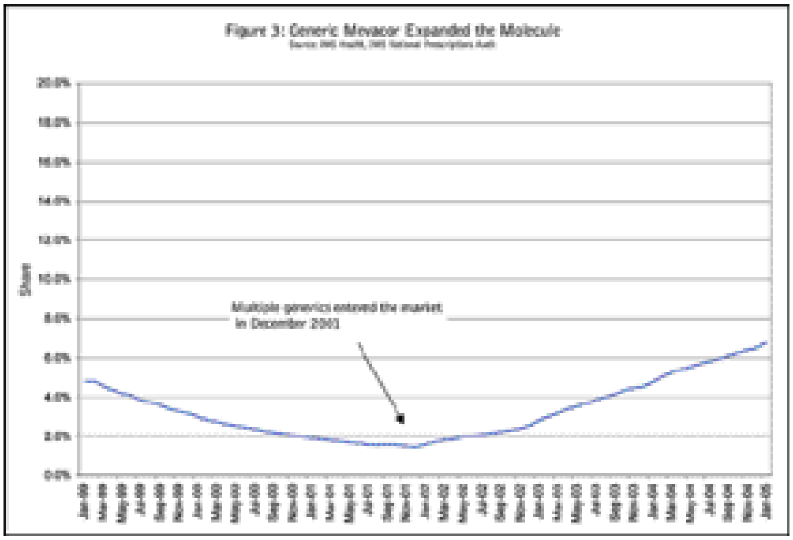
Statistical models, such as time series ARIMA (autoregressive integrated moving average) models, regression models and exponential smoothing, are often used to develop the baseline forecasts for the market volume. For detailed descriptions of statistic techniques and their applications in forecasting the market volume, please see the book *Forecasting: Methods and Applications* (Spyros Makridakis, Steven Wheelwright, and Rob Hyndman, 1998).

For the purpose of establishing a



baseline forecast for a new product, an analog's absolute prescription volume is not useful since prescription totals may vary dramatically from one therapeutic class to another. Instead, it is better to study an analog's share of its therapeutic class. The goal is to establish what the product's share might have been if there had been no subsequent, competing market entries or other market events.

Two types of growth curves are often used to model product share curves. One type is the negative exponential curve in which the growth rate declines continuously, and another type is the Gompertz curve (S-shaped curve). For detailed information on the specification and parameter estimation of these curves, please see the book *Mathematics of Statistics*, (Kenney and Keeping, 1962). The Gompertz curve depicts slow prescription volume growth in the early phase of a product launch followed by accelerated growth as more and more physicians begin to prescribe the product and as word of mouth begins to operate in both the professional and patient communities. After some period of time, the market begins to saturate and growth levels off. The negative exponential curve, on the other hand, illustrates more rapid growth in the early phase. In IMS Health's experience, the early slow-growth portion of a new pharmaceutical product launch curve is so brief that it usually can be ignored. What is left is a share curve that grows very rapidly at first, and then flattens, i.e., the growth rate constantly decreases over time. By analyzing hundreds of new product growth curves, IMS has found that, typically, a new pharmaceutical product share growth follows a negative exponential curve. By adjusting the negative exponential curve's parameters, it is possible to generate a curve



with the desired shape and asymptotic market share (Figure 2).

It is not surprising that new pharmaceutical product launch curves have a negative-exponential curve shape with the starting point zero. Early in the product life cycle, there are relatively more new prescribers and patients than in later periods. In addition, promotion spending is generally higher in the first few years. Usually, new product market share grows very slowly after about two to three years post-launch.

At this point, one must also consider how the new product launch will impact the market growth rate by looking into the impact that the analogs had on the expansion of their respective markets.

Market events and impact assessment

Many factors can influence the performance of the market and an individual new product. Some of these factors affect the entire industry (such as the state of the economy, increased unemployment, reduced insurance coverage, demographics and Medicare drug benefits), while other factors impact only specific therapeutic areas (such as practice guidelines and epidemiological trend of the disease, new technologies and new tests, new products in the pipeline, over-the-counter [OTC] switches and patent expirations). Therefore, baseline forecasts for the market volume and for the new product share must be modified in anticipation of the market events and their possible ramifications. For example, the new treatment guidelines that were mentioned earlier for lowering LDL cholesterol should have a positive impact on the growth rate of the cholesterol reducers market.

Let's again take the cholesterol reducers market as an example. Zocor and Pravachol will lose their patent protections in 2006. In the past, when generics entered the market, they took share only from the branded product within the same molecule. They did not alter the market share trend of the molecule, nor did they expand the treatment market. However, with the pressure to contain drug costs and the practice of managed care plans to require a higher copay for branded products once a generic is available, generics have recently taken share not only from the branded product of the same molecule, but also from products derived from other molecules in the same treatment market. When Mevacor lost its patent in December of 2000, the generic forms not only wiped out Mevacor prescriptions but also took share from other products in the same market and expanded the market share for the total lovastatin molecule (Figure 3).

Modifying market forecasts and new product share forecasts based on events

To apply the impact of specific events to the baseline forecast of a therapeutic class and to a new product baseline market share, one must quantify the impact of each event, considering:

• timing - that is, when the event is likely to happen;

• magnitude - what is the magnitude of the peak impact of the event;

• time to peak impact – in other words, how long it takes to reach the peak impact;

• probability – or the likelihood that this event will occur.

Because the same event may have a different impact on the market than on the new product, the magnitude and time to peak impact may be different for each. Once the baseline forecasts are thus modified, they are considered "evented" forecasts.

Consider, for example, the impact of statins being switched to OTC status. Since the 10mg strength of Zocor assumed OTC status in the United Kingdom in July 2004, there's been talk of OTC statins becoming available in the United States. Should that happen, it would have a negative impact on prescription drug volumes as statins go off-patent – and that impact must be calculated as part of a market forecast.

It is most likely that only the lowest strengths (10mg) of statins would go OTC in the United States. Zocor and Pravachol will go off-patent in 2006, and, according to information from IMS Health, their 10mg strengths account for 14 percent and 6 percent of their sales, respectively. Therefore, the total amount at risk is about $0.74B and the estimated impact on the market is about -0.3 percent. The timing of a Zocor and Pravachol OTC switch is likely to be at the end of 2006 when they lose patent protection. The estimated peak impact will be about –0.3 percent on the cholesterol reducers market as a whole and will have no impact on the estimated share of any new product that enters the market subsequently. Based on the recent examples of Claritin OTC and Prilosec OTC, the time to peak impact will be about two to three years. The probability that this event would actually occur is low (10 percent), since an FDA advisory committee recommended against approving Mevacor for OTC status in 2004.

To estimate the prescription volume of a new product, one must multiply the "evented" forecast of the market volume and the "evented" forecast of the new product market share. For example, for a hypothetical statin product to be launched in 2007, based on an analog analysis, the product would likely achieve about 3-5 percent market share and about 8.6 to 14.4 million total prescriptions in 2009.

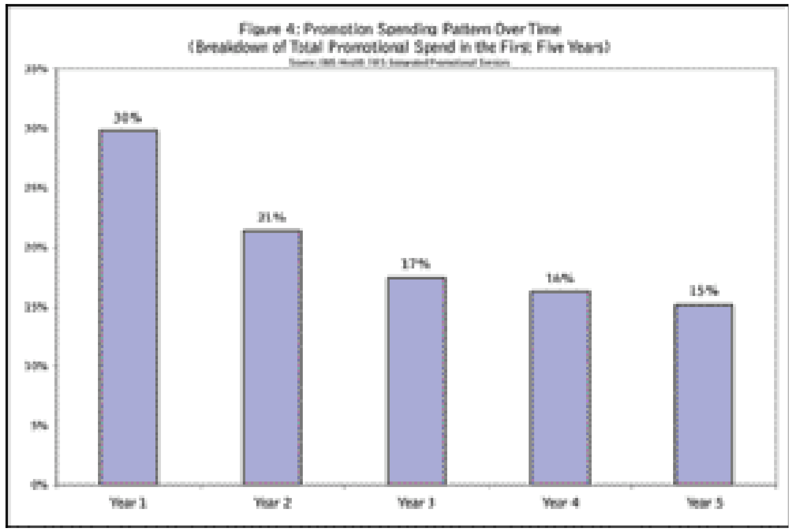


Figure 4: Promotion Spending Pattern Over Time (Breakdown of Total Promotional Spend in the First Five Years)

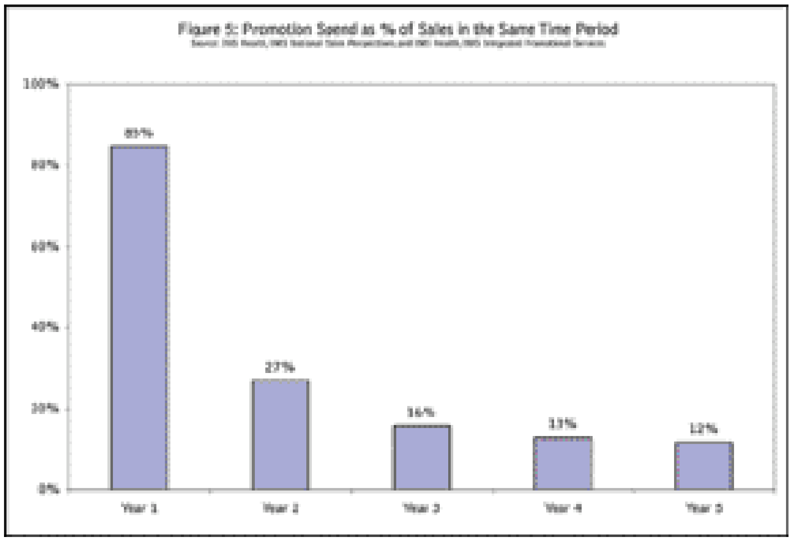


Figure 5: Promotion Spend as % of Sales in the Same Time Period

Promotional resources planning for new product launch

One goal of conducing a forecast of market potential is to be able to determine the optimum level of promotion that should be allocated to launch a new product. To provide evidence-based guidance on promotional resource planning, IMS Health analyzed the professional promotion spending patterns in the first five years after launch for 10 recently- launched products in the United States:

Product	Therapeutic Area
Amerge	Anti-migraine
Maxalt	Anti-migraine
Meridia	Anti-obesity
Xenical	Anti-obesity
Comtan	Anti-Parkinson's
Micardis	Anti-hypertension
Atacand	Anti-hypertension
Actos	Anti-diabetics
Avandia	Anti-diabetics
Prandin	Anti-diabetics

The promotional costs included in the analysis relate to physician detailing, sampling and professional journal advertisement. In the first five years following a launch, the total professional promotion spend is about 15 to 25 percent of the total sales achieved in the same time period. For example, if a product achieved total $2B sales in the first five years, the company spent $300M to $500M in total on promotions in that period. The spending pattern is front-loaded with about 30 percent of the total spent in the first year (Figure 4).

Promotional spend in the first year is about 85 percent of the first year's sales. Over time, promotional spend drops to about 10 percent of the sales for a given year (Figure 5).

Primary research

Although analogs play a very important role in forecasting new product market potential, primary research with physicians, payers and patients can provide valuable information that may not be available otherwise. And, primary research is even more important than analogs when only sparse secondary data is available or when significant new events are anticipated. Whenever possible, qualitative and/or quantitative primary research should be undertaken with stakeholders. Primary research with doctors can collect data on doctors' perspectives on product performance and on their satisfaction with existing treatment options, the role of product attributes in their therapy selections, their reactions to the new product based on the product profiles, and their likely usage of the new product.

Similarly, primary research with payers and patients can provide information on price sensitivity and other insights. However, preference share estimated from primary research cannot be treated as a market share estimate for a new product because survey biases do exist. For instance, physicians often overestimate their usage of new products and underestimate their usage of old products. In addition, market share will be influenced by many factors other than physicians' preference share. These factors include order of entry, promotional support, product uptake rate, competitive promotions and performance, and competitive product launches.

Forecast boundaries

Because of many uncertainties on the future developments of the therapeutic area and environment factors, it is wise to develop pessimistic and optimistic cases in addition to the "most likely" case, in this way providing a forecast boundary. These forecast bounds can be developed based on analog analysis, and/or by changing some of the forecast assumptions such as certain product attributes, or the level of promotional support. Analyzing the promotional response of analogs using promotion mix models can also provide guidance on setting forecasting range and allocate promotional resources needed to launch the product.

Forecasting new product potential within the pharmaceutical industry is not easy, but neither is it impossible. A wealth of resources exist and the methodologies have been well tested. | Q

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IMS Health, IMS National Sales Perspectives.

IMS Health, IMS Integrated Promotional Services.

By Andrea Michaud

Multiple methods for multiple specialties

Targeting physicians using online methodologies

Increasing numbers of pharmaceutical companies are turning to market research to gain insight on industry trends, develop brand strategies, evaluate marketing materials and advertising and help position new products prior to launch. At the same time, many research companies are taking their research online for projects targeting physicians, specialists and surgeons to obtain the supporting data that is integral for decision-making in these areas.

The field time required to conduct surveys with health care professionals is often much longer than studies conducted with consumers or ailment sufferers. Patient studies are generally completed in a matter of days, where physician studies often take weeks, depending on the methodology and sampling size. Costs associated with physician studies can be significantly greater due to survey complexity, time and effort required in recruiting medical professionals, as well as the cost of honorariums. The ability to target health care specialties adds to the time often needed for recruiting.

In addition, health care professionals are difficult to target and projects have low response rates, which can threaten the validity of survey data. The response rates for surgeons are especially low. Using an online survey combined with multiple-mode recruitment methods can boost response rates.

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Creative approaches

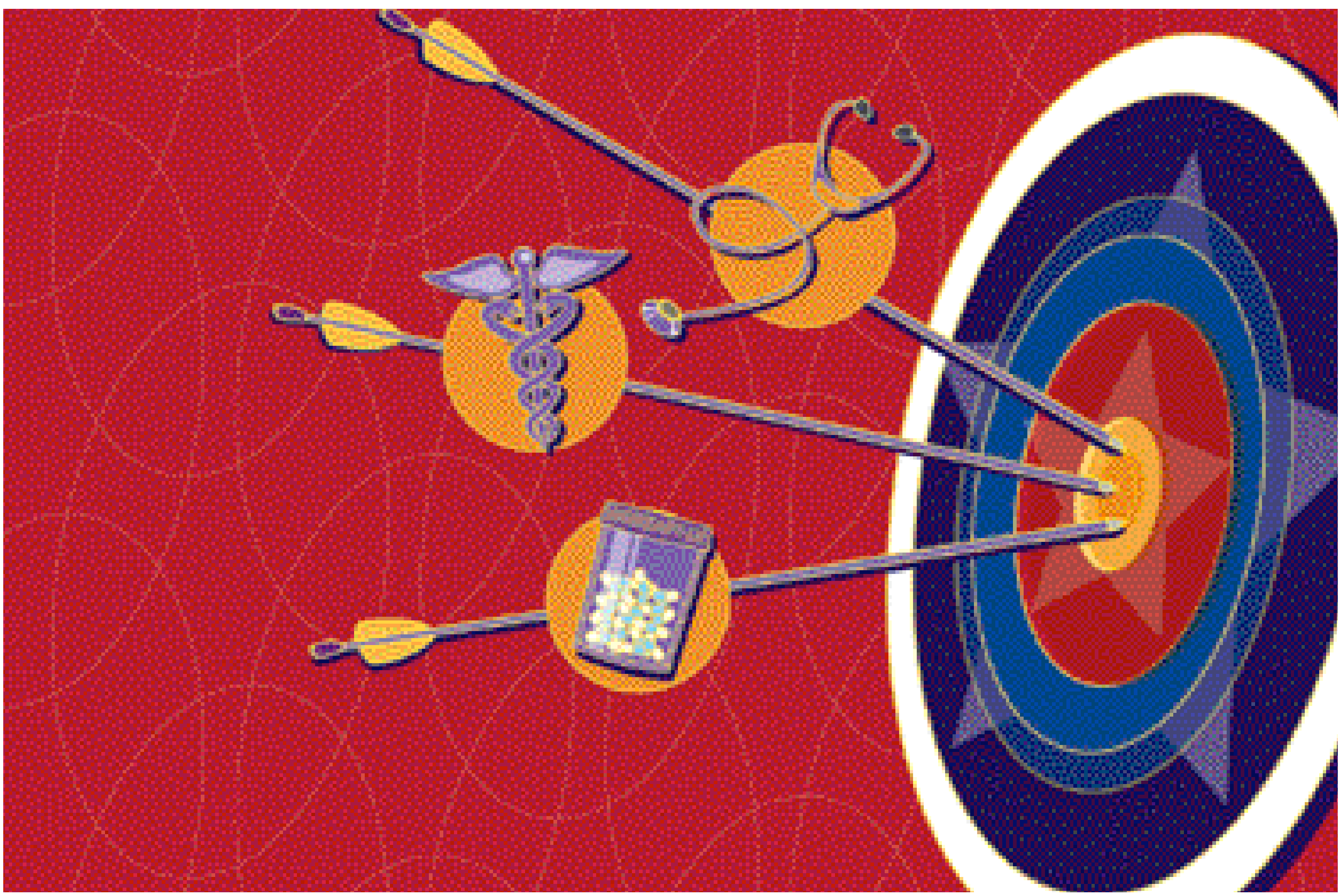
Because physicians are so busy and so difficult to reach, creative approaches are required to gain interest and achieve the desired response rates.

Over the past year, our firm has worked with market research firms on a variety of online survey projects targeting a range of physicians. Online surveys can provide the flexibility to handle even the most complex survey, which often is required to develop an effective medical market study. Complicated questionnaire formats include piping, rating, ranking and randomization of attributes.

Conjoint surveys, including adaptive conjoint or discrete choice models, are frequently used when targeting physicians to obtain information on various trade-offs by asking respondents to rank, rate or choose among a series of scenarios or profiles with different features. One of the things this allows the researcher to identify is what factors ultimately influence physicians' prescribing decisions. The pattern of responses can provide benefit measures for treatment features that have little or no direct effect on efficacy. It can also provide key information for decision makers on particular treatment attribute levels to help predict product adoption and design clinical trials.

Multiple modes

To minimize expenses and boost participation statistics, multiple modes of data collection have been employed when targeting physicians. These include phone-to-Web surveys, fax-to-Web surveys and even a detailed process using faxing, phone screening, data entry and finishing with an online survey. These hybrid methods have been effective in reaching targeted specialties while obtaining quality data and meeting project objectives. The convenience of Web data collection teamed with traditional methods boosts response rates and allows shorter field times for studies. Mail, phone or Internet surveys alone often cannot reach the target respondents and have shown extremely poor response rates. Providing respondents with the option to complete the survey at their convenience increases the likelihood of cooperation. Internet access is widely available throughout hospital wards, and in physician and surgeon offices, allowing respondents to access the survey when they choose, without the inconvenience of a paper survey and return mailing, or having to



spend time on the phone for a CATI study.

