QUIRK'S

Marketing Research Review

JUNE 2009

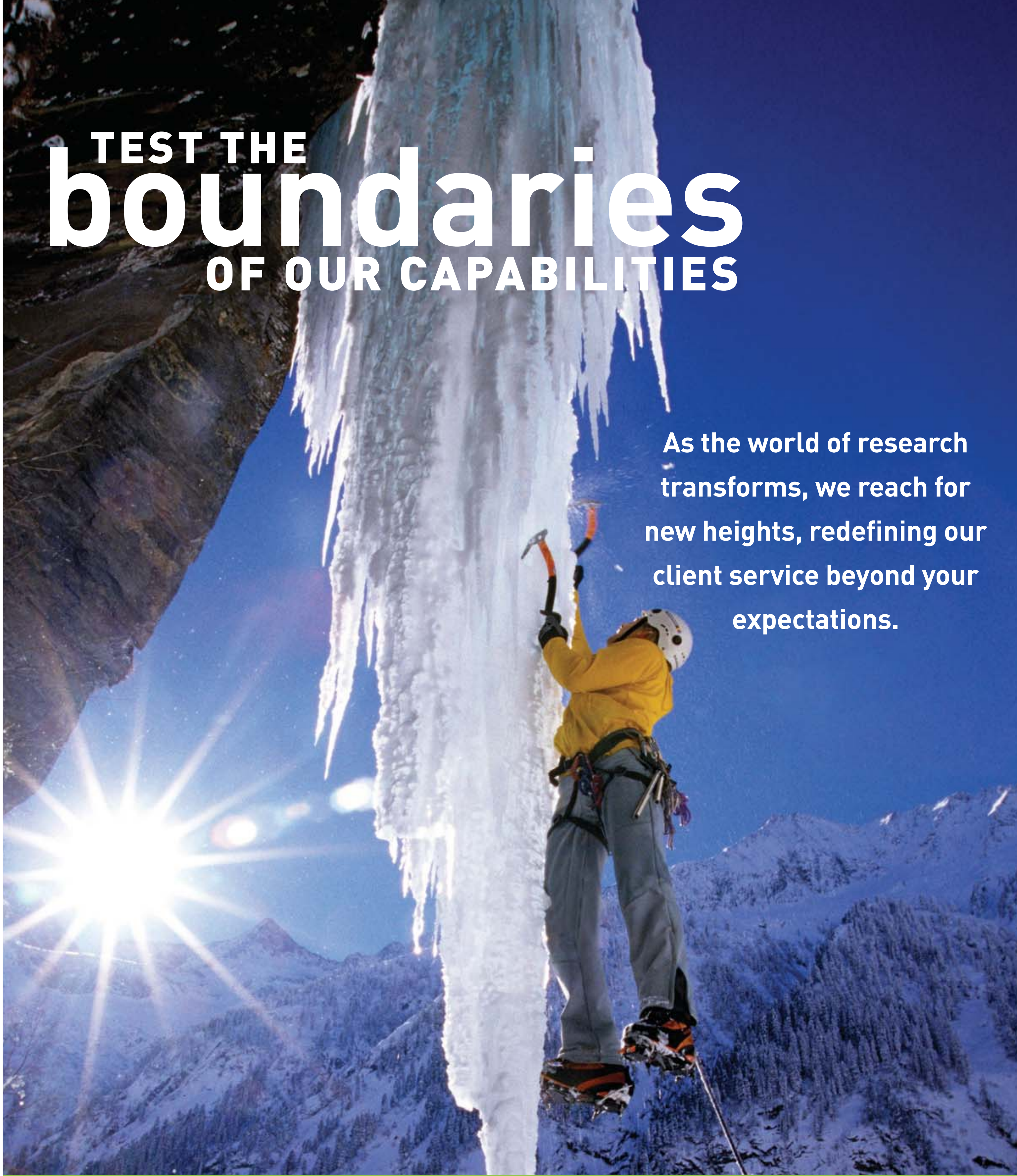
How accurate is your physician survey data?

Also...

