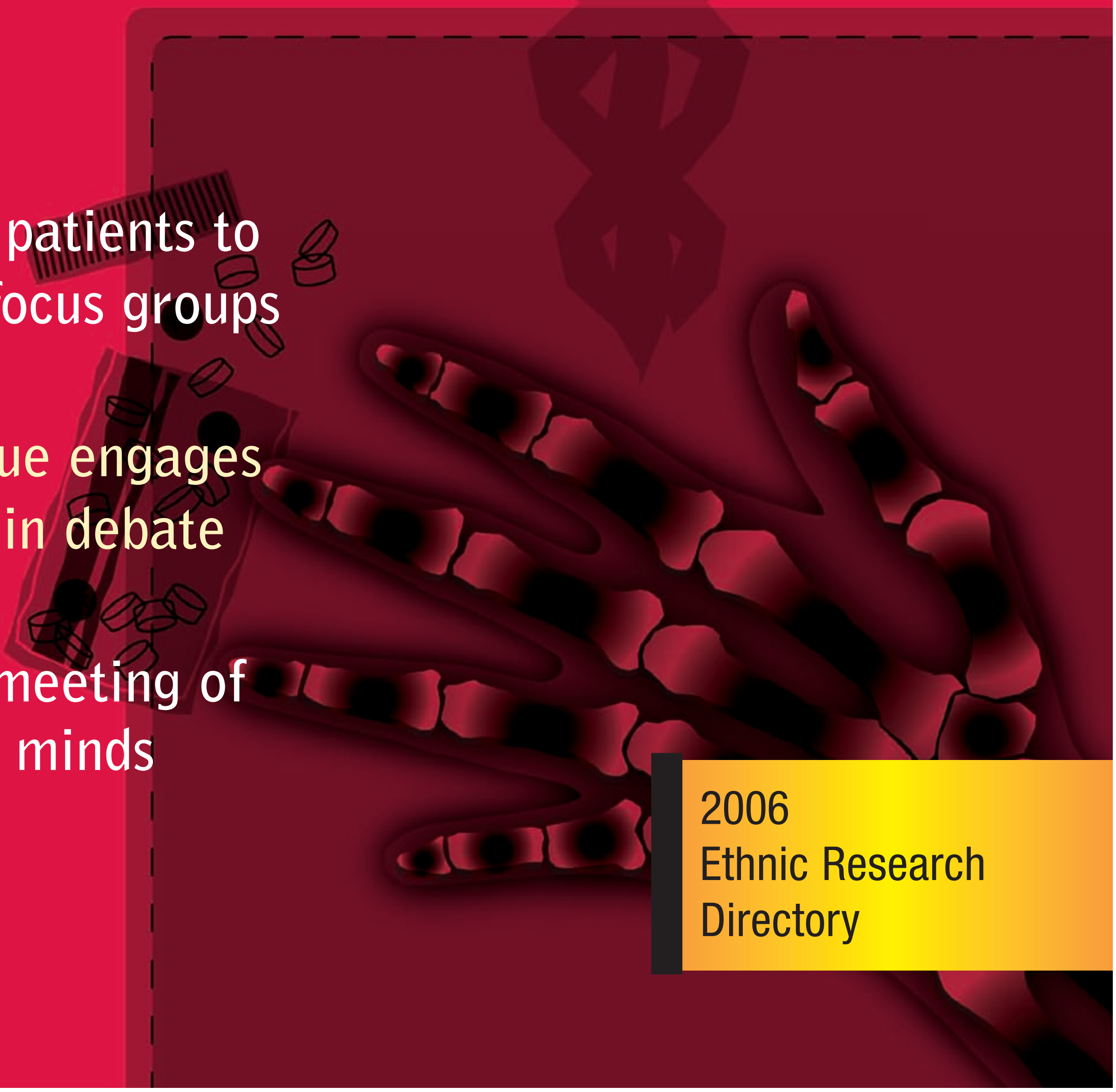
QUIRK'S

Marketing Research Review

JUNE 2006

Health care research issue



> Getting patients to talk in focus groups

> Technique engages doctors in debate

> Hold a meeting of medical minds

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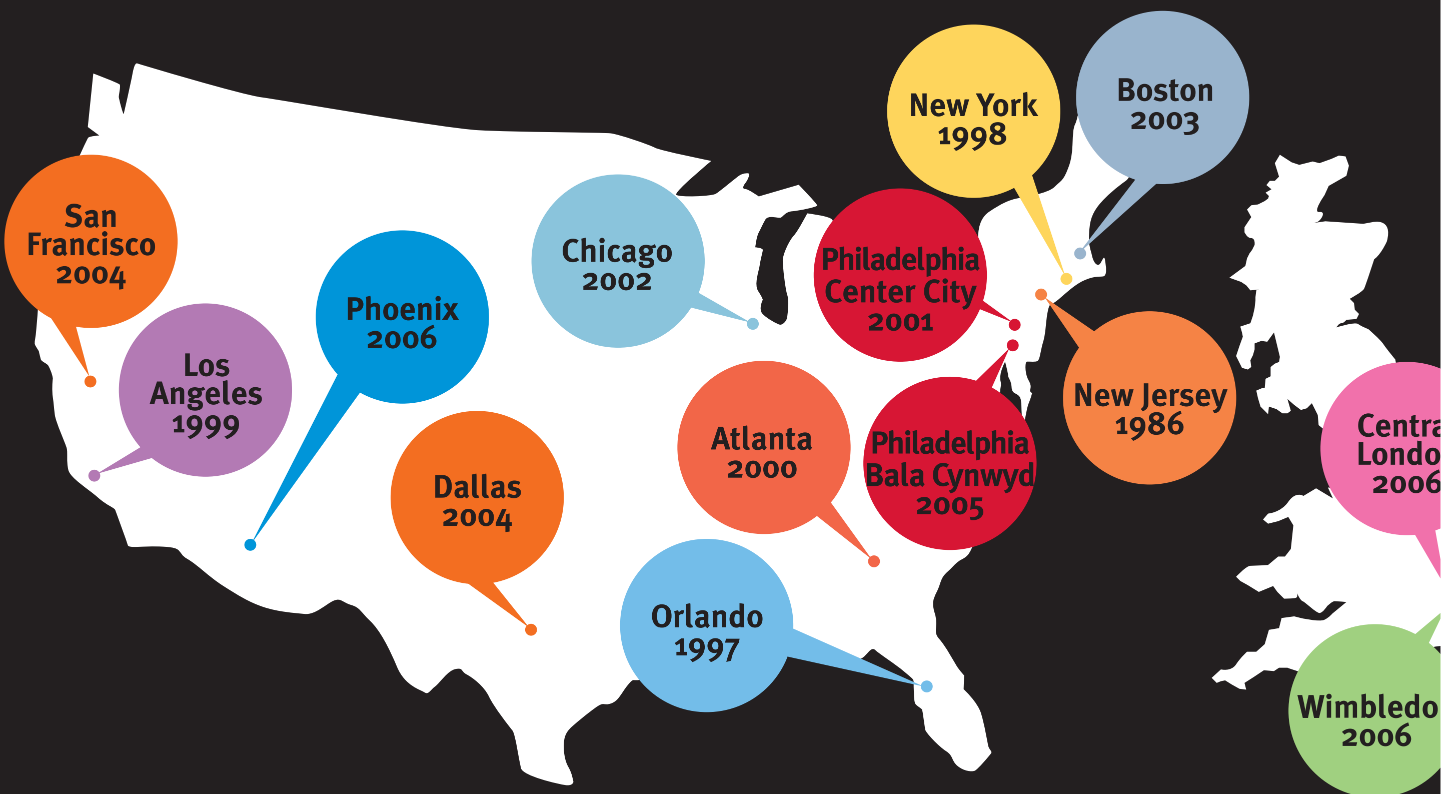

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Quirk's Marketing Research Review
Volume XX Number 6

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in case you missed it...

news and notes on marketing and research

TiVo debuts on-demand ads

TiVo has launched Product Watch, a service offering on-demand ads to its 4.4 million subscribers. (Somehow, the words "on-demand" and "ads" just don't go together.) As reported by the *Wall Street Journal*'s Brian Steinberg, about 70 advertisers, including Kraft Foods, Ford Motor, General Motors and LendingTree, have signed up.

Rather than standard 30-second commercials, the marketers will offer longer-form ads that focus more on informing than selling. Kraft, for example, offers 20 different cooking videos showing how to create a Jell-O dessert, make a potato salad or grill one of its Tombstone pizzas.

Ford has tapped magicians Penn and Teller to perform tricks on a golf course, with a Ford vehicle nearby. In LendingTree's ad, personal finance guru Suze Orman gives overviews of different types of loans.

Users can search for ads in categories such as finance and travel and leisure. (Marketers are charged only for viewers who download an ad.) TiVo is hoping that viewers will use the service in a manner similar to the Internet, as a way to research products and services. While it is certainly hard to imagine large numbers of viewers plopping down on the couch to watch commercials, if the ads offer some kind of value - whether via entertainment or information - they could find an audience.

The pay-per-view approach was attractive to charter advertiser Tourism Australia, which is using Product Watch to offer four documentary-style ads about things to do in Australia, such as seeing marine life on the Great Barrier Reef. Talking to consumers one-to-one is preferable to aiming at masses who may not be interested in the ad message, said Michael Londregan, vice president of Tourism Australia. "Australia doesn't have the budget to aim broadly and fire erratically at the whole consumer market," he said.

"TiVo's Latest Viewing Option: Commercials," *Wall Street Journal*, May 8, 2006

Wal-Mart goes upscale in Texas

Wal-Mart has opened a new supercenter targeting upscale shoppers and catering specifically to the needs of female shoppers. As detailed by Patricia Odell in *Promo* magazine's Promo Xtra, the 203,000-square-foot supercenter is unlike any other in the Wal-Mart chain. Everything is different, from store layout to merchandise selection to new signage and graphics to a selection of fine wines. "With the opening of this store, Wal-Mart is adopting an active approach to understanding and meeting customer needs, particularly those of the selective female shopper," said John Fleming, Wal-Mart's executive vice president and CMO.

Fleming said the company plans to use the supercenter - located in Plano, Texas, in a highly competitive retail corridor - as an lab for testing new ideas. "If something doesn't work, we will change it and try something else. And when an innovation resonates with our customers, we will consider introducing it in other stores."

Some of the new features include:

• Store layouts geared to women. For example, consumables, pet food and health and beauty aids are adjacent to grocery.

• New signage and graphics that individualize the store's eight main shopping areas - food, apparel, home, health, beauty, do-it-yourself, electronics and baby.

• An apparel area with its own cash registers, more privacy and space in dressing rooms and more space around clothing racks. Clothing purchases will be carried out on hangers instead of being folded and placed in a bag.

• A quieter shopping environment - no in-store radio, fewer P.A. announcements and quieter cash registers. Wal-Mart TV will be found only in certain areas.

• An expanded grocery selection and thousands of premium items in wine, dry grocery, meat, cheese and products that are new to Wal-Mart supercenters.

• A sushi bar and a Wi-Fi-enabled coffee shop.

• Hundreds of additional organic and natural product offerings.

Plano has an estimated population of 236,929 as of January 1, 2003. The median age is 34.1 years and 68.2 percent of the population is 21 years or older. Of the total households, 74.9 percent are families and 42.01 percent have children under 18. The percentage of household incomes over $100,000 increased from 27.8 percent in 1990 to 36.8 percent in 2000. The median household income for Plano also increased from $72,233 in 1990 to $78,222 in 2000, according to the U.S. Census Bureau.

"Wal-Mart Opens Supercenter for Upscale Shoppers," Promo Xtra, March 30, 2006, http://promomagazine.com

This sponsorship tie was hard to digest

Bloomberg News reported in April that Bayer AG, maker of drugs to treat heart disease and indigestion, has severed ties with a U.S. company that promotes speed-eating.

Bayer's heartburn-relieving Alka-Seltzer was a sponsor of the 2005 U.S. Open championship of the International Federation of Competitive Eating Inc. (IFCOE), which organizes eating contests around the world. Bayer's U.S. marketing staff made the decision to sponsor the event, said Bayer HealthCare spokesman Hartmut Alsfasser. "We became aware of it and stopped it immediately. This was a one-off marketing event, which won't be repeated," he said.

Takeru Kobayashi and Sonya Thomas competed with 30 other contestants for a total $40,000 in prize money at the event in Las Vegas last July. Kobayashi is famed for swallowing 57 cow brains in 15 minutes, while Thomas has eaten 65 hard-boiled eggs in 6 minutes and 40 seconds, according to IFCOE.

Bayer's association with IFCOE, which says competitive speed-eating is a sport, drew criticism from the Coalition Against Bayer Dangers, a group that campaigns against the Leverkusen, Germany-based company. "It is obvious to all that excessive eating is a danger to health," said Hubert Ostendorf, a spokesman for the group. "Paradoxically, Bayer offers diabetic remedies to cure the diabetes that is often caused by the very events they are sponsoring," he said.

Almost a third of adults, or around 60 million people, in the U.S. are obese, according to the American Obesity Association (AOA). The chronic condition is linked to diabetes, heart disease and cancer and is the second-highest killer among preventable diseases, AOA says. It estimates annual health care costs related to obesity at around $100 billion.

Better health, lower premiums?

A majority of U.S. adults say they would support employer-provided financial incentives as part of their health insurance benefits in exchange for proactively living a healthy lifestyle, according to a Wall Street Journal Online/Harris Interactive Health-Care Poll. The survey also shows that many adults would support differences in insur-

ance costs for those who compromise their health and safety, such as if they are overweight, do not exercise regularly, do not wear seat belts, or if they smoke or drink heavily.

Below are the results of the online survey of 2,007 U.S. adults conducted by Rochester, N.Y.-based Harris Interactive between December 12 and 14, 2005 for the Wall Street Journal Online's health industry edition.

To alleviate soaring health insurance costs, some companies are starting to cover expenses to help their employees kick smoking and addiction problems, control their weight and health and practice safe driving habits. According to the poll, while majorities say they would favor employer-provided financial incentives as part of their health insurance benefits to employees who participate in various health and wellness programs, women, seniors and those with higher education and incomes appear to be the biggest proponents of these programs.

Women are more likely than men to say they would favor financial incentives to employees who join a stop-smoking program (74 percent vs. 68 percent) and join a gym (62 percent vs. 58 percent). Seniors are more likely than the overall adult population to say they would favor incentives for employees who join a stop-smoking program (77 percent vs. 71 percent), get counseling for alcohol, gambling or drug addiction (78 percent vs. 70 percent), take a course on safe driving (76 percent vs. 67 percent) and participate in an educational program to help manage a chronic medical condition like asthma, diabetes or migraines (73 percent vs. 66 percent).

Those with a postgraduate education are more likely than the overall adult population to support financial incentives for employees who join a stop-smoking program (80 percent vs. 71 percent), participate in an educational program to help manage chronic medical conditions (75 percent vs. 66 percent), join a weight reduction or weight management program (76 percent vs. 64 percent) and join a gym (73 percent vs. 60 percent).

Those with incomes of $75,000 or over are more likely than those with incomes less than $15,000 to favor financial incentives for employees who join a stop-smoking program (79 percent vs. 60 percent), participate in an educational program to help manage a chronic condition like asthma, diabetes or migraines (75 percent vs. 60 percent), join a weight reduction or weight management program (74 percent vs. 59 percent) and join a gym (68 percent vs. 48 percent).

In addition, majorities of U.S. adults favor different levels of insurance premiums, co-payments or deductibles for those who smoke (63 percent), drink heavily (57 percent) or do not wear their seat belt (62 percent). Despite research that shows obesity and lack of exercise lead to health complications and high medical costs, pluralities say they would oppose a difference in insurance costs for those who are overweight (45 percent) and those who do not exercise regularly (47 percent).

Support for insurance rates that take these health factors into account is more likely to come from men and those with a high level of education. Men are more likely than women to favor differences in insurance rates that are based on one's weight (37 percent vs. 23 percent) and the inclusion of regular exercise in their daily routine (31 percent vs. 21 percent).

Those with a postgraduate education are more likely than the overall adult population to say they would favor different rates based on whether or not someone smokes (81 percent vs. 63 percent), wears a seat belt (75 percent vs. 62 percent), is overweight (42 percent vs. 30 percent), drinks heavily (68 percent vs. 57 percent), or exercises regularly (34 percent vs. 26 percent). For more information visit www.harrisinteractive.com.

Hispanic youths are avid Web users

Youth must be served, particularly in Spanish. That is the message of a report, "Hispanic Youth Online: Language and Culture Define

continued on page 82

names of note

Bill Walker has been named director of research for *First Research*, Raleigh, N.C.

Forrester Research, Inc., Cambridge, Mass., announced a number of new hires, naming **Brad M. Bortner** director, custom research, the Americas; **Nigel Fenwick** vice president and practice leader, Forrester leadership boards, IT programs, the Americas; **Dwight Griesman** vice president and practice leader, Forrester leadership boards, marketing programs, the Americas; **Dennis Kanemitsu** vice president of sales and marketing, Asia Pacific; **Jan Louwes** vice president of sales, Europe, the Middle East, and Africa; **Fiona McDonnell** director of marketing, Europe, the Middle East, and Africa; **David Metcalfe** senior vice president of research, Europe, the Middle East, and Africa; **Mark R. Nemec** vice president, Forrester leadership boards, the Americas; **Ian Taylor** head of Forrester leadership boards, Europe, the Middle East, and Africa; and **Paul Warren** vice president and practice leader for consulting, the Americas.

Minneapolis research firm *Iconoculture* has named **Jim Riesterer** vice president of marketing and **Steve von Bevern** vice president of research.

Dallas-based *Kinesis Survey Technologies* has named **Jason Ehler-James** senior account executive.

Stamford, Conn., research firm *InsightExpress* has named **Darcy Briggs** project manager within the company's AdInsights group. In addition, **Laxmi Viswanath** has been promoted to software quality assurance manager.

New York researcher *TNS* has named **Kimberly Till** president TNS, North America.

Australia-based research outsourcing firm *Pulse* has added **Jeremy Liew**, **Zhang Wen Kui**, **Faye Ng** and **Rapizi Abdullah** to its project management team.

Shannon McGuire has joined *Flake-Wilkerson Market Insights*, Little Rock, Ark., as executive vice president, client service. He is based in the firm's Evergreen, Colo., office. In the Stamford, Conn., office, **Paul Donagher** has been named senior vice president, client partnerships.

David van Nostrand has been named senior vice president and chief research officer at New York research firm *Focalyst*.

London-based *comScore Europe* has relocated **Piers Stobbs** from Chicago to the London office.

Dolly Hightower has joined *Millward Brown USA* as vice president of market development, Eastern region. She is based in Boston. In addition, Millward Brown has named **Nigel Hollis** executive vice president, chief global analyst.

Researcher *Synovate* has added four to its technology and telecom practice: **Steve Levine** as senior vice president and sector head; and **Beth Ritchey**, **Karen Stuth** and **Holly Edmunds** as vice president.

Polaris Marketing Research, Atlanta, has named **Toni Holloway** marketing research project manager.

Exercise equipment maker *NuStep Inc.,* Ann Arbor, Mich., has named **Dipti Jain** marketing research analyst.

Denise Conroy-Galley has been named vice president marketing/research for the *Outdoor Channel*, Temecula, Calif.

Eileen Diskin has been named vice president-marketing for *PBS Kids Sprout*, Arlington, Va.

Harris Interactive, Rochester, N.Y., has named **Richard Goosey** senior vice president, marketing science and methodology. He will be based in London.

Woburn, Mass., site selection firm *geoVue* has named **Rudy Nadilo** CEO.

New York research firm *Ipsos ASI* has promoted **Lana Busignani** to president, Ipsos ASI North America West, and **Pam Maltby** to president, Ipsos ASI North America East.

M/A/R/C Research, Irving, Texas, has added **Erika Cinicolo** and **Azure Steele** as research analysts. Cinicolo is based in the Irving office and Steele in the Greensboro, N.C., office. The firm also named **Fred Van Tatenhove** vice president.

Cook Research & Consulting Inc., Minneapolis, has named **Gayle McCoy** vice president.

Geographic information system firm *ESRI,* Redlands, Calif., has named **Simon Thompson** commercial business industry solutions manager.

Survey Sampling International (SSI), Fairfield, Conn., has opened new offices in Europe and named **Andrew Moffatt** sales director for Europe and **Pete Cape** knowledge director, both in SSI's London office. **Milan Dolinar** has been named managing director in the firm's Frankfurt, Germany, office.

Chicago-based *Information Resources Inc.* has named **Stewart Jones** executive vice president of global operations. In addition, **John Lawlor** has been named division president and general manager of the firm's panel and test solutions business.

Version 6 of Microtab

Alpharetta, Ga.-based Microtab has released version 6 of its Microtab crosstabulation software. Though the XP year designator has been discarded in favor of the more common version designator, the software continues to operate on multiple platforms - from Windows 95 through the not-yet-released Windows Vista operating system.

Feedback about the usefulness of the charting Add-on Module prompted its inclusion as a standard part of the Professional Edition of Microtab version 6. Also, building on the popularity of the enhanced table creation features added during development of the SPSS add-on and Triple-S module, the company has added new automation features for creating tables. It also expanded the user's options for setting defaults and enhanced options for customizing the appearance of tables. A "no limits" evaluation edition of the software is available for download. For more information call 770-664-9244 or visit www.microtab.com.

Product combines GIS and health care info

Redlands, Calif., ESRI and health care software company Planning 2.0, Brentwood, Tenn., have teamed for Business Analyst Online for Health, which combines geographic information system technology with demographic, consumer expenditure and hospital discharge information as well as diagnostic related groups and ICD-9 codes from Planning 2.0.

Health care planners and marketers can use Business Analyst Online for Health to get data reports and maps in a ready-to-use format. Health care providers' upper management, strategic planners and business development can use the software for product planning, market forecasting and other marketing applications. For more information visit www.esri.com/ baohealth or www.planning2.com.

Test new products online with ProSelect

Marketing Research Services Inc. (MRSI), Cincinnati, is now offering ProSelect, an online product testing solution designed for marketing researchers and product developers in a variety of consumer product markets. As part of MRSI's PRISM system for product development, ProSelect answers product development questions such as: Is my product as good as I think it is? Does it have strong consumer appeal? How well does it perform in real-world conditions? What needs improvement? Does the product deliver on its promises?

With ProSelect, surveys are available 24/7 and results are monitored as they come in. Clients can ship products to one central MRSI facility instead of malls across the country. Through ProSelect's primarily monadic testing technique, consumers provide likes and dislikes about the product, rate the product overall and on key diagnostic product attributes. Analysis of product strengths and weaknesses is then used to provide specific guidance on areas of product improvement (prior to an actual product launch). ProSelect can also be used to test frozen products. MRSI can pack and ship products from one centralized facility using dry ice and insulated coolers. For more information visit www.mrsi.com/proselect.html.

Syndicated study tracks C-store shopping habits

Meyers Research Center, New York, has launched the sixth wave of its syndicated category management research program, Convenience Store Close-Up, which takes a look at behavior, attitudes and decision-making patterns of convenience store shoppers in the United States.

The research objective of the 2006 study is to get into the minds of convenience store consumers in order to identify and quantify behavior. The results will provide the convenience store industry with a framework for thinking about the positioning of the convenience store, including how and why consumers shop this type of store and insights into how to best target the convenience store consumer with a special emphasis on convenience shopping.

A minimum of 1,000 shoppers will be interviewed about their attitudes, perceptions and behavior in convenience stores. Interviewing will take place across the four broad geographical census regions in order to achieve a thorough cross-section of shoppers. Only traditional convenience store chains and petroleum retailers will be utilized for the sample. For more infor-

continued on page 86

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research industry news

News notes

New York-based **Jupitermedia Corporation** has sold its JupiterResearch division for $10.1 million in cash and the assumption of certain liabilities by the purchaser, subject to certain post-closing adjustments. The purchaser is JupiterResearch LLC, a subsidiary of JupiterKagan, Inc., which is a portfolio company of MCG Capital Corporation.

The work of ethnographers Hy Mariampolski and Sharon Wolf, managing directors of **QualiData Research Inc.,** Brooklyn, N.Y., is featured in the book *Odder Jobs: More Portraits of Unusual Occupations* by photo essayist Nancy Rica Schiff.

The United States Patent and Trademark Office has awarded Waltham, Mass.-based research firm **Affinnova Inc.** U.S. Patent No. 7,016,882 entitled, "Method and Apparatus for Evolutionary Design." The patent involves an algorithmic approach for presenting and generating product ideas to consumers, typically in an electronic format.

Calendar of Events June-October

The American Marketing Association will hold its annual Advanced Research Techniques forum on June 11-14 at the Marriott Monterey, Monterey, Calif. For more information visit www.marketingpower.com.

The Marketing Research Association will hold its annual conference on June 14-16 at the JW Marriott Hotel in Washington, D.C. For more information visit www.mra-net.org.