Phone-to-Web recruits

In phone-to-Web projects, respondents are contacted by phone, qualified through a series of simple screening questions and then given a URL to complete the survey online. E-mails can be sent as a follow up to confirm the survey link. The physician can complete the online portion of the study at their convenience. Typically it would be difficult to complete an entire CATI survey with physicians based on their schedules, and using a combination of telephone and online methods increases participation levels. This approach ensures the proper respondent is participating in the study while providing a respondent-friendly method for supplying information. Reminder calls are usually conducted for physicians who have not yet completed the study and occasionally an additional incentive is offered near the end of a project to get the last few completes. As with all online surveys, privacy and confidentiality are assured through the use of unique URL login formats or individual passwords. This allows physicians to come back to the survey if they are unexpectedly called away.

Fax-to-Web recruits

Fax broadcasts are also effective in targeting physicians. Using client-supplied lists, large numbers of faxes can be sent simultaneously for a low cost. The faxed document invites physicians to complete the online survey to receive an honorarium. Again, respondents have the convenience of completing the study when time permits. Overall the number of physicians that can be contacted at once is significantly increased, eliminating the labor costs of initiating contact by phone. Follow-up calls are beneficial to confirm receipt of the fax and to remind physicians to complete the study. This type of study typically requires a longer field time than a phone-to-Web recruit; however, it can be more effective than trying to reach specialists for a strictly telephone survey.

Combining phone, fax, and data entry with an online survey

Another, more involved, process combines a fax and phone recruit, followed by an online survey. Physicians are faxed an invitation to participate in the online study for a specific honorarium. The fax details the length of time involved to complete the study and asks the respondent to contact a CATI center where they respond to the initial screening questions. Once qualified, they can choose to receive the patient case forms for them to complete, which ask the physicians to provide information about specific patients, length of treatment, past and current medications, and other relevant information. Although this is a long and detailed process, overall it has proven effective for specific projects.

Sourcing sample

To supplement phone or fax recruits, the data collector can team with specialty panels for physicians and allied health care professionals in the U.S., Canada and internationally. Panel members are pre-screened, have opted-in to participate in online surveys and are genuinely interested in sharing their professional and clinical opinions. An array of specialties, ranging from nurses to primary care physicians to surgeons, is available. Respondents can be targeted geographically or screened for minimum years in practice, percentage of hours in a specific setting, or to ensure they are board-certified or eligible. The panel provider will handle honorarium payments and has established specific amounts based on each specialty. Surveys can also be conducted in multiple languages, including French, Italian and Japanese and some panel companies will even handle survey translations.

For clients with targeted lists of physicians, panel companies can match the list against their panel using 10- or 11-digit medical education numbers. In this way the sampling can be managed by the panel provider. Obviously larger lists will result in a greater number of matches and increase the number of completes that can be obtained. For the average list match, the panel will match between 10 percent and 15 percent of physicians, with approximately 12 percent being the norm. The total number of matches is influenced by the quality and accuracy of the client list. By using a larger list or the entire universe, evidently the match rate is much higher.

Multiple methods

Pharmaceutical research with physicians is crucial for decision-making on new or existing health care interventions, and clients are more interested in learning about everyday concerns and practices of physicians. Multiple data collection methods, including phone-to-Web and fax-to-Web, increase overall response rates while meeting project deadlines. Despite the projects sometimes fielding longer than the average patient study, overall costs are often reduced.

By incorporating online methodologies, market researchers have the ability to target a wide variety of physicians and health care specialists while providing respondents with the flexibility of completing surveys at their convenience. In boosting response rates, researchers can be confident that survey data is never compromised and the overall research objectives of the client are met. | Q health care research

Analyzing an empowered patient

By Dinesh Sharma

Health care consumers are changing the face of health care delivery[1]. As active members of the health care process, consumers are adopting innovative technologies to gather information, building their own health records, expressing their demands and preferences through multiple channels and shaping health care policy decisions.

Pharmaceutical clients have traditionally focused on the physician markets but are now beginning to see the value of consumer research. Driven by the emergent possibility of combining consumer trends with prescription and claims databases, and, more importantly, due to the changes in the managed care laws effective in 2006 that make it mandatory to provide prescription drug coverage to seniors and low-income families, pharmaceutical companies are gearing up to better understand the targeted consumer segments.

As the public becomes more involved, health care informatics - a hybrid discipline of health sciences and information technology - is giving the industry greater access to data on consumer behavior. Using both primary and secondary data sources on health care products and marketing efforts, linking consumer and physician behaviors and attitudes dynamically and interactively, health care informatics allows the analysis of health care consumers through all stages and phases of life, from well-being to acute episodes of illness and chronic or terminal diseases.

Number of trends

The empowerment of health care consumers has been driven by a number of trends. Aging Baby Boomers, who want to maintain their current lifestyle at any cost and are willing to experiment with alternative modes of therapies and health care systems, are becoming more involved in making health care choices.

A look at consumer-driven health care informatics

The growth of generics is another important factor[2]. A positive environment in the U.S. has led to intense competition and commoditization of generics, and left major pharmaceutical players seeking growth opportunities with existing blockbusters and specialty pharmaceuticals. Meanwhile, global regulatory reform in generics markets is increasing generic usage, attracting attention from multinational players and bringing with it new challenges. As more drugs go off-patent, how consumers choose generic drugs over branded drugs will be an important issue for health care marketing research.

In addition, health care Web portals are giving consumers an active role

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in their health care decision-making. Multiple stakeholders within the health care industry have invested in interactive Web portals, which allow patients and physicians to communicate online and provide diagnostic tools, treatment algorithms, educational materials and access to physician networks[3].

Health care consumers appreciate the convenience of access to multiple services in one place. According to recent estimates, 16 million consumers used a hospital Web site last year, while another 30 million used portals associated with their health plan[4]. This represents a significant step forward following the dot-com boom-and-bust cycle, firmly establishing a multi-channel, interactive marketing device for the health care industry.

And finally, the arrival of direct-to-consumer (DTC) advertising has changed the nature of the patient-doctor relationship. The evidence on the impact of DTC ads may be mixed, but there is no doubt that they are driving consumers to doctors' offices and to pharmacies more often[5].

IT revolution

All of these market forces are coinciding with the IT revolution, as even the Department of Health and Human Services (HHS) has mandated that an integrated health delivery system is necessary for building the nation's health and security. By providing greater access to various consumer demographics; institutionalizing data warehousing in hospitals, managed care organizations (MCOs), pharmacy benefits managers (PBMs) and chain pharmacies; providing electronic health records (EHRs), personal health records (PHRs) for utilization and review, IT will change the access to and delivery of medicine[6].

While still heavily reliant on primary research methods, the migration to large-scale databases and warehousing in most of the large MCOs, PBMs and third-party payer organizations has generated new ways to analyze claims and prescription data on almost all of the major therapeutic areas. The challenge remains how best to analyze consumer behavior and attitudes in conjunction with prescription and claims-level behavior.

The merging of DTC campaign databases with script and claims-level databases raises unique opportunities and challenges for marketing research, especially in light of HIPPA, which bars the sharing of certain undisguised patient-centric data.

Importance will grow

The importance of being able to mine these multiple data sources will only grow, especially in light of the following factors.

• E-prescribing: There has been significant excitement about digitizing the billions of prescription orders written every year[7]. As expected, the barriers to adoption include standards and usability. Physician groups are unclear about its economic benefits across the health care delivery system. How will digitizing save money, time and improve quality? Perceived benefits are tied to investment levels. For example, if the physician groups receive limited economic value from e-prescribing, consumer initiatives may be needed to further systems integration.

The role of the government in promoting adoption can not be underestimated. Pilot programs and matching grants are building an e-prescribing network within the National Health Service in the U.K. Business limitations on pharmaceutical companies to make investments in physicians and their practices must be understood within the current climate of tightening revenues and a tough regulatory environment. Perhaps the value proposition is the access to population-level or practice-level data through processing hubs, which companies such as IMS, NDC and Verispan heavily rely upon. Pharmaceutical clients of course use this type of data to make critical business decisions.

• Electronic health record: The electronic health record is on a rapid adoption curve, particularly since it was mentioned in the presidential State of the Union address in January 2004[8]. HHS is taking a lead on this technology initiative and feels that an interoperable EHR-based national health infrastructure can be built within 10 years. An industry consortium is developing EHR certification standards for all major stakeholders.

How rapidly will an integrated health care network emerge from the adoption of the EHR and other technology initiatives? This is contingent on many significant players, such as hospital networks, payer organizations, pharmacies, MCOs, PBMs and other health care service providers. However, it is not inconceivable that a systems integration of this magnitude can be completed within 10-20 years. After all, the U.S. public school system universally adopted the Internet within less than 10 years. Even as we await the next wave of changes in health care informatics, customer relationship management (CRM) technology is significantly changing the marketing research landscape within pharmaceutical companies, managed care organizations and hospital networks.

Health care PRM informatics

Some pharmaceutical companies and health care providers have built databases and specific analytic functions to develop better relationships with patients and to deal with the growth of the patient-centric information[9]. The framework is CRM, built on the principles of one-to-one relationship or loyalty marketing. The analytic challenges for market researchers and marketers will be to demonstrate how best to utilize the abundance of health care information to gain greater insight into physician and consumer behaviors and attitudes, especially in terms of combining consumer trends and prescription databases.

Managed through integration of diverse databases, CRM has certainly moved health care marketing away from mass marketing techniques and towards patient relationship management (PRM), which focuses on an organization's or pharmaceutical company's existing patient database, with capabilities to generalize to the entire market.

The PRM process is driven by an interactive database that manages and measures customer loyalty and profitability. As a business intelligence tool for strategic market planning, the PRM database presents a complete view of patients' activities and attributes. Once the relational database is functional, the PRM process and market planning drive it forward, employing online analytics, market segmentation and communication strategies.

Online analytics consists of advanced data analysis on promotional detailing, market share, patients' demographic backgrounds, diagnoses and treatment. Marketing segmentation predicts individuals in the database most likely to seek specific health care programs or services and respond to promotional incentives. Communication management not only manages campaigns but conducts ROI analysis.

A step forward

Health care PRM informatics represents a step forward, beyond traditional pharmaceutical and health care marketing research, which has traditionally been heavily physician-focused. Integrating both primary and secondary databases on health care products and marketing channels - ideally juxtaposing consumer behavior and preferences with physician behavior and attitudes - PRM informatics can give health care providers and pharmaceutical firms the tools to better compete in an industry that is increasingly consumer-driven. | Q

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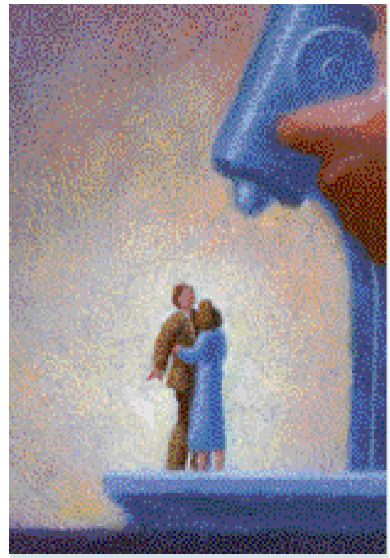
health care research

A deeper examination



By Joel Goldberg

Behavioral science techniques in medical marketing research

This article provides an overview of behavioral science research techniques that are being applied to medical marketing research. These techniques enhance existing qualitative and quantitative methodologies in a number of different ways:

• By developing a simple behavioral profile of each respondent, researchers can interpret their responses much more meaningfully.

• Through an understanding of the mental processes of health care providers, research instruments can be designed to work more effectively.

• By using behavioral measures as screening criteria for recruiting and panel-building, it is possible to create samples that are either behaviorally representative of the target universe or which are skewed to suit the objectives of the survey.

• Respondents' fundamental beliefs and ingrained mental processes are a strong and projectable guide to their likely future behaviors, whereas the attitudinal data typically gathered by conventional research are not.

These four advantages can best be understood by giving an example of each.

Improved interpretation of responses

Everybody has an optimum mode of assimilating information – a reliance on one of the five senses. For practical purposes, the four major assimilation modalities are reading, seeing (ranges from preferring graphics to the written word through to observing the actions of others), hearing and doing.

If the objective of a survey is to test various advertising concepts we might typically ask questions concerning the graphics, the headlines, the copy, the call to action and so on. We then summate the responses and report. Suppose that in this case the target universe is primary care physicians (PCPs). This group is particularly auditory. In fact, we have found in research that 80 percent of PCPs best assimilate information through hearing, rather than seeing or reading. We have also found that about 80 percent of PCPs are "big picture" people. Big-picture types are most comfortable with large pieces of information. For a limited period of time they can work well with details but will quickly return to the big picture. They see a whole issue

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at once. The big-picture type communicates and receives information in random order and in simple sentences with few modifiers. They poorly absorb details, sequences, modifiers and proper nouns. Understanding this about the universe and knowing exactly which respondents have these behavioral characteristics will completely alter the interpretation of the data gathered through a standard ad concept survey. We start the interpretation by knowing that an advertisement is not the optimum media for the information assimilation modality of the audience, and that the audience will best respond to a big-picture presentation of information. Just as important, we know which respondents fit the profile and which are the exception respondents, so that we are not confused by varying responses.

Improved research design

It is an axiom of market research that we "start with the general and move to the particular." However, a vital and unconscious process in reasoning is the way in which an individual moves from the general to the particular and back again - connecting the big picture with the detail. The creative type (the kind of person who designs marketing communications for example!) moves from the general to the particular while the scientific type typically starts with the particular and generalizes to the big picture. We have found by simple experimentation that redesigning an interview questionnaire to lead physicians with a strong scientific process to generalize from particular examples leads to a much better interview result than the traditional method. The key here is that not all physicians have a strong scientific process - many actually have a stronger affinity with philosophical or emotional processes of decision-making, so that alternative questionnaires may be employed for different types of respondent. Advanced screening of physicians to determine their basic thought process (a very simple and short question sequence) tells the researcher which questionnaire to use.

Creating custom sample

In conventional market research, we generally rely on the random recruiting of large samples to provide a representative and projectable sample. By screening a sample behaviorally as well as demographically, it is possible to create small, representative samples; even as small as a single focus group.

If, in this case, the target universe is patients suffering from a certain disease, those so qualified can be screened using a small number of behavioral metrics. Those metrics might include information assimilation modalities, introversion vs. extroversion, and locus of control (degree of deference to authority figures such as physicians). The selection of the metrics would depend upon the objective of the study. As the proportion of each type in the general population is already known, these criteria reduce the recruitment to acquiring appropriate quotas of behavioral types already existing in the universe in known proportions.

By basing the sample design on known criteria the dependence of randomness is broken and the sample can be certified as representative of the fundamental behavioral profile of the universe.

Attitudes vs. beliefs

First, we have to get past the point that most people use the terms attitudes, beliefs and values interchangeably, so that the attitudinal questions in a typical survey may address both surface attitudes and fundamental beliefs. The advantage of thinking in behavioral science terms is that we understand which is which and can incorporate that understanding into survey design.

There is a well-established hierarchy of human behavior:

• Attitudes
- conscious
- transient
- most recently formed of behavioral constructs
- There is not much we can do to influence behavior based on them

• Beliefs
- in some cases, can be modified if fully understood
- must be directly addressed by sales and marketing tactics

• Closely-held values
- elements of personality, not available for modification but must be directly addressed by sales and marketing tactics for those tactics to be fully successful

• Behavioral filters
- unconscious processes used in information assimilation and deci-

sion-making

- consistent, generally predictable in multiple contexts

An example of a truly attitudinal question is to ask a respondent to rate the following statement for applicability to them on a Likert scale: "I generally do not prescribe drugs that have not been on the market for at least six months."

This surface attitude may or may not be based upon deeply-held beliefs about the ethics of medical practice and attitude to risk. It is a gross simplification of a decision-making process that we have found involves many factors, including:

1. Underlying attitude to risks to patients.
2. The physician's natural tendency to move towards positive outcomes or to seek to move away from negative results.
3. The locus of control, which, if external could mean that the physician's attitude would be quickly modified by, say, thought-leader opinion.
4. The physician's natural tendency to be a late or early adopter.

Our research shows that, in a general sense, about 50 percent of PCPs are very risk-averse in the management of their practices. For these respondents, avoidance of risk rates very highly in their hierarchy of decision criteria. This tendency is not homogenous, however. White/Caucasian physicians are much less risk-averse than other ethnic groups and physicians whose primary motivation to practice medicine is the maximization of personal income are more likely to be risk-averse than those with an emotional calling to serve the sick.

In all cases, the general behavioral tendencies of respondents need to be re-examined in the exact context of the disease state or health care process being studied. Some of the most interesting results from this type of research arise from discovering that physicians or patients are acting "out of character" in certain circumstances. For example, groups of physicians who normally interact with their patients on a 50:50 basis, allowing discussion between doctor and patient to create a consensus on how to move forward with the case, may in certain circumstances become much more forceful and authoritarian. In one example, we discovered this process at work in a market where efforts were being made to use DTC-driven "patient push" tactics to drive the adoption of a treatment regime. The discovery that this dynamic was at work highlighted that this precisely defined market was not a good environment for "patient push" and that traditional professional marketing would be a better use of marketing funds.

Fundamentally different

Behaviorally-based marketing research differs fundamentally from conventional research in a number of ways. Conventional research is based upon eliciting opinions and data (content) and then summating it into report form. Behavioral research elicits hidden motivators (context), which respondents are generally not able to reveal voluntarily as they are not in their consciousness, and then interpreting the output into actionable sales, marketing and communications strategies.

Carrying out this type of research involves two new processes. The first is the modification of a researcher's skills. For example, in conventional research questions are sharpened to ensure that exactly the right content is forthcoming. In behavioral research questions are often generalized because it is the content chosen by the respondents and the language they use that provides the basis for interpretation. The second is the use of psycholinguistic analysis as one of the means by which the responses are interpreted.

When people speak there is actually a second level of information available that reveals much richer data and allows for a deeper understanding of their subconscious motivations. These subconscious motivations are very real and well documented – they speak to the heart of human behavior and decision-making. Very often the use of psycholinguistics leads to insights and uncovers practical channels of action that basic market research does not.

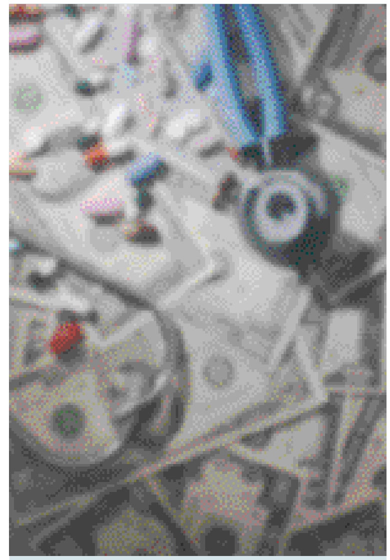
The answer to marketing questions does not always lie in what respondents say (content), but in how they say it (context), which can often override the stated answer to completely alter the meaning of the recorded response. Building behavioral techniques into market research provides important insights into human communication and decision-making that are often overlooked.