> Conducting qualitative with disease sufferers

> Social media and multicultural consumers

> Research tips for hard times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Quirk's Marketing Research Review
Volume XXIII Number 6

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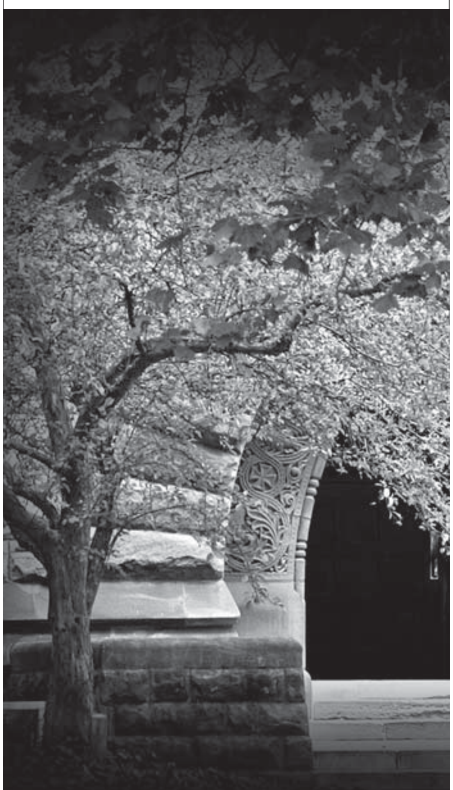

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101 | Practical Marketing Research $2,195

New York	Jan 6-8
Baltimore	Feb 2-4
San Francisco	Mar 10-12
Chicago	Apr 20-22
Philadelphia	May 19-21
Cincinnati	Jun 23-25
New York	Jul 27-29
Los Angeles	Sep 28-30
Chicago	Oct 27-29
Atlanta	Dec 7-9

104 | Designing Effective Questionnaires: A Step by Step Workshop $2,195

New York	Jan 20-22
Los Angeles	Feb 24-26
Chicago	Apr 28-30
Baltimore	Jun 9-11
San Francisco	Aug 18-20
Cincinnati	Oct 20-22
Boston	Dec 1-3

106 | Online Research Best Practices & Innovations $1,795

New York	Feb 18-19
San Francisco	Jul 7-8
Chicago	Oct 6-7

202 | Focus Group Moderator Training $2,695

Cincinnati	Jan 27-30
Cincinnati	Mar 10-13
Cincinnati	Apr 21-24
Cincinnati	Jun 2-5
Cincinnati	Jul 14-17
Cincinnati	Aug 25-28
Cincinnati	Sep 28-Oct 1
Cincinnati	Nov 17-20

203 | Specialized Moderator Skills for Qualitative Research Applications $2,695

Cincinnati	Mar 16-19
Cincinnati	Jul 20-23
Cincinnati	Oct 27-30

207 | Qualitative Technology Workshop: Recording, Reporting & Delivering $1,795

Chicago	May 7-8
San Francisco	Sep 17-18

301 | Writing & Presenting Actionable Marketing Research Reports $2,195

New York	Jan 28-30
Los Angeles	Mar 25-27
Chicago	May 13-15
Baltimore	Jul 21-23
Cincinnati	Sep 2-4
San Francisco	Nov 4-6

501 | Applications of Marketing Research $1,795

Baltimore	Feb 5-6
Chicago	Apr 23-24
New York	Jul 30-31
Los Angeles	Oct 1-2
Atlanta	Dec 10-11

502 | New Product Research: Laying the Foundation for New Product Success $1,795

New York	Mar 17-18
San Francisco	Jun 16-17
Chicago	Sep 22-23

504 | Advertising Research $1,795

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Chicago	Sep 24-25

505 | Market Segmentation & Positioning Research $2,195

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506 | Customer Satisfaction & Loyalty Research: Managing, Measuring, Analyzing & Interpreting $2,195

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Cincinnati	Aug 31-Sep 1
San Francisco	Nov 2-3

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Los Angeles	Mar 31-Apr 3
Chicago	Jun 2-5
San Francisco	Aug 11-14
Cincinnati	Oct 13-16
Baltimore	Dec 1-4

603 | Practical Multivariate Analysis $2,595

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San Francisco	Sep 22-25
Baltimore	Dec 8-11

605 | Practical Conjoint Analysis & Discrete Choice Modeling $2,195

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New York	Aug 4-6
San Francisco	Nov 17-19

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San Francisco	Jun 25-26
Chicago	Oct 22-23

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in case you missed it...

news and notes on marketing and research

Can Starbucks reconcile 'value' and 'experience'?