The Conference Board will hold its annual marketing research conference on June 22-23 at the Hyatt Regency McCormick Place in Chicago. For more information visit www.conference-board.org.

The Product Development Management Association and IIR will hold Team NPD, a new product development conference, on July 17-19 at the Keystone Resort, Keystone, Colo. For more information visit www.iirusa.com/npdteam/.

The Photizo Group will hold review sessions to help marketers prepare for the Product Development Management Association New Product Development Professional certification exam. Training dates are August 23-25 in St. Louis and October 25-27 in Cincinnati. For more information visit http://photizogroup/contact/pdmatrain.html.

The American Marketing Association will hold its annual marketing research conference on September 10-13 in Chicago. For more information visit www.marketingpower.com.

ESOMAR will hold its annual congress on September 17-20 at the Queen Elizabeth II Conference Centre in London. For more information visit www.esomar.org.

The Qualitative Research Consultants Association will hold its annual conference on September 27-30 at the Intercontinental Hotel - Buckhead, Atlanta. For more information visit www.qrca.com.

IIR will hold a conference on improving respondent cooperation and data quality on September 28-29 in Chicago. For more information visit http://iir-ny.com/respondentcooperation/.

ESOMAR will hold a conference on qualitative research on October 8-10 in Cape Town, South Africa. For more information visit www.esomar.org.

The Council of American Survey Research Organizations will hold its annual members-only conference on October 18-20 at the Ritz-Carlton, Marina del Rey, Calif. For more information visit www.casro.org.

IIR will hold its annual market research event on October 22-26 at the Century Plaza Hotel in Los Angeles. *Quirk's* subscribers can receive 15 percent off the standard price by using registration priority code XM1828QUIRKS. For more information visit www.themarketresearchevent.com.

ESOMAR will hold its annual Latin American conference on October 25-27 in Rio de Janeiro. For more information visit www.esomar.org.

Resolution Research & Marketing Inc., Denver, announced two successful settlements of trademark actions taken against competitors whose names were confusingly similar to Resolution Research. "We took legal action because we, like many companies, place great importance and value in our name. In both cases, the infringing name and logotype were so similar that Resolution Research actually received calls and correspondence, demonstrating public confusion between the two entities," said Nina Nichols, president and CEO of Resolution Research in a press release. Both competitors have changed their names. The name Resolution Research is a federally registered trademark with the U.S. Patent and Trademark Office.

Association/organization news

The Council for Marketing and Opinion Research, Bethesda, Md., has named Christopher S. Lee as its new director of government affairs and counsel.

The Advertising Research Foundation has moved to new offices at 432 Park Avenue South (at 29th Street), 6th Floor, New York, N.Y., 10016. Phone 212-751-5656. Fax 212-319-5265.

The Boardroom Project, a body of marketers in advertising, media, academic, measurement and modeling with a mission to "establish marketing measurement standards for continuous improvement in business performance," has defined a marketing measurement audit protocol (MMAP) connecting all marketing activities to the financial performance of a firm. "MMAP will become to the marketing profession what GAAP and IFRS are to accounting and ISO is to operations. It is no longer acceptable for marketing to be viewed as a cost that lacks standard metrics and processes to drive continual improvement," said Dwight Riskey, senior vice president of PepsiCo, in a press release. "The body has proposed that cash flow both short-term and over time is the ultimate metric to which every marketing activity should be causally linked through the validation of intermediate marketing metrics."

"The process of validating all intermediate marketing outcome metrics against short-term and/or long-term cash flow drivers is the only way to facilitate forecasting and improvement," said Margaret (Meg) Henderson Blair, president of ARS/rsc and a founding member of the Boardroom Project.

"We are now inviting broader involvement in three areas. One, review the standards. Two, start incorporating them into current business practices. And three, address measurement in specific marketing activities where standards are lacking," said Kate Sirkin, executive vice president of Starcom MediaVest. For information contact David W. Stewart, professor of marketing, Marshall School of Business, University of Southern California, at david.stewart@marshall.usc.edu.

The new 2006-07 president of Canada's **Marketing Research and Intelligence Association**, Nik Nanos, president of Toronto-based SES Research, and the 2006-07 board of directors took office

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By Christine Holt and Liria Barbosa

The importance of being earnest

There's no question that there are many respondents out there, participating in qualitative and quantitative studies, who are being contacted too often. It's likely that some of these individuals are "trained" – they have been exposed often enough to screeners, groups or surveys that they know how things work and what question's coming next. We've been stopped many times after groups and had respondents say, as a means of praise, "Wow, that was really fun. So different from the other ones I've done." Really? That always catches our attention because we wonder exactly what they've been exposed to, how long ago and how often.

But what worries us more than the frequent participant who's earnest in sharing their point of view, who's qualified honestly, and has done a few groups before, is the lady at the table who hasn't qualified honestly, doesn't really use the product in question, and is more interested in whether time is about up so she can collect her check and be on her merry way.

These folks, the professional respondents, don't contribute to the research process. In fact, it's difficult for them to actually participate because they often don't have any familiarity with the issues at hand. This, in turn, signals the moderator, unwittingly, to try to draw them out, which detracts from getting fuller responses from the "real" participants.

Even worse, though, is if they do take an active role in the group. They're unable to provide honest feedback, which can give us a false sense of what's happening – not to mention their potential impact on other respondents. Still other professional respondents can be quite aggressive, since they may feel they are experts on the focus group process. They may give answers they believe will move the group along or that will satisfy the moderator, "Is that what you were going for?" In contrast, the earnest respondent is participating because she wants to have a voice, to have an impact, to feel a part of something bigger than her. Plus, she can be a real asset in the room because she's familiar and comfortable with the process. She can jump right in and participate fully.

Editor's note: Christine Holt is research director of the InVision Qualitative division of C&R Research, Chicago. Liria Barbosa is senior qualitative analyst in the firm's LatinoEyes Qualitative division. They can be reached at 312-828-9200 or at cholt@crresearch.com or liriab@crresearch.com.

What to do?

So what can we, as qualitative researchers and moderators, do to ensure that we're at least getting earnest respondents at the table, even if some of them have participated before? First and foremost, we must take care to screen carefully and specifically. Organizations such as ESOMAR provide us with guidelines regarding past participation screening for qualitative research. So, as an industry, we typically screen for no participation in other groups in the past six months. ESOMAR also recommends that we screen for no participation in the past two years in the same or a related category. It also recommends that we cap the total

number of group experiences to five in the past five years. And finally, to increase our odds of not seating that less-than-earnest respondent, ESOMAR suggests that we strive for half of each group to be virgins to the process – no past group participation.

While these are great recommendations, we all know that in the real world it's not going to be feasible to follow them to the letter – particularly the last recommendation about seating newbies. If we make this a recruiting requirement, our costs are going be substantially higher and the time it takes to finish recruiting will be longer than our clients can tolerate.

So, we rely on our qualitative partners, the recruiters and facilities, to help reduce the incidence of professional respondents by being diligent about maintaining accurate and objective records in their databases regarding potential respondents' past participation and reported dishonesty. It's our responsibility as moderators to share with the recruiter or facility any concerns we have about any respondent, based on things we observed or heard in the groups. In turn, it's the facility or recruiter's responsibility to follow up on those concerns, including removing that individual from the database.

We can also help to discourage the professional respondent by requiring all respondents to have their ID checked upon arrival at the facility and by formally questioning them about whether they work with other facilities. As moderators, we can ensure that our screeners are fully blinded and open, offering as few clues as possible to our purpose. We can ask respondents to bring the product to the groups or require them to complete homework about the product that demonstrates their level of involvement – and refuse to seat those who forget their assignments. Facilities and recruiters could more proactively work to expand their databases (to bring in "new blood"), control contact frequency and actively purge or put on hold the most heavily used respondents or those with whom there have been issues. In the ideal world, facilities would be more compelled to participate in existing sample validation programs sharing contact information on the respondent level with each other. Of course this sometimes happens on a voluntary basis now, but an industry-wide initiative along these lines would be a big step forward.

Positive impact

In the meantime, by focusing on the "professional" respondent, and not overly concerning ourselves with the earnest respondent with some history of past participation, we can truly make a positive impact on the net result of the focus group. We can be satisfied that we have exercised an appropriate level of control in an effort to seat as productive a group of consumers as possible. Then we can focus on the real task at hand: understanding their impressions and motivations toward the category or product at hand to help our clients bring the most consumer-focused products or service to market as possible. | Q

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By William M. Bailey

Evaluating a market using P-E gap analysis

Gap analysis is the term for a methodology used to help a business understand the relationship between what is important to its customers and the derived difference between business performance and customer expectations (the P-E gap). For example, a client might note that price is very important in their decision to purchase an item. However, when asked what else is important in that decision, the customer might also list another 20 items or attributes that are equally important. Thus, how does price actually rank in comparison to the entire set of decision criteria?

As with cause/effect models, such as regression and discriminant analysis, gap analysis attempts to understand relative positioning. The value in gap analysis is its simplicity and pictorial representation. However, gap analysis does not determine any statistical relationship between these items of importance. Gap analysis is based on the comparison between an attribute's importance (mean rating) and the difference between the attribute's (mean) performance and its (mean) expectation, called the P-E gap or the difference between performance and expectations.

This article is based on the author's part in the addendum research to a study of the trends driving the demand for oligonucleotides (oligos) in the United States. Oligos are short sequences of single-stranded RNA or DNA which are often used as probes for detecting complementary DNA or RNA because they bind readily to their complements.

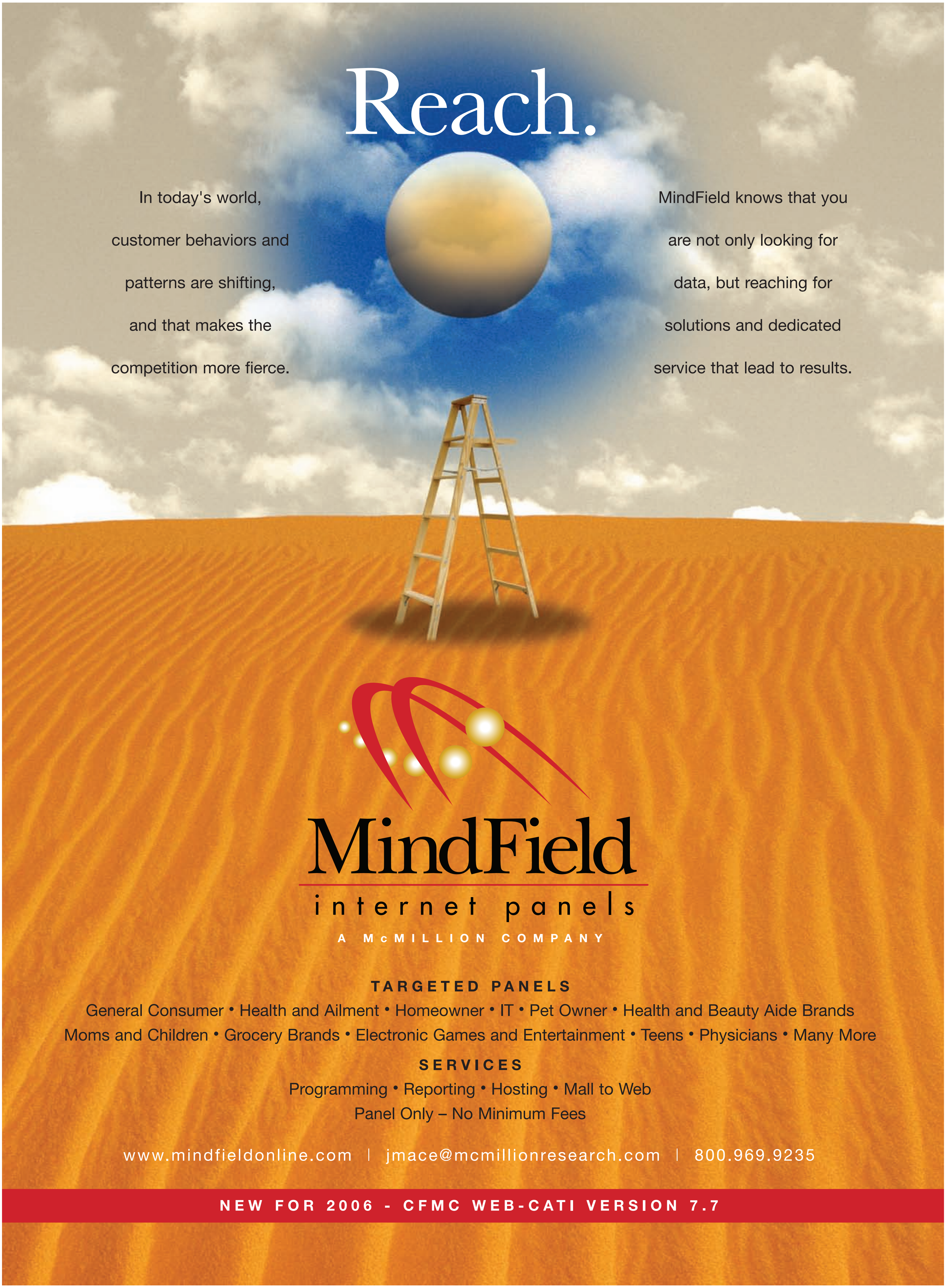
As described in the report ("The U.S. Market for Synthetic Oligonucleotides: Establishing Differentiation for Success," published by BioInformatics LLC, Arlington, Va.), competition in the current oligos market is intense:

"Overall, the market for commercially available custom oligonucleotides has reached a certain level of maturity. Mature markets are those that have achieved a state of equilibrium marked by the absence of significant innovation. In such a situation, brand equity is difficult to establish and suppliers are challenged to differentiate themselves and/or their products in an effort to keep customers from switching to competitors. Customers in a mature market therefore enjoy significant leverage over their suppliers, and in an attempt to maintain market share suppliers often feel as if they have no choice but to compete on price with a resultant decline in profitability."

Editor's note: William M. Bailey is principal of WMB & Associates, an Apopka, Fla., statistical services firm. He can be reached at 321-637-0777 or at statmanz@earthlink.net.

The data collected for this project is based on a survey conducted by BioInformatics through its market research panel of scientific customers, the Science Advisory Board, which consists of life science and medical professionals from 62 countries who participate in surveys that address emerging technologies, test customer reactions to new product concepts, measure brand awareness and assess advertising effectiveness.

The goal of the addendum research was to use P-E gap analysis to determine key attributes in selecting a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synthetic oligos supplier. While the actual results were segmented by brand, this illustration is viewed from an overall perspective. A secondary objective was related to brand equity - indexing based on derived importance - and is planned for a later article.

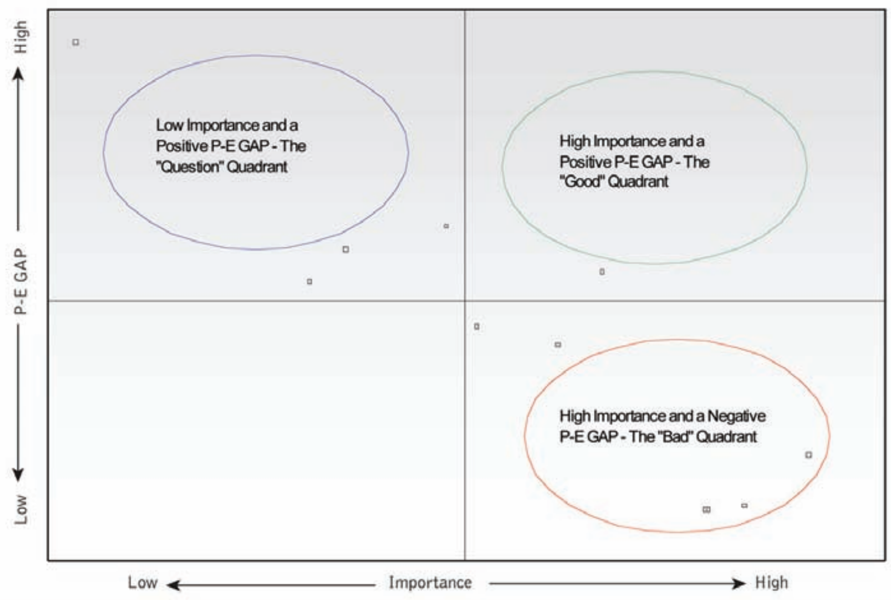
The gap table that forms the basis of this type of analysis displays the mean results for each measured attribute based on its importance (I) to the respondent, the respondent's perception of performance (P) of each attribute and then what the respondent expects (E).

The gap map is another form of a quadrant map that pictorially represents the results with the P-E gap on the vertical axis and importance on the horizontal axis. The four quadrants are based on the intersection of the overall importance mean and the P-E gap (Figure 1).

A high (or positive-direction) P-E gap for an attribute is generally favorable and means that performance exceeds expectations (P > E). On the other hand, a low (or negative-direction) P-E gap shows performance as being below expectations (P < E).

While these are informative results, a much more revealing interpretation takes place when attribute importance is considered. Attributes that fall to the left of the vertical reference line are classified as those of lesser importance relative to those to the right of the line. This is not to say, however, that they are unimportant.

Figure 1: P-E Map



The P-E map used to represent the results of the gap analysis does not form its basis on pure quadrant theory but is an extension of an earlier theory that involved market acceptance models that describe "cash cows" and "dogs" to segment products based on their market attractiveness and competitive positioning. Here we relate attractiveness to importance while the P-E gap is a gauge of perceived market position. Such a display exposes attributes that have a high level of importance to the consumer, as defined by their mean rating, but have a low performance-to-expectation deviate (P-E gap).

Key supplier attributes

In the research, each respondent was asked to rate a series of attributes using a seven-point Likert scale ranging from a "low" rating to a "high" rating using the following questions:

"Previous studies have identified the following features as important to other life science researchers. When considering your Primary Supplier's [noted in an earlier question] ability to provide oligos, how IMPORTANT to you are each of the following? (Choose only one for each.)"

"How we expect a company to perform may differ from how they actually perform. How high or low are your EXPECTATIONS for each of these features when purchasing oligos from your Primary Supplier? (Choose only one for each.)"

"As we mentioned in the previous question, how we expect a company to perform may differ from how they actually perform. How well is your Primary Supplier PERFORMING based on your experiences when

Table 1: P-E Gap Table

I	Attribute	P	E	P-E
6.73	Accuracy of shipment	6.41	6.63	- 0.22
5.43	Customer service/support	5.75	5.47	0.28
5.99	Electronic ordering capabilities via Web site	6.13	5.95	0.18
5.83	Institute specific pricing offered	5.69	5.67	0.02
5.07	Oligo design expertise	5.68	5.45	0.23
6.36	Quality-control procedures	6.03	6.37	- 0.34
6.50	Quality guarantee	6.11	6.44	- 0.33
4.10	Sales force	5.23	4.55	0.68
4.94	Same-day delivery	5.39	5.23	0.16
5.54	Technical service/support	5.76	5.70	0.06
6.37	Timeliness of delivery	5.95	6.29	- 0.34
6.30	Value for price paid	5.99	6.19	- 0.20
5.76	Overall Means or P-E Gap	5.84	5.83	0.01

purchasing oligos from this company? (Choose only one for each.)"

Table 1 displays the results of the P-E gap analysis and consists of the mean results for each measured attribute based on its importance to the respondent (I), the respondent's perception of their primary supplier's performance regarding that attribute (P) and then what the respondent expects of each attribute (E). The P-E column represents the difference, or gap, between performance and expectation. Thus, a positive P-E indicates that the attribute's performance is higher than expected, and vice versa.

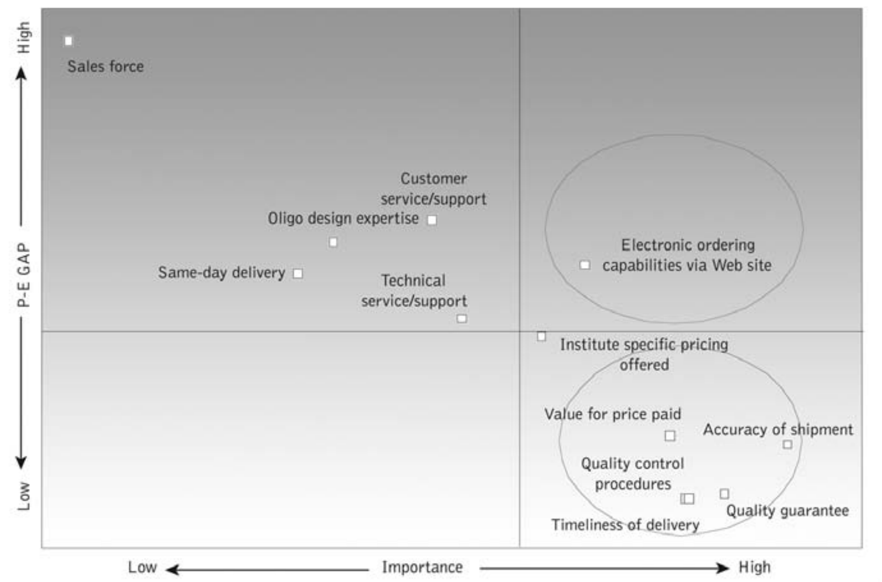
For example, based on the seven-point Likert scale, the mean response for the perceived importance of accuracy of shipment is 6.73; its mean expected value is 6.63 while it is performing at a mean rating of 6.41. Thus, the P-E gap is -0.22 (6.41-6.63), which finds that accuracy of shipment is underperforming.

Of particular note is "value for price paid." The results show that the perceived performance of the price value being derived for the price being paid is lower than expected. That is, the price being paid is greater than the perceived value - again, underperforming.

Also noted in the table are the overall importance mean and P-E gap, which are used to determine the quadrants for interpretative purposes. The overall P-E gap of 0.01 suggests that, generally, performance is just about at par with expectation.

The gap map (Figure 2) is the pictorial representation of Table 1 with the P-E gap on the vertical axis and importance on the horizontal axis. The four quadrants are based on the

Figure 2: P-E Gap Map



intersection of the overall importance mean and the P-E gap, 5.76 and 0.01, respectively.

As seen, performance is lower than expected (a negative P-E gap) for the following attributes that have higher than average importance:

- timeliness of delivery (-0.34)
- quality-control procedures (-0.34)
- quality guarantee (-0.33)
- accuracy of shipment (-0.22)
- value for price paid (-0.20).

Respondents are not getting what they expect from this set of above-average importance attributes.

On the other hand, performance is higher than expected (a positive P-E gap) for:

- sales force (0.68)
- customer service/support (0.28)
- oligo design expertise (0.23)
- same-day delivery (0.16).

But, compared to several other attributes, these are relatively unimportant.

The only supplier attribute that is both deemed as being important and meeting the P-E gap expectations is electronic ordering capabilities via the Web site.

Detailed picture

Gap analysis is but one tool that provides a means of evaluating brands or companies based on attributes that are deemed by customers as crucial to selecting a supplier. While performance alone is a significant criterion for selection, the addition of customer expectation and importance into the equation paints a more detailed picture for companies seeking to learn more about the many factors that customers take into consideration when making their purchase decisions. | Q

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By Robin Segbers

Adding a human touch

To increase its volume of high-acuity and long-term patients, Northeast Ohio-based Akron Children's Hospital needed to understand parents' reasons for sending their children to one hospital over another. The hospital enlisted Marcus Thomas LLC, a Cleveland advertising and public relations firm, to help determine the thought process involved in such health care decisions by targeting several key service areas in which high-acuity patients could most often be found - namely, cardiology/cardiac surgery, neurology/neurosurgery, orthopedics/orthopedic surgery, hematology/oncology and pulmonary/asthma.

Research lays foundation for hospital's non-traditional ad campaign

Focus groups served as the basis for a subsequent telephone survey. From observing the one-on-one interaction of the focus groups, hospital executives learned which issues were most important to the target audience and uncovered the terms respondents used when referring to their experiences. Therefore, the focus group helped the hospital determine the most appropriate questions to ask in the quantitative portion. The quantitative research provided the necessary measurable results needed to develop an overall communication plan for the hospital.

Marcus Thomas first conducted three focus groups, with an average of eight respondents per group, in which participants were asked to discuss their experiences while at a hospital. Participants were required to be the primary decision makers for health care decisions within the family and have a child - one month to 18 years old - with an acute condition and who had spent at least three consecutive days in a hospital.

Editor's note: Robin Segbers is manager of planning services at Marcus Thomas LLC, a Cleveland advertising and public relations firm. She can be reached at 216-292-4700, ext. 3041 or rsegbers@marcusthomasllc.com.

As expected, most focus group participants were female since the health care decision makers within a family tend to be women. Participants were most often between 25 and 54 years old and had two or more children, ranging from toddlers to 18 years old.