Individuals generally do not understand the deepest motivations, needs and desires that lead to their health care decisions. The most deeply-held values have the greatest power to influence and are also the most ingrained in beliefs, behavior and habits. For this reason they are most often not in the consciousness. However, these deeply-held values and criteria are available by listening to the language patterns used when describing experiences with a drug, device or instrument and using psycholinguistic analysis to reveal the respondents' unstated motivations.

Growing use

While in its infancy in the health care industry, these techniques are based on very well-established science from both investigational and clinical psychology, and have been in use in other industries (such as packaged goods and financial services). Their growing use in health care will fundamentally change the techniques used and the impact of marketing research results upon sales training, marketing communications and marketing strategy. | Q

Seeing patients as customers



A guide to developing a CRM process in the health care setting

By Nancy V. Paddison

Customer relationship management (CRM) is a new way of looking at and interacting with patients and prospective patients in a health care market. It represents a change in the way business and marketing are done to build customer loyalty, improve customer service and strengthen the bottom line. To effect organizational change, you must first look at deficiencies or outdated methods in the workplace, along with market trends. Once you've identified these issues, it's easier to find a solution. For a growing number of health care organizations, CRM is that solution.

Health care organizations cite five reasons for adopting CRM:

1. To drive more of the right kind of revenue.

a. Attract the right payer mix while fulfilling the organizational mission.

b. Answer the questions: Are we reaching the right customers? Are preferred patients responding? Do individuals we communicate with actually need the services we are promoting? What is the ROI of our campaigns?

2. To better operationalize business strategy.

a. Prioritize and focus resources based on comprehensive market and patient database information.

b. More carefully align marketing tactics around the organization's strategic goals.

c. Measure to determine effectiveness and ways to improve.

3. To increase marketing effectiveness.

a. Stretch existing or shrinking dollars to reach more geographic areas and customer segments, and to increase the number of promoted service lines.

b. Respond to more market-savvy health care consumers who are used to CRM tactics and efforts from other industries such as banking, retail and travel.

c. Speak directly to each customer using technology such as variable digital imaging to create unique communications for each individual.

4. To prove (undeniably) marketing's worth.

a. Effectively track and calculate the return on investment attributed solely to each marketing campaign.

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Focus Group Recording Will Never be the Same.
VideoMarker
Includes VideoMarker™ Editor Software
Digital Focus Group Recording
Facility: TODAY'S
Client: SESSION
Project:
Date: (TUES.)
Introducing VideoMarker™ by FocusVision
The last group articulates critical issues.
Edited the key clip and e-mailed it to Kevin.
Kevin presents our findings to the team.
Imagine having your next focus group session with the revolutionary new VideoMarker™ CD Recording instead of videotape. Imagine flipping open your laptop and being able to quickly and easily:
Create video bookmarks and notes while watching the live focus groups.
Review the sessions on your PC. No VHS cassettes. No VCRs. No TVs.
Jump right to your bookmarks at the click of a mouse. No more rewind and fast forward.
Instantly create video clips for PowerPoint,™ e-mails, or a highlight reel.
Imagine saving time, money and headaches while creating powerful, persuasive presentations. Make it a reality. Ask your favorite focus facility for it instead of videotape—VideoMarker™ CD Recording. More than you imagined.
For a FREE demo and to learn more about VideoMarker call 203-961-1715 opt. 7, email videomarker@focusvision.com or visit www.videomarker.com.
FocusVision
Available at these facility networks:

b. Answer the question: What is the ROI of our marketing campaigns?

5. To enhance customer loyalty and build long-term relationships.

a. Offer special programs for specific patient segments such as seniors, cardiovascular and obstetrics patients.

b. Build on overall hospital reputation and skill of the staff to retain patients.

Understanding CRM

Understanding specific problems CRM was designed to solve and how it solves them allows you to build excitement and justify CRM to key decision makers. You must also understand the components of CRM.

Key CRM components:

• A comprehensive database, which compiles and standardizes information from disparate sources across the organization. This includes patient, non-patient and marketing information: internal information – inpatient and outpatient data, ER, Web site, call center and foundation; external data – state data, demographic enhancements, non-customer lists; computed information – cleaning and scrubbing of all data, duplicate matching, death suppression as well as market and health risk utilization projections.

• Data mining, analysis and tracking, which allow you to explore your database to discover information, new correlations, and patterns and trends that might not be obvious. Specific online analytical processing tools offer detailed, customized analytical reports based on parameters you define. By setting up a control group for each campaign, you can get a comparison that allows you to measure the exact impact of marketing programs. In addition, you can easily access your database from anywhere with these tools.

• Predictive segmentation, which offers a look at projected health risks among patients and the market at large so you can more efficiently plan service line strategies, business development and campaigns.

Predictive segmentation, also called predictive modeling, uses mathematical techniques, health care variables and disease states to actually predict health outcomes by scoring both patients and non-patients in your database. Predictive modeling can result in more focused intervention, disease management and focused campaign efforts that are more financially beneficial than traditional segmentation methods in reaching the right individuals.

• Automated campaign management, which allows you to send personalized and relevant information to the right individuals at the right time for more effective behavior modification. A campaign management tool reacts to data captured from every information source in your facility or system and turns it into a variety of programs to help you reach your target audience. This intelligent agent sits on top of your database to manage, monitor and track results of multi-step, multi-channel marketing programs.

Variable digital imaging allows organizations to produce customized pieces for each individual. Rather than sending the identical postcard, brochure or newsletter to thousands, digital imaging allows you to create a unique piece for each individual with relevant copy and graphics.

CRM applications

You can use these CRM tools in a variety of applications:

1. As a strategic planning/decision support system.

– Analyze your organization's performance year-to-year and compare against other providers in the area to determine market share, gaps in service, and potential for new service.

– Use data to prioritize and focus your resources based on market analysis.

– More strategically plan growth strategies and new product development.

2. As a prime enabler to build and sustain customer loyalty.

– More efficiently and cost-effectively reach the right customers: specific messages for individuals; right time based on event or treatment triggers; right channel(s) based on convenience and preference.

– Watch and respond to market/customer trends indicating needs and desires.

3. As a solution for promoting brand/organizational strengths.

– Demonstrate you know your customers and will respond to their individual needs.

– Respond to customers' knowledge and savvy about brand, preference and loyalty beyond insurance/payer arrangements.

– Measure customer loyalty to gauge service excellence, areas for improvement.

Build a team

To build excitement for CRM and to get key decision makers on board, you first need to build a team of the right people who share your understanding of and vision for the organization and for CRM. Include individuals from top management, strategic planning/business development, information technology and patient care professionals, who will be directly and indirectly involved and who agree on the organizational mission and vision to be achieved with CRM.

The team becomes an ambassador and champion for promoting acceptance and adoption of CRM within the organization. Here are some tips for promoting CRM.

1. *Educate*. Explain the reasons, benefits and expected outcomes for CRM to top decision makers. These include generating volume and revenue growth for targeted programs, improving business planning with better customer marketing knowledge, building better physician relations, and enhancing fundraising efficiency and effectiveness.

2. *Illustrate*. Use application examples to illustrate exactly how CRM works in health care.

3. *Seek input*. Ask key decision makers to provide input that will ultimately affect the way the organization treats its customers. Then ask for acceptance, including the necessary funding.

4. *Implement*. Once you gain acceptance for CRM, understand it will take time for the organization to make the transition. Map out a reasonable timetable. Make sure managers have the tools they need to effectively incorporate CRM initiatives in a timely manner.

5. *Evaluate*. Although organizations usually set a timetable for CRM implementation, it doesn't have an end date. Effective CRM requires periodic reassessment, evaluation and modification to accommodate changes within the organization and the market.

CRM in practice

Because CRM can represent a major cultural shift within the organization, it is important to illustrate the benefits and rewards of CRM by sharing best CRM practices from other organizations. Keep in mind that the CRM application each provider uses depends on organizational objectives and management's creativity.

Here are a few examples of CRM applications:

• *Advancing business planning based on more complete customer/marketing knowledge.* A health system in the Mid-South uses a CRM system to research and analyze many of its capital investment decisions - usually in ways its operating system otherwise could not do. The organization adopted CRM after it discovered it was the underdog with a distant second-place market share. It used its CRM tools for strategic planning to chart the organization's overall vision, increase volume in existing practices, improve the image of women's health services and make inroads in the managed care market. Over time, the organization became the solid market leader and continues to use its CRM system every day.

• *Generating volume and revenue growth for targeted programs.* A CRM focus helped a Midwestern hospital strengthen its leadership position in orthopedics by shifting from mass-media promotions to CRM techniques and direct mail that increased attendance at orthopedic seminars by approximately 25 percent. The hospital used predictive modeling and other demographic information to carefully select its campaign audience. Post-campaign, control group-adjusted data analysis revealed the hospital achieved 8 percent of its overall response as a direct result of the campaign, and a post-marketing profit of $152,407.

• *Increasing communications effectiveness/efficiency.* A Northeastern health provider improved the interactivity of its Web site using CRM to meet the needs of its market - one of the savviest groups of Web users in the country. First, it conducted market research about its Web users' preferences and needs. Then it customized its Web portal features and interactivity to increase customer satisfaction. To develop a more personalized Web experience, the health system mirrored trends in direct mail and started segmenting portal content for key audience segments. For example, it offered an interactive pregnancy specialty resource center featuring information on high-risk pregnancy, newborns and delivery options. Compared with previous months, the monthly registration for this type of information doubled following the launch of the center. More than 2,000 new registrants signed on during the first 10 months the center was offered, and more than 26 percent of the registrants became patients. This organization uses the CRM multi-channel concept to promote its specialty centers by e-mailing non-portal registrants from e-mail addresses in the CRM database, by playing a message to callers on hold at the call center, by placing banner ads on a local key newspaper site and by sending immunization and check-up reminders to portal registrants.

• *Improving physician relations.* A Midwestern health system turned to its CRM system to promote better patient health and stronger physician-patient relationships. It developed a personalized patient retention program for its health centers and medical group, producing response rates of approximately 15 percent. The provider involved its physicians in the process to get better results and then carefully targeted the health maintenance campaign to the health centers' and medical group's respective audiences. It used its database and market information to customize campaign materials, set up control groups and effectively track the results.

• *Enhancing image-building effectiveness.* One of the key ways health providers can enhance their image and recruit new patients is to conduct new movers programs for individuals new to the community. While the conventional wisdom is to include all newcomers in this activity, one Midwestern health system used a CRM control group to determine the true effect its program had on new movers by comparing activity within the group who received campaign materials with an identical group of individuals who did not receive them. The organization not only wanted to convert prime new movers into patients with a results-oriented creative campaign, it also wanted to highlight the campaign's ability to stimulate both "call to action" and service utilization responses. Using its CRM system, it gauged its effect on both and was able to prove it earned a net $126,208 return on investment from the program.

Expected return on investment

Organizations that adopt CRM make the commitment to train employees to use it. These organizations also evaluate and modify the program over time to maximize their return on investment. "With CRM we went 3:1 in consumer preference. By segmenting our markets, targeting our brand messages and tracking results, our ROI gives us more options on where to spend our marketing dollars," says Jack C. Frank, network vice president, Community Health Network in Indiana.

Inova Health System in the Washington, D.C., area was able to track the impact of its "Don't Wait" cardiology campaign both within cardiology services only and for all other services. The control-group adjusted ROI for cardiology services only was $225,008, while for non-cardiology services it was $578,605. Other organizations note CRM has impacted the ROI of their programs by offering previously unavailable research and analysis with which they could make more reasoned and complete strategic business decisions.

Necessary response

While organizational change is difficult and time-consuming, it often is a necessary response to market and industry challenges and cultural shifts. CRM is one such endeavor that moves health providers beyond a population or market focus to a lifetime, person-centric philosophy.

Adopting and implementing a CRM system requires a shift in philosophy and a financial commitment that can pay off in customer loyalty and preference, leading to improved financial performance and overall brand strength.

By shifting to CRM, the organization can use comprehensive data to better prioritize resource allocation, improve strategic product and service development, increase marketing effectiveness and reduce costs. You'll find you can drive more of the right kind of revenue while building loyalty and long-term relationships. CRM also helps identify the best individuals, channel and message for each campaign and tracks campaign utilization results to calculate true return on investment attributed to CRM.

Gaining support and acceptance for CRM within your organization requires a team that can promote the vision and educate key decision markers. Demonstrating CRM's benefits and financial rewards with best-case practices will help you justify CRM. | Q health care/ethnic research

Many questions, not so many answers

By Tara Olson
and Sherrie Aycock

In June 2004, our firm, AllPoints Research, completed a study into women's health issues. The first phase was a quantitative survey that asked women between the ages of 40 and 54 about health issues in general, and sexual health in particular. Our second phase was a qualitative study that used focus groups to raise questions and test the phase one results within ethnic populations.

We developed the study for two reasons: curiosity and methodology. Given that the vast majority of women who responded to the quantitative survey (92 percent) were Caucasian, it was clear that the opinions and attitudes of minority women over the age of 40 were not sufficiently represented in that research. The owners and staff of AllPoints (a woman-owned company) were curious to know how women of color felt about a variety of health issues, including sexual health and the marketing of pharmaceuticals, so a follow-up qualitative phase of research was conducted among ethnic women.

The final analysis brought several issues to the forefront: direct-to-consumer (DTC) marketing, sexual health, information resources, and a doctor/patient disconnect that was a common thread throughout.

Direct-to-consumer marketing

Many women who participated in the quantitative research study felt that DTC advertising conducted by drug companies is beneficial to the public. Evidence of this impression among women of color was further supported in the qualitative study. Many of the women of color interviewed appreciated DTC marketing primarily because it is a quicker, more efficient way of getting important information out, such as pharmaceutical availability, applications and possible side effects, to large numbers of consumers. Study participants also mentioned that DTC marketing provides health and drug-related information directly to consumers and allows each individual to have greater control over their personal health choices and decisions.

Respondents in women's health study cite doctor/patient disconnect

Discussion regarding the extent to which current DTC initiatives effectively target women of color tended to evoke a mix of perspectives. Some participants felt that, while they have observed an increasing trend

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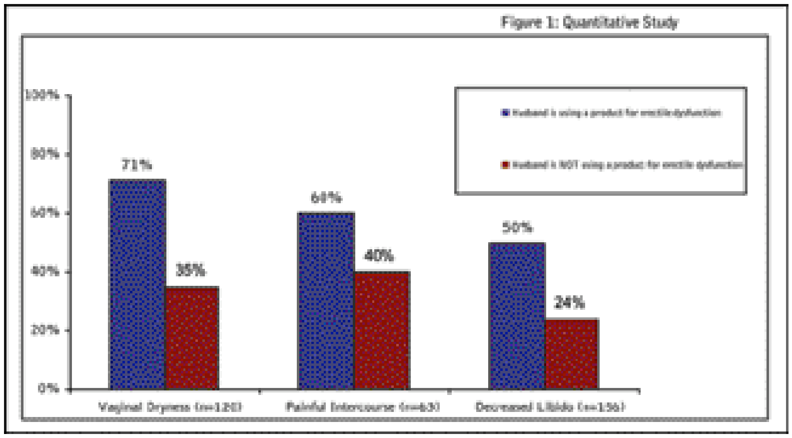
of DTC advertising that effectively targets women of color, this is still an area for improvement.

For many of the women participating in the qualitative study, the degree of realism expressed in the message was more important than was the emphasis on one's particular ethnicity. Participants said that they'd respond to marketing that showed everyday people doing everyday things, not models to which none of them can relate.

Some ethnic women may be tuning out the messages or dismissing them altogether when DTC advertising focuses on a very specific health condition (e.g., diabetes, high blood pressure, etc.) rather than more general health issues (e.g., weight, healthy diet).

A need was identified for a greater representation of minority women in clinical trials and a more concerted effort to identify potential pharmacokinetic differences as a function of ethnicity. Women of color in the study tended to express concern about how various drugs would impact women of their own ethnicity, especially when high-profile medications such as Vioxx are pulled off the market because of harmful side effects.

Women of color also stated that the DTC information frequently provides consumers with more information (e.g., about possible side effects, possible contraindications) than they are able to easily obtain from their physicians. This is an example of the doctor/patient disconnect shown again and again in the study. Focus group participants didn't feel comfortable asking their doctors for such information and didn't trust that their doctors would take the time to discuss options and side effects them.



Sexual health

The quantitative portion of the study carefully examined women's feelings about their partners' use of erectile dysfunction products, about their own sexual health, and about how they relate with their doctors on the subject.

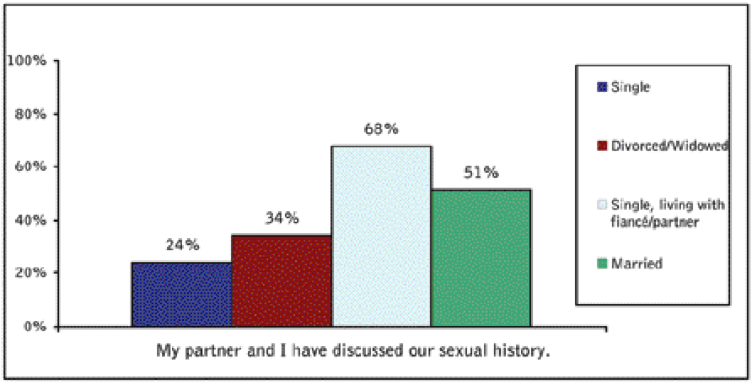
Women whose male partners and husbands use erectile dysfunction (ED) products - such as Viagra, Levitra and Cialis - felt overwhelmingly positive about the experience. Of the 712 women surveyed, 88 percent of women whose partners are currently taking an ED product were glad that their partners had decided to use the products; 72 percent said that they played a role in the decision; and 67 percent said that the products have enhanced their romantic lives.

On the other hand, 24 percent of women whose partners are currently taking a product for erectile dysfunction didn't feel that the use of the product was necessary and 28 percent felt that there was "more pressure to perform sexually" now that their partners were taking an ED product.

When it comes to their own personal sexual health, women in general have a tendency to avoid such a sensitive subject when speaking with their doctors and/or partners. Women of color specifically cited several factors, such as embarrassment and uncertainty about the causes of the problem. Many women participating in the qualitative research indicated that they didn't feel that sexual health issues like vaginal dryness or decreased libido were medical problems; they are simply the result of getting older or lack of interest in their partners. However, findings from the quantitative research show that women whose partners were already under treatment for sexual dysfunction felt more comfortable discussing these sensitive subjects with their physician. These women were likely to or had already discussed their own sexual health with their doctors (see Figure 1). Also, women with a high level of education (master's degree or higher) were more likely to look to their doctors for such information.

Hispanic women in the focus groups indicated that their cultures were strongly against the discussion of these subjects, especially with an authority figure like a doctor.

Figure 2: Quantitative Study (n=712 Women)



In another example of the doctor/patient disconnect, single women older than 40 surveyed in the quantitative phase tend to disregard their doctor's warnings about safe sex. While these single women say that their doctors consistently advise them to practice safe sex, they still do not talk with their partners about their sexual histories (Figure 2) and many are not concerned about contracting a sexually-transmitted disease. Some of the women of color participating in the qualitative research attributed this to their feeling that asking questions of their partners could put their relationships in jeopardy. These women were unaware that older women are the fastest-growing group of people diagnosed with HIV in the U.S.