Starbucks (and its $4 cup of coffee) is rethinking its image and strategy during tough economic times as consumers flee to the McDonald's McCafes and Dunkin' Donuts of the world to get a caffeine fix without the extravagance. With same-store sales down 3 percent in 2008, Starbucks coffee-lovers may see an uptick in lower-priced coffee drinks, Starbucks breakfast combos and - perhaps if Starbucks proves extraordinarily savvy - instant coffee.

According to Dan Mitchell's March 22, 2009, article "Starbucks Faces Existential Crisis In Downturn" in *The Washington Post*, the Seattle-based coffee chain has been closing stores by the hundreds and laying off workers by the thousands, and data shows people started skipping Starbucks even before the economy bottomed out. Before the recession, Starbucks drove its business through expansion. But in the end, Starbucks went too far, resulting in "watering down the Starbucks experience," as chairman and CEO of Starbucks Howard Schultz put it, and turning off customers.

But the "Starbucks experience" (store ambience, personalized service, etc.) is a tough sell during a deep recession, so Schultz is trying to make the Starbucks experience a "value" proposition. The two concepts might seem at odds, but Schultz seems to be pulling it off. The introduction of a $3.95 breakfast combo offers the same items Starbucks was already selling but for about a dollar less. The combo may help Starbucks fend off the gigantic quick-service competitors without directly competing on price.

Similarly, Via, the chain's instant coffee product, is Starbucks' attempt at making instant coffee seem upscale and at taking a big chunk of the $17 billion spent on instant coffee every year. The product is still in its naissance, but the consensus seems to be that while it's not as good as the real thing, it's superior to most instant coffees. Via is also a major part of Starbucks' international strategy. Globally, instant coffee makes up about 40 percent of the coffee market.

Home-owners do it themselves, with some help

More and more Americans are taking it upon themselves to do what needs to be done around the house. Perhaps they're taking the DIY route because selling the house isn't an option, or because contracting the work is too expensive, or maybe it's because they just plain like it. According to research from Lowe's, Mooresville, N.C., and as reported in Sarah Mahoney's April 15, 2009, Marketing Daily article "Lowe's: People Love Their DIY Moments," 35 percent concede the main reason they're DIY-ing is to save money, but a surprising 32 percent gave "pleasure" as the main motivator.

Eighty-four percent of homeowners are planning a lawn or garden project in the next 12 months, 82 percent plan to do interior painting, 65 percent will paint exteriors, 56 percent are putting in new flooring and 55 percent are either remodeling or adding a bathroom. That's good news for retailers Lowe's and the Home Depot, which have been pummeled by the slump in the housing market. And while many laud the remodeling sector of the business as recession-proof, it isn't: Total sales in the home-improvement segment of the market fell 4.5 percent to $290.5 billion in 2008, according to the Home Improvement Research Institute, Tampa, Fla., which is predicting an even sharper decline of 6.5 percent for this year.

Lowe's survey also noted an increase in people combining DIY with do-it-for-me. Among those who are planning kitchen remodeling, for example, 37 percent say that while they will hire professionals to do some part of the job, they will handle some aspect of the project themselves. The two tasks least-embraced by the DIY crowd? Installing carpets and replacing roofs.

A study from Harvard University's Joint Center for Housing Studies does find that the downturn in this segment of the economy will be less pronounced than the housing market overall. "Lower mobility rates imply not only lower levels of improvement spending, but also changes in spending priorities," the study says. "With home prices falling, owners are shifting from high-end discretionary improvements to those that maintain the structural integrity and efficient functioning of their homes, as well as generate cost savings."

Among the growth spots: increasing demand for green improvements; upgrades to the nation's aging rental stock; and the growing population of immigrant homeowners, whose home-improvement spending has been growing at about 13 percent a year since 2000, compared to 7 percent of native-born households.

The qualitative art in armpit science

Convincing guys to share their feelings about deodorant is no easy task, considering that most men aren't aware that they even have feelings about deodorant. But in an effort to better position Cincinnati-based Procter & Gamble's deodorant line Old Spice to fend off competitors, this is exactly what Tim Nolan, senior scientist for P&G, asked male focus respondents to do.

In 2008, men's deodorant accounted for more than $1.2 billion in sales in the U.S., and qualitative research (namely focus groups and shop-alongs) proved to be a cornerstone for P&G as the company worked to create and launch a high-performance brand extension of Old Spice to put a fresh spin on the legendary marketing techniques of deodorant, according to Evan West's article "Smells Like a Billion Bucks" for *Fast Company*'s May 2009 issue.