Understand the process

Marcus Thomas developed discussion topics that would allow focus group facilitators to understand the hospital selection process and criteria for acute care, including:

- identifying influencers throughout the process of diagnosis and treatment;
- ascertaining reasons for selecting a hospital for treatment versus diagnosis;
- understanding the criteria or factors used by parents in determining quality of care, how they know and what makes them believe a hospital offers excellent quality;
- understanding common situations and circumstances in which a more expert, second opinion is sought; and
- understanding the role insurance coverage plays in a parent's selection of a physician or hospital for her child's serious illness.

With regard to hospital selection, focus group respondents placed greater value on the following criteria: proximity; recommended by pediatrician/general practitioner; insurance; reputation of quality; previous experience with hospital.

Respondents felt proximity was critical for emergency and long-term treatment situations but was less of a factor when parents did not know their child's diagnosis. Instead, parents were willing to travel far to seek a diagnosis.

When asked about physician referrals, many respondents said they contacted their pediatrician when their child became sick or at the time of an emergency. And when their pediatrician recommended a specific hospital, parents usually followed their pediatrician's advice.

"With a broken bone, a close place is fine for treating a child. But if it's for something that is life-threatening, you are not very versed on the hospitals that are farther away and you are putting your trust in your doctor to choose a hospital," said one respondent.

A majority of respondents reported selecting hospitals where they knew they had insurance. Many parents reported calling their insurance company to ask for a referral.

When parents selected a hospital on their own, the hospital's reputation for high quality was critical. Participants defined high quality as having the best doctors, being world-renowned and having the newest treatments available. Compassion fol-

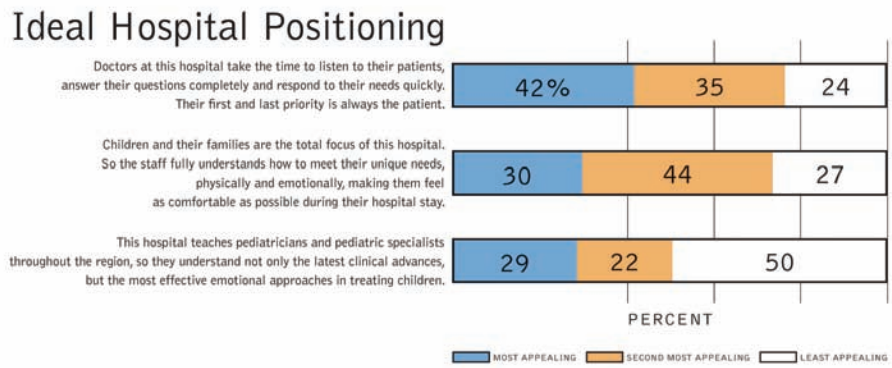
lowed as the second-most crucial criterion and included such attributes as being responsive to patients' needs, having respect for the patient and family, communicating with patients and families, and creating family-friendly facilities with meeting and activity rooms, single rooms and places for parents to stay overnight.

In situations in which respondents had to select from two equally competent hospitals, respondents - especially the parents of chronically-ill children - placed greater importance on the dedication/caring exhibited by hospital staff.

"It's a bigger picture when you have a chronic condition. You want a little more. I want doctors to relate to my son and to us better," said one respondent.

When asked about their perception of Akron Children's Hospital, respondents perceived the hospital to offer a personal approach and greater communication, respect and caring than other hospitals who treated patients as "numbers."

Figure 1:



Telephone interviews

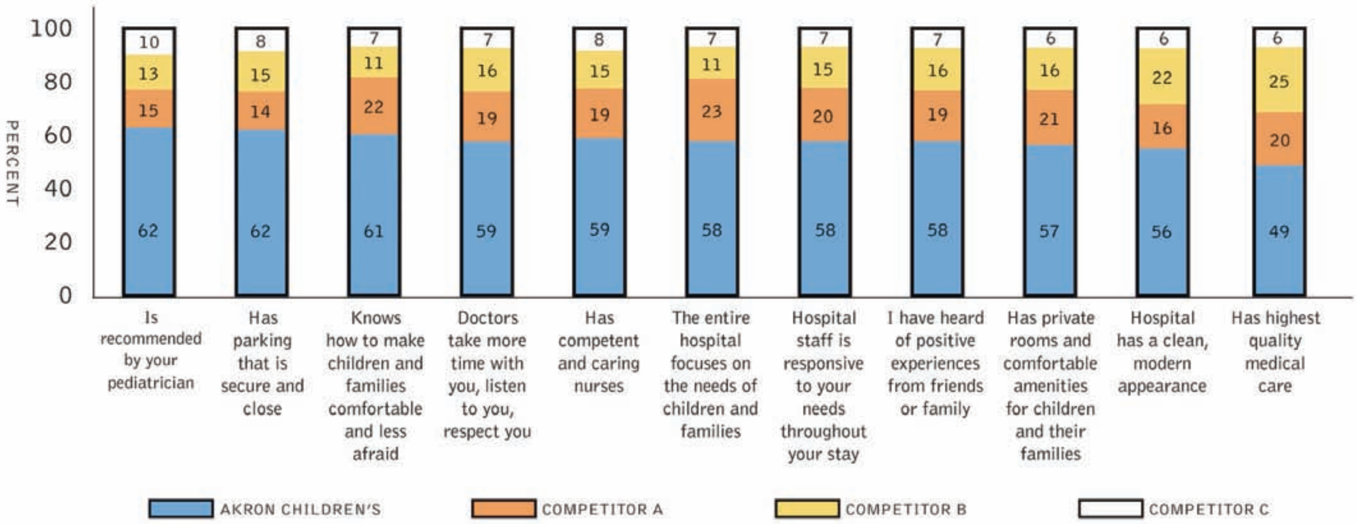
For the quantitative portion of the study, Marcus Thomas conducted 1,000 telephone interviews with parents who lived in hospital growth areas. Of the respondents, 15 percent, or 154 individuals, were parents of high-acuity children defined as having had a hospital stay of three consecutive nights or more. Respondents were primarily white, married moms in their 30s and 40s.

For telephone respondents, Akron Children's Hospital received the highest top-of-mind, unaided and aided awareness, with 33 percent of respondents mentioning the hospital without prompting and 52 percent with prompting.

Akron Children's Hospital ranked first in patient preference for orthopedics and orthopedic surgery, with respondents overwhelmingly preferring the hospital (46 percent) to its primary competitors. The hospital was also widely preferred for treatment of lung or respiratory problems (41 percent) compared to its competitors.

Figure 2:

Hospital Attribute Association by Hospital



Akron Children's Hospital performed on par with its primary competitors in the other three service areas, including cancer care (32 percent), heart care (34 percent) and brain and spinal cord care (33 percent).

Filling patients' emotional needs was rated highest when selecting a hospital without regard to a specific service line. The ideas that the hospital's first and last priority is the patient and that doctors take the time to listen to their patients, answer their questions completely and respond to their needs quickly were rated most appealing by the majority of respondents (42 percent) (Figure 1). This characteristic was most often associated with Akron Children's Hospital, with half of the respondents overwhelmingly believing that the hospital's first and last priority is always the patient.

Sixty-one percent of respondents claimed the hospital knows how to make children and families comfortable and less afraid, while 59 percent believed the hospital had competent and caring nurses and also claimed that doctors take more time with patients, listen to them and respect them. Fifty-eight percent of respondents believed that the entire hospital focuses on the needs of children and families and that the hospital staff is responsive to their needs throughout their stay (Figure 2).

Parents of chronically-ill children placed more importance on private rooms and comfortable amenities and on making children and families less afraid and more comfortable.

Clinical excellence

Based on the research results, hospital officials decided to focus on Akron Children's clinical excellence in three of the high-acuity service areas: cardiology, orthopedics and oncology. The hospital wanted to position itself as the preferred hospital for these service areas instead of just one of the preferred hospitals. At the same time, officials wanted to build upon the hospital's competitive strength as a hospital in which doctors and nurses offer personal care and attention to families, which consumer research shows is the quality that parents selecting a hospital value most.

"The research showed us very clearly that when parents select a hospital, it is that emotional connection that they value most," says Andrea Reynolds, manager of Web development and public relations at Akron Children's Hospital. "Parents want to know that doctors will take the time to answer their questions fully and completely and make one of life's most frightening experiences as comfortable as possible. This one-on-one interaction between the families we serve and our staff has always been a hallmark of Akron Children's care, and we wanted to relay that to viewers."

The hospital worked with Marcus Thomas to develop an ad campaign that would best portray this personal care and attention while showcasing the hospital's clinical excellence in these areas. "We wanted the ads to demonstrate our high-quality and high-tech medical care, but at the same time we wanted viewers to receive an inside look at our unique child friendly care," Reynolds says.

Untraditional approach

Since the abundance of hospital advertising uses actors, Marcus Thomas opted for an untraditional approach to the advertisements to overcome skepticism and build trust among its target audience. "The hospital staff is truly focused on the needs of children and families," says Joanne Kim, partner of Marcus Thomas LLC, who created the ads. "We felt the best way we could capture and communicate this was through a documentary-style format. Real doctors, real patients, real families living through each stage of care at the hospital."

"From pre-surgery to post-surgery, the footage was totally unscripted," says Kim. "It was a risky approach because hospital administrators and staff obviously couldn't guarantee the outcome of the surgeries."

A director and crew chronicled the real-life stories of two families facing serious surgeries. The first series focused on a two-year-old girl who was born with a hole in her heart between the left and right ventricles. She also developed additional complications with her aortic valve. The leak was allowing blood to flow backwards into the left ventricle, threatening to enlarge the heart and lead to congenital heart failure. In another series, an eight-year-old was suffering from a hip dysplasia in which the ball on top of the thighbone does not properly rest within the hip's socket.

Each family's story was developed into a series of 30-second commercials, each of which builds upon the other as the story unfolds. Each commercial recounts a particular stage, from admission to post-op and release.

Viewers received a firsthand look at the personal care and attention that the hospital is known for with the footage showing each step of a child's care. In one scene, a nurse rocks and comforts the crying two-year-old after surgery. In another an Akron Children's doctor kneels down to be on the same level as the eight-year-old as he explains to the child and her parents what will happen in the surgery.

Positive response

The television spots run daily Monday through Friday during peak viewership times of the hospital's target demographic - women ages 25-49. Spots air during popular programs such as the *Oprah Winfrey Show, Good Morning America, Today Show* and local morning newscasts. One spot airs per week. Regular viewers will see the stories unfold over the course of several weeks.

Each spot ends by directing viewers to the hospital's Web site so they can learn more about the families and hospital and see future spots in the series. A series on the hospital's oncology services is planned for later in the year.

Thus far, the response to the commercials has been overwhelmingly positive. "The advertisements are wonderful," says Reynolds. "We have received a lot of attention from people talking about the spots and how powerful they are." | Q

health care research

The great debate

Use debate in focus groups to understand different viewpoints

By Cheryl Ladd

In market research we all know that there are no right and wrong answers. As moderators, we want to ensure that focus group participants are reassured that their perspectives are valid and valuable. Pitting one respondent against another to argue their points of view would, under most circumstances, be considered a big no-no. However, there are situations where doing just that actually provides an environment to explore both sides of the issue much more thoroughly.

Consider the following case study involving the treatment of subarachnoid (brain) hemorrhages (SAH). Currently, there are two methods of treating SAH: surgical treatment by a neurosurgeon, which involves placing clips around the base of the aneurysm via open surgery, to prevent bleeding; and endovascular treatment by an interventional neuroradiologist, a newer technique which involves placing a coil into the aneurysm by means of a catheter (i.e., not requiring open surgery). At the time of this case, open surgical clipping was being done in a far greater percent of cases than endovascular coiling.

A new, prospective, randomized study comparing these two treatment modalities and showing potentially favorable results for endovascular coiling versus open surgical clipping was about to be published in a peer-reviewed journal. Our client was interested in understanding what influence this study might have on procedure volumes and referrals for endovascular coiling. Since neurosurgeons are typically the gatekeepers for these patients and are often the primary decision maker on which treatment a patient receives, focus groups were to be conducted with this specialty. However, because these neurosurgeons are for the most part biased toward surgery, there was concern that the discussions would be one-sided and focused on finding the negatives of the study.

To overcome this, we decided to include a debate format in the focus groups. In this format, the neurosurgeons were divided into two teams. One team was assigned to argue for endovascular coiling and against surgery, the other for surgery and against endovascular coiling. They were instructed to use the new data, abstracts of other articles that had been published comparing the two modalities which we also provided, their own experience and/or other studies they were aware

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of to build a case for their assigned technique, and to prepare rebuttals to what they expected to hear from the opposing team. They were separated on either side of the focus group room and given 25 minutes to prepare their arguments. They were given flip charts to develop their arguments and list the supporting points.

When we reconvened, we used a coin toss to determine which group would begin. Each team was given time to present their case, using supporting data. They were then able to rebut the other team's arguments for as long as it took to exhaust all the pros and cons of all the articles and data.

While we did not adhere strictly to the time limits used in debates, we did request that the physicians remain in character throughout the debate - in other words, even if they agreed with a point the other side was making, they were to continue to defend their assigned technique.

Valuable exercise

This proved to be a valuable exercise for this particular case. The physicians enjoyed the process as it was out of the norm for typical market research projects and kept them more energized and involved. It gave them a low-risk opportunity to express viewpoints that perhaps they would not have admitted in a traditional discussion, i.e., they could support a technique that would essentially result in them losing procedure volumes. And it provided a format for them to truly look for positives for both sides of the argument.

The clients gained an understanding of how various aspects of the data would be used both for and against endovascular coiling. They learned how neurosurgeons would attack the data from the new article to prove that endovascular coiling was NOT better than surgery. By the same token, they also saw how they could present the data in the most favorable light, which aspects of the data might be most persuasive, or what additional data would be needed to change those views.

In essence the physicians provided the client with the "here's what I'm going to say to you when you show me this article and try to convince me to refer more patients for endovascular coiling" information, so the client could be prepared for these potential objections. Of course the client could have expected to get this through more traditional focus group discussions. But the debate also showed the client how to skirt these roadblocks. The physicians themselves formulated the "but here are the nuances that are potentially persuasive, and if you combine this data with this data, or point out this flaw, it becomes more convincing" arguments. This information may not have come out in a more traditional group setting.

Used with patients

Debate or variations thereof can be used in other market research situations as well. A similar type of debate exercise might be used with patients to understand the pros and cons of two different therapeutic or diagnostic options. For example, consider a company developing a new method of permanent birth control for women - a less invasive means of performing a tubal ligation which involves inserting something into the tubes to permanently block the tubes as opposed to tying or cutting the tubes in a surgical procedure. In focus groups, women could be provided with a detailed description of the product, procedure, recovery, statistics, insurance information, etc. Similar to the physicians, they could be placed into teams and asked to debate for or against the new procedure. This allows them to look for all the pros and cons without the concern of judgment since they have been assigned to their particular viewpoint. Of course other techniques can be used before and after this exercise to ensure that the study sponsor understands each respondent's thoughts on the procedure prior to the exercise and whether or not their thoughts changed as a result of the exercise.

We have also used debate in doing positioning research for new pharmaceutical products. In these situations, physicians are provided with the data on the new product, along with the data and current marketing pieces for the competitive products. A short "positioning 101" is given to provide physicians with an understanding of what the marketing team is looking to accomplish. Physicians are paired up, or put into a couple of teams, depending on the size of the group. We like to have three to four teams for this exercise. Each pair or team is asked to develop a positioning statement for the new product that they believe highlights its advantages versus the competition, taking into consideration the desire to also achieve the largest share of sales. In addition to the positioning statement, they are asked to provide supporting "reasons to believe." Each pair or team is then asked to present their positioning statement and reasons to believe. The group then debates the pros and cons of each of the positioning statements. This shows the client the upsides and the downsides of each potential positioning, and helps them better understand the way the product is being perceived versus the competition from the physician's perspective.

A variation on this would be to provide data on the new product as well as the competitive products and assign each pair or team to develop a positioning statement for one of the products - present them and then debate them among themselves. This provides more insight into the physicians' views on the competitive products.

Effective and stimulating

Certainly, other tools could be used in all of these situations to glean similar insights. One might argue that in the case study for the endovascular coiling, the client could have gotten similar information by conducting focus groups with interventional neuroradiologists as well (those who do the endovascular coiling) - to gain the opposite perspective. However, since the neurosurgeon is the gatekeeper, it was beneficial to understand how they would convince themselves because they are the ones deciding what treatment a patient receives. We conclude that in this case, the debate proved to be an effective and stimulating technique for accomplishing the objectives for this project, and that it can be successfully used in other situations to gain additional insights. | Q

health care research

Getting patients to talk

By Will Leskin

A support-group approach to qualitative research

Long-term illnesses or conditions often have a profound impact on a person's quality of life. Pain, disfigurement, embarrassment, stigmatization, physical limitations or disability, death, depression, anxiety, poverty and impaired relationships are some of the common results of chronic illnesses reported by primary and secondary sources and clinicians, patients and caregivers alike. In some cases, the therapies themselves and associated side effects can be the culprits. In others, the patient's inability to adhere to a drug regimen allows their condition to spiral out of control. In still other cases, the patient is unable to comply with lifestyle recommendations and the medications alone are not enough to keep them out of trouble.

Because of the impact on quality of life, patients often find great comfort in sharing their experiences with others who are living with the same condition. This is evidenced by the many support-group offerings by different types of organizations or institutions representing different chronic illnesses. The support-group environment is one in which members educate one another, find and give strength in and to one another and validate each other's failures, fears, desires, needs, goals and successes. It is a safe environment that fosters sharing of feelings and an honest discourse.

The support-group environment has applications extending beyond patient therapy in creating an ideal forum for conducting market research. By encouraging patients to open up and discuss their shared experiences in dealing with their illness, key behaviors and attitudes are identified which are directly complicit in poor/non-compliance and persistency with taking prescription medication. It can also serve to identify products, product attributes and services that would fulfill unmet needs in the patient marketplace. Often, the information gathered in a support-group environment is richer and more honest than what is captured in a more traditional group or one-on-one setting.

In traditional qualitative market research, the moderator-respondent bond and configuration, while positive in many ways, can create an unseen barrier when investigating some chronic illnesses. While many patients are eager to share some of their experiences, certain critical feelings or behaviors may be left unsaid. In some cases, it may be

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because the patient has a hard time admitting them. In other cases, they may be buried at a subconscious level, so the patient may not even realize they exist. One of the most empowering things for a patient to know is that "other people out there" have been through or are going through exactly what they are. This creates a bond between patients and allows them to open up in ways they may not have been willing or able to otherwise.

A case study involving Type II diabetes serves as a good example. In a qualitative project interviewing patients whose diabetes was not well controlled, the client's assumption going into the study was that the poor control was related to poor compliance with taking the medication. The objective of the study was to find out why patients were not taking the medication as they should and what could be done to affect their behavior.

The study revealed, however, that the patients were highly compliant with their medication. In fact, we heard from quite a few of participants that they took their medication "religiously." Interestingly, the reason for their high compliance was that they could not stick to their diet. They hoped (in some cases, believed) that talking their medication exactly as prescribed would offset their inability to stick to a diet low in sugars. Some of these patients were both embarrassed by and despondent over their "failure" with their lifestyle change.

As they discovered other patients in their group who were experiencing the exact same thing, their relief was evident. While it was gratifying to observe such catharsis during research, the most important aspect for the client and the outcome of the study was the richness of the ensuing discussion. In many cases, the patients had unrealistic expectations of what the medications could achieve. They were afraid to face their medical provider and so were missing appointments and the opportunity to benefit from adjustments in their medication and other interventions.

These sessions provided essential information to the client on to how to focus marketing strategies that addressed the realities of the marketplace. The level of discovery during these sessions was made possible by setting them up to be more support-group oriented in nature rather than using a traditional market research approach.

While these kinds of "gems" may emerge whenever you bring a group of people together to talk about something, they are much more likely to be consistently observed if the research is set up to specifically foster such discoveries. In order to create the ideal environment, three key elements must be present: an ideal group size, a discussion-based room configuration, and a "group leader" approach to moderation.

In our experience, group size should be limited to four to five patients each. Smaller groups are more likely to achieve a group-wide bond than larger ones since it is harder for shyer respondents to fade into the background in small groups.

Another aspect of achieving a support-group type of setting is the physical arrangement of the research environment. Getting the participants out from behind the ubiquitous table and conducting the session in a circle of chairs is very important. By removing the table, a physical barrier between the respondents is eliminated, further encouraging a deeper level of sharing.

Most importantly, the moderator must foster a support-group type of discovery. The approach of the moderator who conducts these sessions should be that of a gentle and compassionate group leader. The moderator sets out with clear objectives in mind that seek to uncover truths but are not dependent on a detailed guide. The group itself determines what in their lives is most impacted by their disease and treatment. By empowering the patients to drive the emotional agenda of the discussion, truths are uncovered that some patients will only share with other people in their situation. This leads to discovery of where the unmet needs are and how and in what ways patients are not being adequately served.

Due to the bond that is created between respondents, the support-group approach is not suitable for every study. For example, presenting these groups with a series of communication materials to get opinions about which execution they prefer would not be appropriate. However, conducting these groups to identify the core needs and drivers prior to the development of communications materials would be both highly appropriate and a very good use of this methodology.

Free to share

In sum, this type of research creates a safe environment in which patients feel free to share experiences, behaviors and attitudes they may not normally reveal. This, in turn, provides the ideal forum for uncovering the needs within a disease category of patients and providing clients with strategies for how best to meet those needs.

In a typical market research study involving patients, the client leaves with responses to a list of pre-determined questions and the respondent leaves with an honorarium check. In a support-group-based study, both parties end up with much more. The client takes away a deeper understanding of the world of the patient and, perhaps, answers to important questions he or she did not even think to ask. A patient often leaves with a feeling of fulfillment, answered questions and a sense of relief. Everyone gains from support-group-based research - the client, the patient and, most definitely, the market researcher. | Q

A meeting of medical minds

Use medical meetings to access key opinion leaders

By Gary Schwebach

As the bio-pharmaceutical marketplace becomes increasingly scrutinized and competitive, it's more important than ever for drug companies to understand the needs and perceptions of their most critical clientele. Access to the thoughts and expertise of the industry's most recognized - and influential - physicians is vital to the success of many pharmaceutical and biotech companies. These key opinion leaders (KOLs) set the pace for industry trends and provide leading-edge exposure for a therapy in the medical community through speaking engagements, articles in medical journals and general practice.

In addition, throughout a product's lifecycle, manufacturers seek valuable information from KOL physicians about a myriad of issues, ranging from clinical science to advertising concepts. For instance, with the right information, drug developers can design clinical trials to focus on outcomes and attributes that will improve patient outcomes and compliance. This influential group can also help companies identify which promotions resonate most with prescribers - both in and out of the expert segment.

For these reasons and more, leading physicians comprise what is often considered to be the single most valuable market segment in the health care industry. It's a perfect example of the 80-20 dynamic: KOLs tend to be the 20 percent of a pharmaceutical brand's customers that account for 80 percent of the market's experience within a therapeutic or product category.

Yet engaging this group in meaningful market research has never been more challenging. They tend to be extremely busy and rarely have time to participate in traditional research such as surveys, personal interviews and focus groups. Nevertheless, they are pursued heavily, often receiving multiple invitations each week to participate in a study.

KOLs attend medical meetings

Medical meetings are an attractive forum for companies seeking face-to-face contact with this hard-to-reach group. These events are educational in nature and typically feature clinical and scientific data presented by a well-known physician scientist. Third-party facilitators with a high level of technical and scientific training along with well-developed interpersonal skills are used to manage discussion among participants

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and generate peer-to-peer interaction among top health care providers, clinical scientists, researchers and pharmaceutical companies.

If developed appropriately, these events are often well-attended, because they provide the following key benefits to KOLs:

• access to the latest information about treatment options or advancements;

• opportunity to respond directly to manufacturers on a variety of issues;

• interaction with peers to discuss their treatment preferences.

Since the hosting company is not blinded to participants and its staff is present, pharmaceutical professionals can directly interact with KOL physicians at medical meetings. This means that manufacturers can gather the most timely and reliable information about significant market issues or events while establishing relationships with those who most influence their products.

For example, if a major competitor withdraws its leading brand from the market or the FDA implements a significant new requirement, the company's response must be swift and effective. Companies can assess the impact of a market change more quickly through the interactive setting of a medical meeting than through a standard market research project.

Encourage and monitor KOL interaction

The most worthwhile medical meetings are designed to facilitate interaction among participating physicians. When KOLs are speaking to each other, the information they provide is less affected by a research setting and, thus, potentially more valuable. So while a rigid script isn't followed for medical meetings, measurement of these interactions is key. If the peer-to-peer dialogue among physicians is objectively monitored and recorded, then companies discover which issues are truly important to KOLs. Otherwise, the success of accessing the opinions of this important group is wasted.