Information sources

Ethnic women in the U.S. tend not to depend on their physicians as a primary source of health information. Instead, women of color cite friends and family, the Internet, books and patient education handouts as primary information sources. Many of the women of color interviewed in the study appear to place even greater reliance on non-physician sources of information when seeking information and answers to matters pertaining to their sexual health.

Of note, several women (across different focus groups) spontaneously mentioned their use of Internet-based discussion forums when they had health-related concerns of a more sensitive nature. Descriptions of these more "structured" forums (i.e., with real-time moderation by a health care professional) that allow the individual to express her concerns and questions in a safe and anonymous environment frequently prompted reactions of interest and enthusiasm among other focus group participants. Also of note, women participating in the quantitative phase of research indicated that they rely heavily on the Internet as a source of information for health-related questions and concerns. Several women (across several of the discussion groups) also identified their insurance providers as a key resource for health information. The women who did seek out advice from medical professionals on these issues were women with other chronic health issues that required regular physician visits.

At least two women (in two different groups) expressed a need for some kind of resource (e.g., a pamphlet or brochure) that provides information regarding the health-related changes a woman should expect at different stages of her life and identifies specific health areas that warrant particular attention at different life stages. Perhaps such a resource could also help women properly "frame" a health condition they are experiencing.

Methodology

For the quantitative phase of the study, AllPoints administered a Web-based survey to 712 women. Results are subject to a maximum sampling error of + 3.67 percent at the 95 percent confidence level. Women were invited to participate and sent a link to the Web study via e-mail. All participants were over the age of 40.

The qualitative phase consisted of four focus groups, each with five African-American women and one Hispanic woman. The findings are considered to be a valuable source of additional information and anecdotal evidence - not precise data that can be extrapolated across entire populations. | Q

Your language, their language, or both?

A new perspective on Hispanic media planning

By Felipe Korzenny

There were approximately 10 million Hispanics in the U.S. in 1980 according to the U.S. Census Bureau. In 1990 there were about 23 million; in 2000, 35.4 million. By July 2003, U.S. Census Bureau estimates indicated that U.S. Hispanics numbered about 40 million. The explosive growth over the past 25 years has been fueled largely by immigration. Immigration to the U.S. accelerated as economic conditions in Latin America deteriorated dramatically over the same period of time. Mexico, the key exporter of Hispanics to the U.S., has been the barometer of Hispanic immigration to the U.S. Mexicans largely define the shape, size, and profile of the U.S. Hispanic market.

This explosive growth does not take into consideration the findings of the Pew Hispanic Center, which has published conservative estimates that there are 11 million undocumented individuals in the U.S. in 2005, of which about six million are Mexican, and another 2.5 million are from other countries in Latin America. It is intuitive to those who have followed the development of the U.S. market that these estimates undercount the actual number of undocumented U.S. Hispanics.

The U.S. Census Bureau has engaged in an aggressive campaign to encourage undocumented residents of the U.S. to complete census forms. Despite their good intentions and work, it is difficult to imagine that undocumented Hispanics would complete official census forms. If there are over 40 million Hispanics accounted for and a minimum of 8.5 million likely unaccounted for, it can be postulated that conservatively there should be close to 50 million Hispanics in the U.S., without counting Puerto Rico. That makes the U.S. the second largest Hispanic country in the world behind only Mexico. The next most populous Hispanic country after the U.S. is Colombia with an estimated 47 million and then Spain with about 40 million.

In addition to substantive population numbers, the Selig Center of the University of Georgia has estimated that the buying power of U.S. Hispanics in 2005 is over $750 billion. The same organization has provided projections that in 2008 the buying power of U.S. Hispanics is likely to reach $1 trillion. This latter figure will make the

Editor's note: Felipe Korzenny is professor and director of the Center for the Study of Hispanic Marketing Communication at Florida State University. He can be reached at fkorzenn@fsu.edu. Some of the ideas in this article are further elaborated on in the forthcoming book Hispanic Marketing: A Cultural Perspective, *by Felipe Korzenny and Betty Ann Korzenny, to be published by Butterworth Heinemann/Elsevier in July 2005.*

U.S. Hispanic market more affluent than the entire country of Mexico and one of the largest economies of the world.

But how do you reach them?

These estimates and projections have made the U.S. Hispanic market the subject of increased marketing attention. Also, these figures have energized the debate of how to reach these consumers.

Traditionally, the majority of the Hispanic marketing and media industries have reasonably argued that the Spanish language is the best way of reaching U.S. Hispanics. The U.S. Census Bureau and other sources have consistently shown that about 80 percent of U.S. Hispanics are identified as speaking at least some Spanish at home. The reasoning has been that if Hispanic consumers largely speak Spanish at home, then the language in which they need to be approached with commercial messages should be Spanish. The reasons for this vary. Most importantly, if consumers depend on the Spanish language for communication and comprehension, then Hispanic consumers must be reached in Spanish.

There are also more subjective but equally important reasons. It has been argued that the language of the heart is Spanish because, being it the language of the home, it strikes emotional chords more directly than does English. A further argument is that Hispanics take pride in the Spanish language in recent times because it has become increasingly cool to be Hispanic. Hispanic parents now encourage their children to master the Spanish language because it makes young people proud of their heritage and more employable. In sum, it is largely accurate that the Spanish language among U.S. Hispanics is now more than a tool for communication, it a symbol of cultural pride.

It is not that Spanish is not important

The above are intuitive and logical arguments. The key problem is that new available data makes the assumption of widespread Spanish dependence less tenable. The key point to be made here is not that the Spanish language is not important. On the contrary. The point is that the assumption that Hispanics are only and primarily reachable in Spanish needs to be re-addressed.

Despite all the commonsense arguments, Hispanics, even those whose first language is Spanish, say they watch about half their dose of weekly TV in English and half in Spanish (Yankelovich Multicultural Monitor 2003 in collaboration with Cheskin and Images USA). The U.S. Census Bureau provides data that shows that over 70 percent of those who are designated as speaking Spanish at home also understand English well or very well. In sum, a conservative estimate is that over 56 percent of Hispanics who speak at least some Spanish at home in the U.S. may be reached in English. And there is the 20 percent that do not speak Spanish. Thus close to 76 percent of all U.S. Hispanics may be reachable in English.

While reaching specific groups of Hispanics in Spanish will continue to be important for a long time to come, media strategists need to start thinking differently. It is not just Spanish-language media that reaches Hispanics. It would be illogical to think that despite overwhelming access to English-language media and messages Hispanics just ignore them. Even in small markets there are many times more TV, radio and print offerings in English than in Spanish. While Hispanics are likely to have a strong affinity for their language, they look at what English-language media has to offer. Thinking that Hispanics only look at Spanish-language media would be unrealistic even in the case of those who depend on the Spanish language.

A complex media-planning environment

In a complex media environment, the complexity of the media planning needs to correspond to consumer behavior. Hispanics flip channels and are curious about what is available in their media market. Many Spanish-dependent Hispanics may watch English-language media if for nothing else to learn English.

Talking about complexity, the diversity of the Hispanic family's internal language and other behavioral orientations will continue increasing. While the mother may be Spanish-dependent, the father may be Spanish-dominant but proficient in English. The grandmother may be totally Spanish-dependent, and the two or three young children may speak Spanish at home but fluent English outside of the home. If this family is exposed to different messages depending on what they watch on traditional Spanish or English media they may have seen very different approaches and brand characterizations. If this family makes product decisions, they may talk to each other and each may come from a somewhat different perspective.

New and realistic approaches to the Hispanic market will need to consider the reality of the media environment of U.S. Hispanics. Media planners will have to start thinking about cross-language strategies. Some may place Spanish-language messages in English-language media. Some may place English-language messages in Spanish-language media. Others may find it more relevant to place English-language messages in English media when targeting specific groups of Hispanics. Many may combine their approaches and should have consistent and culturally relevant messages in both Spanish- and English-language media, in their respective languages. This latter approach is geared to providing positioning consistency for Hispanics who are exposed to both media.

The communication strategist should not be bound by dogma but by pragmatism. The strategist has the mission of reaching Hispanics with the complete palette of alternative and complementary media. The Spanish language will continue to be very important for U.S. Hispanics and U.S. society in general. Still, marketing communications need to acknowledge the duality of life of U.S. Hispanics. Media outlets will need to diversify their offerings to serve Hispanics – and advertisers – in both languages. Mun2 is an example of how a media group understands the diversity of the market and the need to reach different segments with different approaches and different languages.

Challenges for market research

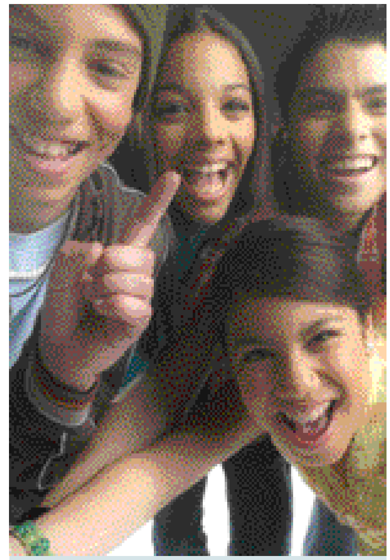
Market research focusing on Hispanics will have to account for linguistic and media exposure diversity. This is a very difficult task because consumers typically have a hard time remembering where they have seen ads and promotions. Still, this is a challenge that the research industry needs to rise to. The key question is: What is the media and cultural environment where different Hispanic segments obtain their information and consumer guidance? Other research issues that need to be addressed include:

- For those Hispanics exposed to both Spanish- and English-language media, what is the relative emotional weight of the messages received in each medium?
- What is the impact of the influence of different family members – with different linguistic abilities and preferences – on the ultimate decision to buy cars, homes, financial products, etc.?
- How do consumers process discrepancies between messages for the same brand when the product is differently communicated in Spanish and in English? | Q

ethnic research

Bilingual, bicultural and more

A primer on Hispanic teens



By Mary Baroutakis

As a researcher who works in both the general and Hispanic markets, I am constantly being asked about Hispanic teens and what similarities and differences they exhibit vs. their Anglo counterparts. Actually, there are many similarities between Hispanic and general-market teens. This should not be surprising, as Hispanic teens are exposed to almost everything that Anglo kids are exposed to and these exposures, of course contribute to making them much more alike than ever before.

All teenagers want to belong, to be part of a group, to not be singled out in any negative way. Hispanic teens are no exception. This means that, for the most part, Hispanic teens follow many of the same trends as other teens in their area, especially when it comes to fashion (hip- hop clothes, low-risers); entertainment (movies, clubs, concerts, hanging out with friends, Internet); music (R&B, rap); TV shows (*The O.C.*) and sports (basketball, rollerblading, skateboarding).

There are, however, also many differences to take into consideration when marketing to Hispanic teens. These differences come into play when Hispanic teens decide to mix their Hispanic heritage into the equation. And they do this very often. For example, Hispanic teens who listen to rap and R&B will also listen to salsa, bachata and rock Latino. Hispanic teens will use a Spanish chat room instead of an English-language one. And, yes, Hispanic girls will watch *The O.C.*, but they will also watch a Spanish novela with their mother or grandmother. Hispanic boys will listen to an R&B radio station but they will also tune in to a Hispanic station to hear the latest Latin beats.

In most instances, Hispanic teens feel part of their city, especially those who live in big multicultural cities such as Los Angeles, New York, Chicago and Miami. They don't see themselves as outsiders. Although a large portion of their friends tend to be Hispanic, they do embrace other cultures as well, especially those teens that were born in the U.S. and/or live in multicultural neighborhoods. Hispanic teenagers hang out with African-Americans, Asians, Anglos (and even with Russians, if they live in Brighton Beach, Brooklyn). Their Hispanic friends may also be from Latin American countries other than their own. So although there might be a strong affinity with someone of the same ethnic background, there is no rejection of

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other nationalities. Hispanic teens tell us that "all kids are basically the same."

Hispanic teens also tend to be much more open-minded and tolerant than their parents. They are more accepting of abortion, homosexuality, people with different views and cultures, etc. Their perspective has been colored by an outside environment that is quite different from that of their parents and, certainly, grandparents.

Optimistic

By and large, Hispanic teens tend to be optimistic about life and about their future. They feel that they have many opportunities available to them in this country - probably many more than what they would have had in their parents' native country. Their aspirations are quite mainstream. Most say that education is their No. 1 priority. They want to go to college, study something that they like, which hopefully will get them a good job. Eventually, they hope to have a family. The vast majority feel that money is necessary but not the most important thing in life. To have a good family and feel satisfied with life in general is deemed to be much more important.

Hispanic teens look up to their parents. Although many feel that their parents tend to be more old-fashioned and more strict than Anglo parents, they also describe them as more caring than the parents of their non-Hispanic friends. For most Hispanic teens, their parents, especially their moms, are their role models. This should not be surprising given what their parents went through to get to this country and the type of work they do in order to achieve what they have today. Their parents' sacrifices have not gone unnoticed by their children.

Although Hispanic kids worry about discrimination, this is not one of their primary concerns (as it may be with their parents). They know that discrimination exists, that it is out there, but they feel that they can fight it and that they can win. Certainly, they are more optimistic about the range of opportunities available to them compared to those that are or were available to their parents.

One great advantage

Interestingly, the vast majority feel that they have one great advantage over Anglo teens: biculturalism. They believe that the fact that they speak another language and know another culture is quite important in this country. Hispanic teens are quick to point out that the U.S. is increasingly becoming more Latin-conscious, especially when it comes to jobs, politics, food and music. They feel that they will be able to capitalize on this.

Hispanic teens are proud of their heritage. Unlike some teens of other ethnicities who ignore their background and even refuse to speak their parents' native language, Hispanic teens embrace their heritage. Music is one powerful way of savoring their culture. Although, they like to listen to R&B and rap, they also listen to Latin rock, salsa, cumbia and bachata.

Food is another way they identify with their culture: hamburgers, pizza and KFC when they go out with their friends; arroz, frijoles and platanos when they are at home. It should be noted, however, that increasingly more and more teenage girls, especially those who live in more upscale Hispanic markets such as Miami, tell us that they try to watch their weight and have become more health-conscious. Consequently, they report pressuring their moms to reduce consumption of fried foods and buy more fat-free, low-fat and sugar-free products for in-home use.

Most Hispanic teens use Spanglish when they speak with their Latin friends. Although they recognize that Spanglish is not the best use of language, they themselves cannot help using it. Some use it all the time, others use it some of the time depending on what they want to express, where they are, how well their friends speak either language, etc. Use of Spanglish in advertising, contrary to what some advertisers may think, is not widely accepted by teens. While everyone admits that this form of expression is reality, many Hispanic teens prefer not to see it in advertising, saying that it degrades the Spanish language.

Internet usage among Hispanic teens is almost at the same level as among general-market kids. They have access to it at home, at school, in the library or at their friends' homes. Hispanic teens use e-mail and instant messaging to communicate with their friends, visit chat rooms, download music and lyrics, visit product Web sites for information on fashion, sport events, concerts, celebrities, etc. It has become a way of life for many.

Some problems

As many other teens, Hispanic teens also face some serious problems. Hispanic girls, in particular, lag behind in education and currently have the highest high school dropout rates in the U.S. Teen pregnancy as well as cigarette and drug use are other common problems. On the other hand, Hispanic teens are not drinkers the way that their Anglo counterparts are. Getting drunk is not considered cool. One reason for this is that drinking has never been a common way of bonding among people in the Latin culture.

Most Hispanic teens have little exposure to some of the "finer" things in life: attending classical music and dance performances, visiting museums, going to the theater, traveling abroad to places other than their own countries, reading serious books, learning other foreign languages. Some of these shortcomings are directly related to the low socioeconomic level of their parents. They also have to do with their parents' lack of vision and knowledge. In other words, their parents are not aware that exposing their kids to such things will make them more well-rounded and more desirable in a world that's increasingly more competitive.

Because Hispanic kids are bicultural and know what is going on in both the Hispanic and the general market advertising environments, they cannot help notice how kids are courted in the Anglo media vs. how they are courted in the Hispanic media. Hispanic teens have told us time and again that while most advertising targeted to Anglo teens is cutting-edge and original, most Hispanic advertising targeted to teens is commonplace, boring and safe.

Hear it firsthand

So how do you reach Hispanic teens? Do your homework via good marketing research. Hear what the Hispanic teens have to say firsthand. Target them in both general-market and Hispanic media and reflect who they are: bicultural kids in a society that is increasing less insular and more curious and accepting of others. And, finally, be bold with your Hispanic advertising. Remember, these kids are exposed to everything that is out there and have the same standards as all other kids their age. |Q

Survey Monitor

continued from page 10

compared to 78 percent of whites had retirement account savings of $50,000+, per Ariel/Schwab.

Their attitudes and beliefs about saving and investments practices often differ from others as well:

• One in four blacks has a professional financial adviser as they realize planning has become more important and they tend to trust someone from a well-known company who is recommended by friends or family and is involved in community development, according to a recent LIMRA survey. Fifty-eight percent of black savers prefer suggestions from a professional regarding saving and investing but often make their own decisions; they are twice as likely as all workers to want a paid professional to manage their investments, per the 2003 Minority RCS. With establishment of a trusting relationship, often with someone they can relate to (of color), blacks are more likely to be loyal to financial advisers.

• 58 percent compared to 44 percent of whites feel that you can never have too much money and 72 percent of blacks versus 63 percent of whites feel money is very important, according to an Ariel/Schwab study.

• 83 percent of blacks and 80 percent of whites believe that saving for the future should be a priority; 84 percent versus 77 percent respectively learned from their parents to save a portion of all earnings, per Ariel/Schwab.

• 44 percent of blacks compared to 58 percent of whites consider retirement a savings and investment goal while 20 percent and 14 percent respectively consider sending kids to college a goal, per Ariel/Schwab.

• 42 percent versus 33 percent of all workers are not too confident or not at all confident about having enough money to live comfortably through retirement, per the 2003 Minority RCS.

The African-American market is becoming increasingly affluent and requires greater education and outreach with respect to financial planning for the present and the future. However, this market has traditionally been underserved by financial institutions. Thus, a tremendous opportunity exists for culturally sensitive organizations to approach African-Americans with financial advice as well as saving and investment options to meet their needs. Many financial institutions have already recognized the long-term significance of establishing a presence in black communities as well as forging partnerships with black organizations and churches to advance the economic base of the community and its members. In addition, some have engaged in conscious efforts to recruit and train professionals of color to cater to the black community. Outreach and support of the African-American market must become a higher priority for the financial services industry given the significant and increasing buying power of this group, its estimated wealth transfer value, and the interest in becoming financially savvy. For more information visit www.huntermillergroup.com.