The marketing team was sent out to tag along with guys on deodorant-shopping trips, and Nolan asked a focus group to explain what they didn't like about their current deodorants by composing good-bye letters to them. (One subject's letter unfavorably compared his antiperspirant's texture to "the sugar coating on a glazed donut.") He discovered that while most guys wanted the wetness protection that dry, solid antiperspirant sticks offered, many didn't use them because the waxy residue was uncomfortable and left white streaks on their clothing.

Armed with this insight, P&G chemist and research fellow David Swaile discovered a means of embedding liquid molecules of the kind found in invisible-solid deodorants into the waxy material found in typical antiperspirants. The breakthrough, as Swaile puts it, is akin to "making water not feel wet." Nolan ran the promising new formula, aptly named Ever Clear, through some product demos, which included rubbing it onto black cloth and then studying it under black light, as well as scrutinizing tight-focus photos to see how it looked when applied to men's hairy armpits. When Nolan asked his focus group to write love letters to the new product, one aspiring poet asked, "Can it really be true, that such a product exists as you? If you're willing to give it a shot, I'll tell my friends to use you a lot."

Newspapers - in some form - still part of most Americans' lives

Rochester, N.Y., is the top U.S. city for newspaper readership, and a higher percentage of adults in Rochester are reading newspapers in print or online than in any other U.S. market, according to Integrated Newspaper Audience (INA) data from Scarborough Research, New York. The INA of Rochester is 87 percent, meaning that 87 percent of adults in the Rochester area read a printed newspaper, a newspaper's Web site or

both during the past week.

Following closely behind are Cleveland and Buffalo, N.Y., each with an INA of 86 percent. In the 81 local markets measured by Scarborough, 75 percent of adults read the newspaper weekly in print or online.

"This data begs the question: Is the constant negative news feed on the industry warranted when newspapers are actually being read by three-fourths of the adult population? When you look at audience data, it seems irrational that advertisers are leaving newspapers because the numbers speak for themselves," says Gary Meo, senior vice president, print and digital media, Scarborough Research. "If you are an advertiser seeking to reach a large, upscale audience, newspapers are among the most effective media for doing so. Further, readership rates vary market by market and frequently defy local generalizations about declining audience. In order to obtain an accurate, in-depth portrait of newspaper health, in print and online, one needs to drill down to this local level."

More than half of the adult population reads the newspaper, even in those cities with lower-than-average INA. For example, in Bakersfield, Calif., and Las Vegas (the two lowest-ranking markets for INA), 59 percent of the adult population read a printed newspaper, a newspaper's Web site or both during the past week. For more information visit www.scarboroughresearch.com.

Bilingual Hispanics pick and choose best of both worlds

U.S. Hispanics, regardless of whether their language preference at home is English (43 percent) or Spanish (52 percent), are turning to both languages to meet their needs. Mixing languages does not complicate the lives of U.S. Hispanics who are living with ease in both worlds. Hispanics' skill to utilize either language is an advantage in functioning in U.S. institutions while preserving their Hispanic heritage. When Hispanics turn on their televisions over half of them are tuning into an English-language program, according to an Ipsos U.S. Hispanic Omnibus study conducted by Paris research company Ipsos.

Younger viewers are not the dominating presence in front of the English-language small screen. Hispanics age 18-34 are actually less likely (54 percent) than older Hispanics (age 55+) to prefer English-language television (61 percent), and 52 percent of Hispanics age 35-54 prefer English-language television. While 45 percent of Hispanics with children in the household say that they prefer Spanish-language television, 63 percent of Hispanic households without children are highly likely to prefer English television. Eighty percent of college-educated Hispanics prefer English-language television.

Fifty-five percent of all Hispanics said that their language preference for the Internet is English, but 39 percent of Hispanics age 18-34 prefer Spanish-language Internet sites. Forty-two percent of Hispanic females prefer Spanish when surfing the Web compared to just 29 percent of Hispanic men.

Fifty-three percent of Hispanics read the news and they are looking for information in both languages. Of that 53 percent, 53 percent read the news in English to find out the current affairs in their local U.S. city and 33 percent in Spanish to follow up with the news in their home country. Forty-four percent read Spanish newspapers that cover news in their community in the U.S. For more information visit www.ipsos-ideas.com.