Methodologies that have proven to be successful with KOLs in settings ranging from small dinner meetings to large events with 500 or more physicians include:

• *Small-group discussions*

A small-group format provides the greatest opportunity for meaningful interaction with select physicians. Small groups often generate the most robust opinions and perspectives among this critical population. Facilitators who are skilled in not only qualitative research but in interpersonal, small-group dynamics tend to maximize the results of these discussions.

• *Real-time polling*

Large-group interactions require some additional tools to achieve the most useful information from an audience of experts. Using keypad technology with groups as large as 500, researchers can generate immediate feedback from meeting participants on issues presented by speakers or discussed with their colleagues.

Results can be used to direct further discussion and to identify areas of opportunity or concern.

• *Self-directed small-group activities*

Often, a medical meeting is designed to address issues that require specific decisions or outputs. For example, a company may be seeking design consultation for its clinical trials or treatment protocols. Large groups can be broken into small interactive circles to generate ideas on a particular topic using audio/visual materials and workbooks. These activities typically include a case study, a group discussion and exercise, and presentation of recommendations or findings to the larger group.

• *Pre- and post-meeting surveys*

When a company needs comparative information on the opinions or awareness of individual consultants based on a meeting experience, pre- and post-meeting surveys can be used. Paper, interactive voice response or Web/computer surveys are administered to an audience prior to an event to assess the perceptions, attitudes and behaviors that the group brings to a program. Following the meeting, these perceptions, attitudes and behaviors are again tested to determine the impact of the program.

• *Meeting evaluation surveys*

Successful future programs are built by implementing constructive feedback from meeting attendees. Since meetings can happen within weeks or months of each other, it's important that program evaluation data be collected and implemented quickly. When surveys are administered at a meeting or several weeks after the event, constructive feedback can help identify successful elements of the program as well as areas for improvement for future meetings.

To keep pace with the dynamic nature of these meetings, data collection instruments must remain highly flexible. Research tools - such as discussion guides, surveys and interactive questions - should evolve as the event progresses and researchers learn from participants. This flexibility allows the company hosting the meeting to address issues that arise during the event. It also keeps KOLs engaged, because topics sync with their stated interests.

Invite the right participants

KOLs are categorized most generally by the reach of their influence. The most reputed - and often toughest to reach - are global specialists of a disease state or therapeutic category. However, there are also physicians who are highly influential at a local, regional or national level. Depending on the objectives of your study and your team's product or treatment area, your medical meeting may target one or more type of KOL. It's not always necessary to access the top specialist of a field.

Limiting a meeting to only the most appropriate participants is critical. As explained above, KOL physicians are highly sought after, and they tend to work with many pharmaceutical companies - and even within several departments of a single company - at the same time. To establish and retain credibility as a medical meeting host, your program should be highly targeted and beneficial to those you invite to participate. It's also important that participating KOLs who do attend have the knowledge and experience they need to effectively advise your company on prescription and treatment protocol.

Adhere to industry guidelines for corporate-sponsored events

Most health care professionals, whether on the corporate or provider side, are driven by a desire to improve treatment options and patient care. To facilitate understanding throughout the industry, pharmaceutical companies have been providing legitimate medical education services and event-based market research in the health care community for years. Unfortunately though, some organizations have used the forum to promote their brands instead of to gather and disseminate objective and accurate information.

To prevent fraud and abuse related to these events, industry organizations such as the Pharmaceutical Research and Manufacturers of America (in cooperation with the Office of the Inspector General, Department of Health and Human Services) have established guidelines that prohibit promotional efforts by pharmaceutical companies that provide kickbacks, including meals and entertainment, with an intent to influence prescribing behavior. Medical meetings and other manufacturer-sponsored education events must present balanced information about products based on scientific methods generally accepted in the medical community.

To avoid penalty, sound research methodologies and measurement are essential. Companies must appropriately target the KOLs who affect their products and develop a legitimate program that enables company leaders to interact with these physicians in ways that are meaningful and legal. In order to facilitate a stronger understanding of its benefits and shortcomings, a leading researcher in the disease state will present information about the medicine and science of a product or therapeutic category to colleagues at medical meetings.

Reliable insights

When data collection and reporting is facilitated by a qualified third-party researcher, medical meetings with physician consultants generate reliable market insights in a forum that complies with regulatory standards. A reputable research provider can help eliminate any perceived bias related to a medical meeting event by designing rigorous research interactions designed to address specific business needs. In this way, both physicians and manufacturers can access each other and provide valuable information without raising the red flag of impermissible promotional activities.

Pharmaceutical companies that successfully access and build rapport with KOLs in a legitimate way win a valuable and reliable source of insight about the marketplace or therapeutic category. These companies are able to stay competitive in an increasingly crowded marketplace, because they understand how a specific product can address today's most important health care matters. | Q

health care research

A trust-building exercise

By Alastair Bruce
and Luc Rens

Research examines drivers of consumer trust in pharmaceutical and other brands

It has become increasingly more challenging for health care industry players to connect with the new consumer, who is healthier, wealthier and better informed than ever before. In this changing world, intense consumer connections are often based on trust. Some would argue that trust is the oil in the machine of modern culture. Trust in the state, nation, authority, religion, trust in progress and innovation, marriage and the family, trust in justice and our own identity are all "under review" as trust has been undermined in many cultures.

As trust in institutions breaks down, it becomes just one more commoditized brand attribute, and as such, brands will need to provide trustworthiness. So why might trust be an important attribute to have, and what is the consumer benefit or drawback?

One argument is that although trust in institutions may wane, there is still a human need to trust in something.

Enter brands.

Brands offer certainty in an otherwise complex and baffling global chaos. What kind of certainty? Good or bad? It's more than just reliability of product performance. In higher-involvement categories brands offer cultural capital and new identities. In lower-involvement categories brand relationships can just be an easy way of surfing the fragmented landscape. So how do you build trust in pharma and other categories? And what can pharma learn from other categories like automotive, finance and consumer electronics?

Consumer trust connectivity

Research International Qualitatif recently conducted ethnographic and traditional qualitative research on trust across several sectors, including pharmaceuticals, automotive, finance, non-alcoholic beverages, alcoholic beverages, consumer electronics and the federal government. Ethnography, for example, was used to help marketers understand the intense relationships pharma brands have with consumers and disease sufferers.

While trust still resides in the bond between the consumer and the brand, there are complementary trusts that resonate with consumers and drive their relationship. These drivers, along with their activation triggers, were identified after conducting focused brand relationship research in pharma and the other sectors. The characteristics and attributes that drive

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and trigger trust are:

- quality - performance- and product-related;
- endorsement – trust in the brand shown by friends, family or experts;
- familiarity - awareness created by buzz, media and advertising;
- heritage - trust is rooted in the brand's country of origin, the origin of its founder or by authenticity;
- status - trust conveyed by luxury, prestige and superiority;
- leadership - the ability to lead the category and innovate;
- socially-conscious - trust in the brand's integrity.

Sample and method

This research included both a qualitative and a quantitative phase. The qualitative phase encompassed a series of extended group discussions and consumer immersions with sufferers of chronic conditions to understand trust and related brand attributes and personalities.

We built a trust model to identify and understand the underlying consumer needs that drive and activate trust. We explored all brand attributes/personality traits that address the consumer needs for trust across the seven sectors previously mentioned.

We brought the trust model alive by linking:

- consumer definitions of trust across categories;
- different underlying consumer needs for trust (trust platforms);
- ways to address each trust platform - brand attributes and personality traits.

A complementary quantitative phase was conduced online via Lightspeed Research among approximately 700 U.S.-based consumers with chronic conditions to quantify and refine the trust model. The sample included the following: a mix of males and females age 18 and over; and a mix of asthma, Type I and Type II diabetes, allergy, and osteoporosis suffers.

This second phase was designed around quantifying and refining the trust model. The goal was to build upon the learnings identified in the qualitative phase of the research by providing a quantitative understanding of consumer trust drivers that are relevant and unique to health care.

Figure 1: The World of Trust

Trust drivers

Based on the findings from this study and previous work, we identified several trust drivers that resonate with consumers and sufferers. The drivers differ by the seven sectors but share key cross-sector relevance, particularly for health care organizations.

Study respondents said they feel a strong bond with brands they trust. The trust is built from past experience, which creates high expectations about future brand performance. Established, trusted brands have more to lose when they fail to deliver. When a newer brand fails to deliver, trust is not as easily broken. People are more willing to forgive brands if the brand image is less established.

Consumers feel protective about the brands they trust. Because they have established a strong investment in what brands mean to them, consumers can disconnect the consumer world from the more rational real world - just as they can disconnect their personal self from their political self. When a brand is truly trusted, people are reluctant to accept negative messages from the real world that challenge their view of the brand. A trusted brand doing "bad" is not always seen as an issue for consumers, unless it affects them very directly (their personal health) or cannot be denied. However, consumers of health care brands, given their personal dependence on these brands, are less likely to forgive if their brands of choice misbehave since consumers are impacted immediately and personally.

Overall, there is a modest trust in pharmaceutical companies compared to non-alcoholic beverage manufacturers, automobile manufacturers and computer companies. However, there is a far lower trust threshold for pharmaceutical brands. This is driven by relatively little knowledge or brand experience with most drugs advertised directly to consumers.

While communication programs may inform respondents about a new drug, they are perceived as doing little to explain the benefits. There is hesitancy to accept the drug when its purpose cannot be revealed. The common "ask your doctor about" line in health care advertising provides little motivation and relevance for the consumer.

However, established OTC brands are very trusted due to their efficacy and heritage. Respondents highlighted Bayer aspirin, Tylenol, Advil and Benadryl as examples. Prescription medications are trusted for their efficacy, while OTC medicines are trusted to have fewer side effects.

Trust in a company will drive product purchase intent. About 65 percent of respondents claim that they need to highly trust a company before they purchase its product (i.e., top three-box: 8-10 on a 10-point scale).

Out of the seven sectors tested (pharmaceutical, auto, computers, alcoholic beverages, non-alcoholic beverages, financial services, federal government), the pharmaceutical sector ranks third in consumer trust, outranked slightly by non-alcoholic beverages and computer manufacturers. The overall ranking is encouraging, but only about 12 percent of the respondents claim that they "trust the pharma companies 100 percent."

Our trust model identified several key drivers of trust across all seven sectors; an illustrative output is shown in Figure 1.

Across all sectors, consumers see brand trust as being driven by:

• *Product quality*

Makes good quality products, offers good value for money, is consistent over time, monitors its safety, makes life easier, is a knowledgeable brand.

• *Leadership and innovation*

The category standard, the expert in the category, is a leader by innovation.

• *Familiarity*

Is well-known, is successful, has been around a long time, offers variety, and has advertising awareness.

• *Heritage*

Is rooted in a country's origin, is the original in the category, is local and understands the local community.

• *Socially-conscious*

Is socially-conscious, treats employees well, is earnest and has good intentions, shows that it is passionate about its customers.

• *Endorsement*

Is recommended by family member or friend, or, in the case of pharma, is endorsed by a physician or expert.

• *Status*

Is prestigious, offers empowerment, is trendy, is luxurious, is endorsed by the media or celebrity, and conveys status.

Overall trust drivers

Quality, leadership and familiarity are the general drivers of consumer trust. Good quality of the product is the "hygiene" factor of trust. People are always looking for confirmation and evidence of leading and superior product performance.

These consumer drivers of trust need to be addressed by the brands, though it seems difficult to distinguish brands at this level, as most brands claim high quality. Due to this small space, brands can hardly be differentiated by quality alone.

Trust drivers across categories

Additional trust drivers across categories like pharma, automotive and finance are endorsement, familiarity and status. The drivers are the same, though the significance of each driver varies by category (Figure 2).

Endorsement by friends or experts drives trust in pharma. Obviously when the product/category is recommended and endorsed by a specialist, consumers, especially sufferers who depend on the product, are more willing to try or use it.

Trust in pharma is driven particularly by endorsement and familiarity. The automotive sector has status and heritage as key drivers of trust, while trust in financial comes from status,

Figure 2: The World of Trust

endorsement and familiarity.

Trust drivers at brand level

Within pharma, brands use the same drivers of trust. Endorsement by experts of the product quality, efficacy and safety are the main drivers of trusted brands. Therefore, it seems that consumers do not see the difference between the key players in the pharma industry. A recommendation by the doctor is a key aspect of trust, though it does not help to differentiate the brand in the category. Consumers are looking for more creative and new ways to learn about the brand.

At an individual company/brand level the trust in Bayer, Pfizer and Claritin is strongly driven by quality and endorsement (Figure 3). Other drivers like heritage, status and social consciousness are less important. Claritin in its communication clearly stresses its product quality and characteristics. It is a safe choice within OTC.

In the prescription category the endorsement of the brand is essential to build trust. As stated before, the space of endorsed brands is very crowded. The question is, how can brands differentiate themselves?

A great example is Viagra, which built trust by becoming familiar to consumers through its marketing efforts. A significant trust driver for Viagra is familiarity, which Viagra has built through different and creative steps of endorsement. First Viagra's maker Pfizer focused on a specific target audience, using older men in its advertising to endorse the brand. Then it broadened the audience by using popular figures, and currently it uses mainstream couples in its ads.

The success of Viagra forces other pharma players to consider this question: How can we endorse our brands in creative ways to build trust through familiarity? Viagra clearly applies some of the same principles used in mass marketing, without losing trust. And Viagra is proof that pharma can apply the trust drivers used in other categories to distinguish the brand in their market.

What can pharma brands take from the automotive and finance industries? Within automotive, the trust in brands like Mercedes and Ford is driven by heritage and status; they are differentiated by the strength of those drivers. Evidently, these brands still confirm the basic driver of trust: product quality. Pharma brands could look into using heritage and status as a way to build trust in their category as well.

Pharma brands could also look at the evolving drivers of trust within the category of electronics. There, trust is mainly driven by category leadership and innovation. Apple is a great example of building consumer trust by its innovative design and superior quality/product experience.

Research indicates that when it comes to trust at the pharmaceutical company/brand, rather than at the industry level, quality (safe, efficacious and of good value) is as powerful a driver as endorsement (endorsed by a celebrity or the media, a doctor or a family member) and familiarity (well-known and successful brand, been around a long time, familiar from advertisements, offers a variety of products).

Therefore, it is natural that the levels of consumer perceptions on efficacy, safety and value of pharmaceutical brands impact the degree of trust. For example, in this research:

• Overall, about 25 percent of respondents claim that they have some

Figure 3: The World of Trust

level of trust in the pharmaceutical companies.

• About 20 percent of survey respondents claim that they consider pharmaceutical products effective (these claims are slightly higher among diabetes, allergy and osteoporosis sufferers).

• About 20 percent consider them safe (again slightly higher claims among respondents with diabetes).

• About 10 percent find them a “good value” (higher claims among asthma and osteoporosis sufferers).

• In addition, consumers seem to have a low tolerance for mistakes made on the part of the pharmaceutical companies. Only about 7 percent of respondents claim to be “willing to forgive” such mistakes.

Therefore, while the development of high-quality health care products is mandatory for a company’s long-term success, this research also suggests that companies that successfully educate gatekeepers and end-users and effectively communicate competitive advantages are more likely to win consumer trust.

Table 1: Overall Trust vs. Trust in Pharma Industry

Overall Trust	Correlation	Trust in Pharma	Correlation
Quality	0.32	Endorse	0.58
Leader	0.26	Familiarity	0.36
Familiarity	0.25	Status	0.35
Heritage	0.20	Leader	0.27
Socially-Conscious	0.20	Quality	0.19
Endorse	0.17	Heritage	0.11
Status	0.10	Socially-Conscious	-0.20

Table 2: Trust in Pharma Industry vs. Trust in Individual Pharma Companies

Trust in Pharma	Correlation	Trust in Pfizer	Correlation	Trust in Bayer	Correlation
Endorse	0.32	Endorse	0.59	Endorse	0.58
Familiarity	0.26	Quality	0.48	Quality	0.52
Status	0.25	Familiarity	0.48	Familiarity	0.50
Leader	0.20	Status	0.23	Leader	0.31
Quality	0.20	Leader	0.12	Status	0.15
Heritage	0.17	Heritage	0.09	Heritage	0.12
Socially-Conscious	0.10	Socially-Conscious	-0.14	Socially-Conscious	-0.05

Consumer sentiment

Consumer and sufferers feel very strongly that it is their responsibility to look after their health and well-being (82 percent top three-box rating on a 10-point agree/disagree scale). This is also seen as a significant responsibility of their physicians (42 percent). However, to a lesser degree consumers feel it is also the responsibility of pharmaceutical manufacturers (29 percent). Among diabetes, allergy and osteoporosis suffers, there is a strong level trust that the products made by pharmaceutical companies are effective, but there is less trust in their safety. There is a strong belief among sufferers that their interaction with their prescription medications makes them important to drug companies. More

Table 3: Attribute Ratings (Top 3 Box)					
Above Average (36%-100%)		Average (30%-35%)		Below Average (0%-29%)	
Profitable	76%	A Good Place to Invest Money	30%	Makers of Safe Products	21%
Big	68%			Trustworthy	18%
Secretive	52%			Run by Good Managers	17%
Multinational	47%			Ethical	15%
Associated with Special Interest Groups	47%			Truthful	14%
				Honest	14%
				Likeable	12%

and more so, pharma companies are seeking ways to better understand their end consumers, and are increasingly aware of how important it is to incorporate sufferers' feedback information into their marketing initiatives. There is, however, very little forgiveness from sufferers for pharmaceutical companies when they make mistakes.

When questioned specifically about pharmaceutical companies, consumers and sufferers alike assessed them as follows:

"Profitable," "big," "secretive," "multinational" and "associated with special interest groups" are statements that the majority (45 percent to 75 percent) of the respondents agree with when asked about the pharmaceutical companies. (Note: Percentages shown in Table 3 are among top three-box [high trust] respondents [8-10 on a 10-point scale].)

On the other end of the spectrum (with claims in the range of 10-20 percent) are agreement ratings for "likeable," "honest," "truthful," "ethical," "run by good managers," "trustworthy" and "makers of safe products."

Between 20 percent and 30 percent of respondents agree that pharmaceutical companies are a "good place to work" and a "good place to invest money."

Holy Grail

A marketer may ask: "Where do I commit my company's money so we can get more, lose less, and keep all current customers?" It's a fair question. It is precisely in the search for the Holy Grail of consumer brand and sector trust that a company will discover the opportunity to establish and own the intense consumer-brand trust relationship that will maximize product uptake and usage.

Furthermore, pharma and health care organizations will create an opportunity to maximize compliance and, hence, long-term profitable growth by figuring out how their brands perform with respect to overall leading quality, leadership/innovation and familiarity trust drivers, coupled with a deep understanding of their own unique brand-specific competitive sector trust drivers (in endorsement, familiarity and status). | Q

ethnic research

When moderating, be culturally-aware

By Martha C. Rivera

Planning Hispanic research studies is a matter of patiently searching for secondary source data that will lead to the best possible decisions on segmentation. Conducting it, however, is a matter of sensitivity to the differences and psychological needs of respondents who are typically unfamiliar with marketing research, are still struggling with their adaptation to a new culture, and really want to do a good job at participating in the research.

While recruiting differences between general-market respondents versus Hispanics are obvious and require accommodation, only some aspects of the actual interviewing or moderating offer clear distinctions. To be consistent with my original purpose of providing a comprehensive roadmap, common aspects between both populations are also discussed below, though with less detail.

Recruiting

Finding Hispanic respondents

Large databases including names, contact information and demographics of potential general-market and second-generation Hispanic respondents are available in most research facilities. They have been built up through traditional means: collecting information about participants in qualitative/quantitative research projects, asking for referrals, registration via specific Web sites, and sample lists provided by companies that specialize in this business activity. Screening questionnaires are usually completed over the phone.

Part II of a guide to planning qualitative research among Hispanic consumers

Finding first-generation Hispanic respondents is quite a different story. Some facilities are unable to recruit this population because they do not know how to reach the Hispanic community. Facilities that do offer the capability generally rely on Hispanic professional recruiters or community leaders rather than pre-existing databases.

Hispanic professional recruiters and community leaders are typically Hispanic people who have open access to Hispanic communities. These recruiters go to their friends' houses, schools offering English classes, churches, Hispanic supermarkets, community associations and centers, beauty salons, etc., to engage in conversations with potential respondents, pre-screen them or request referrals, and subsequently

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invite them to complete the screening questionnaire or register with the facility. In addition to helping identify qualified participants, this practice generates confidence and encourages potential respondents to participate. Consumer research is not as common in Latin America as it is in the U.S., and Hispanic immigrants tend to distrust anybody asking too many questions (fears of authorities and cultural shyness are some of the factors associated with this). Thus, a natural resistance to participation in research studies is to be expected from first-generation Hispanics.

The likelihood of a potential respondent accepting an invitation to take part in a research study is greatly increased when the invitation comes from another Hispanic person. While recruiting methods may be non-traditional, this does not eliminate the need for proper supervision and quality control. Facilities still need to supervise the completed screener questionnaires, and should safeguard against the participation of professional respondents as much as they do with general-market research studies.

Another difference between Hispanic and general-market recruiting is related to timing; because planning ahead is not as strong a cultural characteristic of Hispanics as it is for some other cultures, finalizing a recruit can be a last-minute proposition. Compared with the general market, it should be expected that there will be a higher proportion of last-minute changes in the lists of participants, late arrivals and no-shows. In an attempt to control this, facilities routinely recruit a higher percentage of backups, and include additional incentives for participants who arrive early.

Communicating with the Hispanic respondent

When dealing with first-generation Hispanic respondents, all phone calls should be conducted in Spanish, preferably spoken by a first-generation person. Badly-spoken Spanish or a strong English accent will create comprehension problems for potential respondents and give the impression that the study will not be entirely Hispanic; this, in turn, could cause potential Spanish-speaking respondents to feel insecure or experience distrust, thus increasing their reluctance to participate.

Letters and invitations should also be written in perfect but plain Spanish. Misspelling, poor grammar, usage of uncommon Spanish words, etc., will cause confusion among Hispanic recipients, whose competence at reading should be expected to be quite uneven.

Believe it or not, I have seen invitation letters and screener questionnaires that were originally written in English and later translated into Spanish by using the translation function of a computer! The result of computer translations is always so poor that misinformation becomes the rule, not the exception. Moreover, the credibility of the facility will be damaged, thus impacting the willingness of potential respondents to participate in the research study. The Spanish-speaking audience is extremely sensitive to poor usage of the Spanish language; it is seen as a sign of poor regard for the Hispanic culture.

Five key screener questions

When designing a screening questionnaire for Hispanic research studies, the following five questions should always be included:

1. Is the potential respondent of Hispanic origin? The wording of this question should eliminate all possibility for subjectivity, so that neither the person who asks the question nor the respondent need to make a judgment to answer it. Choices should include all ethnic groups, and, since some respondents consider themselves "Hispanic," while others consider themselves "Latino," both terms should be included in the list.

2. Which language does the potential participant speak more often? Typically, it is accepted that the language that is more frequently spoken at home is the dominant language of the person. Further questions such as, "Among those members of your family who live with you, how many speak only Spanish and how many speak both languages?" or "In what language did you attend school most of the time?" may be needed if a respondent claims that he/she speaks one language as often as the other one. Avoid asking which language is preferred. A first-generation respondent who is trying to improve his/her English skills could prefer to communicate in English (for practice) while his/her English fluency could still be poor.

3. Where was the respondent born, and where were his/her parents born? These two questions are critical to discriminate between first (unacculturated) and second (acculturated) generations. It is generally accepted that Spanish-speaking, foreign-born Hispanics are unacculturated, while bilingual Hispanics born

in the U.S. with at least one first-generation immigrant parent are acculturated. However, if the respondent was foreign-born but has been educated primarily in the U.S. (which suggests that he or she was brought to the U.S. during early childhood), he/she can also be considered acculturated. Having said that, this subject is very complex and no universal rules apply.

4. How many hours a week is the respondent in contact with either Spanish- or English-language media (specifically, TV, radio or print)? This question is especially relevant for research projects involving decisions on advertising and media planning because, in addition to helping discriminate between English and Spanish dominance, it aids in segmenting groups of respondents that are exposed to similar stimuli in the media. It has long been accepted that people exposed to 15+ hours a week of Spanish media and at most five hours a week of English media accurately represent the consumption patterns of first-generation Hispanics, while second-generation Hispanics would show inverse figures.

5. How many people contribute to the household's annual income? As discussed in the article in last month's issue, the fact that several generations of Hispanic families live under the same roof and share common expenses more often than other ethnic groups makes this a critical question to determine the actual buying power and living standard of the potential respondent.

While it is a common practice to include an articulation question in all screening questionnaires, it is recommended that among Hispanic respondents this question focus on a general topic (such as their favorite TV character, dream vacation, etc.) rather than the subject of the study. Because with the Hispanic culture there is more concern about expressing the "right" opinion than with other populations, a question related to the study topic may encourage respondents to research the topic prior to their participation in the research study. This usually defeats the purpose of the research, which is to gather learning about the real-world experiences of average consumers.