Hispanic-Americans are untapped market for radio ads

The rapidly growing U.S. Hispanic-American population represents untapped potential for the radio advertiser market, according to a new study by Arbitron Inc., New York. Arbitron's Power of Hispanic Consumers Study 2004-2005 shows that Hispanic consumers are heavier users of radio than newspapers or television. They spend significantly more time with radio than non-Hispanics, averaging 22 hours and 30 minutes per week. Hispanic-Americans spend half their radio time listening to Spanish-language formats, a group of formats consisting of diverse musical and programming tastes, from tropical to talk.

"According to the U.S. Census Bureau, there are approximately 40

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Charlotte: Leibowitz Market Research Associates, Inc.
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Chicago/Northfield: National Data Research, Inc.
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Detroit: ADVANCE International
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Houston: Opinions Unlimited, Inc.
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Indianapolis: Herron Associates, Inc.
800.392.3828

Los Angeles/Beverly Hills: Adept Consumer Testing, Inc.
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Los Angeles/Encino: Adept Consumer Testing, Inc.
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Minneapolis: Focus Market Research, Inc.
612.869.8181

Northern New Jersey: Meadowlands Consumer Center, Inc.
800.998.4777

Philadelphia: Group Dynamics in Focus, Inc.
866.221.2038

Phoenix: Focus Market Research, Inc.
480.874.2714

Providence: Performance Plus
508.872.1287

San Diego: Taylor Research, Inc.
619.299.6368

San Francisco: Nichols Research, Inc.
408.773.8200

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San Jose: Nichols Research, Inc.
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Seattle: Consumer Opinion Services, Inc.
206.241.6050

Tampa: The Herron Group of Tampa, Inc.
813.282.0866

Washington, D.C.: Shugoll Research, Inc.
301.656.0310

million Hispanics-Americans living in the U.S with $686 billion in spending power, a number that is growing at twice the annual rate of non-Hispanics," says Stacie de Armas, Arbitron's director, Hispanic services. "Advertisers are taking note of the desirability of the Hispanic-American consumer. From 1998 to 2003, corporate spending on Hispanic advertising has nearly doubled to $2.7 billion."

Hispanic-Americans are younger than the general population. More than half (52 percent) are married and more than half (55 percent) of Hispanic households have four or more members. More than one-third has at least some college education or more. Hispanics are more likely to be employed than the average American, with 14 million Hispanic adults employed full-time in the United States. The study also found that Hispanic-Americans are:

· 19 percent more likely to spend $500 or more on children's clothing per year;

· twice as likely to spend $500 or more on athletic shoes per year;

· spending more on cell phones, with 9 percent spending over $100 per month on cell phone bills;

· seeing more movies than the average American and 81 percent more likely to see a movie in its opening week;

· more likely to take several trips outside the continental U.S. per year (in fact, they are 31 percent more likely to have taken five or more trips outside the U.S. within the last three years). The Arbitron Power of Hispanic Consumers Study 2004-2005 is available free at www.arbitron.com.

Americans like a good knockoff

Step aside Carrie Bradshaw, America's brand loyalty is about as faux as that Louis Vuitton you bought in Chinatown! According to a survey by Chicago research firm Synovate, the majority of Americans are purchasing designer replica clothing, accessories and technology. Through interviews with 1,648 people worldwide, and 539 in the U.S., Synovate has uncovered that many Americans are purchasing counterfeit products - and even more disturbing: there is no guilt or social taboo associated with purchasing knockoff products as opposed to the real thing.

The first key finding was that most Americans have no issues buying imitation-brand clothing or accessories. Fifty-nine percent of respondents said that they had purchased an imitation brand-name product. When asked why they chose to purchase imitation products, almost 96 percent attributed their decision to the lower price of the replica product. The responses were not affected by an increase in household income or age.

The research also found that public perception is largely unaltered when it comes to buying counterfeit products. Ninety percent of respondents claimed that they would lose no respect for a person if he or she had a fake or imitation brand name product. A small percentage (slightly more than 1 percent) of those surveyed said that their respect for the person who purchased the imitation product would actually increase. Fewer Americans (30 percent) found something wrong with purchasing imitation products, such as purses, jewelry or imitation electronic products compared to the other regions surveyed, which included Hong Kong (71 percent), United Arab Emirates (47 percent) and Serbia (52 percent).

"It was astounding to learn that the U.S. population, arguably the world's most sophisticated consumer market, displayed the least guilt about purchasing imitations," says Tom Mularz, head of Global Omnibus, Synovate. "In an age where brand recognition is at its peak, consumers still seem to be focused on price versus quality. This, in turn, is creating pressure for original designers and manufacturers to communicate a negative association with lower-priced replica products."

Synovate interviewed 1,648 respondents in the U.S., Serbia, United Arab Emirates and Hong Kong through online, telephone and face-to-face interviewing. In the United States, the company interviewed 539 people through eNation, Synovate's national online research service. For more information visit www.synovate.com.

Small-biz owners not so confident in their confidence

Even though overall confidence in the economy has been dropping for the past three months (5.5 percent), confidence among small businesses still ranked higher than that of general consumers. In fact, according to the Small Business Confidence Index released by Sam's Club, small-business confidence in the economy has outpaced that of general consumers for the past year by an average of 3.9 percent.

However, less than half (45.4 percent) of 1,200 small-business owners

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3720 DaVinci Court . Norcross GA 30092 . 800.793.3126 . www.activegroup.net and managers polled in April 2005 said they were confident/very confident about the chances for a strong economy during the next six months. That reflects a confidence level drop of almost 7 percent compared to this time last year.

Sam's Club also asked nearly 1,000 small-business owners and managers to rank expenses that are of most importance to their operations. Health insurance (43.1 percent) topped the list ahead of broadband access (35.9 percent), cellular phones (33.9 percent), business energy (gas, oil, propane, etc.) (31.7 percent), advertising (22.2 percent), accounting services (16.9 percent), voicemail (12.8 percent), dial-up Internet service (11.8 percent), financial planning services (8.3 percent), and collection services (7.8 percent). The index is available for viewing at www.samsclub.com.

Wal-Mart is tops with Hispanic-Americans

New York-based NOP World announced results from its Hispanic OmniTel Retail Study revealing where Hispanic-Americans are shopping and why. Asked to name their favorite store, Wal-Mart was far and away the top selection at 36 percent with JCPenney, Sears and Target tying for second place at 4 percent. While no one specific Hispanic store was selected by a significant percent of consumers, 5 percent of respondents named as their favorite a local store that caters to Hispanic-Americans.

The study was conducted in February 2005 among 500 Hispanic-Americans aged 18 and older nationwide via telephone. Respondents were given the choice of completing the survey in English or Spanish.

	U.S.-born	Foreign-born
Low prices	70%	83%
Convenient location	67%	75%
Wide range of merchandise	68%	73%
Employees who speak Spanish	33%	69%
Products relevant to Hispanic consumers	35%	64%
Wide range of payment options	35%	55%
Spanish signage	22%	65%
Product packaging and labels in Spanish	20%	58%
Owner is a member of the local community	28%	40%

Asked which factors are most important when deciding where to shop, Hispanic-Americans cited the same priorities that other Americans have when choosing retailers – convenience, low prices and a wide range of merchandise. However, a critical second-tier of priorities that is unique to the Hispanic market is cited by about half of Hispanics as being "very important," including store employees speaking Spanish, products relevant to Hispanic consumers and Spanish-language signage. Following is a breakdown of factors considered very important in choosing a shopping destination:

- Low prices – 77 percent
- Convenient location – 72 percent
- Wide range of merchandise – 71 percent
- Employees who speak Spanish – 54 percent
- Products relevant to Hispanic consumers – 52 percent
- Wide range of payment options – 47 percent
- Spanish signage – 47 percent
- Product packaging and labels in Spanish – 43 percent
- Owner is a member of the local community – 34 percent

Based on priorities of Hispanic shoppers it is no surprise that national discount chains such as Wal-Mart and Target are frequented even more often than local stores that specialize in serving Latino and Hispanic customers. Asked about their retail shopping habits, following is a breakdown of the types of stores respondents said they shop in often:

- national discount chain stores such as Wal-Mart or Target: 61 percent;
- local stores that specialize in serving Hispanic and Latino customers: 37 percent;
- national home improvement stores such as Lowe's or Home Depot: 37 percent;
- national mid-priced department stores such as Kohl's, Sears or JCPenney: 31 percent;
- specialty clothing stores such as the Gap or Old Navy: 19 percent;
- electronics, entertainment or appliance stores such as Circuit City or Best Buy: 17 percent;
- national upscale department stores such as Macy's, Nordstrom or


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Lord & Taylor: 10 percent;

• sporting good stores such as the Sports Authority: 8 percent.

"The survey shows that mainstream national retailers such as Wal-Mart and Target are highly attractive to Hispanics, but that the key to differentiation stems from meeting and delivering the unique needs of Hispanic consumers," says Brad Fay, managing director, NOP World's Roper Public Affairs. "To stand out with Hispanics, retailers need to consider offering such things as Spanish-speaking sales clerks, Hispanic-oriented merchandise, and Spanish-language signage."

Foreign-born respondents were significantly more attracted to the tailored offerings of local stores specializing in serving Hispanic customers, with 42 percent saying they often shop in these stores vs. 26 percent of U.S.-born Hispanics.

While both groups select Wal-Mart as their favorite store, the chart shows a breakdown of how their shopping priorities differ based on the factors they select as very important in deciding where to shop.

"One has to be careful to recognize that the Hispanic-American market is not a single market, but rather consists of a diverse set of consumers based on differences in language and country of origin, among other factors," says Fay. "Unless marketers carefully study this segment, they take a significant risk of missing the mark." For more information visit www.nopworld.com.

We seafood, we eat it

A survey by Harris Interactive reveals that 51 percent of U.S. adults who have ever eaten seafood say they are eating more seafood now than they did five years ago. Additionally, about two in five seafood eaters (41 percent) say they eat seafood because recent studies suggest it is healthy for the heart.

The survey, commissioned by Red Lobster, also discovered that:

More than three in four U.S. adults (77 percent) say they eat seafood at least once a month. Only about one in 10 (9 percent) say they never eat seafood.

The top two types of seafood frequently consumed by U.S. adult seafood eaters are shrimp (61 percent) and canned tuna (57 percent), followed by salmon (39 percent), crab (23 percent), fresh tuna (22 percent), cod (17 percent) and mollusks, such as mussels, clams or oysters (16 percent). Other types of seafood consumed frequently include: lobster (11 percent), halibut (10 percent), haddock (9 percent), rainbow trout (9 percent), tilapia (9 percent), snapper (8 percent) and grouper (4 percent).

About two-thirds of U.S. adult seafood eaters (67 percent) say they eat seafood because it is a welcome alternative to meat and chicken. Additionally, 68 percent note that they purchase seafood such as salmon, shrimp and sushi at their local supermarket or grocery store. For more information visit www.harrisinteractive.com.

Product and Service Update

continued from page 14

these insights, category, marketing and brand managers can work more effectively with sales and supply chain colleagues; and account managers in the field are better equipped to answer questions and negotiate with customers. For more information visit www.infores.com.

Full release of fall 2004 SimmonsLOCAL Consumer Information

Deerfield Beach, Fla., research firm Simmons announced the full release of its fall 2004 SimmonsLOCAL product. The fall release provides clients with information on local media and purchasing behavior in each of the nation's 200-plus designated market areas (DMAs).

SimmonsLOCAL offers:

• sample sizes large enough to reliably identify valuable consumer segments;

• data that aims to capture the nuances of local market populations;

• insightful information on consumer purchase behavior, including over 8,000 specific brands in more than 450 categories;

• data specific to DMA, county, trade area, and zip codes;

• complete multimedia information including broadcast TV, cable, newspaper, magazine, radio and the Internet.

Launched by Simmons in 2003, SimmonsLOCAL features market-by-market research detailing consumer lifestyles, psychographics and product purchases of over 8,000 brands. For more information visit www.simmonslocal.com.

Research service targets small- and medium-sized businesses

JupiterResearch, New York, has launched a new research service called SMB Marketing, which is designed to help companies market effectively and increase sales to small- and medium-sized businesses. Drawing on comprehensive surveys of SMB decision makers, intelligence from successful marketers and JupiterResearch studies on evolving online marketing best practices, SMB Marketing aims to identify and profile attractive market segments and spell out effective tactics to win SMB market share. For more information visit www.jupiterresearch.com or contact Kieran Kelly at 800-481-1212.

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MarketingExperiments.com, an online marketing research laboratory, is now offering free subscriptions to its publication, the *Marketing Experiments Journal*. This move gives marketers access to marketing research and reports about online marketing techniques that were previously available only to paid subscribers. The free subscriptions include access to more than 60 research briefs covering topics such as e-mail marketing, site conversion, online marketplaces, pay-per-click strategies and online advertising. For more information visit www.marketingexperiments.com/newmemberform.asp.

Briefly

U.K.-based Fieldwork International is now offering videostreaming at its viewing facilities in London. For more information visit www.fieldworkinternational.com.

SIS International Research has opened its second New York City facility at 7 East 20th Street. It features a global call center and a large focus group room that can fit up to 50 respondents and up to 20 viewers. For more information call 212-505-6805 or visit www.sisinternational.com.

Observation Baltimore has opened a new focus group suite. The new Howard suite, named after the street it faces, holds 10 participants and a moderator and is viewable from an observation room that stretches around it at a 90-degree angle. The observation room accommodates up to 15 clients. The Howard suite is designed to allow for multiple configurations, such as a doctor's office, a living-room setting, or a convenience-store setting. For more information contact Brian Siatkowski at 410-332-0400 or visit www.observationbaltimore.com.

Braintree, Mass, software firm Perseus is offering SurveySolutions Express, a free Web survey site which allows individuals to design surveys, collect answers and report results from eight different types of reports or use the analysis functionality to view summary statistics and dozens of charts. Responses can be exported in multiple formats including Excel and SPSS. For more information visit http://express.perseus.com.

TNS Media Intelligence, New York, now tracks advertising occurrences on local radio stations in 30 top markets across the United States through a partnership with Mediaguide. Initially, TNS Media Intelligence will monitor 15 stations per market, both AM and FM, with additional stations being added on a regular basis. Tracking of ads will be done 24 hours a day, seven days a week and all recorded advertisements will be monitored. For more information visit www.tns-mi.com.

Research Industry News

continued from page 16

ket is less easy to predict in advance of the outcome of the 2005 general election but nonetheless things look bright, as we anticipate continued growth above inflation."

Acquisitions/transactions

Germany-based **GfK** has acquired market research company **NOP World** from the British media group United Business Media for approximately $728.5 million in cash. With over 1,500 employees, NOP World achieved sales totaling $416 million and an operating profit of $46 million in 2004.

Greenfield Online, Inc., Wilton, Conn., has completed the acquisition of Munich-based **Ciao AG** for aggregate consideration valued at approximately $154 million. The consideration for the acquisition consists of EUR 57,692,250 in cash and 3,947,367 shares of Greenfield Online common stock valued at $20.19 per share (the closing price of the Greenfield common stock on Nasdaq on April 6, 2005). The amount of consideration is subject to certain post-closing adjustments. The acquisition is expected to be accretive to 2005 and future years' earnings per share.

Ciao AG was founded in 1999. The company has 150 employees across six European offices in Munich, London, Paris, Madrid, Amsterdam and Timisoara, Romania, as well as a small office with five employees in the U.S.

For 2004, Ciao AG recorded revenue of approximately EUR 18.1 million ($22.5 million) with growth of approximately 78 percent over 2003. Ciao AG recorded 2004 operating income of approximately EUR 6.9 million ($8.6 million) representing growth of 100 percent over 2003 and EBITDA of EUR 7.3 million ($9.1 million) representing growth of 91 percent over 2003. These figures were computed based on German GAAP and reconciled to U.S. GAAP.

Ciao AG has created an interactive community in Europe with participants engaged in taking surveys, writing product reviews and giving their opinions.

Ciao AG's Munich headquarters will serve as Greenfield Online's new European headquarters. Ciao AG's four managing directors will join Greenfield Online in management roles. Maximillian Ulrich Cartellieri, Ciao AG's co-founder and co-CEO, becomes Greenfield Online's executive vice president of integration. Frederick Paul, Ciao AG's co-founder and co-CEO, becomes Greenfield Online's executive vice president of online communities. Gunnar Piening, Ciao AG's managing director of online surveys, becomes Greenfield Online's senior vice president European sales and operations. Nicolas Metzke, managing director, Ciao AG France, who is responsible for panel development and support, becomes Greenfield Online's senior vice president European panel.

As a result of the transaction and issuance of the associated 3,947,367 shares of Greenfield Online common stock, Ciao AG shareholders in aggregate will own approximately 15 percent of Greenfield's total outstanding common stock. Included in that group are Ciao AG's four managing directors. Cartellieri and Paul received 250,000 and 200,000 shares, respectively, of Greenfield Online common stock as part of the transaction. Piening and Metzke each received 45,000 shares. The shares issued in the transaction were not registered and, accordingly, are "restricted securities" under the U.S. federal securities laws. Holders may resell the restricted securities only pursuant to a valid registration statement under the Securities Act of 1933 or an exemption from the requirements of such act.

Laurie S. Donnell has purchased and taken over **Research Systems**, a Minnetonka, Minn., market research firm. Donnell will continue operating the company under the Research Systems name and will expand the scope of business applications to include programs in small-business financial consulting, strategic planning, sales enhancement and human capital application services.

Harris Interactive, Rochester, N.Y., has added **Market Team,** a Bogotá, Colombia, market research and retail audit firm, to its Global Network. Market Team, established in 1994, conducts research in its home country, as well as in Ecuador, Central America and the Caribbean region.

Two former executives of Data Development Corp., Chip Lister and Kim Knepper, have purchased the New York research firm and changed its name to **Data Development Worldwide**.

Chicago research firm **IRI** has acquired the outstanding ownership of Mosaic InfoForce, L.P. (MIF). MIF, a joint venture between IRI and the Mosaic Group, Inc., is a provider of in-store data collection and retail audit services which collects information on in-store conditions.

Synovate has acquired **Columbus Quanti**, a Belgium-based research business. Columbus Quanti is a medium-sized research agency with offices in Ghent, employing around 40 staff. The company serves the telecom, FMCG, finance and public utility sectors.

Consumer Health Sciences, a health information and market research company, has become a separate operating division of New York research firm the Ziment Group as part of Grey Global Group's recent purchase by WPP. Formerly part of Grey Healthcare, CHS will form a new division within the Ziment Group. The company will continue to operate from Princeton, N.J.

Leger Marketing, a Montreal-based research firm, has acquired **Criterion Research Corp**., in Edmonton. Maureen McCaw, owner of Criterion Research Corp., the company she founded 20 years ago, will become president of Leger Marketing Alberta. Tammy Fallowfield will continue as general manager.

Chicago private equity fund **Hispania Capital Partners** has acquired a controlling interest in **Eastern Research Services, Inc.,** a Springfield, Pa., research firm. Kean Spencer will remain as president and Nicholas Mannino will remain as CEO.

Alliances/strategic partnerships

Arbitron Inc., New York, has reached an agreement with **VNU** to deploy, by

year-end 2005, a pilot panel of more than 6,000 U.S. households as a demonstration of the Project Apollo national marketing research service. The pilot panel for the national marketing research service will consist of approximately 14,500 participants in 6,250 households, providing multimedia exposure and purchase information from a common sample of consumers.