HSA consumers track health expenses and get involved

Consumers who have health savings account (HSA) plans are more cost-conscious and engaged consumers than enrollees in other traditional health insurance plans, according to a survey conducted by the Chicago-based Blue Cross and Blue Shield Association (BCBSA). The 2008 Consumer Driven Health Plan (CDHP) Member Experience survey found that 72 percent of HSA owners track their health expenses, compared with just 40 percent of their non-CDHP counterparts. In addition, 38 percent of HSA owners estimate future health expenses, compared with 22 percent of non-members; 24 percent of HSA owners contacted their insurer to discuss health expenses,

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names of note

Christian Weller von Ahlefeld and the supervisory board of Nuremberg, Germany, research company *The GfK Group*, have agreed to terminate von Ahlefeld's contract prematurely. Von Ahlefeld has served as CFO and director, human resources, and will leave GfK on December 31, 2009.

Horsham, Pa., research company *TNS* has named **Bob Neuhaus** global head, TNS finance. He will take on the position alongside his current role as executive vice president, TNS North American financial services. Additionally, following the merger of TNS and Research International, TNS has made several appointments: **Mike Gettle** CFO/COO; **David Errington** director, global commercial; **Jamie Hall** CEO, Asia-Pacific, Latin America, Middle East and Africa; **Heather Payne** regional director, Korea, Japan, China and Taiwan; **David Kieselstein** CEO, North America; **Bridget Armstrong** executive vice president, U.S. consumer sector; **Judith Passingham** CEO, Europe; **Denis Delmas** deputy managing director, Europe; **Kirk Ward** director, offer development and integration; **Stephen Factor** global head, consumer sector; **Jordi Ferrer** director, strategy and corporate development; and **Catherine Connolly** global head, human resources.

InsightExpress, a Stamford, Conn., research company, has promoted **Harmen Westra** to senior director, **Nancy Dillon** to Northwest regional manager and **Alicia Allijan** to senior account executive.

Arbitron Inc., a Columbia, Md., research company, has hired three executive vice presidents: **Afton L. Adams**, CMO; **Robert F. Henrick**, customer solutions; and **Taher G. Behbehani**, chief strategy and business development officer.

Todd Costello has joined *Marketing Systems Group*, Fort Washington, Pa., as an account executive.

Seattle research company *GMI* has hired **Karissa Brown** as senior accountant; Brown will be based in Bellevue, Wash. **Svetlana Gershman** has been hired as data analyst, also based in Bellevue. **Petter Nguyen** has been hired as Flash programmer in Sydney, Australia. **Jamie Regan** has been named account executive, Northeast territory, and will be based in Boston.

Hughes

Stephen Hughes has joined *Cint U.K.*, a division of Stockholm, Sweden, research company Cint.

Lightspeed Research, Princeton, N.J., has named **T. Mitchell McCauley** CFO. McCauley succeeds **Chris Urinyi**, who has assumed the role of CEO.

Dallas research company *Toluna* has named **Mike Billingsley** senior vice president, sales for North America; **Hugh Bloch**, managing director of Asia-Pacific; **Matthew Worden**, business development director for the Southeast U.S. territory; and **Sarah Terrelonge**, business development director for Canada.

Russ Dunham has been hired as chief client officer of *NeuroFocus*, a Berkeley, Calif., research company.

BrainJuicer Group PLC, a Manchester, U.K., research company, has named **Alex Hunt** vice president, client service, U.S. Hunt will be based in White Plains, N.Y., until the fall, when he will open the firm's Chicago office.

London research company *Cello Group* has announced a new board for its Cello Research division, with **Vincent Nolan** as chairman and **Jane Shirley** as CEO.

YouGov, a London research agency, has hired **Adele Gritten** as head of the financial services consulting team.

ABI Research, Oyster Bay, N.Y., has appointed **Jason Blackwell** as senior analyst and **Michael Inouye** as industry analyst. Blackwell and Inouye will be part of ABI's digital home research practice.

Andrew Schmitt has joined *Infonetics Research*, Campbell, Calif., as directing analyst for optical; Schmitt will be based in Boston. **Shira Levine** has also been named directing analyst.