Moderating and interviewing

Establishing rapport

As with general-market studies, a warm-up activity needs to be conducted at the beginning of Hispanic research focus groups or in-depth interviews to help set the proper psychological climate for subsequent discussion. This warm-up is even more important for Hispanic respondents because, unlike other populations, the Hispanic culture, as a whole, tends to be shy or humble. While informal chatting about the investigated topic is often used as a warm-up for general-market qualitative research studies, and is well-accepted by client companies for the additional information it can provide, I discourage this type of exercise for Hispanic respondents. The purpose of the warm-up is to help participants feel relaxed and comfortable, which is difficult to accomplish when requiring respondents to start talking even before they become comfortable. For years, I have used games specifically designed to function as ice-breakers for focus groups and in-depth interviews, both supplemented by specific non-verbal and semi-verbal cues. Some of the benefits of these activities for Hispanic research studies (that could also be applied to non-Hispanic participants in qualitative research studies) are:

• Counteracting cultural shyness by showing respondents, without words, that enjoying their participation and open exchange - while relaxing and having fun - is in order. Laughing and having fun are pleasant sensations that displace fear, insecurity, the subconscious desire to dominate in-group situations, and some other emotions that can inhibit free expression.

• Making Hispanic participants feel emotional proximity to each other, allowing all subconscious individual resistance to be broken and bonding as a group to take place. By experiencing fun together, the moderator and the participants or interviewee feel that they are all on the same team, and they start working together to accomplish the subsequent tasks to be performed (i.e., recalling as many details as possible of their consumption behavior, selecting the photo that best expresses their relationship with the product, or filling out a score sheet, etc.).

• Giving equal status to all participants in the group, regardless of their individual personalities and their ability to express opinions. Using topic-related questions as a warm-up almost immediately lets the group know who is well-informed, more skilful at discussing the topic or simply has had unique experiences with the product. In this case, respondents may adopt, very early in the session, the roles of dominant, quiet or uninterested participants, while consuming much of the moderator's energy and concentration. Preventing participants in Hispanic focus groups from adopting any of these roles is even more critical than in other groups. Due to their shyness, Hispanics are concerned about being agreeable to other people more often than other cultures. In addition, they may think that their experiences at consuming a particular product are not common but a consequence of their poor adaptation to the new culture. Thus, their ability to express their own visions and perceptions may be greatly impacted.

• Giving moderators strong (though tacit) control of the group. Moderators also deal with timing, some not-so-smooth transitions from one topic to the next, personal styles and roles of the respondents, notes from observers in the back room, etc. Thus, gaining tacit control of the group is another goal, that, if properly achieved at the beginning of the focus group, will save moderators energy and concentration that will be needed to better perform some of the other moderating tasks. Tacit control of the Hispanic group is critical due to, again, cultural characteristics: controlling overly-talkative participants or eliciting silent respondents to speak by means of direct verbal commands is never a good idea for Hispanic qualitative research studies. For instance, an approach such as, "Sorry about interrupting you but could you please let us hear somebody else?" or "Now you, X, let us hear your opinion," will likely make that respondent not speak again, and everybody else will be afraid of making the same mistake. Comfort, spontaneity, relaxation and commitment to work with the moderator will be gone forever. After all, Hispanic respondents are used to more amiable interactions with other Hispanics, are shy, and are never certain as to how well they are adapting to the new culture.

Asking questions

• Spanish wording: Proper wording in Spanish is critically important when researching the Hispanic market. Because of the profound differences in the colloquial language of each particular Latin American country, and the strong variations in educational achievements of Hispanics in the U.S., I always prepare a detailed translation of the English guides. It allows us to be certain that the proper words are said so that respondents of all national origins and educational levels can understand them while the colloquial tone of the discussion is preserved. Nonetheless, some variations among the words commonly used in each particular Latin American country are so strong that a variety of nouns have to be used to ask the same questions in order to assure their proper comprehension. For example, a stapler is called *grapadora* in Mexico, *presilladora* in Cuba, and *cosedora* in Colombia, while nationals of each of these countries do not know the meaning of any of the names used in countries other than their own.

• Projective techniques: Projective techniques are used in Hispanic research studies just as they are with general-market studies. However, the selection of the specific projective exercise and materials should respect cultural differences. For instance, requesting Hispanic housewives to select the picture that best reflects their relationship with their children, from a collage of photos showing American-style people, houses and landscapes, may lead respondents to select photos that express their subconscious idea of how relationships with children should be in this country, rather than reflecting their own relationship with their children. Differences in cultural patterns related to family composition are one of the aspects that most profoundly impact immigrants coming from Latin America.

• Behavioral questions: Those questions requiring the respondent to describe a specific behavior in detail can reveal unpredictable cues that are regularly useful for new product development. Answers to these questions can be even more productive and useful if the question is broken down into small segments and is complemented with inquiries about details that apparently are not important. For instance, if the question is "Tell me about how you purchase Product X," answers will often sound like "I always walk all the aisles and grab my favorite brand-name as soon as I see it." However, if specific examples of occasions on which the product was purchased are requested, and inquiries about details apparently unrelated are included, (such as "Do you remember who was with you the last time that you purchased Product X?," and "Why did that particular person accompany you that time?"), more precise pictures of the entire purchasing behavior can be obtained, since the respondent will likely tell the whole story. Once the Hispanic respondent pictures himself/herself in the real-life situation and recalls more aspects associated with it, additional self-confidence in speaking about it is gained. For the Hispanic respondent, narration of something that actually occurred in his/her life is an assignment easier to perform than concise answers to questions when he/she is not sure of what the moderator wants.

Enhancing participation

As discussed, Hispanics are culturally more prone to demonstrate shyness while participating in research studies. Being concerned about the extent to which their answers are proper or improper is another idiosyncratic characteristic to be expected. However, Hispanics will strongly commit their energy to the purpose of helping the moderator/interviewer if the right emotional connection is built and maintained. Once initial rapport has been established, keeping high levels of energy will aid the researcher to obtain the best participation from their respondents, while creating a stimulating, enjoyable experience for them. The following observable cues will help to raise and maintain high energy while interacting with the Hispanic respondent:

• Be enthusiastic about each new research project. Regardless of how experienced or knowledgeable you are about a specific research subject, do not assume that your project is something that you could do successfully even if you were half asleep. Since willingness to help is another specific characteristic of the Hispanic culture, your genuine curiosity will enhance the willingness of your participants to team up with you, thus richer insights will be produced. In addition, do not miss any chance to show each respondent your respect and consideration. As discussed, Hispanic respondents will need each piece of human interest that you can show them to be able to overcome cultural barriers to open discussion of their consumption experiences.

• Recall, and incorporate in your moderation style, the warmth and cheerfulness that are characteristics of the Hispanic culture. While interacting with your Hispanic respondents, feel yourself as relaxed and happy as if you were chatting with your Hispanic friends or relatives. By adopting authoritative or distant attitudes, additional barriers can be created. The more your respondents feel emotionally connected to you, the greater their desire to cooperate with you.

• Move. Do not keep seated "in your corner" all the time, because it sets up a subconscious psychological barrier with your respondents. Moving around helps respondents see you less as an authority and more as a facilitator.

• Be well-prepared on your discussion guide, memorizing it if possible. Each time you lower your eyes to read your discussion guide or make a check mark on it, you lose visual contact and emotional connection with your respondents, which can impact the free flow of exchanges; the less frequently this happens during the research session, the less energy will be needed to restore the psychological climate.

• Rely on your body language, eye contact and tone of voice to control the dynamics of the participation. As discussed, the willingness of Hispanic participants to help and be agreeable leads them to be concerned about their successful participation. Most Hispanic respondents will try to "do a good job" at answering your questions, and will feel like a failure if you use straight-out commands such as, "You have already talked enough." Looking at the silent participant's eyes while asking the question in order to encourage him/her to answer, standing right behind the overly-talkative participant so that you capture everybody's looks and take them with you as you move to a different point of the room, and placing visual stimuli right in the center of the table to force all participants to feel related to them, are some examples of how non-verbal communication will help you to succeed at moderating Hispanic focus groups.

A matter of sensitivity

Succeeding in Hispanic qualitative research endeavors is a matter of planning, just as it is for general-market targets. It is also a matter of skillfulness, and again, careful preparation of all aspects related to its execution, from the wording used in questioning to how the moderator stands in the room. Perhaps most importantly, however, it is a matter of sensitivity to the specific characteristics of the target audience, and of professional commitment to offer the best you can offer every single time you communicate with a Hispanic respondent. | Q

ethnic research

What does Italian mean to you?

By Hy Mariampolski
and Sharon Wolf

Alimentare Barilla, Italy's No. 1 pasta brand and a considerable presence on American tables, was facing numerous dilemmas at the start of 2003. Pasta shelves were bulging with multiple look-alike brands. Commoditization was rampant and the only way to catch consumer attention was through cutthroat price wars at the supermarket shelf.

Pasta, along with Italian cuisine in general, was losing its cachet. Restaurant chains were touting "all-you-can-eat spaghetti" and bottomless gorging. The typical "heavy user" in consumers' imagination was Tony Soprano stuffing Italian gangster grub down his gullet without regard to time, temperature or taste. The television tyrant's wife Carmela was using manicotti to seduce her priest.

The meaning of pasta as an economical and nutritious meal was also changing. The anti-carbohydrate fad pointed its finger at pasta as a contributor to American obesity. New ethnic foods, including Asian and Middle Eastern specialties, captured the attention of healthy eaters.

Barilla, supported by its agency Young & Rubicam, had to reverse the image of its own products and distinguish the brand on crowded shelves. Ideas were needed about how to extend the line and associate the brand with other long-term trends, including America's continuing preoccupation with health and fitness. Moreover, as Italy's No. 1 brand, Barilla had to learn how to leverage that equity to its clear advantage against both other imported and domestic Italian food brands.

Researchers use a mix of qualitative methods to help Barilla learn how Americans view Italian food

Barilla engaged our firm, QualiData, to help it understand Italianness in the U.S. and to recommend ways to solve a list of dilemmas. These challenges included how to distinguish the brand in an injured category while responding to new needs for innovative foods. We decided that the objectives of this strategic marketing study called for triangulation, a mix of research approaches designed to yield multiple layers of consumer understanding. The study outcomes generated a series of ideas that have driven the brand forward.

This article describes some of the steps we took to gain critical insights; demonstrates how ideas were turned into actionable strategic

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Exploring Italianness

Our discovery process and related strategic insights had to succeed among those who were fully informed about Italian culture as well as among mainstream consumers. Thus, each phase of this qualitative study was designed to better understand how ideas about what makes something Italian influence consumer behavior. Our research plan was to gain ideas from consumers who are intimately tied to Italianness and then assess how well those concepts "sell" to the general market.

• *Media content analysis*

To assess the current range of images and ideas that were percolating about Italy, we conducted a semiotic analysis of ads, articles and reviews in consumer magazines that addressed Italian style, cuisine, travel and culture. Semiotics is a form of research practice that interprets implicit or hidden meanings and messages. Magazines reviewed for the content analysis included: *Travel & Leisure, Gourmet, Martha Stewart Living, Food & Wine, La Cucina Italiana, Vogue, Harper's Bazaar* and *Elle*.

• *Expert depth interviews*

We sought the advice of undisputed experts who have established their careers on the basis of cultural affinity toward Italy, including a highly-recognized Italian chef, a marketing director for a major Italian clothing brand, an author and food editor specializing in Italian food, a restaurant critic for a major metropolitan newspaper and an Italian studies professor.

• *Life history interviews*

We spoke with leading-edge consumers - early adopters who have strong ties to Italianness through travel, language study and consumption of Italian arts and culture, including a mix of Americans with and without Italian heritage. These three-to-four-hour depth psychological interviews employed projective techniques including consumer collages and sensory stimuli.

• *Ethnographic home visits*

We observed dinner preparations and meal consumption among informed consumers in New York and San Francisco. These contextual encounters brought us into the homes and hearts of Americans to help us understand what made meals Italian and why. All ethnography participants normally cooked Italian food at home at least once a week and it represented a favored mealtime choice.

• *Street intercept interviews*

These were conducted among mainstream consumers who were visiting the Little Italy neighborhood of New York City and the North Beach Italian neighborhood in San Francisco.

• *Extended creativity groups*

This final step involved testing hypotheses for various communication routes among mainstream American consumers. The copy and imagery under evaluation were derived from insights generated by the earlier phases of the study. Mainstream consumers discussed their perceptions of Italian cuisine and evaluated image boards representing different ways of positioning Italianness.

Diet and culture

Dietary habits are central components of culture. Nutrition and sustenance are not only sensory in nature. The manners in which we select, prepare and consume foods are tied to the habits and customs that define a people and their place in the universe. Culinary tastes are based in time and location. Eating preferences are ingrained early and imprinted within the deepest core of our brains. The foods that we value and enjoy are linked to circumstances of availability, tradition, self-image and cultural transference. Hunger is biological, but satiation occurs following a complex process in which raw materials are fashioned into culturally desirable meals.

Understanding the cultural production of taste and food culture is essential for marketers. A meal becomes delicious and desirable within a set of ideas about the components and circumstances of consumption. Knowing the cultural underpinnings of food can help marketers make decisions about how to develop and position products that speak to consumers' ideals, emotions and fantasies. As this study demonstrates, what Americans perceive and believe about Italy and its cuisine influence what they buy, cook and eat.

Eating the Italian myth

Italy provokes a mix of sentimentalism, contempt and aspiration in the American mind. As a land of immigrants, the United States both honors and disdains the heritages of its component peoples. Like other ethnicities, Italians often are dismissed in jokes and stereotypes. Nevertheless, Italy stands out as closer to the American heart and soul than other national cultures. America takes pride in having absorbed Italian foods and arts, preserved as a sentimental collective memory particularly among Italian-Americans, the majority of which are now up to five or six generations removed from their home country. (For an overview of the interaction between immigrant absorption and food styles, see, *Hungering for America: Italian, Irish, and Jewish Foodways in the Age of Migration*, by Hasia R. Diner [Cambridge: Harvard University Press, 2001].)

Studying the forms of Italian sensibility leads to the conclusion that there is no single model of Italian authenticity. It changes as observers move across regions, ages and the social scale.

Among average Americans, Italianness often finds expression in music from the golden age of song in the '40s and '50s - Frank Sinatra, Dean Martin, Perry Como - animated by scenes of Venetian gondoliers, statuettes of Michaelangelo's David, and the Leaning Tower of Pisa. A certain kind of sentimental Catholicism also plays into this ethos; an eventual trip to the Vatican, perhaps with a glimpse of the Pope on a Sunday morning in St. Peter's Square, animates people's dreams and aspirations.

The underside of this mythology finds expression in Americans' continuing fascination the Mafia and the popular TV series *The Sopranos*. In the media, slang from the streets of turn-of-the century Naples or Palermo ("*stugats*") is perpetuated as authentically Italian. A kind of brutal hyper-masculinity, represented by characters played Robert De Niro and James Gandolfini, for example, typify American ideas about what it means to be Italian.

Gastronomically, this Italian-American myth finds continued expression in the foods celebrated in Italian street fairs, pizza stands and the Little Italy restaurants in cities across the U.S. Here you find such favorites as fettucine alfredo and spaghetti and clam sauce, lasagna and manicotti smothered in tomato sauce along with pizza, bottles of Chianti, greasy zeppole or cannoli followed by a sweet cappuccino - all celebrated by Americans as creating an Italian experience.

At the same time, we discovered that there is another level of this Italian myth, among highly educated Americans, that celebrates the arts - the operas of Verdi, Puccini and Rossini, Palladian architecture, Dante, and, of course, Italian painting and sculpture. Renaissance and Baroque artists, such as Raphael, Botticelli, Bernini and even the modernists de Chirico and Modigliani are all admired. Upscale consumers often flock to language classes to better understand operas sung in Italian and dream of an eventual trip to the Uffizi, a peek at Da Vinci's *Last Supper* in Milan, explorations across Rome and the Vatican. These lovers of Italy and Italianness populate Italian film festivals to recall the classics of neorealism and the cinema of Fellini, Passolini and Bertolucci.

There is a higher food sensibility associated with these Americans - a disdain for "red-sauce" Italian foods and a preference for the cuisines of Northern and coastal Italy. These consumers typically maintain connoisseurship about the wines of the Piedmont, can recognize the subtleties of a delicate gorgonzola cheese, and prefer a prosciutto made in Parma to any other aged ham.

On another level, fantasies of Italy populate Americans' dreams in their ongoing search for authenticity and the natural, organic ways of living, loving and eating. One cultural expression of this ideal includes the fantasy of owning a second home in rural Italy as celebrated by Frances Mayes' *Under the Tuscan Sun*. Gastronomically, this involves a search for purity, localism, small-scale production and other ideas associated with the worldwide "slow food" movement.

Moving further up the social scale, our semiotic analysis confirms that Italy represents high style to

Americans as expressed in fashion, interior design and home furnishings. Clothing and accessories branded by Armani, Versace, Missoni, Dolce & Gabbana, Prada and Gucci convey status to their wearers. In food, these Americans follow the celebrity chef of the moment and the canons of Italian haute cuisine. In America, celebrity chefs like Lidia Bastianich, Paul Bertolli and Mario Batali can boast a following that rivals any sports figure. Italy, in this context, may also represent something desirable, ideal, perhaps unachievable by anyone but the hyper-rich.

Comforting antidote

Our content and semiotic analysis of images of Italy and Italian food in the media revealed that, for Americans, Italian food and culture stand as a comforting antidote to the angst of living in the modern world, including post-9-11 anxiety and the fast pace of life exacerbated by the speed of the Internet.

Our study also found that a range of expressions and imagery around the idea of Italianness could motivate Americans to place a higher value on the consumption of Italian foods. These ideas include:

• Evoking modernity and innovation while maintaining authenticity toward a timeless landscape and tradition. While not dwelling on the past, when antiquity is linked to modernity, the message is that the featured ingredients and cuisine are authentic to their roots in Italy.

"Italy is about history, tradition. There's a lot of beauty in the countryside, in the geography and of the people."

• A relaxed and convivial style of eating. Consumer memories and stock of knowledge revealed that Italianness implies not only the sensory aspects of the cuisine but also the manner in which meals are consumed. Socializing in a relaxed context with friends and family is the basis of a deep connection to Italian eating.

"I would describe an Italian experience as being laidback, easygoing and full of life."

• The best ingredients. Regardless of whether the focus was on fashion or foods, Italianness implies attention to components and ingredients. Only the best is good enough. Making meals Italian also requires use of particular ingredients, including olive oil, garlic, balsamic vinegar and other components that form the chef's palette of Italian meals.

• Making meals Italian also requires an emphasis on simplicity and naturalness. In home décor and accessories, Italy connotes a limited range of textures, materials and colors - stone, textured surfaces, earthy colors as backgrounds such as yellow ochre and neutral colors such as black, beige and tan in fabrics. Similarly, in foods, a limited range of ingredients, in which flavors and textures are permitted to remain intact without being hidden or masked, suggest that an item is authentically Italian.

"Good Italian food pronounces the flavors. You taste all the ingredients."

"It's about taking a couple of ingredients and a couple of flavors and really featuring them. It's about presenting them at their best, their most aromatic and flavorful."

Americans consider Italian cuisine to be versatile; meals are quick and easy to prepare, are made from simple, easily available and affordable ingredients, and can be enjoyed by both adults and children. Moreover, everyone agrees that Italian cuisine is suitable for serving to family as well as guests and is enjoyed by Americans from all ethnic backgrounds.

"I don't know a single person who doesn't like Italian food. With Italian food you can never go wrong."

Regional discovery

By inviting consumers to evaluate several communication routes, we discovered that "regional discovery" was the one idea that could encapsulate all of these positive aspects of Italian cuisine and could bring the brand forward. To provoke curiosity and engage consumers to look at Italian foods in a new, fresh way required the client to emphasize varied local and regional foods. Home cooks were eager to embrace special recipes from Tuscany, the Piedmont, Emilia-Romagna and other centers of Italian high cuisine.

Regionalism spoke to consumers' aspirations to try authentic but unfamiliar dishes. It placed Italian meals on a par with other national cuisines that Americans were encountering during mealtime adventures.

Moreover, this idea allowed Barilla's product developers to encompass lighter fare - the Northern and coastal cuisines that shoppers were connecting with currently-favored dietary outcomes. Additionally, since the best ingredients were perceived as originating "close to the source," it gave Barilla permission to introduce novel ingredients while keeping those such as garlic, olive oil and vegetables that Americans already associated with healthy eating. This context allowed Barilla to introduce pastas made with alternative grains and other meal components that were capturing American's interest.

In terms of promotional imagery, the regionalism concept opened up a range of locations well beyond Venetian gondoliers. The Italian regional reality comprises mountain landscapes and seaside towns, rolling hills and Palladian piazzas, modern urban landscapes as well as traditional villages.

Our study also discovered a gap that could be filled by Barilla as the ultimate authority on Italian cuisine. Consequently, the ideas emerging from this study have been incorporated into new products from Barilla - including the award-winning Barilla Plus line - as well as the creation of a branded Web site, Academia Barilla (www.academiabarilla.com), which has become the focus of re-introducing and educating Americans about the uniqueness of regional Italian cuisine.

Create new ways

Our mission was to reverse disparaging stereotypes and to secure marketing insights that promote consumption of Barilla in America. Digging deeply into the meaning of authenticity and seeking positive and constructive aspects of the national mythologies helped us create new ways for Americans to appreciate Italian meals.

We discovered that "authentically Italian" refers to both food and a relaxed, convivial style of eating. It seeks a dialogue between the old and new, classic and contemporary, which communicates timelessness and heritage. Authenticity emphasizes naturalness - texture and colors as well as special ingredients such as olive oil, garlic and tomatoes. Simplicity is another key to Italianness - being able to appreciate every constituent ingredient.

Most importantly, we discovered that ideas about regionalism fed into Americans' positive regard for the foods of Italy. It was not helpful to present an undifferentiated Italian character but, instead, to emphasize local specialties and ingredients as the hallmarks of connoisseurship.

Overall, analysis of food culture reveals the context for what consumers perceive as desirable in the taste and the experience of eating. This, in turn, can generate ideas for new product development, updated branding and powerful communications imagery and messages. | Q

ethnic research

From afterthought to forethought

By Al Barraza

Ethnic diversity touches our lives daily. President Bush and the Democrats fight for the Hispanic vote. Rap, reggaetone and Shakira play at The Gap and at Macy's. Doctors argue about the health of ethnic consumers. Spanish flows at Starbucks, The Home Depot and Nordstrom.

Dazzling figures emanate from the Census and the Selig Center. Minority consumer buying power reaches $1.9 trillion in 2005. The African-American and Hispanic markets are larger than the entire economies of all but nine countries. One of every two people added to the nation's population is Hispanic. Growth is slow in the general market. Anglos are aging, even more demanding, and it is difficult to get them to change their brand preferences.

Despite these trends, multicultural marketers fight hard for every advertising dollar. In the boardroom, a multicultural strategy as the engine of future growth is the exception, not the rule. Multicultural marketing is more often afterthought rather than forethought.

Making multicultural marketing forethought is hard work. It requires a change in mindset, conducting insightful research and segmentation, and designing a multicultural customer experience that supports the business initiative.

Launching a multicultural marketing program

Big fish: it's all about ROI

Corporate multicultural marketing programs have historically been laden with emotion. Undertaken by a staff that sincerely believes in the effort and feels it is the right thing to do for ethnic consumers, multicultural efforts were launched with dedication and passion. More recently, to address senior managements' priorities of profits and shareholder value, multicultural marketers have adopted an ROI mentality.

How does one build a robust ethnic ROI mentality? First, and foremost build a fact-base. Create a set of case studies that clearly demonstrate business success in the multicultural space. Conduct in-depth research and analysis to clearly quantify and define short- and long-term multicultural opportunities. Focus on multicultural customers' lifetime value. Use metrics and develop a set of tracking measures to demonstrate success. Capture data/information from multicultural operations. Use research to justify the business drivers.

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Report widely on progress. The end result is a bigger multicultural marketing budget with multicultural marketers invited to all the right meetings. The big, multicultural fish is ROI.

Back to the future

In recent times, marketers compared the Hispanic market to the Anglo market of the 1950s. Just a few short years ago it was believed ethnic consumers could be told what to buy, where to buy it and from whom. It was a seller's market. Companies with multicultural initiatives faced limited competition. Advertising on an ethnic show such as *Sabado Gigante* or on the local Asian television station guaranteed high brand recognition. Companies easily generated positive word-of-mouth referrals through community activity. Cursory understanding of ethnic consumer needs was sufficient. Few companies created the infrastructure to support the new ethnic customers they acquired.

That train has left the station. Multicultural marketing is maturing. Ethnic consumers are becoming more enlightened and understandably more demanding. Many ethnic consumers expect companies to develop products and services that meet their needs. Technology has empowered all consumers, including multicultural consumers. More companies are targeting ethnic markets. Ethnic consumers realize this and expect better treatment.