These individuals will be incented to voluntarily carry Arbitron's Portable People Meter, a device that collects the volunteers' exposure to electronic media sources. Consumer exposure to other media such as newspapers, magazines and circulars would also be collected through additional survey instruments.

GroupNet, a network of independently-owned focus group facilities, has added two new members: **Meadowlands Consumer Center**, Secaucus, N.J.; and **Galloway Research**, San Antonio.

Association/organization news

The Advertising Research Foundation (ARF) has appointed four new members to its board of directors: Steven Fredericks, president and CEO, TNS Media Intelligence; Stephen Kim, director of media research, MSN; Brian McAndrews, president and CEO, aQuantive; and Jessica Pantanini, COO, Bromley Communications.

In April, the ARF announced the winners of its annual David Ogilvy Awards for Excellence in Advertising Research. Awards are presented based on case history submissions of research initiatives that were instrumental in steering winning advertising campaigns. The Grand Award winner was Lexus, for its "Waking Up the Auto Industry to its Third Category" campaign. Accepting for the research team were Meija Jacobs, associate director, account planning, Team One Advertising, and Vicki Wagner, management supervisor, Team One Advertising.

New accounts/projects

TV One, a new entertainment and lifestyle channel targeting African-Americans, has renewed its contract with **Scarborough Research,** New York. Under the agreement, Scarborough will provide TV One with access to Scarborough USA+ (Release 1 and Release 2 2004) as well as the company's 75 Local Market Databases (Release 2 2004 and Release 1 2005). TV One intends to use the data to educate its customers about the demographics, consumer habits, spending power and leisure preferences of its African-American audience.

Nashville-based **20/20 Research, Inc.**, has added Creative Fuel, online research service E-Poll, and European market research firms Direct Dialogue and NOP World-UK to its list of online software subscribers.

Opinion Research Corporation Princeton, N.J., will use **SPSS**' survey research platform Dimensions to conduct projects for its commercial and public policy research clients.

Simmons, a Deerfield Beach, Fla., research company, has signed a long-term contract to provide the Golf Channel with access to consumer data from its national consumer study.

London research firm **TNS** has announced an agreement of intent with the Norwegian National Radio's Steering Committee representing NRK, P4, Kanal 24, Radio 1, Nordic Web Radio and the Association of Local Radio Companies, to launch a Portable People Meter panel of 200 individuals. Plans to expand the panel to up to 400 people are also under consideration for early 2006.

New companies/new divisions/ relocations/expansions

Decision Analyst, Arlington, Texas, has formed a new syndicated research group and named Diane Brewton as its director. Decision Analyst's syndicated research projects will utilize its American Consumer Opinion Panel. New efforts include studies in the health and wellness, baby product, personal care and pet product arenas.

A&G Research, Inc., has moved to 10 Paragon Dr., Montvale, N.J., 07645-1760. Phone 201-326-0320. Fax 201-307-8899.

Lightspeed Research, Basking Ridge, N.J., has opened a new office on Avenue George V in Paris.

Company earnings reports

In financial results for the first quarter ended March 31, 2005, **Opinion Research Corporation,** Princeton, N.J., reported revenues of $48.9 million versus $48.0 million in the prior year's first quarter. Social research revenues were up over 9 percent to $33.9 million versus $30.9 million in last year's first quarter. Market research revenues totaled $13.0 million versus $13.4 million in the prior year's first quarter. Teleservices revenues were $2.1 million versus $3.6 million in last year's first quarter.

Net income for the quarter was $142,000, or $0.02 per diluted share, versus net income of $938,000, or $0.15 per diluted share, in last year's first quarter. Net income for the first quarter was impacted by $776,000, or $0.12 per diluted share, net of tax benefits, for previously announced refinancing charges.

For the quarter ended March 31, 2005, **Arbitron Inc.**, New York, reported revenue of $79.2 million, an increase of 3.4 percent over revenue of $76.6 million during the first quarter of 2004. Costs and expenses for the first quarter increased by 2.4 percent, from $43.4 million in 2004 to $44.4 million in 2005. Earnings before interest and income tax expense (EBIT) for the quarter were $32.7 million, an increase of 2.5 percent over EBIT of $31.9 million during the comparable period last year. Interest expense for the quarter declined 56.7 percent, from $2.4 million in 2004 to $1.1 million in 2005, due to reductions in the company's long-term debt.

Net income for the quarter was $19.8 million, an increase of 9.6 percent over $18.1 million for the first quarter of 2004. Net income per share for the first quarter of 2005 increased to $0.63 (diluted), compared with $0.57 (diluted) during the comparable period last year, an increase of 10.5 percent.

2005

Ethnic Research Directory >>>

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

Service Codes

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

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

Accent on Research, Inc.*
21021 Devonshire St., #202
Chatsworth, CA 91311
Ph. 866-882-8351(toll free)
Fax 818-882-8957
E-mail: susanp@accentonresearch.com
http://www.accentonresearch.com
Susan Perl, President
Services: DC, FG
African-American, Asian, Hispanic

Affordable Samples, Inc.
185 Sound Beach Ave.
Old Greenwich, CT 06870
Ph. 800-784-8016 or 203-637-8563
Fax 203-637-8569
E-mail: sales@affordablesamples.com
http://www.affordablesamples.com
James Sotzing, President
Services: S
African-American, Asian, Hispanic, Middle Eastern

The Other Sampling Company In Connecticut™ - Quality ethnic and religious samples at affordable prices since 1991. Many selections available: African-American, Arabian, Armenian, Asian, Burmese, Catholic, Chinese, East European, East Indian, English, French, German, Hindu, Hispanic, Indian (Asian), Indonesian, Irish, Italian, Japanese, Jewish, Korean, Laotian, Malaysian, Middle Eastern, Muslim, Pakistani, Polish, Scandinavian, Scottish, Singapore, Sri Lanka, Swedish, Thai, Vietnamese.
(See advertisement on p. 24)

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

AIM Research
10456 Brian Mooney
El Paso, TX 79935
Ph. 915-591-4777
Fax 915-595-6305
E-mail: info@aimresearch.com
http://www.aimresearch.com
Linda Adams, Owner/Director
Services: DC, FG, ST
Hispanic

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

AIM/LA
949 S. Coast Dr., Suite 525
Costa Mesa, CA 92626
Ph. 714-755-3900
Fax 714-755-3930
E-mail: creyes@aimla.com
http://www.aimresearchnetwork.com
Services: FS, DC, FG
Hispanic

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

Almiron-Caban & Assoc. Bilingual Research, Inc.*
141-22 85th Rd.
Briarwood Queens, NY 11435
Ph. 718-523-9323
Fax 718-657-5743
E-mail: ACBR1@aol.com
Jaime Meddy, Field Director
Services: DC, ST
African-American, Hispanic

Alucid Solution
(Formerly Usable Solutions, LLC)
5887 Glenridge Dr., Suite 350
Atlanta, GA 30328
Ph. 678-904-9490 or 866-ASK-THEM (275-8436)
Fax 678-904-9491
E-mail: jimmy@alucid.com
http://www.alucid.com
Services: FS, C, DC, DP, FG, M, ST, T
African-American, Asian, Hispanic

* Indicates minority-owned firm

American Language Services
1950 Sawtelle Blvd., Suite 325
Los Angeles, CA 900025
Ph. 800-951-5020
Fax 310-829-3222
E-mail: alan@alsglobal.net
Alan Weiss, Sales Manager
Services: ST, T
Asian, Hispanic, Middle Eastern

Arizona Market Research Services
Div. of Ruth Nelson Research Services
10220 N. 31st. Ave., Suite 122
Phoenix, AZ 85051-9562
Ph. 602-944-8001 or 303-758-6424
Fax 602-944-0130
azmktres@worldnet.att.net
www.ruthnelsonresearchsvcs.com
Lincoln Anderson, Manager
Services: FG
Hispanic, Native American
(See advertisement on p. 82)

Asia Link Consulting Group*
10 W. 66th St.
New York, NY 10023
Ph. 212-721-5825
Fax 212-595-1993
http://www.aslinkny.com
Wanla Cheng, President
Services: FS, C, M, ST
African-American, Asian, Hispanic, Middle Eastern

Athena Research Group
6700 Indiana Ave., Suite 270
Riverside, CA 92506
Ph. 951-369-0800
Fax 951-369-0866
E-mail: lynn@athenamarketresearch.com
http://www.athenamarketresearch.com
Lynn Diamantopoulos, President
Services: FS, C, DC, FG, M, ST, T
African-American, Hispanic, Native American

Atkins Research Group, Inc.
4929 Wilshire Blvd., Suite 102
Los Angeles, CA 90010
Ph. 323-933-3816
Fax 323-933-3916
E-mail: atkins@atkinsresearchinc.com
http://www.atkinsresearchinc.com
Kim Atkins, President
Services: FS, DC, FG, M
African-American, Asian, Hispanic, Middle Eastern, Native American

Ideal central Los Angeles location close to Beverly Hills, yet uniquely near our ethnic research specialties: African-American, Korean, Chinese and Hispanic. Spacious five-suite complex comfortably accommodates groups from 1 to 75 and features state-of-the-art translation equipment and free stationary videotaping. Our extensive staff is also well-trained in pre-recruits, on-site interviewing, and medical research. ActiveGroup and FocusVision available.
(See advertisement on this page)

Cris Bain-Borrego Bilingual Consultant
5248 Nagle Ave.
Sherman Oaks, CA 91401
Ph. 818-784-7235
Fax 818-788-5197
E-mail: bainborrego@adelphia.net
Services: C, M, ST, T
Hispanic

Barry Leeds & Associates, Inc
(See Informa Research Services, Inc.)

Bethart Bilingual Research*
7600 S.W. 117 St.
Miami, FL 33156
Ph. 305-255-2170 or 305-588-9007
Fax 786-242-8029
E-mail: bbr76000@bellsouth.net
http://www.focusgroupmoderator.com
Marta Bethart
Services: FS, C, ST, T
African-American, Hispanic

Bilingual Research Services
A div. of Eastern Research Services
Vista Estrella II
1810 George Diter Blvd., Suite 106
El Paso, TX 79936
Ph. 469-222-1984
Fax 610-543-2577
E-mail: suzanne@easternresearch.com
http://www.bilingual-research.com
Suzanne Lopez
Services: FS, DC, DP
Hispanic

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 becausewe have 150 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. 81)

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
http://www.bgglobal.com
Ashref Hashim, President
Services: FS, DC, DP, FG
African-American, Asian, Hispanic

Multicultural research is a fast growing research trend, but it's nothing new to the Blackstone Group. The Blackstone Group offers a deep understanding of multicultural markets, including insights into areas of personal finance, health care, purchase behavior, and work/family issues. In addition to U.S. multicultural markets, the Blackstone Group can provide value-added insights into international markets.
(See advertisement on p. 80)

Bravo Bi-lingual Services
4425 Randolph Rd., Suite 316
P.O. Box 221013
Charlotte, NC 28222
Ph. 704-365-2685
E-mail: bravo.mail@att.net
http://www.cross-cultural.net
Sharon Feldman, Operations Manager
Services: C, DC, M, ST
Hispanic

Service Codes

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

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
http://www.brc-field.com
Earl de Berge, Research Director
Services: FS, C, DC, DP, FG, M, 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 ext. 1
Fax 773-933-0558
E-mail: info@crmarketsurveys.com
http://www.crmarketsurveys.com
Cherlyn Robinson, Project Coordinator
Services: FS, DC, DP, FG, M, S, ST, T
African-American, Asian, Hispanic, Middle Eastern

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
http://www.crresearch.com
Miguel Gomez Winebrenner
Services: FS, M
Hispanic

LatinoEyes, a division of C&R Research, is devoted to offering genuine cultural insights into the Latino market in the U.S. and LATAM. In addition to U.S.-focused research, LatinoEyes offers a strong research network throughout Mexico and Latin America. LatinoEyes is led by a very experienced bicultural and bilingual research team, providing qualitative, quantitative and online panel research with acculturated and unacculturated households.
(See advertisement on p. 3)

Rebecca Cantu Helmstetler*
P.O. Box 760
South Fork, CO 81154
Ph. 719-873-5240 or 719-850-8996
Fax 719-873-5709
E-mail: rchelmstetler@mindspring.com
Rebecca Cantu Helmstetler
Services: C, M, ST
Hispanic

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
http://www.c-asoc.com
Enrique F. Castillo, Principal
Services: FS, C, M, 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
http://www.cheskin.com
Services: FS, C
Asian, Hispanic

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
http://www.thefocusnetwork.com
Karey Stiefer, Managing Director
Services: FG
African-American

CIBA Research & Consulting, LLC
4610 Tiger Lily Way
Marietta, GA 30067
Ph. 770-565-0882
Fax 705-565-7578
E-mail: egibson@gociba.com
http://www.gociba.com
Services: C, M
African-American, Hispanic

* Indicates minority-owned firm

Service Codes

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

Colorado Market Research Services
Div. of Ruth Nelson Research Services
2149 S. Grape St.
Denver, CO 80222-5203
Ph. 303-758-6424
Fax 303-756-6467
rnncmrs@aol.com
www.ruthnelsonresearchsvcs.com
Ruth Nelson, President
Services: DC, FG, ST
African-American, Hispanic, Native American

Colorado Market Research, a division of Ruth Nelson Research Services, is one of the oldest data collection firms in Denver. If you are fielding a Hispanic/multicultural project, you will want to work with us. Over 40 years of experience has given us the edge in working with these specialized groups. Branch offices in Phoenix and Oklahoma City.
(See advertisement on this page)

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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@yourcci.com
http://www.yourcci.com
Jerry Karson, Director of Client Services
Services: DC, DP, 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
http://www.comscore.com
Services: FS, C, DC
African-American, Asian, Hispanic

Consumer Research Centre Ltd.
1398 West 7th Avenue
Vancouver, BC V6H 3W5
Ph. 604-714-5900 or 866-455-9311
Fax 604-714-5901
E-mail: info@consumerresearch.ca
http://www.consumerresearch.ca
Jessica Gibson, Dir. of Marketing Research
Services: C, DC, FG, M, ST
Asian

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

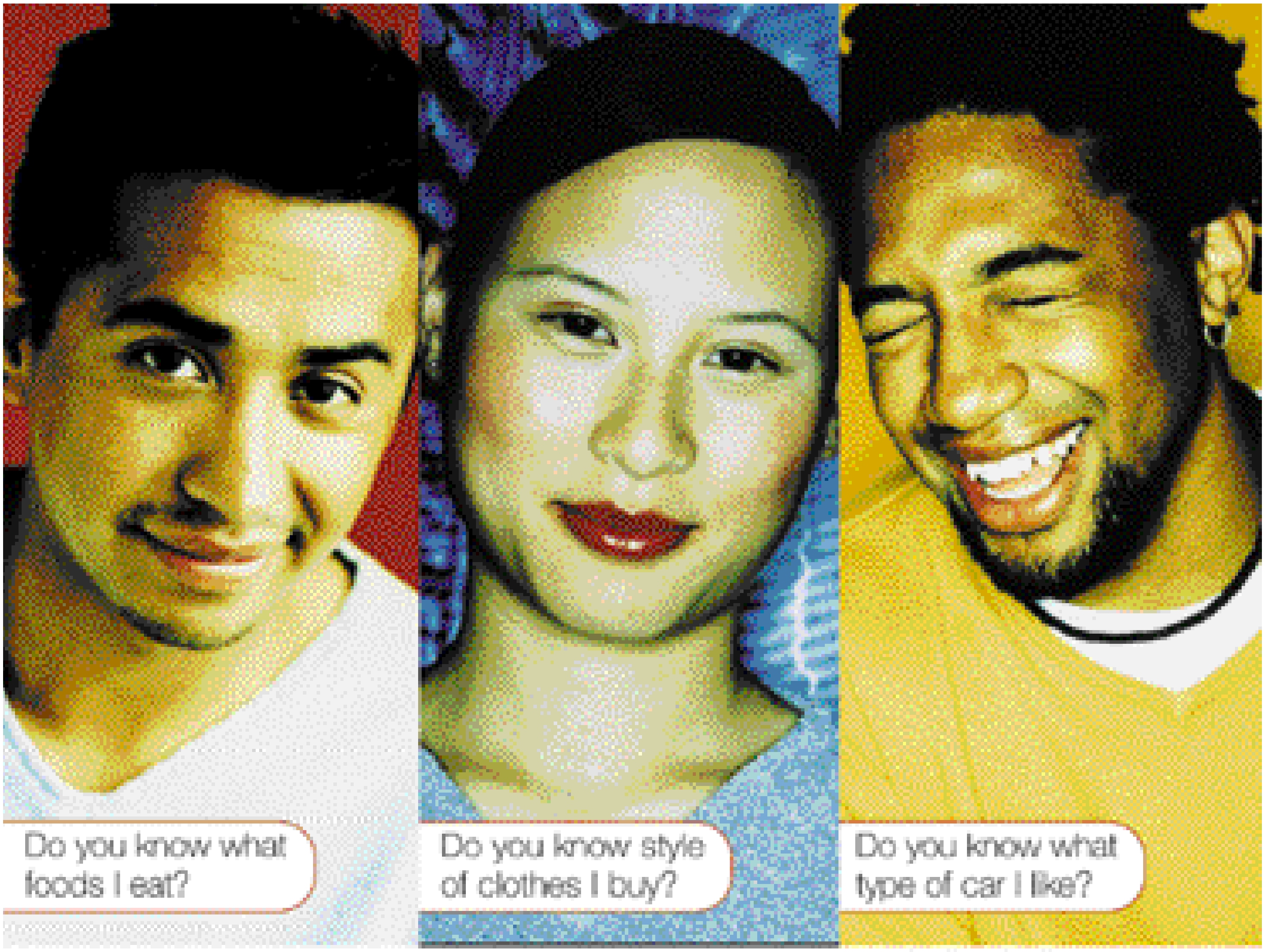
Cultural Vision Research*
2 Wynmor Rd.
Scarsdale, NY 10583
Ph. 914-722-4240
Fax 914-472-1229
E-mail: lbella@culturalvision.com
http://www.culturalvision.com
Lisa Bella, Partner/New Business Develop
Services: FS, C
African-American, Asian, Hispanic, Middle Eastern

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, M
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
http://www.datapromptintl.com
Services: DC, DP, FG
African-American, Asian, 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. 84)

* Indicates minority-owned firm



Do you know your market? **We do!** It's our business to know.

Get to know your target market. Call us today for our complimentary "Guide to the World of Multicultural Research"

Let's face it, in order to successfully reach your market you've got to know everything about them. It's important to rely on detailed and accurate information in order for you to develop your brand and strategy to market your business or product.

At Ebony Marketing Research we have an enviable reputation for superior performance, reliability and creativity in studying ethnic markets. Our research professionals can put you in touch with key multi-cultural populations just about anywhere. Experienced and incisive, we've got the expertise and resources to access any market segment – face-to-face, door-to-door, multi-cultural recruiting, and of course focus groups. Whatever your research needs may be, we've got the reach, the range and the rapport to deliver the results you need.