LightCounting LLC, a Eugene, Ore., research company, has hired **Brad Smith** as senior vice president.

Rochester, N.Y., research company *Harris Interactive* has appointed **Enzo Micali** as global executive vice president, technology and operations. Harris has also hired **Marc H. Levin** as senior vice president and general counsel. Micali and Levin will be based out of the company's New York office.

Matt Coggan has joined *JRA Research*, Nottingham, U.K., as head of qualitative research.

Angus Reid Strategies, a Vancouver, B.C., research company has appointed **Jaideep Mukerji** and **Hamish Marshall** to its North American public affairs practice.

OTX, a Los Angeles research company, has hired **Jim Nyce** as executive vice president, managing director, OTX East, and **Howard Ballon** as executive vice president, managing director, OTX West.

Washington, D.C., research company *MDLinx* has hired **Jessica McCann** to its Pennsylvania team and **Vikas Joshi** as quality assurance manager, operations.

Firm adds ABS to phone sampling technique

Knowledge Networks, a Menlo Park, Calif., research company, has integrated address-based sampling (ABS) into KnowledgePanel - an online panel for custom research. By using dual-frame recruitment (ABS and random-digit dialing), Knowledge Networks aims to further its ability to represent cell phone-only households, Hispanics and other groups.

Knowledge Networks' dual-frame sampling approach is designed to address the trend of "cord cutting," in which households drop landline telephone service in favor of exclusive use of cell phones. Among those most likely to discontinue (or never establish) landline service are teenagers and adults under 35. Due to cord cutting and other factors, the landline-only telephone frame used by many survey researchers now covers, on average, 74 percent of U.S. households; by contrast, the KnowledgePanel dual-frame approach intends to represent 99 percent of the U.S. population by the end of 2009. KnowledgePanel is designed to meet the criteria of government and academic research studies. For more information visit www.knowledgenetworks.com.

GMI improves its sampling technologies

GMI, a Seattle, Wash., research company, has enhanced its sampling and quality technologies in the context of the GMI X vision, a set of technologies and business processes that, along with its global panel, are designed to deliver accurate and timely information.

By combining existing technologies with GMI's knowledge of sample construction and panelist behavior, GMI aims to develop new ways to enable clients to tap into 1.4 billion Internet users worldwide with interactive surveys when they want and on the device of their choice.

GMI has launched a set of technologies that may help provide identified online respondents from around the globe by evaluating their authenticity - starting at registration and continuing throughout the study life cycle. The process combines respondent self-declared information with observed online behavior through the panelist's life.

The first step toward the GMI X vision is a series of enhanced panel quality initiatives. Key elements include a higher-quality bar for new panelists, including enhanced respondent source validation, fraud and location detection, and duplication prevention at panel registration level; expanded respondent profiling; strengthened in-study quality controls; and enhanced panel management with improved incentive redemption monitoring to better identify undesirable respondents and remove them from the panel. For more information visit www.gmi-mr.com.

SPSS rebrands its software portfolio

SPSS Inc., a Chicago research software company, has introduced newer versions of its data mining workbench and text analytics software. PASW Modeler 13 (formerly Clementine) and PASW Text Analytics 13 (formerly Text Mining for Clementine) are designed to extend and automate data mining and text analytics to the business user while enhancing the productivity, flexibility and performance of the analyst.

Predictive Analytics Software (PASW) is the new name for the complete portfolio of SPSS predictive analytics products. David Vergara, director of product marketing for SPSS, explains that the name change was intended to help customers and prospects understand what the products are doing and how each offering fits within the broader portfolio.

The entire SPSS software portfolio will carry the PASW naming standard beginning with the releases of PASW Modeler 13 and PASW Text Analytics 13. New naming will be introduced at each release of the other SPSS products, including: PASW Statistics (formerly SPSS Statistics), PASW Data Collection (formerly Dimensions) and PASW Collaboration and Deployment Services (formerly Predictive Enterprise Services).

PASW Modeler 13 has enhanced its functionality to include automated data preparation designed to simplify the data mining effort and conditions data by detecting and correcting quality errors and imputing missing values. It also provides a report with recommendations on which data to use. For example, if large amounts of data are missing from a data set it will make a "Do not use" recommendation. The comments feature also allows users to post quick notes directly into the model stream. Auto Cluster gives users a way to determine the best cluster algorithm for a particular data set. Modeler 13 has also been integrated with PASW Statistics so that all models and functionality can be used directly within Modeler 13 to conduct statistical analysis without having to switch between applications.