Segmentation within a market

Smart multicultural marketers obtain a comprehensive understanding of their target consumer. Research for clients in different industries clearly shows that culture, language, degree of acculturation, etc., help shape multicultural consumers' interest in various products and services.

A recent immigrant with limited knowledge of the complex U.S. financial services category is likely to have distinctly different needs than an immigrant who has already been here for many years. Face-to-face explanation of the various products available is very important to someone who has lived here only a short time. These consumers will appreciate company representatives who walk them through the purchase process and are likely to solicit advice about other financial issues. In contrast, an immigrant who has already made the U.S. their home for many years is savvier with regard to local financial services and is probably more comfortable making their own financial decisions. They will have different expectations when it comes to customer service.

This consumption pattern holds true in other product and service categories. Findings from secondary research and surveys by beverage companies such as Coca-Cola show that recent Hispanic immigrants more often purchase and buy greater quantities of soft drinks than a Hispanic who has lived here for 10 or more years. Leading soda drink companies have marketed internationally for years. Consequently, recent Hispanic immigrants are very familiar with colas, but are not very informed about related health issues.

Segmentation within a market segment is a must. Segmentation must go beyond cultural and linguistic factors. Product demand, brand preference and (re)purchase decisions are affected by the same factors that affect all consumers, regardless of race/ethnicity. Psychographic (attitudes, values, lifestyle), behavioral (product usage, loyalty, pricing, benefits) and demographic and geographic variables drive purchase decisions. In a recent large study for a leading distributor of specialty foods, we found distinctly different subsegments within the Anglo, African-American and Hispanic markets. Each sub-segment's brand preferences and interest in new products were driven by their attitudes toward health and taste, cooking patterns and convenience.

The multicultural marketers' goal must be to find the profitable ethnic consumer sweet spot, which is at the intersection of culture/language/acculturation and consumer needs, lifestyle, and behavior. It is the area of the matrix where marketers' products and services meet the specific needs of a core group of target ethnic consumers, at a profitable price.

What was that commercial about?

Ethnic consumers unquestionably have the attention of advertisers. Companies, often in the same industry, bombard them with messages from multiple brands. Like general- market consumers, confident ethnic consumers use technology to avoid advertising. More access to the Internet means ethnic consumers will, most likely, spend less time watching television. How can advertisers get through to ethnic consumers?

During the mid 1990s, Allstate employed a first-to-market Hispanic strategy. Its marketing toolkit included a unique Spanish-language ad campaign that depicted insurance agents interacting with customers in familial situations. Brand recognition, preference and imagery metrics skyrocketed. Not to be outdone, competitors started advertising. Brand recall dropped and brand preference measures became flat.

Allstate's response was smart. A comprehensive research process was instituted. Focus groups alone were deemed insufficient. Competitive intelligence illuminated competitors' strategies. Insurance agents countrywide provided critical feedback and direction about a proposed campaign. Specific advertising goals were set. Surveys identified motivating "reasons to consider" the client's brand and products. Quantitative copy testing confirmed unique message points. Tracking studies measured progress, and were used to adjust media weight, and fine-tune the new ad campaign. Over time, the company regained its substantial lead over its competitors. Sales from ethnic markets significantly increased, at a rate appreciably greater than growth of the ethnic population. This effort demonstrated a positive ROI from Allstate's multicultural marketing efforts.

In today's increasingly competitive environment, rigorous, quantitative customer insight is required to ensure ethnic advertising that achieves its business goals.

Identify needs, design the experience

When you invite a new friend to your home, you don't just open the door. You invite them in, engage in pleasant conversation and serve great food! You want them to have a positive experience so they come again and/or reciprocate the invitation.

Not many companies think this way. Only a few do a great job of designing an outstanding, welcoming experience for their customers. Starbucks is an exception. It has crafted such a desirable environment that customers pay $3.40 for a cup of coffee to experience it!

In the multicultural marketing realm, even fewer companies take the time to identify multicultural customer needs, design the experience to meet the need and continuously build the infrastructure to support the experience - as my client Allstate did.

In the insurance business, the critical moment of truth is the claim process. We all know the car accident claim process very well: You exchange insurance information. You call your agent. An insurance adjustor asks detailed questions about the accident. You read a lot of legal mumbo jumbo in your insurance policy. The car is taken to the repair shop. You pay the deductible, pick up the car, and hope your insurance rates don't go up. If they do go up, you start shopping around.

Now imagine going through that process for the first time. Imagine the process if you speak only Spanish. Imagine that process if your own unique needs have been disregarded. That's the experience of some Asian, Hispanic and African-American consumers.

Allstate understood this. When it embarked upon a multicultural initiative, it flowcharted the full multicultural customer experience. At each customer touch point, ethnic customer needs were examined. Interviews and focus groups were completed with claims staff, insurance agents and, of course, customers. Ethnic customers wanted the agent involved in the claims process - to a greater extent than general-market consumers. Claims staff received in-language material with appropriate claims/legal terminology. Brochures explained the claims process for customers. Staffing analysis determined the appropriate number of bilingual claims adjusters in Hispanic markets. Improvements to the claim service process were dealt with and turned around.

Allstate designed the experience and built the infrastructure to meet the needs of the multicultural customer. By meeting - if not exceeding - customer expectations, it improved retention and drove positive word-of-mouth in the ethnic community. This insurance provider delivered a Starbucks-like experience to its multicultural customers.

Snag the big one

My clients are typically peppered with tough questions and scrutiny from internal parties when it comes to their return on the multicultural marketing investment. Some tips: Be pro-active. Design a comprehensive multicultural measurement process that leaves no stone unturned. Be thorough. Be objective. Don't spin the story. Be prepared. Make sure you can answer whether your ROI exceeds what would have been obtained from normal demographic growth. Integrate and align your measurement process with other marketing functions and non-marketing functions.

Make the finance people and the controllers your best friends. Develop simple, easy-to-follow multicultural marketing scorecards. Compare and contrast multicultural return to returns obtained from general-market initiatives. The results will amaze you. If necessary, adjust your strategy to enhance your ethnic ROI. Consider finding an objective third-party to facilitate, analyze and manage the measurement process. If you've correctly developed and executed a well-thought out multicultural marketing strategy, then ROI metrics can only help you.

Stock the tackle box, buy heavyweight line, and oil your reel. If you employ an ROI mentality, conduct insightful research and segmentation and design a Starbucks-type multicultural customer experience, you are likely to snag the big one. | Q

ethnic research

Same ethnicity, different viewpoints

By Heidi Dickert

According to 2002 data from the U.S. Census Bureau, Hispanics are the fastest-growing segment in the U.S., comprising 12.5 percent of the U.S. population. That number is projected to reach 24 percent by 2050. They also represent an estimated $600 billion in buying power, which is expected to grow to $1 trillion by 2007, according to the Direct Marketing Association 2005 Hispanic Market Report.

Many marketers are struggling to gain a representative picture of this multi-segmented population and its unique brand preferences. This is in part due to the segment's varying degrees of acculturation and the difficulties researchers often have in capturing survey data from them in offline and online formats.

There are multiple factors that drive the extent of acculturation. Most acculturation models include dimensions such as country of origin, Spanish-language preferences, attitudes and beliefs, fluency in English, neighborhood type and education, among others. Our firm uses English- and Spanish-language use, media preferences, time living in the U.S., and degree of Hispanic representation in the neighborhood in which they reside as the key drivers for producing four distinct acculturation segments.

Most segmentation models present two extreme groups - acculturated and unacculturated. However, our research shows two other distinct groups that fall in between these two extremes - the partially acculturated and partially unacculturated segments. The partially acculturated group is often mislabeled as fully acculturated because these individuals live and behave similarly to their fully acculturated counterparts. However, they hold on to certain key Hispanic traditions and beliefs. And those traditions and beliefs impact where they shop, what they buy, their opinions of the brands they see every day and their media usage patterns. Consistent with their fully acculturated counterparts, 80 percent of partially acculturated consumers choose brands and stores because they feel they are getting a better value compared to only 65-70 percent of their fully unacculturated counterparts. Twenty percent are watching Spanish vs.

Marketers must consider the impact of acculturation on Hispanic consumers

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English media for the majority of the television viewing time.

Furthermore, our recent advertising tests found that consumers in this segment have diverse opinions about and varying levels of identification with the characters and images in Hispanic ads. In tests, many partially acculturated consumers strongly identified with the traditional characters and felt the situations portrayed mirrored those of their everyday life. Others believed the characters and images reinforced negative cultural stereotypes that they did not wish to see depicted in advertising.

The partially unacculturated group continually diversifies and experiments with new products and services. This is due, in part, to greater disposable income than the fully unacculturated group. Yet they still identify very closely with the Hispanic community - it is a part of their heritage and they have no intention of leaving it behind. In fact, 57 percent of partially acculturated Hispanics still shop in neighborhood bodegas on a monthly basis, and 25 percent shop on a weekly basis or more often. Additionally, 80 percent are watching Spanish TV on a regular basis, and 31 percent are watching four or more hours of Spanish TV per week.

Figure 1: Language Preferences

	Fully Acculturated	Partially Acculturated	Partially Unacculturated	Fully Unacculturated
How Often Watch Spanish / English Television	Mostly or Always English 96%	Mostly/Always English 79%	Half and Half 52%	Mostly or Always Spanish 51%
Language Prefer to Speak at Home	English 90%	English 67%	Both Equally 39%	Spanish 96%
Language Prefer to Watch, Read, Listen to Media	Always/Mostly English 81%	Always/Mostly English - 71% Both - 17%	English and Spanish Equally 59%	Mostly Spanish 57%

Greater share on groceries

Among the Hispanic segments, the partially unacculturated and fully unacculturated groups spend the greatest amount of money per household weekly on groceries. The fully unacculturated group spends nearly 20 percent of household income on groceries; fully acculturated Hispanics more closely resemble the general population, spending less than one-tenth of their annual income on groceries (Figure 2).

The fully unacculturated segment has lower household income but spends a greater proportion of income on groceries than the other acculturation segments. This could be due to larger household sizes. The frequency of bodega and non-bodega shopping is strongly linked to varying levels of acculturation (Figure 3). Bodegas are small local stores catering to the everyday necessities (primarily food) of Hispanics. Consumers in the fully unacculturated groups shop there more frequently. Since it allows them to socialize among their "own" people, who share the same cultural roots, shopping in bodegas may be an externalization of this segment's unspoken aspirations to hang on to the Hispanic culture. In addition, the more frequent bodega shoppers tend to have lower household income and may focus more of their spending on necessities. The bodega shopping basket tends to have a higher dollar value, which is likely caused by higher prices in the bodega channel.

Measurement differences

Capturing all four of these distinct acculturation segments online for research purposes is challenging. While the fully acculturated Hispanic spends on average 20 hours per week on the Internet, less than 50 percent of unacculturated Hispanics spend two or more hours per week accessing English and/or Spanish Internet sites. Despite common perception, English-language sites are popular among all acculturation levels. Across all segments, their primary use of the Internet still centers around communication with friends and family or accessing news and information. Online shopping and bill paying are also common, but only among the acculturated segments.

Offline sampling is typically done to reach these offline unacculturated/Spanish-language-dominant consumers. While offline methods may appear to offer the perfect answer, it is more likely that partially or fully unacculturated Hispanics will be the primary groups recruited into offline studies due to common profiling and screening practices. Hispanics from mixed backgrounds and specific Latin American countries may not exhibit the stereotypical physical characteristics and language choices and therefore may be passed over as potential respondents.

In addition, most offline studies are concentrated in urban vs. non-urban areas in an effort to identify respondents quickly. The distribution of acculturation segments is most predictable among the most and least acculturated segments. Specifically, the acculturated segments are more likely to live in suburban/rural areas, while the unacculturated segments are more likely to live in urban neighborhoods.

While the mix of acculturation segments living in suburban areas is rapidly evolving to include more of the unacculturated segments, sampling coverage of both urban and rural areas today assures representation from both ends of the acculturation spectrum.

Dramatically skewed

As a result of these natural method biases, research findings can be dramatically skewed. Hispanics who

Figure 2: Percent of HH Income Spent on Groceries

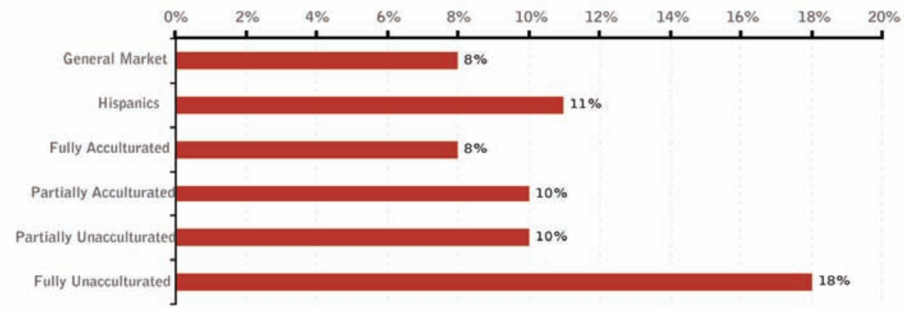
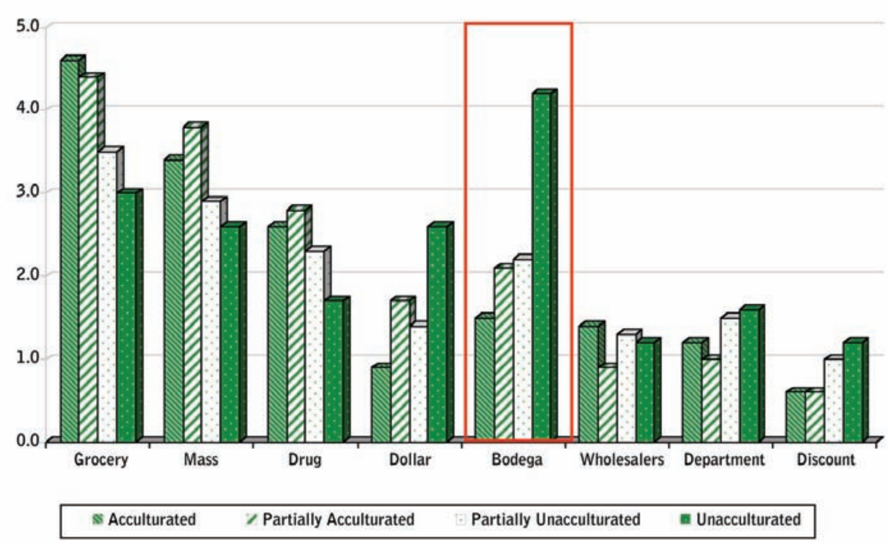


Figure 3: Average Monthly Shopping Trips



are more acculturated tend to buy mainstream/new products. The less acculturated are more loyal to brands they already know and value. However, not all brands and products are available in non-urban areas. These factors can directly affect the purchase interest of new products, awareness trends and other key research-related data.

It is important to note that the extent of differences in attitudes may depend largely on the category of products. That being said, in many of our recent studies, offline respondents' purchase interest scores were more than 50 percent higher than online respondents' scores. Many assume that this is due to scale bias issues within the Hispanic population. However scale bias is a much more substantial issue for the fully unacculturated segment and can overshadow the true opinions of the remaining three segments. In a relative comparison test, these differences are often disregarded as one winner is chosen among many. The challenge is trying to determine just how much interest there is in a concept or product in absolute form among the Hispanics, compared to the general population.

Understanding the purchase interest among the four segments is one step toward making a more educated decision on whether or not a product will have broad appeal to the Hispanic market. With at least three-fourths of the segments providing a more accurate evaluation of their opinions and evaluations, this data can be used in conjunction with the fully unacculturated segment data to gain a more accurate expectation of in-market acceptance.

Evaluate objectives

When choosing the appropriate Hispanic sample, researchers need to first evaluate their marketing objectives. Will your media plan be national, regional or local? Will your media have different brand messages communicated in different languages? Are you concerned about a different brand identity among the different acculturation segments based on different executions across Spanish and English media?

Here are some quick Hispanic research tips to consider:

- Be careful how you refer to Hispanics while conducting research. Many believe that Hispanics prefer the term Latino. However, our research indicates that all groups have a strong preference for the term Hispanic vs. Latino, even among the fully unacculturated segment.
- Offer a survey in both English and Spanish to all survey respondents. Do not assume that an individual in a specific segment will take a survey in English or Spanish. Do not assume they will choose the same language on every occasion.
- When conducting advertising testing, do not assume that Spanish-dominant consumers are the only ones watching Spanish media. There is a proportion within each segment that watches varying degrees of Spanish media.

Rapidly diversifying

As you can see, the growing Hispanic populations have diverse shopping and media preferences. That is why it's critical for marketers and researchers to keep abreast of the four acculturation segments. To best meet their marketing objectives, clients should use a truly representative sample and method that targets the relevant acculturation segments they are choosing to reach. Assuming that either fully acculturated or unacculturated Spanish-speaking Hispanics will represent the entire U.S. Hispanic purchasing audience can lead to potentially misleading market conclusions and decreased product sales or brand value. | Q

Survey Monitor

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Usage," from New York research firm Emarketer. The Hispanic youth market is one of the toughest of all consumer demographic groups to understand. Hispanic people in the U.S. share a common language but come from many countries. Some are first-generation immigrants, others are the children of immigrants and still others have grandparents or great-grandparents who were born in the U.S. "Some speak only Spanish; others barely know the language. Still others use Spanish in some environments, English in others, or a mix of the two called Spanglish," says Debra Aho Williamson, eMarketer senior analyst and author of the report. "Many Hispanic youth live in two worlds: one dominated by the culture and traditions of their family history, and the other awash in the iPods, MySpaces, mobile phones and hip-hop music of the general youth culture."

There were 15.7 million Hispanic Internet users in the U.S. in 2005, according to eMarketer. This total will rise to 16.7 million in 2006 and by 25 percent, to reach nearly 21 million, by 2010. "This means that by 2010 the number of Hispanic Internet users will approach the number of African-American users," says Williamson.

In addition, the U.S. Hispanic population is young, particularly online. EMarketer estimates that, in 2005, there were 9.1 million Hispanic Internet users under the age of 35 and projects that this will rise to 12.1 million in 2010. "The Hispanic youth explosion doesn't show signs of slowing, at least in the near term," says Williamson. "By 2010, when the median age of the U.S. population is expected to be 36, the Hispanic median age will be just over 27, and in 2010, one-third of all Hispanic people in the U.S. will be under 18."

In many respects, the Hispanic youth market looks and feels like the greater youth market. Blogging, mobile phones, social networking, music and entertainment are all popular activities. "Hispanic youth use the Internet more than older Hispanic-Americans," says Williamson. "They are also more likely to say that the Internet has had an impact on their lives."

For Hispanic youth, there's an added dimension that sets them apart from the general market: Their cultural heritage and their language choices make for multiple identities, both online and off. Today, the media message to young Hispanic-Americans is, "You don't have to speak Spanish to feel Hispanic." They hold their heritage in high regard and make an effort to preserve it regardless of how much Spanish they speak. For more information visit www.emarketer.com.

A new product was born every three minutes in 2005

Hot on the heels of a record-breaking product launch year, companies are exploring a vast range of innovation for 2006. According to the Global New Products Database from Chicago researcher Mintel, more than 156,000 new products took their spot on store shelves around the world last year. This number equated to approximately one new product introduction globally every three minutes in 2005.

"Globally we have seen a significant rise in variety of products," says Lynn Dornblaser, director of Mintel Custom Solutions. "Consumers are looking for more products that address their individual needs, and this is resulting in more product offerings. There is a particular focus on catering to the aging consumer, specifically in the non-foods product categories."

The most active category in food and drink was beverages, carrying close to a fifth of the launches, followed by bakery (12 percent) and confectionery (11 percent). On the non-food product front, more than 68,000 new products were launched internationally with cosmetics, skin care and hair care leading the way. Food experienced close to a 10 percent increase in launches from 2004, where non-food product introductions remained relatively level to the previous year. In the U.S. alone, more than 16,000 new food products were introduced. In addition, there were more than 13,000 non-food products launched in the U.S., with cosmetics and skin care innovations driving the numbers.

There are several new and evolving trends that are predicted to impact product innovation for 2006. Age-defying treatments, increases in portion control, brain-power foods, and "just for you" customized products are all among the trends expected to make strong impressions on the consumer packaged goods industry.

With the aging population experiencing global growth, companies have a key opportunity to focus their efforts on this newly rediscovered consumer group. Displaced for several years by youth marketing initiatives, marketers are now banking on the senior market for non-food products. However, age-focused food is a generally untapped area. Mintel has recently tracked a couple of product examples that show the possibilities in the category. In Japan, home of the largest senior population in the world, new, easier-to-chew foods such as Kameda Seika's rice porridge are being launched. Recently, Gerble chocolate biscuits were launched in Europe, with the claim that they are formulated for the dietary needs of seniors.

Companies worldwide are battling with new anti-aging skin care technologies, expanding on the massively successful category. Neutrogena and Oil of Olay in the U.S. have both recently launched home microdermabrasion systems, positioned as skin-renewing products. But anti-aging cosmetics are moving into anti-tiredness as well. "Some new products are focusing on battling tiredness, a key trait that can actually accelerate the skin aging process," says Dornblaser. "Products such as L'Oreal Europe's Infallible foundation are claiming to resist the signs

of tiredness, which can be felt at any age. It presents more preventive versus reactive options for consumers."

Portion control is expected to grow among the new product ranks. The Kraft 100 Calorie Pack made a strong impression over the year, and Frito-Lay introduced the Doritos 75 Calorie Snack Pack in the U.S. This trend is expected to move away from snacks this year into other food categories. In addition to eating less, consumers are also being treated to new ways to get their needed nutrients. Several products that emphasize healthy balance have hit shelves, including Balance Pizza in Germany (touting reduced calories and added fiber).

"Health is now a top priority for product developers," Dornblaser says. "As consumers embrace more organic and specialty products, mainstream consumer packaged goods manufacturers need to compete with products that promote wellness and overall care for body and soul."

As consumers get healthier globally, they also are getting wiser. Omega 3, a fatty acid said to enhance brain function, is making as strong showing in new food introductions. Several products are targeting youth, including iQ3 Brainstorm! Cereal and Fruit Bars in the U.K., promoting concentration, mental function and eye health; and Nestlé's P'tit Yoco Omega 3 snacks from France, with ingredients claimed to be essential for children's brain power. Mintel predicts that added focus will be placed on more brain-boosting products.

In the non-food category, customized products are making a big industry splash. These products reflect the changing wants and needs of consumers, such as the new variety of Mademoiselle Bigoudi skin care products in France. Targeting consumers who want personalized treatments, each system is designed for the individual consumer's needs. The face creams can be customized by skin type or even specific protection, such as the Cigarette Smoke Protection formula. Even toilet paper is catering to individual preferences, with the Renova debut of black toilet paper in Europe. Outside of the home, men and women can get sex-specific scents from Ambipur car fresheners in Portugal. For more information visit www.mintel.com.

Health and wellness trends offer opportunities for marketers

The Natural Marketing Institute (NMI), a Harleysville, Pa., consulting and research firm, has released its Top 10 list of health and wellness trends for 2006, based on findings from its various research sources including the Health & Wellness Trends Database, the Supplement/OTC/Rx Database and the Healthy Aging/Boomer Database.

1. Changing demographics create health and wellness opportunities. Shifting demographics such as household size, age, gender, lifestage and ethnicity present new opportunities across many health and wellness products. Generational shifts among matures, Boomers, Gen X, Gen Y and millennials will dictate changes in marketing and product offerings.

2. Organic versus natural: the balance of price and benefits. While the marketplace is experiencing many new organic introductions from mainstream brands, including private-label products, finding the optimal balance of price, benefits and consumer understanding levels will be the determining factor in consumer choice between natural and organic products.

3. Energy and vitality: future platforms for growth. Look for an expansion of energy and vitality platforms across a variety of categories and brands. Opportunities abound as concepts related to sustained energy, low-glycemic and others help redefine the market.

4. Ingredient/nutrient drivers. 2006 will see the continued propagation of specific ingredient/nutrient platform drivers across food/beverage and supplements, including, for example, omega-3, protein, gluten-free, low sodium, probiotics and others.

5. The proliferation of heart-healthy products. Consumer interest in the concept of eating for heart health and new dietary supplement science will encourage the continued introduction of new heart-healthy products to the marketplace. This trend has real staying power with the right products and a good base of products upon which to build.

6. On-the-go healthy eating opportunities. Whether it's grab-and-go healthy snacking or healthy food service and menu options, opportunities abound for the integration of health and wellness into away-from-home foods and beverages.

7. The next growth opportunities in nutritional supplements. Savvy manufacturers will seek to market new supplement formats (beyond pills) and we will continue to see the proliferation of condition-specific supplements and the clinical science to back them.