Know your market. It's your business to know.

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2100 Bartow Avenue
Baychester, NY 10475

ebony marketing research, inc.

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Philadelphia, PA 19102-4403
Ph. 215-790-8900 or 800-842-4836
Fax 215-790-8930
E-mail: info@mdavisco.com
http://www.mdavisco.com
Morris Davis, President
Services: FS, C, DC, DP, S, ST
African-American

Delve
1650 De Peres Rd., Suite 110
Des Peres, MO 63131
Ph. 800-325-3338 or 314-966-6595
Fax 314-835-3128
E-mail: helpinghand@delve.com
http://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. 55)

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: dphife@diresearch.com
http://www.diresearch.com
Paul X. Izzo, Executive Vice President
Services: FS, C, DC, DP, FG, S, ST, T
Hispanic

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

Doyle Research Associates, Inc.*
400 N. Michigan Ave, Suite 800
Chicago, IL 60611-4148
Ph. 312-863-7600
Fax 312-863-7601
E-mail: info@doyleresearch.com
http://www.doyleresearch.com
Kathleen M. Doyle, President
Services: M
Hispanic

Ebony Marketing Research, Inc.*
2100 Bartow Ave., Suite 243
Bronx, NY 10475
Ph. 718-320-3220
Fax 718-320-3996
E-mail: emr@interport.net
www.ebonymktg.com
Bruce Kirkland, Vice President
Services: FS, C, DC, FG, ST
African-American, Asian, Hispanic, Middle Eastern, Native American

Ebony Marketing Research, Inc. is a full field service company specializing in ethnic market segments, locally, nationally and internationally. With three New York mall locations, offices in Central America, and state-of-the-art focus group, telephone and test kitchen facilities, EMR has the reach, resources and community rapport to produce timely, accurate data on a wide range of specialized and mainstream markets.
(See advertisement on p. 83)

Ebony Marketing Research, Inc.*
666 11th St. N.W., Suite 730
Washington, DC 20001-4500
Ph. 202-628-4640
E-mail: emr@interport.net
www.ebonymktg.com/
Services: FS, C, DC, FG, ST
African-American, Asian, Hispanic, Middle Eastern, Native American
(See advertisement on p. 83)

Ebony Marketing Research, Inc.*
100 N. Biscayne Blvd., Suite 2906
Miami, FL 33131
Ph. 305-416-0200
E-mail: emr@interport.net
www.ebonymktg.com
Services: FS, C, DC, FG, ST
African-American, Asian, Hispanic, Middle Eastern, Native American
(See advertisement on p. 83)

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
http://www.encuesta.com
Martin G. Cerda, President
Services: FS, C
Hispanic

* Indicates minority-owned firm

Erlich Transcultural Consultants
11430 Burbank Blvd.
North Hollywood, CA 91601
Ph. 818-623-2425
Fax 818-623-2429
E-mail: info@etcethnic.com
http://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 this page)

Ethnic Focus*
20th Fl, Wembley Point, 1 Harrow Rd.
Wembley, Middlesex
London HA9 6DE
Ph. 44-07000-266-587
Fax 44-20-8-900-5601
E-mail: research@ethnicfocus.com
http://www.ethnicfocus.com
Saber Khan, Director of Research
Services: FS, C, DC, DP, FG, M, S, ST, T
African-American, Asian, Hispanic, Middle Eastern

FGI Research
400 Meadowmont Village Circle, Suite 431
Chapel Hill, NC 27517
Ph. 919-929-7759
Fax 919-932-8829
E-mail: info@fgiresearch.com
http://www.fgiresearch.com
Dino Fire, General Manager
Services: FS, C, DC, DP, FG, S, ST, T
African-American, Asian, Hispanic

Fieldwork Network
500 Michigan Ave., Suite 1200
Chicago, IL 60611
Ph. 800-TO-FIELD or 800-863-4353
Fax 312-923-7405
E-mail: info@network.fieldwork.com
http://www.fieldworknetwork.com
Sarah Kotva
Services: DC, FG

Here's our promise up front: Partnering with fieldwork can make a successful research project - and your life - a lot easier. We offer world-class focus group facilities nationwide: Atlanta, Boston, Chicago (four facilities), Dallas, Denver, Fort Lee, N.J., Los Angeles, Minneapolis, N.Y. at Westchester, Phoenix, Scottsdale, Seattle. The fieldwork Network team can handle bidding, booking, screener development, status updates, and more - every capability for managing multi-market studies from start to finish, both in our offices and other facilities. For simply great research, find out why all it takes is fieldwork.
(See advertisement on the Inside Back Cover)

Service Codes

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

Fieldwork Atlanta, Inc.
200 Galleria Pkwy., Suite 1600
Atlanta, GA 30339
Ph. 770-988-0330
Fax 770-955-1555
E-mail: info@atlanta.fieldwork.com
http://www.fieldwork.com
Edie Gayton or Bette Hayden
Services: DC, FG
African-American
(See advertisement on the Inside Back Cover)

Fieldwork Boston, Inc.
800 South St., Suite 105
Waltham, MA 02453
Ph. 781-899-3660
Fax 781-893-5574
E-mail: info@boston.fieldwork.com
http://www.fieldwork.com
Maria Kuschel
Services: DC, FG
African-American, Hispanic
(See advertisement on the Inside Back Cover)

Fieldwork Chicago-Downtown, Inc.
Chicago-Lab, Inc.
200 E. Randolph, 36th floor
Chicago, IL 60601
Ph. 312-565-1866
Fax 312-552-2371
E-mail: info@chicagolab.fieldwork.com
http://www.fieldwork.com
Stacey Zontini
Services: DC, FG
African-American, Hispanic
(See advertisement on the Inside Back Cover)

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
http://www.fieldwork.com
Sanford Adams
Services: DC, FG, T
African-American, Asian, Hispanic
(See advertisement on the Inside Back Cover)

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
http://www.fieldwork.com
Services: DC
African-American, Asian, Hispanic
(See advertisement on the Inside Back Cover)

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
http://www.fieldwork.com
Karyn Picchiotti
Services: DC, FG
African-American, Hispanic
(See advertisement on the Inside Back Cover)

Fieldwork Dallas, Inc.
15305 Dallas Pkwy., Suite 850
Addison, TX 75001-4637
Ph. 972-866-5800
Fax 972-866-5801
E-mail: info@dallas.fieldwork.com
http://www.fieldwork.com
Freddi Wayne, Jessica Najjar, Marsha Fugitt
Services: DC, FG
African-American, Hispanic
(See advertisement on the Inside Back Cover)

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
http://www.fieldwork.com
Nikki Darre
Services: DC, FG
Hispanic
(See advertisement on the Inside Back Cover)

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
http://www.fieldwork.com
Sandy Starr
Services: DC, FG
African-American, Hispanic
(See advertisement on the Inside Back Cover)

Fieldwork Los Angeles, Inc.
In Orange County
2030 Main St., Suite 300
Irvine, CA 92614
Ph. 949-252-8180
Fax 949-252-1661
E-mail: info@losangeles.fieldwork.com
http://www.fieldwork.com
Kami Celano
Services: DC, FG
Hispanic
(See advertisement on the Inside Back Cover)

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
http://www.fieldwork.com
Denice Duncan
Services: DC, FG
African-American, Asian, Hispanic
(See advertisement on the Inside Back Cover)

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
http://www.fieldwork.com
Tamara Curtis, President
Services: DC
African-American
(See advertisement on the Inside Back Cover)

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
http://www.fieldwork.com
Vicki Knoell
Services: DC, FG
Hispanic
(See advertisement on the Inside Back Cover)

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
http://www.fieldwork.com
Vicki Knoell
Services: DC, FG
Hispanic
(See advertisement on the Inside Back Cover)

Fieldwork Quant Group
4849 N. Milwaukee Ave., Suite 500
Chicago, IL 60630
Ph. 888-TO-FIELD or 773-282-0203
Fax 773-282-6422
E-mail: info@quantgroup.fieldwork.com
http://www.fieldwork.com
Mary Pederson
Services: DC, DP
African-American, Asian, Hispanic, Native American
(See advertisement on the Inside Back Cover)

Fleischman Field Research
250 Sutter St., Suite 200
San Francisco, CA 94108-4403
Ph. 800-277-3200 or 415-398-4140
Fax 415-989-4506
E-mail: ffr@ffrsf.com
http://www.ffrsf.com
Services: DC, DP, FG
African-American, Asian, Hispanic

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

* Indicates minority-owned firm

Focus Groups of Cleveland
2 Summit Park Dr., Suite 225
Cleveland, OH 44131
Ph. 216-901-8075 or 800-950-9010
Fax 216-901-8085
E-mail: research@idirectdata.com
http://www.focusgroupsofcleveland.com
Betty Perry, Director
Services: FG
African-American, Hispanic
(See advertisement p. 60)

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

Established 1996. Hispanic qualitative consumer research. Beatriz - a psychologist, Guy - a marketing, advertising and research professional, each has 25+ years' experience working in USA, Mexico and Latin America; Guy II - a 2002 University of Texas graduate in communications. Bilingual and bicultural, all moderate in Spanish or English. Individual backgrounds and expertise enable us to better uncover consumer insights and provide value-added recommendations.
(See advertisement on this page)

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
http://www.focusonmiami.com
Lisa Switkes, President
Services: FS, C, DC, FG, M, ST
African-American, Hispanic

Focus Pointe Dallas
Park Central VII
12750 Merit Dr., 10th floor
Dallas, TX 75251
Ph. 888-873-6287 or 972-386-5055
Fax 972-387-9915
E-mail: dallas@focuspointe.net
http://www.focuspointe.net
Susan Hunnitutt, Associate Director
Services: FG
African-American, Hispanic

Focus World International, Inc.*
146 Hwy. 34, Suite 100
Holmdel, NJ 07733
Ph. 732-946-0100
Fax 732-946-0107
E-mail: gary@focusworldint.com
http://www.focusworldinternational.com
Paulette Eichenholtz, President
Services: C, DC, DP, FG, M, 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
http://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
http://www.garciaresearch.com
Carlos Yanez, Project Director
Services: FS, C, DC, DP, FG, ST, T
Hispanic

GENESYS Sampling Systems
565 Virginia Dr.
Fort Washington, PA 19034-2706
Ph. 800-336-7674 or 215-653-7100
Fax 215-653-7115
E-mail: info@m-s-g.com
http://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-CSS wireless number screening and sample/list enhancement services also available.
(See advertisement on p. 39)

The Golden Door*
200 W. 20th St., #1208
New York, NY 10011
Ph. 212-647-9181
Fax 212-647-7191
E-mail: eleanorew@goldendoor.net
http://www.goldendoor.net
Services: FS, C, M
African-American

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
http://www.greenfieldgroup.com
Barbara Clancy, Sr. Dir. Client Svcs.
Services: FS, M
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
http://www.headfirstinc.com
Greg Head, President
Services: FS
African-American

Herrera Communications
28751 Rancho California Rd., Suite 201
Temecula, CA 92590
Ph. 951-676-2088 or 866-676-2088
Fax 951-676-2996
E-mail: eherrera@herrera-communications.com
http://www.herrera-communications.com
Enrique Herrera, Vice President
Services: FS, DC, FG, M, ST, T
Hispanic

Hispanic Access
12000 Richmond Ave., Suite 200
Houston, TX 77082
Ph. 713-482-6666
Fax 713-482-6595
E-mail: egardo@hispanicaccess.com
http://www.hispanicaccess.com
Edgardo de la Garza, Research Director
Services: FS, DC, DP, S, ST, T
African-American, Hispanic

Service Codes

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

Hispanic America, Inc.*
116 Weldon Way, Suite 1
Pennington, NJ 08534-1829
Ph. 609-333-1400
Fax 609-466-7430
E-mail: hispanicamerica@aol.com
http://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
http://www.hispanicfocusunltd.com
Ruben Cuellar, President
Services: FS, C, M
African-American, Hispanic

Hispanic Perspectives*
64 Digital Dr.
Novato, CA 94949
Ph. 408-254-7322
Fax 408-254-2213
E-mail: dlays@qar.com
http://www.qar.com
Diana Layseca, VP Field Director
Services: FS, C, DC, DP, FG, M, S, ST, T
Hispanic

Hispanic Research & Consulting Services
380 Lexington Ave., Suite 1700
New York, NY 10168
Ph. 212-551-7817 or 718-896-3965
Fax 212-551-1001
E-mail: anorti@aol.com
Ana Ortiz, President
Services: C, DC
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
http://www.hispanic-research.com
Ricardo A. Lopez, President
Services: FS, C, M, 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 this page)

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

House of Marketing Research*
2555 E. Colorado Blvd, Suite 205
Pasadena, CA 91107
Ph. 626-486-1400
Fax 626-486-1404
E-mail: info@hmr-research.com
http://www.hmr-research.com
Amy Siadak
Services: DC, DP, FG, M, ST, T
African-American, Asian, Hispanic

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

IMAGES Market Research*
914 Howell Mill Rd.
Atlanta, GA 30318
Ph. 404-892-2931
Fax 404-875-1052
E-mail: research@imagesusa.net
http://www.imagesusa.net
Juan Quevedo, Director Market Research
Services: FS, C, DC, DP, FG, M, ST
African-American, Asian, Hispanic, Middle Eastern, Native American

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

Informa Research Services, Inc.
26565 Agoura Rd., Suite 300
Calabasas, CA 91302
Ph. 800-848-0218
Fax 818-880-8448
E-mail: inquiries@informars.com
http://www.informars.com
Services: FS, C, DC, DP, FG, M, S, ST, T
Asian, Hispanic, Native American

Informa Research Services, Inc.
(formerly Barry Leeds & Associates, Inc.)
420 Lexington Ave., #615
New York, NY 10170
Ph. 800-848-0218 or 212-889-5941
Fax 212-889-6066
E-mail: inquiries@informars.com
http://www.informars.com
Brian Richards, SVP, Business Development
Services: FS, C, DC, DP, FG, M, S, ST, T
Asian, Hispanic, Native American

Informa Research Services, Inc.
(formerly Market Trends, Inc.)
375 Corporate Dr. S., Suite 100
Seattle, WA 98188
Ph. 800-848-0218
Fax 206-575-8779
E-mail: inquiries@informars.com
http://www.informars.com
Jackie Weise, Exec. Vice President
Services: FS, C, DC, DP, FG, M, S, ST, T
Asian, Hispanic, Native American

* Indicates minority-owned firm

Insight Research Group
401 Greenwich St., 3rd floor
New York, NY 10013
Ph. 212-343-9894
Fax 212-343-9895
E-mail: stacey@insightresearch.biz
http://www.insightresearch.biz
Services: FS, C, DP, S, ST, T
African-American, Hispanic

The Insight Works, Inc.
1123 Broadway
Suite 1007, The Townsend Bldg.
New York, NY 10010
Ph. 212-929-9072 or 212-929-5115
Fax 212-929-9174
E-mail: mark@theinsightworks.net
http://www.theinsightworks.net
Services: FS, C
African-American, Asian, Hispanic, Middle Eastern, Native American

Insights Marketing Group, Inc.*
2512 Swanson Ave., Suite 1A
Miami, FL 33133
Ph. 305-854-2121
Fax 305-854-2130
E-mail: belkist@insights-marketing.com
http://www.insights-marketing.com
Services: FS, C, M, ST
African-American, Asian, Hispanic

International Data Collection, Inc.*
1111 Bay Blvd., Suite A
Chula Vista, CA 91911
Ph. 619-628-2370
Fax 619-628-2371
E-mail: hpomeroy@intdatacollection.com
http://www.intdatacollection.com
Victor Mayer
Services: DC, DP, S, ST
Hispanic

Interviewing Service of America, Inc.
15400 Sherman Way, 4th floor
Van Nuys, CA 91406-4211
Ph. 818-989-1044
Fax 818-756-7489
E-mail: mhalberstam@isacorp.com
http://www.isacorp.com
Michael Halberstam, President
Services: FS, C, DC, DP, FG, S, ST, T
African-American, Asian, Hispanic, Middle Eastern

ISA is the recognized expert in Asian and Hispanic American and multicultural research. Since 1984 we have completed projects in 65 languages including Mandarin, Cantonese, Vietnamese, Korean, Tagalog, Japanese, Russian and Polish. Six of the largest Asian and Hispanic-American TV networks use ISA! Of course English is still the majority of our business but with 325 positions, complete translations, in-house DP and Internet/IVR capabilities we can complete any type of project.
(See advertisement on this page)

IPC (International Point of Contact)
32 E. 31st St.
New York, NY 10016
Ph. 212-213-3303
Fax 212-213-3554
E-mail: rbrooks@ipcgroup.us
http://www.ipcgroup.us
Rhoda Brooks, Partner
Services: DC, DP
African-American, Asian, Hispanic, Middle Eastern

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

Service Codes

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

Juarez & Associates*
12139 National Blvd.
Los Angeles, CA 90064
Ph. 310-478-0826
Fax 310-479-1863
E-mail: juarezla@gte.net
http://www.juarezassociates.com
Nicandro Juarez, President
Services: FS, C, DC, FG, ST
African-American, Hispanic

Just The Facts, Inc.
P.O. Box 365
Mt. Prospect, IL 60056
Ph. 847-506-0033
Fax 847-506-0018
E-mail: slb@jtfacts.com
http://www.justthefacts.com
Bruce Tincknell, President
Services: FS, C, M, ST, T
African-American, Asian, Hispanic

Karchner Marketing Research, LLC
202 Paperbirch Drive
Collegeville, PA 19426
Ph. 610-489-0509
Fax 610-489-6939
E-mail: mike@kmrinsights.com
http://www.kmrinsights.com
Mike Karchner, President
Services: M
Hispanic

Kiyomura-Ishimoto Associates*
1906 18th Ave.
San Francisco, CA 941161246
Ph. 415-566-3603
E-mail: norm@kiassociates.com
http://www.kiassociates.com
Norman P. Ishimoto, President
Services: FS, C, DC, M, ST, T
Asian, Hispanic

L.A. Focus
17337 Ventura Blvd., Suite 301
Encino, CA 91316
Ph. 818-501-4794
Fax 818-907-8242
E-mail: wendyfein@aol.com
http://www.la-focus.com
Lisa Balelo or Wendy Feinberg, Partners
Services: FS, FG
African-American, Hispanic

LaVerdad Marketing & Media*
7817 Cooper Rd., Suite D
Cincinnati, OH 45242
Ph. 513-891-1430
Fax 815-301-9664
E-mail: rob.hanson@laverdadmarketing.com
http://www.laverdadmarketing.com
Services: FS, DC, DP, FG, M, ST, T
Hispanic

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

Lieberman Research Worldwide
1900 Avenue of the Stars, 15th floor
Los Angeles, CA 90067
Ph. 310-553-0550
Fax 310-553-4607
E-mail: dsackman@lrwonline.com
http://www.lrwonline.com
Dave Sackman, President
Services: FS, M
Asian, Hispanic