PASW Text Analytics 13 uses the insights and sentiments locked in unstructured data - including call-center notes, open-ended survey responses, blogs and wikis - in hopes of improving model accuracy. The new version includes prebuilt categories for satisfaction surveys, advanced natural-language processing techniques and more comprehensive language support.

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News notes

President Barack Obama has nominated **Robert Groves**, director of the University of Michigan - Ann Arbor's survey research center, as director of the **U.S. Census Bureau** in preparation for the 2010 census. Groves served as an associate director of the bureau from 1990-92 and is a former president of the American Association for Public Opinion Research.

The Auckland, New Zealand, division of Chicago research company **Synovate** has signed a memorandum of understanding (MOU) with Unite Union in an effort to reach a final settlement regarding the 30+ call center workers who were notified via text messages on April 10, 2009, that they were locked out of the office after turning down a pay increase of NZ$0.20 per hour.

According to the call center employees' union Unite, almost all the firm's employees in New Zealand are paid the minimum wage of NZ$12.50, less than half the figure workers get in Australia, where wages were increased by 3.5 percent in January 2009. The telephone interviewers were asking for a NZ$0.50-per-hour pay raise to take their wage to about 4 percent above the minimum wage level. They also wanted 12 hours' notice of roster changes, rather than finding out whether they are working that day when arriving at work.

The key points of the MOU are as follows: Synovate and the union members will set up a working party to negotiate a performance pay scheme for interviewing staff; the working party has six weeks from April 14, 2009, to reach agreement; during that time, there will be no further strike action, nor will there be any other industrial, picket or protest action against or targeting the company, its clients or associated individuals; and union members will return to work immediately.

Calendar of Events June-October

The Travel and Tourism Research Association will hold its annual conference, themed "Catch the Wave: Tourism Research!," on June 21-24 at the Hilton Hawaiian Village in Honolulu. For more information visit www.ttra.com/hawaii2009.html.

IIR will hold a conference, themed "Voice of the Customer," on June 22-24 at the Chicago Marriott in Chicago. For more information visit www.iirusa.com/voc.

ESOMAR will hold its annual congress on September 15-18 in Montreux, Switzerland. For more information visit www.esomar.org.

The Australian Market and Social Research Society will hold its annual national conference, themed "100 Stories," on September 30-October 1 at the Hilton Hotel in Sydney, Australia. Workshops will be held on October 2. For more information visit www.mrsa.com.au.

The AMA will hold its annual marketing research conference on October 4-7 at Desert Springs JW Marriott Resort & Spa in Palm Desert, Calif. For more information visit www.marketingpower.com.

The QRCA will hold its annual conference, themed "Communicate, Rejuvenate, Celebrate," on October 7-9 at Desert Resorts in Palm Springs, Calif. For more information visit www.qrca.org.

CASRO will hold its annual conference on October 14-16 at The Broadmoor in Colorado Springs, Colo. For more information visit www.casro.org.

IIR will hold The Market Research Event 2009 on October 18-21 at the Red Rock Casino Resort & Spa in Las Vegas. For more information visit www.iirusa.com.

PMRG will hold its annual meeting of The PMRG Institute, themed "Tools for Maximizing Brand Potential," on October 25-27 at the Sheraton Philadelphia City Center Hotel in Philadelphia. For more information visit www.pmrg.org.

ESOMAR will hold its annual online research conference, themed "Online Panels and Beyond," on October 26-28 in Chicago. For more information visit www.esomar.org.

To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail Emily Goon at emily@quirks.com. For a more complete list of upcoming events visit www.quirks.com/events.

IMS Health, a Norwalk, Conn., research company, and **SDI**, a Plymouth Meeting, Pa., heath care analytics company, have filed a joint petition for a writ of certiorari with the **U.S. Supreme Court** in the case of IMS Health vs. Ayotte, the U.S. Court of Appeals First Circuit ruling that upheld a New Hampshire law restricting the commercial use of prescriber-identifiable data. The decision reversed a U.S. District Court decision that had previously ruled that such restrictions were in violation of the First Amendment's protection of commercial speech. The appellate court, instead, found that the First Amendment afforded no such protection to the gathering, analysis or publication of data for commercial purposes, and that restriction of such data was not an abridgment of free speech. A writ of certiorari asks the Supreme Court to review the lower court's opinion.