8. Premium personal care. The growing market for natural and organic personal-care products join forces with an increasing number of consumers seeking premium personal-care products and benefits beyond their traditional use. Watch for more upscale natural and organic product introductions from all market sectors.

9. Individualism crosses categories. Consumers are compartmentalizing information and taking the pieces that apply to their beliefs and lifestyles to formulate their individual, personalized health plan. Evidenced in the new My Food Pyramid and the proliferation of products with specific health claims, marketers must take note of this very strong trend. Watch for new personalized supplements.

10. Corporate social responsibility: values connect to brands. Social values, community involvement and ethical consumption (both pre- and post-manufacturing) will continue to drive consumer connection to brands. Look for this trend to gain momentum in 2006 across many industries. For more information visit www.nmisolutions.com.

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mation contact Jeff Friedlaender at 800-221-5015 or visit www. meyersresearch.com.

Mosaic Japan now available

Costa Mesa, Calif., information firm Experian has released Mosaic Japan, which classifies every Japanese household into 11 main groups and 50 different socioeconomic types. It uses the Japanese National Census and a range of other statistical datasets to build a set of typologies and deliver insight into the structure of Japanese society.

Developed over two years with Acton Wins, a Japanese lifestyle data specialist, it uses the same capabilities found in Experian's other Mosaic solutions, offering international marketers a familiar, standardized consumer segmentation tool. For more information visit www.experianmarketingsolutions.com.

Conduct online research in China's Internet cafés

Los Angeles research firm Online Testing eXchange has formed a partnership with Market China Inc. (MCI) that will enable global and local Chinese brands to conduct online market research in 120,000+ Internet cafés in urban and suburban areas throughout mainland China.

China's popular Internet cafés have an environment set up to promote social interaction - "couples" stations, team/group gaming areas, VIP areas, food/drink, etc. - and are now one of the dominant places where young adults gather for peer interaction, while surfing the Net, playing video games and watching online entertainment content.

The 120,000+ Internet cafés across China have an average of 70 computers each - more than eight million total - and an estimated 50 million users per month. Over 50 percent of the 18-25 population of mainland China's urban markets visit cafés, according to the 2004 China Media and Marketing Survey by Sinomonitor International. The official government report states that nearly 30 percent of all Internet users in China cite the Internet café as their most preferred Internet access point. For more information visit www.otxresearch.com.

Focalyst study targets Boomers

New York research firm Focalyst has launched the inaugural Focalyst View survey, which is expected to have a return of 35,000 respondents, ages 42 and older. It covers a range of topics, from media preferences and technology adoption to retirement plans and spending habits, with the goal of understanding the needs, behaviors and attitudes of older Americans. The study will be conducted annually, providing clients with year-over-year measurements to help them see trends and assess the impact of strategies and services. Focalyst is a joint venture of AARP Services Inc. and the Kantar Group. For more information visit www.focalyst.com.

Update to panel management system

MARSC Version 4.1 is now available from U.K.-based Centurion Marketing Systems Ltd. Enhancements to the sampling and panel management system include the ability to specify simple or complex selection criteria based on previous activity within the panel. An example of this would be to select names from those who took part in projects A, B and C but did not take part in project D. MARSC can also now accept bonus-point information from interviewing systems. Response rate calculations have been improved and MARSC will now support the output of sample lists to a database table for immediate pickup by an interviewing system. For more information visit www.marsc.co.uk.

MarketSight 5.0 now shipping

Monitor Software, Cambridge, Mass., is now offering MarketSight 5.0, a data analysis application. In addition to usability enhancements, MarketSight 5.0 introduces new features and functionalities, including: interactive banner runs; support for tracking studies; statistical test automation and optimization; an automated variable creation process for top-box and other common groupings; expanded export capabilities and home page and navigation improvements. MarketSight 5.0 is available as a hosted application or as an application that can be installed behind a corporate firewall. MarketSight uses a Web-based architecture to facilitate collaboration and sharing of research data and analysis. For more information visit www.marketsight.com.

New demographic datasets available

Demographic Data Center is now offering On-Line Census 2000 Long Form (SF3), which puts the complete Census 2000 Long Form (SF3) at users' fingertips. The Census 2000 Long Form has detailed information on the social and economic characteristics of the U.S. population, including employment, occupation, income, education, poverty and more. The On-Line products give downloads of data in .dbf and .csv formats for use in spreadsheets and statistical programs, as well as exports of geographic boundaries for use in mapping programs such as ArcGIS and MapInfo.

The firm has also released an expanded data set of the U.S. Population and Housing. This demographic data set has more detailed variables for the 2005 population including income by race, sex by age and by race, household by race and by age, total housing units and housing tenure. For more information call 800-577-6717 or visit www.us-census.biz/products.htm.

Attract more automotive advertising with MatchMAKER

Equifax Inc., Atlanta, is now offering the 2006 version of MatchMAKER, a research tool that arms publishers with the most recent market data to help attract automotive advertising. It contains more than 11 million records for new cars and trucks purchased between October 1, 2004 and September 30, 2005. With MatchMAKER, publishers gain insight into subscribers' recent automotive purchases as well as their demographics, attitudes and lifestyles. MatchMAKER delivers a picture of vehicle purchases in the most recent model year, revealing the latest consumer trends and behavior.

MatchMAKER customized reports are created by matching subscriber names to millions of new state motor vehicle registrations, showing the actual number of subscribers that bought specific new makes and models of cars and

trucks. Delivered as spreadsheet files and as hardcopy, MatchMAKER demonstrates marketplace patterns and behaviors based on aggregate statistics. To protect consumer privacy, the report does not divulge the buying and leasing behaviors of individual consumers.

With every MatchMAKER report, Equifax offers a subscriber study, called a FOCUS report, which provides insights into the demographics, purchasing behavior and lifestyles of magazine and newspaper subscribers. For more information visit www.equifaxmarketingservices.com.

ACNielsen expands Homescan Suite

Schaumburg, Ill.-based ACNielsen U.S. is offering its Homescan Consumer & Shopper Insights Suite, which offers data on consumer behavior across 96 custom-projected retailer trading areas, providing an expanded view of retail shopper behavior. This broader geographic coverage of trading areas is a result of the expansion of the Homescan consumer panel to 125,000 households. The trading areas represent a retailer-defined view of the consumer landscape which provides demographic and shopping behavior reads and fosters alignment for better manufacturer-retailer collaboration. Trading areas feature increased sample sizes when compared with traditional local market views, to enable better coverage of shoppers across the marketplace.

The Consumer & Shopper Insights Suite has also expanded its local market coverage to offer nine new local markets (for a total of 32); released new channel reads including automotive and liquor retailers; and introduced a syndicated reporting sample of 91,500 households. It includes Consumer Facts, which provides brand-level consumer purchase behavior and demographic insights; Channel Facts, for category-level consumer purchase information by channel/account; Account Shopper Profiler, providing demographic and new shopping trip profiles of channel/retailer accounts; and Cross Outlet Facts, which helps users understand shopper loyalty and dollar opportunity for key product group segments. For more information visit www.acnielsen.com.

Arbitron begins PPM rollout

Arbitron Inc., New York, will begin the rollout of the Portable People Meter (PPM) system as its radio ratings service in the top 50 markets. Beginning with Houston in July 2006, Arbitron will start making the change to the Portable People Meter, an electronic audience measurement technology that has been in U.S. market trials since 2001. The PPM will be used in place of the current paper-and-pencil diary method that the company has employed to collect radio audience estimates since 1965.

The rollout schedule the company announced in March would put the Portable People Meter into the top 10 radio markets by the fall of 2008, and into all of the top 50 radio markets two to three years thereafter.

Arbitron believes that the introduction of the Portable People Meter will offer advantages to local-market radio broadcasters and their advertisers including: faster and more frequent delivery of ratings reports; better insights into how people listen to radio; more reliable measures of the total audience reached by a radio station - the PPM indicates that a typical radio station often reaches twice as many listeners compared to current measures of the audience; additional sales opportunities for stations through better measures of the audience to special programming events and during evenings or weekends; more stable audience trends with far less "bounce" from one report to the next; and the ability to report all of radio's new distribution methods: HD Radio, Internet streaming, digital multicasts, podcasting and others. For more information visit www.arbitron.com.

Briefly

New York-based Scarborough Research is offering a free report, "Unbanked Consumers: A Unique Opportunity for Financial Marketers," on its Web site. It can be downloaded at www.scarborough.com/freestudies.php.

Norway-based research software provider FIRM has launched Confirmit Kiosk, a standalone module for its Confirmit research software that allows research agencies to conduct product testing and surveys in malls and shops. Confirmit Kiosk is fully integrated with the Confirmit platform. It can be implemented in both online or offline locations and integrates with Confirmit Reportal, enabling live access to customized reports. For more information visit www.confirmit.com.

20/20 Research Inc., Nashville, Tenn., has opened a new, 9,500-square-foot focus group facility in the Doral area of Miami. Located at 8350 N.W. 52nd Terrace, close to the Doral Resort, the site was selected because of easy access from both Dade and Broward counties and its close proximity to the Miami airport. The facility houses four focus group rooms, each with a client viewing room, separate telephone suite and complete technology and A/V connections.

India-based research firm Pulse has established an online panel of approximately 245,000 Indian consumers. Data from 2005 showed 4.5 percent or approximately 45 million of India's population are now online or Internet-savvy. A majority of Indian Internet surfers are urbanites from major markets such as New Delhi, Mumbai, Calcutta and Chennai. For more information visit www.pulse-group.com.

U.K.-based E-Tabs has launched E-Tabs AutoGraph, designed for users who have to prepare ad hoc PowerPoint presentations and Excel reports. Accepting data from all industry-standard crosstabulation/analysis products, E-Tabs AutoGraph enables the creation of complete PowerPoint presentations containing fully formatted charts and tables. For more information visit www.e-tabs.com.

Seattle-based QuestionPro has enhanced its QuestionPro online survey tool with Spotlight Report, which enables participants in multi-question surveys to see how their answer on each question compares to the aggregated responses of all other survey respondents. For more information visit www.questionpro.com/spotlight-report.

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on March 30 in conjunction with the association's first annual general meeting.

Awards/rankings

Seena Sharp, founder and principal of **Sharp Market Intelligence**, Los Angeles, Calif., is one of three recipients of the 2006 Fellow Award from the Society of Competitive Intelligence Professionals (SCIP). The award annually recognizes up to three SCIP members who have made outstanding contributions to the competitive intelligence profession. The candidates must have completed five years of valued and recognized service to SCIP and they may come from any field, such as government, business or academia.

The 2006 Grand Ogilvy Award was accepted by **Postal Service** representatives for the organization's "Access" campaign, which increased awareness of USPS package shipping products and services. "We knew our small-business customers would take advantage of the convenience of our services through usps.com, but the challenge was building awareness," said Chief Marketing Officer Anita Bizzotto in a press statement. "We successfully did that."

The Advertising Research Foundation Ogilvy Awards are named after advertising executive David Ogilvy, who believed that behind every great advertising campaign is great research.

The Postal Service included television, print, radio and Web advertising, as well as employee awareness efforts. The research, developed in cooperation with the Postal Service's advertising agency Campbell-Ewald and other partners, was the driving force behind the creative work.

Waltham, Mass., research firm **Invoke Solutions** was included in the list of "Cool Vendors" in the Cool Vendors in CRM Marketing and Analytics Report, 2006, published in March by Stamford, Conn., technology research firm Gartner Inc. The companies represented in Gartner's report have developed new delivery models and new ways for their clients to use customer insight and relationships to build better and more profitable businesses.

New accounts/projects

San Francisco research firm **Zoomerang** has announced four new clients using Zoomerang for their business operations: Hairpin Turns, San Francisco; the Hospitality Sales and Marketing Association, McLean, Va.; the NonProfit Times, Morris Plains, N.J.; and WorldWIT, Boulder, Colo.

Zimmerman Advertising, part of the Omnicom Group, has signed a contract for the use of Portable People Meter-based radio audience estimates from New York-based **Arbitron.**

New companies/new divisions/relocations/expansions

Research firm **Millward Brown** has expanded in mainland Europe, opening a new office in Geneva, Switzerland. The firm tapped Sana Carlton to head the new office.

U.K.-based **Research Now** has opened an office in Paris, installing Client Development Director Jean-Luc Daurelle and Client Service Manager Emmanuel Probst in it. The new office will be overseen by Andrew Cooper, managing director of Research Now.

Survey Sampling International (SSI), Fairfield, Conn., has opened an office in Beijing and named Juai Kong (JK) Leong president, SSI Asia, and Bill Zuo director, SSI Asia.

Separately, **SSI-Bloomerce Access Panels** has adopted the name of its parent company, Survey Sampling International, as the corporate name for all its European branches. In addition, SSI-Bloomerce expanded its London and Rotterdam offices and added offices in Madrid, Paris and Frankfurt.

Company earnings reports

For the quarter ended March 31, 2006, **Arbitron Inc.,** New York, reported revenue of $85.1 million, an increase of 7.4 percent over revenue of $79.2 million during the first quarter of 2005. Planned spending on the Portable People Meter and Project Apollo initiatives and the required expensing of share-based compensation, effective January 1, 2006, increased costs and expenses for the first quarter by 20.9 percent, from $44.4 million in 2005 to $53.7 million in 2006. Earnings before interest and income tax expense (EBIT) for the quarter were $29 million, a decrease of 11.2 percent over EBIT of $32.7 million during the comparable period last year. Net income for the quarter was $18.2 million, a decrease of 8.3 percent from $19.8 million for the first quarter of 2005. Net income per share for the first quarter of 2006 was $0.58 (diluted), compared with $0.63 (diluted) for the comparable period last year, a decrease of 7.9 percent.

IMS Health, Fairfield, Conn., reported first-quarter 2006 revenue of $446.2 million, up 9 percent (13 percent constant dollar), compared with revenue of $411 million for the first quarter of 2005. First-quarter 2006 diluted earnings per share on an SEC-reported basis were $0.56, compared with $0.13 in the prior year. Excluding the expensing of stock options, on an adjusted basis, earnings per share were $0.34, a 17 percent increase, compared with $0.29 per share in the same period last year. Including the expensing of stock options, adjusted earnings per share for the first quarter were $0.31, up 7 percent. Net income on an SEC-reported basis was $118.1 million, compared with $30.3 million in the year-earlier quarter. On an adjusted basis, excluding the expensing of stock options, first-quarter net income rose 6 percent to $72.1 million for the 2006 first quarter, compared with net income of $68.1 million in the prior year. Including the expensing of stock options, adjusted net income for the first quarter of 2006 was $65.3 million, down 4 percent.

Operating income in the first quarter of 2006 was $96.7 million on both an SEC-reported basis and adjusted basis (including the expensing of stock options), compared with $96.9 million in the year-earlier period. Excluding the expensing of stock options, adjusted operating income in the 2006 first quarter was $106.4 million, up 10 percent (13 percent constant dollar) over the prior year.

Adjusted results for the 2006 first quarter exclude a net $29.5 million U.S. tax benefit resulting from a favorable audit settlement with the IRS on a legacy tax matter, as well as certain net tax benefits of approximately $21.8 million. First-quarter 2005 results on an adjusted basis exclude a one-time tax charge of $67.1 million related to repatriating $647 million of previously undistributed foreign earnings under the American Jobs Creation Act.

Mountain View, Calif., research firm **CustomerSat Inc.** announced strong revenue growth in its 2006 fiscal year ending March 31, 2006. Revenue in the quarter ending March 31 was up 62 percent over the same quarter in 2005. For the entire fiscal year, revenues were up 35 percent. As of FY2006, CustomerSat extended its consistent profitability to four consecutive years.

2006

Ethnic Research Directory

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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
M	Moderating
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
bcollins@aocresearch.com
www.aocresearch.com
Betty Collins, Co-Owner
Services: DC, FG
African-American

ABC WordExpress Translation & Interpretations*
8306 Wilshire Blvd., Suite 200
Beverly Hills, CA 90211
Ph. 310-260-7700 or 800-570-0700
clients@wordexpress.net
www.wordexpress.net
Services: ST, T

Accent on Research, Inc.*
21021 Devonshire St., #206
Chatsworth, CA 91311
Ph. 866-882-8351(toll free)
susanp@accentonresearch.com
www.accentonresearch.com
Susan Perl, President
Services: DC, FG
African-American, Asian, Hispanic

AFFORDABLE SAMPLES, INC.
Since 1991, Delivering Quality Survey Research Samples

Affordable Samples, Inc.
185 Sound Beach Ave.
Old Greenwich, CT 06870
Ph. 800-784-8016 or 203-637-8563
sales@affordablesamples.com
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. 34)

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

AIM RESEARCH

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

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

AIS Market Research*
1320 E. Shaw, Suite 100
Fresno, CA 93710
Ph. 800-627-8334 or 559-252-2727
jdawson@aismarketres.com
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
ACBR1@aol.com
Jaime Meddy, Field Director
Services: DC, ST
African-American, Hispanic

American Language Services
1950 Sawtelle Blvd., Suite 325
Los Angeles, CA 90025
Ph. 800-951-5020
alan@alsglobal.net
www.alsglobal.net
Alan Weiss, Sales Manager
Services: ST, T
Asian, Hispanic, Middle Eastern

Anderson Analytics, LLC
154 Cold Spring Rd., Suite 80
Stamford, CT 06905
Ph. 203-912-7175
inquiries@andersonanalytics.com
www.andersonanalytics.com
Services: FS, C, M
Asian, Hispanic

Arizona Market Research Services (Br.)
Div. of Ruth Nelson Research Services
10220 N. 31st. Ave., Suite 122
Phoenix, AZ 85051-9562
Ph. 602-944-8001 or 303-758-6424
azmktres@att.net
www.ruthnelsonresearch.com
Lincoln Anderson, Manager
Services: DC, FG, ST
African-American, Asian, Hispanic, Native American
(See advertisement on p. 99)

* Indicates minority-owned firm

Service Codes

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

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

Ask Dallas/Pregunta Dallas
(Division of MMR Consumer Research)
8700 N. Stemmons Fwy., Suite 190
Dallas, TX 75247-3715
Ph. 800-315-TEXX
tveliz@mmrx.com
Tony Veliz, Facility Director
Services: FS, DC, DP, FG, M, ST, T
African-American, Hispanic

Athena Research Group
6700 Indiana Ave., Suite 270
Riverside, CA 92506
Ph. 951-369-0800
lynn@athenamarketresearch.com
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
atkins@atkinsresearchinc.com
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 one 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
bainborrego@adelphia.net
Cris Bain-Borrego
Services: C, M, ST, T
Hispanic

Barraza & Associates*
731 Sequoia Ave.
San Mateo, CA 94403
Ph. 866-385-2696 or 650-458-8925
albarraza@barrazaconsultinggroup.com
www.barrazaconsultinggroup.com
Al Barraza, President
Services: FS, C, DC, M, ST
African-American, Asian, Hispanic

Luther Bernadel*
8305 Donoghue Dr.
New Carrollton, MD 20784
Ph. 301-520-2352
louto@hotmail.com
Luther Bernadel
Services: DP

Bethart Bilingual Research*
7600 S.W. 117 St.
Miami, FL 33156
Ph. 305-255-2170 or 305-588-9007
mbethart@yahoo.com
Marta Bethart
Services: FS, C, ST, T
African-American, Hispanic

Bilingual Moderator*
(formerly Utilis Hispanic)
1001 Avenue of the Americas, 12th Floor
New York, NY 10018
Ph. 212-939-0077
freelancemoderator@yahoo.com
Services: FS, C, DC, DP, FG, M, S, ST, T
Hispanic

Bilingual Research Services
A div. of Eastern Research Services
1001 Baltimore Pike, Suite 208
Springfield, PA 19064
Ph. 610-543-0575 ext. 357
kimberly@easternresearch.com
www.easternresearch.com
Kimberly White, V.P. of Sales
Services: FS, DC, DP
Hispanic
(See advertisement on p. 97)

The Blackstone Group
360 N. Michigan Ave., Suite 1500
Chicago, IL 60601
Ph. 312-419-0400 or 800-666-9847
info@bgglobal.com
http://bgglobal.com
Services:

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

* Indicates minority-owned firm

BRC Field & Focus Services
45 E. Monterey, Suite 100
P.O. Box 13178
Phoenix, AZ 85002-3178
Ph. 602-258-4554 or 800-279-1212
info@brc-field.com
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
info@crmarketsurveys.com
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

C&R Research Services, Inc.
Creative & Response Research Services, Inc.
500 N. Michigan Ave., Suite 1200
Chicago, IL 60611
Ph. 312-828-9200
info@crresearch.com
www.crresearch.com
Brenda Hurley
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)

Rebeca Cantu Helmstetler*
P.O. Box 760
South Fork, CO 81154
Ph. 719-873-5240 or 719-850-8996
rchelmstetler@mindspring.com
Rebeca Cantu Helmstetler, Qual. Consultant
Services: C, M, ST
Hispanic

Castillo & Associates, Inc.*
2400 Fifth Ave., Suite 128
San Diego, CA 92101
Ph. 619-683-3898
info@c-asoc.com
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
dklarquist@cheskin.com
www.cheskin.com
Denise Klarquist, VP Marketing
Services: FS, C
Asian, Hispanic

Chicago Focus
The Focus Network
222 Merchandise Mart Plaza, #240
Chicago, IL 60654
Ph. 312-755-0720
info@chicagofocus.net
www.thefocusnetwork.com
Karey Stiefer, Managing Director
Services: DC, FG
African-American, Hispanic

CIBA Research & Consulting, LLC*
4610 Tiger Lily Way
Marietta, GA 30067
Ph. 770-565-0882 or 678-463-4289
egibson@gociba.com
www.gociba.com
Elvenyia Gibson, President
Services: C, M
African-American, Hispanic

Ruth Nelson Research Services™

Colorado Market Research Services
Div. of Ruth Nelson Research Services
2149 S. Grape St.
Denver, CO 80222-5203
Ph. 303-758-6424
rnncmrs@aol.com
www.ruthnelsonresearch.com
Ruth Nelson, President
Services: DC, DP, FG, ST
African-American, Asian, 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 44 years of experience has given us the edge in working with these specialized groups. Branch office in Phoenix.
(See advertisement on this page)

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

Service Codes

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

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

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

Cunningham Research Group

Cunningham Field & Research Svc., Inc.*
3 Signal Ave., Suite A
Ormond Beach, FL 32174
Ph. 386-677-5644
crgsales@cunninghamresearch.com
www.cunninghamresearch.com
Paul Cunningham, President
Services: FS, DC, DP, FG, ST, T
African-American, Asian, Hispanic

Cunningham Field & Research Services, Inc. provides advanced data collection, interviewing methods, and tabulations, in the field with facilities in over 30 of America's most popular, geographically-dispersed malls. We can provide comprehensive samples of respondents to meet all of your research needs. We have facilities located in ethnic neighborhoods. We are proud to earn a solid reputation based on credibility, reliability and accountability.
(See advertisement on this page)

DataPrompt International*
360 N. Michigan Ave., Suite 1610
Chicago, IL 60601
Ph. 312-423-4100 or 800-468-0419
info@datapromptintl.com
www.datapromptintl.com
Services: DC, DP, FG
African-American, Asian, Hispanic

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

Delve

Delve
11971 Westline Industrial Dr., Suite 200
St. Louis, MO 63146-3224
Ph. 800-325-3338
helpinghand@delve.com
www.delve.com
Services: DC, FG
African-American, Asian, Hispanic

Delve is an innovative data collection partner that fosters natural environments for dialogues between marketers and customers, whether they be face-to-face, voice-to-voice, or technology-based settings like the Web. Nationwide services include: focus groups, central location tests, pre-recruits, taste tests, Web surveys, IVR, telephone interviewing and project management.
(See advertisement on p. 67)

Service Codes

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

Distinctive Marketing, Inc.*
516 Bloomfield Ave.
Montclair, NJ 07042
Ph. 973-746-9114
dmiassociates@verizon.net
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
info@doyleresearch.com
www.doyleresearch.com
Kathleen M. Doyle, President
Services: M
Hispanic

Eastern Research Services
1001 Baltimore Pike, Suite 208
Springfield, PA 19064
Ph. 610-543-0575 ext. 357
kimberly@easternresearch.com
www.easternresearch.com
Kimberly White, V.P. of Sales
Services: FS, DC, DP
Hispanic

ERS conducts more accurate consumer surveys through language-of-choice interviewing. We can conduct thousands of telephone surveys, within a few days, in English and/or Spanish because we have 200 CATI stations staffed with fully dual-speaking bicultural interviewers, supervisors, programmers and executives. Services offered: full-service Hispanic research, telephone data collection, data processing, survey and verbatim data translations, bilingual programming, bilingual interviewing, bilingual recruiting for qualitative studies.
(See advertisement on p. 97)

Ebony Marketing Research, Inc.*
2100 Bartow Ave., Suite 243
Bronx, NY 10475
Ph. 718-320-3220
emr@interport.net
www.ebonymktg.com
Services: FS, C, DC, FG, ST, T
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. 101)