Lightshed Group*
142 Whitney Ave.
Los Gatos, CA 95030
Ph. 415-640-7795
E-mail: info@lightshedgroup.com
http://www.lightshedgroup.com
Roberto Lartigue, Principal
Services: FS, C, DC, DP, M, S, ST, T
African-American, Asian, Hispanic

Loretta Marketing Group*
13935 S.W. 102 Court
Miami, FL 33176
Ph. 305-232-5002
Fax 305-232-8010
E-mail: jimloretta@bellsouth.net
http://www.lorettagroup.com
Jim Loretta, President
Services: FS, M
Hispanic

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

LPM Market Research Services
640 High Ridge Rd.
Stamford, CT 06905
Ph. 203-322-6890
Fax 203-329-8840
E-mail: focus3003@aol.com
Services: DC
African-American, Asian, Hispanic

M G Z Research
5715 Silent Brook Lane
Rolling Meadows, IL 60008
Ph. 847-397-1513
Fax 847-397-9016
E-mail: MGZipper@aol.com
Martha Garma Zipper, President
Services: C, M, ST, T
Hispanic

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

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1165 N. Clark St., Suite 410
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Fax 312-654-9917
E-mail: market-eas@aol.com
Iliana R. Moran, President
Services: FG
African-American, Asian, Hispanic, Middle Eastern

Market Intelligence Consulting Group
Customer Satisfaction Rsch. & Consulting
15421 Lake St. Ext.
Minnetonka, MN 55345-1914
Ph. 952-933-6825
E-mail: ahmedia2000@mmcommunication.com
http://www.mmcommunication.com
Ahmed Abdelaal, Lead Consultant
Services: C, DP, ST
Middle Eastern

Market Research Dallas
2723 Valley View Lane, Suite 100
Dallas, TX 75234
Ph. 972-239-5382
Fax 972-239-5399
E-mail: mail@marketresearchdallas.com
http://www.marketresearchdallas.com
Gail Airoldi
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Market Segment Research*
Colonnade Corporate Center
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Coral Gables, FL 33134
Ph. 305-669-3900
Fax 305-255-5087
E-mail: gberman@marketsegment.com
http://www.marketsegment.com
Gary L. Berman, CEO
Services: FS, C, DC, DP, FG, ST, T
African-American, Asian, Hispanic

Market Study International, Inc.*
9700 Richmond Ave., Suite 108
Houston, TX 77042
Ph. 713-952-1400
Fax 713-952-2444
E-mail: marketstudy@pdq.net
Rafael Mendoza, Vice President MBA
Services: FS, C, DC, DP, FG, ST, T
Hispanic, Middle Eastern

Market Trends Pacific, Inc.*
1136 Union Mall, Suite 405
Honolulu, HI 96813
Ph. 808-532-0733
Fax 808-532-0744
E-mail: wanda@markettrendspacific.com
http://www.markettrendspacific.com
Wanda L. Kakugawa, President
Services: FS, DC, DP, M
Asian

Market Trends, Inc.
(See informa Research Services, Inc.)

Marketing Matrix International, Inc.*
2612 S. Sepulveda Blvd.
Los Angeles, CA 90064
Ph. 310-312-1717
Fax 310-312-1709
E-mail: research@markmatrix.com
http://www.markmatrix.com
Lynn Walker Moran
Services: FS, M
Hispanic

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

Mars Research
6365 NW 6th Way, Suite 150
Fort Lauderdale, FL 33309
Ph. 954-771-7725
Fax 954-771-8224
E-mail: joyceg@marsresearch.com
http://www.marsresearch.com
Joyce Gutfreund, Executive Vice President
Services: FS, C, DC, DP, FG, ST, T
Hispanic

MBC Research Center
270 Madison Ave., 18th floor
New York, NY 10016
Ph. 212-679-4100
Fax 212-251-0001
E-mail: info@mbcresearch.com
http://www.mbcresearch.com
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MDI Interviewing Services
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National City, CA 91950
Ph. 619-474-4300
Fax 619-474-8784
E-mail: ifo@mdiis.com
http://www.mdiis.com
Services: DC
Hispanic

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100 Plaza Dr., 1st floor
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http://www.meadowcc.com
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Services: FS, C, FG, M
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(See advertisement on p. 42)

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8720 Georgia Ave., Suite 606
Silver Spring, MD 20910
Ph. 301-565-0770
Fax 301-565-0773
E-mail: jsanders@themedianetwork.com
http://www.themedianetwork.com
JoAnn Sanders, Research Manager
Services: FS, C, DC, DP, FG, M, S, ST, T
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Medimix International*
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5201 Blue Lagoon Dr., Suite 800
Miami, FL 33126
Ph. 305-716-4236
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E-mail: mail@medimix.net
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Menendez International*
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Key West, FL 33040
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Fax 305-292-6950
E-mail: menendezin@aol.com
Services: FS, C, FG, ST, T
Hispanic

Meneses Research & Associates*
1996 Frankfort St.
San Diego, CA 92110
Ph. 619-276-5335
Fax 619-276-7330
E-mail: info@menesesresearch.com
http://www.menesesresearch.com
Walter Meneses
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Hispanic

Metropolis Research
3570 Bainbridge Rd.
Cleveland Heights, OH 44118-2255
Ph. 216-371-9979
Fax 216-373-2637
E-mail: vaughn@metropolisresearch.com
http://www.metropolisresearch.com
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Services: DC, M, ST
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Miami Market Research, Inc.*
6840 S.W. 40 St., Suite 201A
Miami, FL 33155
Ph. 305-666-7010
Fax 305-666-7960
E-mail: miamktrsch@aol.com
http://www.miamimarketresearch.com
Luis Padron, President
Services: DC, FG, ST, T
African-American, Hispanic

Millward Brown, Inc.
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Fairfield, CT 06825-4859
Ph. 203-335-5222
Fax 203-333-6307
E-mail: info@us.millwardbrown.com
http://www.millwardbrown.com
Kimberly Snyder-Bastoni, Senior Vice President
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MMR Research
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Dallas, TX 75247-3715
Ph. 800-315-TEXX
Fax 214-630-6769
E-mail: tveliz@mmrx.com
Tony Veliz, Facility Director
Services: FS, DC, DP, FG, M, ST, T
African-American, Hispanic

Moderators Etc.
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Kissimmee, FL 34759
Ph. 863-427-4434
Fax 863-427-4434
E-mail: arivera@moderatorsetc.com
Services: FS, C, DC, DP, FG, M, S, ST, T
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Moore Research*
3711 W. Jefferson Blvd.
Los Angeles, CA 90016
Ph. 323-735-2209
Fax 323-294-4378
E-mail: smoore@rmooreassociates.com
http://www.mooreresearchla.com
Services: FS, C, DC
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MRSI (Marketing Research Services, Inc.)
720 East Pete Rose Way, Suite 200
Cincinnati, OH 45202
Ph. 513-579-1555 or 800-SAY-MRSI
Fax 513-562-8819
E-mail: info@mrsi.com
http://www.mrsi.com
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John McKay, President
Services: FS, C, DC, M, ST, T
Asian, Hispanic, Middle Eastern

Multicultural Solutions, Inc.
22902 Adolph Ave.
Torrance, CA 90505
Ph. 310-378-2388
Fax 310-373-8807
E-mail: huafu@multicultural-solutions.com
http://www.multicultural-solutions.com
Services: FS, C, M
African-American, Asian, Hispanic

National Opinion Research Services
790 N.W. 107th Ave., Suite 110
Miami, FL 33172
Ph. 800-940-9410
Fax 305-553-8586
E-mail: quality@nors.com
http://www.nors.com
Daniel Clapp, President
Services: DC, DP, FG, S, ST, T
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Los Angeles, CA 90045
Ph. 310-670-6800
Fax 310-670-7158
E-mail: dmorse@newamericandimensions.com
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New American Dimensions is your doorway to new marketing intelligence for the Next America. As a multiethnic, multilingual research and consulting firm, our enterprise delivers actionable marketing insights—helping our clients shape effective advertising and communication strategies to capture the rapidly expanding consumer opportunities represented by U.S. Hispanic, Asian-American, African-American, GLBT, and American youth markets.
(See advertisement on opposite page)

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Fax 212-867-9643
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http://www.thefocusnetwork.com
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Services: FG
African-American, Asian, Hispanic, Middle Eastern, Native American

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Flushing, NY 11365
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Fax 718-591-7386
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Judy Novasel, President
Services: FS
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Honolulu, HI 96813
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Fax 808-538-6227
E-mail: aellis@omnitrakgroup.com
http://www.omnitrakgroup.com
Alan Ellis, Vice President
Services: FS, DC, DP, FG, ST
Asian

OMR (Olchak Market Research)
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Greenbelt, MD 20770
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Fax 301-474-4307
E-mail: info@OMRdc.com
http://www.OMRdc.com
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African-American

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Long Island City, NY 11101
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E-mail: info@opinionaccess.com
http://www.opinionaccess.com
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Renton, WA 98055
Ph. 425-271-2300
Fax 425-271-2400
E-mail: info@pacificmarketresearch.com
http://www.pacificmarketresearch.com
Andrew Rosenkranz
Services: DC, DP, S, ST
African-American, Asian, Hispanic

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Fax 732-656-7676
E-mail: ravipara@aol.com
http://www.paradigmtek.com
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Gainesville, FL 32608
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Fax 352-336-6763
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http://www.pmrresearch.com
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Services: FS, C, DC, DP, FG, M, S, ST, T
African-American, Asian, Hispanic, Native American

Service Codes

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

Pfeifer Market Research, Inc.
5413 Flynn Parkway
Corpus Christi, TX 78411
Ph. 361-850-7660 or 800-503-6682
Fax 361-857-7225
E-mail: pfeifermtg@aol.com
http://www.pfeifermarketresearch.com
Services: DC, FG
Hispanic

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

Pioneer Marketing Research
3323 Chamblee - Dunwoody Rd.
Atlanta, GA 30341
Ph. 770-455-0114
Fax 770-458-8926
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http://www.pioneer.bz
Jon Mitchell, Exec. Vice President
Services: FS, C, DC, DP, FG, M, ST, T
African-American, Asian, Hispanic

Planet Latino Market Intelligence, Inc.
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Miami, FL 33156
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Fax 305-271-5590
E-mail: latinoplanet@aol.com
http://www.marketplanetlatino.com
Horacio Segal, President
Services: FS, C, M
Hispanic

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Services: S
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Fax 415-777-2420
E-mail: info@fscgroup.com
http://www.fscgroup.com
Leslie Derbin, Ph.D., Director Marketing Research
Services: FS, C, DC
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St. Louis, MO 63131-0426
Ph. 314-966-6188 or 314-821-7448
Fax 314-821-7448
E-mail: SAXENAMWI@aol.com
http://www.pragmaticsolutions-mktg.com
Swaran L. Saxena, President
Services: FS, C
Asian

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Glendale, AZ 85306-1879
Ph. 602-997-9711
Fax 602-997-5488
E-mail: jmuller@precisionresearchinc.com
John Muller, President/CEO
Services: FS, C, DC, DP, ST
African-American, Hispanic, Native American

Probe Market Research, Inc.
166 E. 63rd St., Suite 2A
New York, NY 10021
Ph. 212-754-4258 or 800-961-1992
Fax 212-504-8201
E-mail: lynette@probemarketresearch.com
http://www.probemarketresearch.com
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Pueblo Research Associates, Inc.
3710 S. Park Ave., #706
Tucson, AZ 85713
Ph. 520-623-9442
Fax 520-623-1440
E-mail: pueblorsch@aol.com
http://www.puebloresearch.com
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Fax 415-883-1344
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http://www.qar.com
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Hispanic

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Honolulu, HI 96813
Ph. 808-524-5194
Fax 808-524-5487
E-mail: bankersmit@starrtech.com
http://www.starrseigle.com
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Asian

Qualitative Insights
15060 Ventura Blvd., Suite 125
Sherman Oaks, CA 91403
Ph. 818-988-5411
Fax 818-988-4057
E-mail: lginiewicz@q-insights.com
http://www.q-insights.com
Jennifer von Schneidau, Vice President
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http://www.recruitingresourcesllc.com
Maryanne Livia, Vice President
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Research Data Design, Inc.
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Portland, OR 97239
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Fax 503-223-6760
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http://www.rdd.info
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Research Explorers/L.G. McDonald & Ascts.*
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Ph. 847-853-0237
Fax 847-853-1063
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Lisa Gaines McDonald, Principal
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Fax 305-621-3533
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http://www.rifemarketresearch.com
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Services: DC, FG, M, ST
African-American, Hispanic, Native American

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

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New York, NY 10014
Ph. 212-924-1600 ext. 105
Fax 212-924-8241
E-mail: rminer@sachsinsights.com
http://www.sachsinsights.com
Tammy Sachs, President
Services: FG, M
African-American

Service Codes

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ST	Survey Translation
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Ph. 408-988-4800
Fax 408-988-4866
E-mail: info@sanjosefocus.net
http://www.thefocusnetwork.com
Heidi Flores, President
Services: FG
Asian, Hispanic

Savitz Field and Focus - Dallas
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Dallas, TX 75240
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Fax 972-450-2507
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(See advertisement on the Inside Front Cover)

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http://www.scpmarketresearch.com
Services: FS, C, FG, M
Hispanic

Scientific Telephone Samples
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E-mail: Seaportand@aol.com
http://www.seaportsurveys.com
Andrea Waller, President
Services: DC, FG
African-American, Asian, Hispanic, Middle Eastern

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Delray Beach, FL 33483
Ph. 561-526-3200 ext. 113
Fax 561-526-3201
E-mail: arnoldsheer@hotmail.com
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Asian, Hispanic, Middle Eastern

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Delray Beach, FL 33483
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Timm Sweeney
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Hispanic

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Fax 212-598-5401
E-mail: info@smrb.com
http://www.smrb.com
Jill Axelrod, Mgr. Corp. Comm.
Services: FS, C, DC, ST
Hispanic

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1600 Canal St., Suite 400
New Orleans, LA 70112
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Fax 504-539-9228
E-mail: lindecuir@aol.com
http://www.southernspectrum.com
Tierney DeCuir, Research Coordinator
Services: C, DC, FG, S
African-American, Asian, Hispanic

Southwest Planning & Marketing
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Santa Fe, NM 87501
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Fax 505-984-1393
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index of advertisers

Trade Talk

continued from page 102

after 9 a.m. By region, 8 percent of adults in Asia-Pacific and 7 percent of adults in Europe rose after 9 a.m.

In terms of total sleep hours, the U.S. is in the top 10 when it comes to getting little sleep, with 19 percent getting six hours or less during the week. The Japanese top the list, with 41 percent getting six hours or less. On the other hand, the U.S. also makes the top 10 when it comes to sleeping in, with 18 percent getting nine hours or more during the week. Australians top that list with 31 percent getting nine hours or more. New Zealanders came in second at 28 percent.

Pill popping

Estimates by the National Institutes of Health show that 70 million Americans have some form of sleep disorder. Yet just 6 percent of U.S. households buy over-the-counter sleeping aids according to ACNielsen Homescan consumer panel data. While I haven't been reduced to popping a pill to fall asleep, ACNielsen data (chart) shows that many folks have been - and that sleeping aids are out-selling anti-sleep products in the U.S. by more than two-to-one (though note the percent-change from the previous year).

Work, habit, family

Nearly half of all global respondents selected both "work hours" and "habit" as major factors dictating their sleep schedule. Fifty-four percent of Europeans claimed work hours more than habit (41 percent) determined their sleep schedule, particularly among younger respondents. Both Americans and Asians rated habit as the biggest influence on sleep hours. One-third of Americans cited the influence of "family/children" on their sleep schedule - double that of Europeans (17 percent) and Asians (16 percent). | Q

Sleeping Aids vs. Anti-sleeping Aids

	Volume (capsules, tablets, etc.)	% Change vs. Year Ago
Sleeping Aids	599,281,701	+0.8%
Anti-Sleep Products	237,326,508	+1.7%

Source: ACNielsen Strategic Planner, 52 weeks ending 12/28/04, food/drug/mass merchandise (excluding Wal-Mart) stores combined.

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trade talk

By Joseph Rydholm, *Quirk's* editor

The world could use a nap

As I roll over and stare at the red digits of the clock radio and curse my inability to fall asleep before midnight, it's comforting to know that there are millions around the world in the same frazzled state of mind. An ACNielsen survey found that 34 percent of U.S. adults go to bed after midnight during the week. Elsewhere in the world bedtime is post-midnight for an average of 37 percent of adults.

By region, 40 percent of adults in Asia-Pacific burn the midnight oil compared with 32 percent of Europeans. Of the top-five globally-ranked night-owl markets, three are Asian; the other two are Mediterranean countries.

The ACNielsen survey was conducted in October 2004 over the Internet in 28 markets across Asia-Pacific, Europe and the U.S., with more than 14,000 adults participating. In Vietnam, the survey was conducted face-to-face.

Bedtimes differ quite a bit by age in the U.S. Over half (55 percent) of Americans aged 18-20 stay up past midnight. Twenty-five percent of those 60 and older are in bed by 10 p.m.

What Time Do You Normally Go To Bed During The Week?

U.S. Respondents	Total	Age 18-20	Age 21-29	Age 30-39	Age 40-49	Age 50-59	Age 60+
Before 8 p.m.	1%	5%	1%	0%	0%	1%	0%
8-9 p.m.	2%	0%	2%	3%	2%	0%	7%
9-10 p.m.	11%	0%	6%	13%	8%	15%	18%
10-11 p.m.	27%	15%	22%	37%	27%	2%	18%
11 p.m.-12 a.m.	26%	25%	28%	18%	30%	33%	21%
12-1 a.m.	17%	20%	19%	17%	15%	19%	11%
After 1 a.m.	17%	35%	22%	13%	19%	10%	25%

Top Night-Owl Nations - In Bed After Midnight

Rank	Country	Between 12 - 1 a.m.	After 1 a.m.	Total after 12 a.m.
1	Portugal	47%	28%	75%
2	Taiwan	34%	35%	69%
3	Korea	43%	25%	68%
4	Hong Kong	35%	31%	66%
5	Spain	45%	20%	65%
11	United States	17%	17%	34%

Early to rise

As for when people start their day, 29 percent of American adults are up by 6 a.m., compared to 25 percent of those in Asia-Pacific and 15 percent of Europeans. Leading the global market-by-market rankings are the Indonesians, with 72 percent out of bed by 6 a.m., followed by 55 percent of Vietnamese, 41 percent of those in the Philippines, and 29 percent of Germans. (The youngest American adults are most likely to sleep in: 40 percent of those aged 18-20 do not get up until after 9 a.m.)

While we have a decent percentage of early birds here the U.S., we're also a bunch of slugabeds. Thirteen percent of U.S. adults don't get out of bed until after 9 a.m., ranking the U.S. second only to Taiwan as a nation of late-risers among the 28 markets studied by ACNielsen (Hong Kong and Spain, each also at 13 percent, were tied for second place with the U.S.). The night-owl Taiwanese, by far, are the last out of bed in the morning, with 26 percent not getting up until

continued on page 101