Ebony Marketing Research, Inc. (Br.)*
100 N. Biscayne Blvd., Suite 2906
Miami, FL 33131
Ph. 305-416-0200
emr@interport.net
www.ebonymktg.com
Services: FS, C, DC, FG, ST
African-American, Asian, Hispanic
(See advertisement on p. 101)

Ebony Marketing Research, Inc. (Br.)*
666 11th St. N.W., Suite 730
Washington, DC 20001-4500
Ph. 202-628-4640
emr@interport.net
www.ebonymktg.com/
Services: FS, C, DC, FG, ST
African-American
(See advertisement on p. 101)

Encuesta, Inc.*
4990 S.W. 72nd Ave., Suite 110
Miami, FL 33155-5524
Ph. 800-500-1492 or 305-661-1492
martin.cerda@encuesta.com
www.encuesta.com
Martin G. Cerda, President
Services: FS, C
Hispanic

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

Erlich Transcultural Consultants
11430 Burbank Blvd.
North Hollywood, CA 91601
Ph. 818-623-2425
info@etcethnic.com
www.etcethnic.com
Andrew Erlich, Ph.D., President
Services: FS
African-American, Asian, Hispanic, Middle Eastern, Native American

Fieldwork Network
111 E. Wacker Dr., Suite 220
Chicago, IL 60601
Ph. 800-TO-FIELD or 800-863-4353
info@network.fieldwork.com
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 Inside Back Cover)

Fieldwork Atlanta, Inc.
200 Galleria Pkwy., Suite 1600
Atlanta, GA 30339
Ph. 770-988-0330
info@atlanta.fieldwork.com
www.fieldwork.com
Bette Hayden or Sharonda Simmons or, Carolyn Lee
Services: DC, FG
African-American
(See advertisement on Inside Back Cover)

Fieldwork Boston, Inc.
800 South St., Suite 105
Waltham, MA 02453
Ph. 781-899-3660
info@boston.fieldwork.com
www.fieldwork.com
Maria Kuschel
Services: DC, FG
Asian, Hispanic
(See advertisement on Inside Back Cover)

Fieldwork Chicago-Downtown, Inc.
111 E. Wacker Dr., Suite 200
Chicago, IL 60601
Ph. 312-565-1866
info@chicagolab.fieldwork.com
www.fieldwork.com
Stacey Zontini
Services: DC, FG
African-American, Hispanic
(See advertisement on Inside Back Cover)

* Indicates minority-owned firm

Fieldwork Chicago-North at Harmswood
5750 Old Orchard Rd., Suite 500
Skokie, IL 60077
Ph. 847-583-2911 or 800-851-3317
info@chicago.fieldwork.com
www.fieldwork.com
Sanford Adams
Services: DC, FG, T
African-American, Asian, Hispanic
(See advertisement on Inside Back Cover)

Fieldwork Chicago-O'Hare
8420 W. Bryn Mawr Ave., Suite 650
Chicago, IL 60631
Ph. 773-714-8700
info@ohare.fieldwork.com
www.fieldwork.com
Services: DC, FG
African-American, Asian, Hispanic
(See advertisement on Inside Back Cover)

Fieldwork Chicago-Schaumburg
1450 E. American Lane, Suite 1880
Schaumburg, IL 60173
Ph. 847-413-9040
info@schaumburg.fieldwork.com
www.fieldwork.com
Karyn Picchiotti
Services: DC, FG
African-American, Hispanic
(See advertisement on Inside Back Cover)

Fieldwork Dallas, Inc.
15305 Dallas Pkwy., Suite 850
Addison, TX 75001-4637
Ph. 972-866-5800
info@dallas.fieldwork.com
www.fieldwork.com
Freddi Wayne
Services: DC, FG
African-American, Hispanic
(See advertisement on Inside Back Cover)

Fieldwork Denver, Inc.
Wells Fargo Center
1700 Lincoln St., Suite 2650
Denver, CO 80203
Ph. 303-825-7788
info@denver.fieldwork.com
www.fieldwork.com
Nikki Darre
Services: DC, FG
Hispanic
(See advertisement on Inside Back Cover)

Fieldwork East, Inc.
2 Executive Dr., Suite 800
Fort Lee, NJ 07024
Ph. 201-585-8200 or 877-993-4353
info@ftlee.fieldwork.com
www.fieldwork.com
Sandy Starr
Services: DC, FG
African-American, Hispanic
(See advertisement on Inside Back Cover)

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

Fieldwork Minneapolis, Inc.
7650 Edinborough Way, Suite 700
Edina, MN 55435
Ph. 952-837-8300
info@minneapolis.fieldwork.com
www.fieldwork.com
Denice Duncan
Services: DC, FG
African-American, Asian, Hispanic
(See advertisement on Inside Back Cover)

Fieldwork New York at Westchester
555 Taxter Rd., Suite 390
Elmsford, NY 10523
Ph. 914-347-2145
info@westchester.fieldwork.com
www.fieldwork.com
Tamara Curtis, President
Services: DC
African-American
(See advertisement on Inside Back Cover)

Fieldwork Phoenix at Scottsdale, Inc.
6263 N. Scottsdale Rd., Suite 380
Scottsdale, AZ 85250
Ph. 480-443-8883
info@phoenix.fieldwork.com
www.fieldwork.com
Vicki Knoell
Services: DC, FG
Hispanic
(See advertisement on Inside Back Cover)

Fieldwork Phoenix, Inc.
7776 Pointe Pkwy. W., Suite 290
Phoenix, AZ 85044
Ph. 602-438-2800
info@phoenix.fieldwork.com
www.fieldwork.com
Vicki Knoell
Services: DC, FG
Hispanic
(See advertisement on Inside Back Cover)

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

Fleischman Field Research
250 Sutter St., Suite 200
San Francisco, CA 94108-4403
Ph. 800-277-3200 or 415-398-4140
ffr@ffrsf.com
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
spence@focusandtesting.com
www.focusandtesting.com
Spence Bilkiss, President
Services: DC, FG, ST, T
African-American, Asian, Hispanic, Middle Eastern, Native American

Focus Groups of Cleveland
2 Summit Park Dr., Suite 225
Cleveland, OH 44131
Ph. 216-901-8075 or 800-950-9010
research@idirectdata.com
www.focusgroupsofcleveland.com
Betty Perry, Director
Services: FG
African-American, Hispanic

In business over 40 years, we are Greater Cleveland's only centrally located state-of-the-art three-suite full-service focus group facility/large multi-purpose room; designed to serve today's marketing needs. Specialize in consumer, litigation, executive and medical research. Over 5,500 square feet of comfort and technology with on-site recruiting to conduct focus groups, IDIs, taste tests, pre-recruits and entire project management in an upscale environment.
(See advertisement on p. 70)

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

Established 1996. Specialize in Hispanic qualitative consumer research - focus groups, triads, dyads, IDIs, in-homes, shop-alongs and ethnography. Beatriz - a psychologist, Guy - a marketing, advertising and research professional, each has 25+ years of 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.
(See advertisement on p. 60)

Service Codes

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

Focus On Miami*
8603 S. Dixie Hwy., Suite 218
Miami, FL 33143
Ph. 305-661-8332
focusom@bellsouth.net
www.focusonmiami.com
Lisa Switkes, President
Services: FS, C, DC, FG, M, ST
African-American, Hispanic

Focus World International, Inc.*
146 Hwy. 34, Suite 100
Holmdel, NJ 07733
Ph. 732-946-0100
gary@focusworldint.com
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
krooney@focuscope.com
www.focuscope.com
Kevin Rooney, President
Services: DC, FG
African-American, Hispanic

GC Global, LLC
25 Eighth Ave.
Brooklyn, NY 11217
Ph. 718-623-2266
main@gcglobalreseach.com
www.gcglobalresearch.com
Services: FS, C, DC
Asian, Hispanic

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

GENESYS Sampling Systems has the experience and resources to help you define and reach any low-incidence target group. Ethnic sampling capabilities include geo-targeted RDD (random digit dialing), listed surname, dual frame and other options. We will outline your alternatives in balancing representational accuracy and data collection costs. GENESYS-CSS wireless number screening and sample/list enhancement services also available.
(See advertisement on p. 79)

The Golden Door*
200 W. 20th St., #1208
New York, NY 10011
Ph. 212-647-9181
eleanorew@goldendoor.net
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
information@greenfieldgroup.com
www.greenfieldgroup.com
Barbara Clancy, Sr. Dir. Client Svcs.
Services: FS, M
African-American, Hispanic

Herrera Communications*
28751 Rancho California Rd., Suite 201
Temecula, CA 92590
Ph. 951-676-2088 or 877-676-2088
eherrera@herrera-communications.com
www.herrera-communications.com
Enrique Herrera, Vice President
Services: FS, DC, FG, M, ST, T
Hispanic

Hispanic America, Inc.*
12 Roszel Rd., Suite A-103
Princeton, NJ 08540
Ph. 609-333-1400
info@HispanicAmerica.com
www.HispanicAmerican.com
Dr. JM Acuna, President
Services: FS, C, DC, FG, S
Hispanic

Hispanic Focus Unlimited*
303 W. Park Ave.
Pharr, TX 78577
Ph. 956-797-4211
hispanicfocusunltd@aol.com
www.hispanicfocusunltd.com
Ruben Cuellar, President
Services: FS, C, DC, FG, M, ST, T
Hispanic

Hispanic Perspectives*
64 Digital Dr.
Novato, CA 94949
Ph. 415-883-1188
info@qar.com
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. 212-551-7818 or 718-896-3965
anorti@aol.com
Ana Ortiz, President
Services: C, DC
Hispanic

Hispanic Research Consultants
13747 Montfort Dr., Suite 333
Dallas, TX 75240
Ph. 972-450-8400
rhernandez@hispanicresearchconsultants.com
www.hispanicresearchconsultants.com
Rafael Hernandez, Vice President
Services: FS, C
African-American, Hispanic

Hispanic Research Consultants provides in-depth insight and direction for Hispanic marketing and Hispanic marketing research with extensive knowledge and experience with the Hispanic/Latino culture and the effects of acculturation and country of origin. The firm is directed by Rafael Hernandez, former Director of Marketing for Fiesta Foods and Research Manager for Exxon-Mobil where he did research in the U.S., Central and South

* Indicates minority-owned firm

America and the Caribbean. We offer large bilingual telephone and in-person interviewing staff and focus group facilities in five of the top Hispanic cities (Los Angeles, Dallas, Houston, Chicago and New York) and a monthly omnibus survey. We have professionally trained moderators on staff and a host of proprietary models on promotion, customer satisfaction, pricing and more.
(See advertisement on this page)

Hispanic Research Inc.
1 Springfield Rd.
East Brunswick, NJ 08816
Ph. 732-613-0060
info@hispanic-research.com
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 opposite page)

House of Marketing Research*
2555 E. Colorado Blvd, Suite 205
Pasadena, CA 91107
Ph. 626-486-1400
amy@hmr-research.com
www.hmr-research.com
Amy Siadak
Services: FS, 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
pmiller@huntermillergroup.com
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
research@imagesusa.net
www.imagesusa.net
Juan Quevedo, Director Market Research
Services: FS, C, DC, DP, FG, M, ST
African-American, Asian, Hispanic, Middle Eastern, Native American

Informa Research Services, Inc.
26565 Agoura Rd., Suite 300
Calabasas, CA 91302
Ph. 800-848-0218
inquiries@informars.com
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.
375 Corporate Dr. S., Suite 100
Seattle, WA 98188
Ph. 800-848-0218
inquiries@informars.com
www.informars.com
Jackie Weise, Exec. Vice President
Services: FS, C, DC, DP, FG, M, S, ST, T
Asian, Hispanic, Native American

Informa Research Services, Inc.
420 Lexington Ave., #615
New York, NY 10170
Ph. 800-848-0218 or 212-889-5941
inquiries@informars.com
www.informars.com
Brian Richards, SVP, Business Development
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Ph. 303-980-1909 or 303-980-2262
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(See advertisement on p. 59)

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stacey@insightresearch.biz
www.insightresearch.biz
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New York, NY 10010
Ph. 212-929-9072 or 212-929-5115
mark@theinsightworks.net
www.theinsightworks.net
Services: FS, C
African-American, Asian, Hispanic, Middle Eastern, Native American

Insights Marketing Group, Inc.*
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mhalberstam@isacorp.com
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rbrooks@ipcgroup.us
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Rhoda Brooks, Partner
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JRH Marketing Services, Inc.*
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New York, NY 11101
Ph. 718-786-9640
jrobharris@cs.com
J. Robert Harris, II, President
Services: FS, C, M
African-American, Asian, Hispanic, Middle Eastern, Native American

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

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

Kiyomura-Ishimoto Associates*
1906 18th Ave.
San Francisco, CA 94116-1246
Ph. 415-566-3603
norm@kiassociates.com
www.kiassociates.com
Norman P. Ishimoto, President
Services: FS, C, DC, M, ST
Asian, Hispanic

Latin Facts Research, Inc.
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Panorama City, CA 91402
Ph. 818-986-4820
bonnie_ponaman@latinfactsresearch.com
www.latinfactsresearch.com
Services: FS, DC, FG, M
Hispanic

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Cincinnati, OH 45242
Ph. 513-891-1430
rob.hanson@laverdadmarketing.com
www.laverdadmarketing.com
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African-American, Hispanic

Leibowitz Market Research Associates
GroupNet Charlotte
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Charlotte, NC 28273-3335
Ph. 704-357-1961
info@leibowitz-research.com
www.leibowitz-research.com
Karen Johnson, Senior Project Manager
Services: DC, FG
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dsackman@lrwonline.com
www.lrwonline.com
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Services: FS, M
Asian, Hispanic

Lighthouse Research and Development
1277 W. 12600 South, Suite 301
Salt Lake City, UT 84065
Ph. 801-446-4000
janderson@go-lighthouse.com
www.go-lighthouse.com
Joe Anderson, Dir. Business Dev.
Services: FS, DC, DP, M
Hispanic

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13935 S.W. 102 Court
Miami, FL 33176
Ph. 305-232-5002
jimloretta@bellsouth.net
www.lorettagroup.com
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Services: FS, M
Hispanic

LPM Market Research Services
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Stamford, CT 06905
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focus3003@aol.com
Services: DC
African-American, Asian, Hispanic

Luth Research
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San Diego, CA 92101
Ph. 619-234-5884
info@luthresearch.com
www.luthresearch.com
Roseanne Luth, President

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African-American, Asian, Hispanic, Middle Eastern

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Rolling Meadows, IL 60008
Ph. 847-397-1513
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
mari.h@ix.netcom.com
www.marihispanic.com
Lance L. Lindemann
Services: DC, M, ST
Hispanic

Market Research Dallas
2723 Valley View Lane, Suite 100
Dallas, TX 75234
Ph. 972-239-5382
mail@marketresearchdallas.com
www.marketresearchdallas.com
Gail Airoldi
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Los Angeles, CA 90064
Ph. 310-312-1717
research@markmatrix.com
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Services: FS, M
Hispanic

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joyceg@marsresearch.com
www.marsresearch.com
Joyce Gutfreund, Executive Vice President
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www.mdiis.com
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Services: DC, S, ST, T
Hispanic

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Services: FS, C, FG, M, ST, T
African-American, Hispanic

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Ph. 305-716-4236
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www.medimix.net
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African-American, Hispanic

Meneses Research & Associates*
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info@menesesresearch.com
www.menesesresearch.com
Walter Meneses
Services: FS, C, DC, M
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Metropolis Research
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www.metropolisresearch.com
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Ph. 863-427-4434
arivera@moderatorsetc.com
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www.mrsi.com
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Asian, Hispanic, Middle Eastern

Multicultural Insights, Inc.*
4130 Aurora St., Suite F
Coral Gables, FL 33146
Ph. 305-445-2211
svidal@multicultural-insights.com
www.multicultural-insights.com
Sylvia Nieto-Vidal, Managing Partner-Operations
Services: FS, DC, DP, M, ST, T
African-American, Hispanic

Multicultural Marketing Consulting Group
(Communication Research & Consulting)
15421 Lake St. Ext.
Minnetonka, MN 55345-1914
Ph. 952-933-6825
ahmedia2000@mmcommunication.com
www.mmcommunication.com
Ahmed Abdelaal, Lead Consultant
Services: C, DP, ST
Middle Eastern

Multicultural Solutions, Inc.
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Ph. 310-378-2388
huafu@multicultural-solutions.com
www.multicultural-solutions.com
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African-American, Asian, Hispanic

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Winston-Salem, NC 237104
Ph. 336-765-8407
bern_murphy@bellsouth.net
Bernadette Murphy
Services: FS, C, DC, DP, M
African-American

National Opinion Research Services
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Miami, FL 33172
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Daniel Clapp, President
Services: DC, DP, FG, S, ST, T
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www.thefocusnetwork.com
Nancy Opoczynski
Services: FG
African-American, Asian, Hispanic, Middle Eastern, Native American

OmniTrak Group, Inc.*
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841 Bishop Street
Honolulu, HI 96813
Ph. 808-528-4050
aellis@omnitrakgroup.com
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
Ph. 301-441-4660
info@OMRdc.com
www.OMRdc.com
Jill L. Siegel, President
Services: DC, FG
African-American

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OneBrand
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Ph. 310-382-6589
rodney.tanner@onebrand.biz
Rodney D. Tanner
Services: C, M, ST
Hispanic

Opinion Access Corp.*
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www.opinionaccess.com
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African-American, Asian, Hispanic

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surveys@pmrresearch.com
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Hispanic

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npphase3@JPS.net
Martha Mogyorossy, Director Field Services
Services: DC, ST
Hispanic

Pioneer Marketing Research
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Ph. 770-455-0114
btyner@pioneer.bz
www.pioneer.bz
Bill Tyner, President
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African-American, Asian, Hispanic

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swaransaxena@gmail.com
www.pragmaticsolutions-mktg.com
Swaran L. Saxena, President
Services: FS, C
Asian

Precision Research Inc.
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jmuller@precisionresearchinc.com
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Probe Market Research, Inc.
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Services: FS, C, M, S
African-American, Asian, Hispanic, Middle Eastern

Pueblo Research Associates, Inc.
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Ph. 520-623-9442
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Asian

Qualitative Insights
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Sherman Oaks, CA 91403
Ph. 818-988-5411
lginiewicz@q-insights.com
www.q-insights.com
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Maryanne Livia, Vice President
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Research Data Design, Inc.
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Portland, OR 97239
Ph. 503-223-7166
info@rdd.info
www.rdd.info
Services: DC, DP, FG, ST, T
African-American, Hispanic

Research Explorers*
1111 New Trier Court
Wilmette, IL 60091
Ph. 847-853-0237
lisa@researchexplorers.com
www.researchexplorers.com
Lisa Gaines McDonald, Principal
Services: C, M
African-American

Reyes Research*
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Ventura, CA 93003
Ph. 805-278-1444
arvind@reyesresearch.com
www.reyesresearch.com
Arvind Datta
Services: DC, FG, M, ST, T
Hispanic

Rife Market Research, Inc.*
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Miami, FL 33169
Ph. 305-620-4244
RIFEA@aol.com
www.rifemarketresearch.com
Mary Rife, President
Services: DC, FG, M, ST
African-American, Hispanic, Native American

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Rincon & Associates*
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Dallas, TX 75206
Ph. 214-750-0102
info@rinconassoc.com
www.rinconassoc.com
Dr. Edward T. Rincon, President
Services: FS, C, DC, DP, M, S, ST, T
African-American, Asian, Hispanic

Ruth Nelson Research Services - Arizona
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Phoenix, AZ 85051-9562
Ph. 602-944-8001 or 303-758-6424
azmktres@att.net
www.ruthnelsonresearch.com
Lincoln Anderson, Manager
Services: DC, FG, ST
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(See advertisement on p. 99)

Ruth Nelson Research Services-Colorado
2149 S. Grape St.
Denver, CO 80222-5203
Ph. 303-758-6424
rnncmrs@aol.com
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Ruth Nelson, President
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African-American, Asian, Hispanic, Native American
(See advertisement on p. 99)

S I S International Research, Inc.
Worldwide Headquarters
7 East 20th St., 4th Floor
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Ph. 212-505-6805
research@sisinternational.com
www.sisinternational.com
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African-American, Asian, Hispanic, Middle Eastern, Native American

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rminer@sachsinsights.com
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Robert Miner, President
Services: FG, M
African-American

San Jose Focus
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www.thefocusnetwork.com
Heidi Flores, President
Services: FG
Asian, Hispanic

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www.savitzfieldandfocus.com
Services: DC, FG
African-American, Hispanic
(See advertisement on p. 105)

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Edison, NJ 08837
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www.seaportsurveys.com
Andrea Waller, President
Services: DC, FG
African-American, Asian, Hispanic, Middle Eastern

SIL Group
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Ph. 561-526-3200
sil@silgroup.net
www.silgroup.net
Timm Sweeney
Services: FS, C, DC, DP, M, S, ST, T
Hispanic

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Ph. 212-863-4500
info@smrb.com
www.smrb.com
Chris Wilson, President and COO
Services: FS, C, DC, ST
Hispanic

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(See advertisement on p. 65)

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regular discount store, super-sized grocery store, super discount store.) Twenty-three percent of women grocery shoppers 18-34 cited a super discount store compared to 12 percent of women in the same category who visited a super-sized grocery store. Among women grocery shoppers 35-49, 21 percent indicated they had visited a super discount store, compared to 16 percent who shopped at super-sized grocery stores.

Twenty-four percent of women grocery shoppers 18-34 said they had visited a super discount store most often to purchase perishable products (such as meat, produce, dairy or bakery items), compared to 17 percent in the same age group who visited a super-sized grocery store.

You say deli, I say bakery

In addition to the meat and produce departments, respondents were asked to cite two other departments that most influence where they choose to buy groceries. Thirty-three percent of men 18-34 said the deli is the most important department to consider. Other consumers leaned toward the bakery department: 26 percent of women grocery shoppers and 26 percent of men grocery shoppers aged 35-49 tabbed it as most important. Only 9 percent of women and 7 percent of men 18-34 labeled the canned goods department as a prime influence. | Q

classified ads

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By Joseph Rydholm
Quirk's editor

However they can, grocery shoppers just want to save money

Would you prefer to save now or save later? That was one of the questions put to grocery shoppers by Baltimore marketing firm Vertis as part of its Customer Focus 2006: Grocery study. Just under half (49 percent) of the adults queried said they prefer a discount on specific products during each store visit, compared to 34 percent who would rather accumulate points for a larger reward or payoff at stores that offer a frequent-buyer or loyalty card program.

Fifty-one percent of professional/white-collar adults would prefer a discount on specific products during each visit, compared to 46 percent of blue-collar adults surveyed. Of Baby Boomers, 51 percent prefer immediate discounts on specific products or services, compared to 45 percent of Generation X (1965-1976) consumers. Forty-two percent of Hispanic consumers prefer to accumulate points for a larger reward or payoff.

The survey of 3,000 adults was conducted via phone and Web in August and September 2005. Respondents were asked which one type of media most influenced their buying decisions. Among men 18-34, TV (25 percent), advertising inserts/circulars (18 percent) and the Internet (17 percent) topped the list. Among men 35-49, the top three were inserts/circulars (32 percent), TV (17 percent) and newspaper ads (16 percent). For women 18-34 the breakdown was: inserts/circulars (31 percent), TV (24 percent) and newspaper ads (11 percent). For women 35-49: inserts/circulars (40 percent), TV (20 percent) and newspaper ads (16 percent).

Other tidbits:

- The influence of inserts among women 50+ has grown: In 2006 33 percent said inserts had the most influence, up from 28 percent in 2004.
- Eighty-four percent of grocery insert readers use circulars to compare prices, while 52 percent use them to decide where to shop for groceries.
- And among male weekday newspaper readers who are 50+, weekday advertising insert readership increased to 68 percent in 2006 from 52 percent in 2002.

Still clipping coupons

The old-fashioned paper coupon is alive and well, according to the study. Of the grocery ad insert readers surveyed, 51 percent of men 35-49 said they regularly use coupons they receive from grocery advertising inserts or circulars, compared to 45 percent of women in the same age group. Of the women aged 50 and over who said they were ad insert readers, 36 percent said they occasionally use coupons they receive from grocery advertising inserts or circulars, compared to 30 percent of men 50+ in the same category. Twenty-seven percent of men and 23 percent of women aged 18-34 who are grocery ad insert readers rarely use coupons they receive from grocery advertising inserts or circulars.

Some questions looked at the types of stores shoppers prefer for different types of foodstuffs. Respondents were asked, "In the past two weeks, other than at a traditional grocery store, what type of store did you visit most often to purchase non-perishable products, such as rice, pasta, canned goods, cereals etc.?" (Choices included drug store, convenience store, dollar store, wholesale/warehouse club,

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