The petition that IMS and SDI are filing argues that the Court of Appeals' decision represents a threat to the most basic constitutional right of free speech. The petition was submitted to the U.S. Supreme Court on March 27, 2009. The Court is expected to decide whether to take the case before its summer recess in July.

Domenichelli Business Services, a Ludlow, Mass., transcription services company, has changed its name to **Modern Day Scribe LLC** and added copyediting and data entry to its list of services offered.

Dallas research company **Toluna** has completed its integration with

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By Keith Malo and John Widmer

Conducting research in an extraordinary economic climate

In its 2009 Annual Survey of Market Research Professionals, MarketResearchCareers.com found purchasers of marketing research services are expecting their 2009 budgets to decrease by 9.5 percent compared to 2008 - creating a watershed occurrence against 20 years of spending increases.

This same survey reported that "market research professionals are expecting 2009 to be a brutal year," adding "80 percent of market research professionals (up from 64 percent in 2008) believe their job will be more difficult in 2009."

Neither of these conclusions is surprising to present-day marketing research professionals.

Independent of economic conditions, corporate-based research professionals have a fiduciary obligation to be fiscally responsible stewards of their employer's marketing research investments. Yet with a globally downturned economy, the accounting lens is more sharply focused on spending behavior enterprise-wide, and marketing research is not immune.

Employed by a well-known American brand that delivers monthly savings - in the form of coupons - to consumers, we'd like to think we know a thing or two about achieving savings and making a dollar stretch, and offer a few considerations to fellow marketing researchers.

Inventory all research

First, inventory all research team activities with the objective of removing any that do not add value. For example, consider syndicated data that may require download-

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ing to Excel, only to need further manipulation for a PowerPoint sales presentation. Expending time to format Excel spreadsheets that will never see an external audience may not be a valuable exercise and may be worthy of elimination.

In developing primary research programs, be imaginative with design, yet don't compromise integrity or program quality. Consider lowering n-sizes, as long as doing so still achieves an acceptable margin of error. For instance, you may be accustomed to obtaining exactly 1,000 interviews. Instead, identify a comfortable margin of error and reassess the sample size. You may find it only takes 875 interviews to reach a ±3 percent margin of error, potentially saving thousands of interviewing dollars. Or perhaps the 18 in-home

snapshot

The authors offer several suggestions for maximizing research budgets during tough times, including eliminating projects that don't add value, changing methodologies and using free or low-cost Web-based resources to keep tabs on the competition.


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observational sessions can be downsized to nine to provide the high-level directional information required.

Don't overlook a complete change in methodology. If feasible and operationally possible, take a traditional telephone survey to an online platform, particularly one that uses a self-provisioned online survey tool like SurveyGizmo or Zoomerang; doing so can significantly reduce the financial outlay and keep critical information flowing.

If you have not viewed online survey applications as a legitimate option for your primary research toolkit, now is the time to reconsider. With research-trained staff, using this do-it-yourself approach can materialize cost savings that will extend the research budget. Over the past few years these tools have made improvements to offer greater functionality. Many standard online applications now support complex surveys with advanced skip logic, ranking questions, continuous-sum questions, pictures and video - all functions only previously available through expensive software platforms or partnerships with research firms specialized in Internet-based surveys.

Whether outsourced or in-house-managed, individual survey programs must remain focused on the most important information needed. Avoid survey-creep to manage costs and maintain respondent engagement. This can be a challenge in a period where more research projects get postponed and many stakeholders want their concerns addressed within the few projects that obtain approval. But don't ignore opportunities to unite complementary - in content or operational terms - research projects into one program to achieve maximum efficiency.

Research suppliers are important to the in-house marketing research team's success. Nevertheless, now is the time to secure the best terms for the enterprise's research investment. Solicit multiple quotes and don't be afraid to negotiate. Acquiring competitive bids keeps all parties honest and proves to the CFO that limited marketing research funding is being used intelligently. Of course the proposal process and contract-awarding should not come at the expense of compromising quality.

Whenever possible, leverage current resources. These assets may include team skills and talents, internal databases or tools such as online survey applications and statistical software packages. Once you have identified an opportunity, confirm the objectives and then think through cost-effective alternatives to accomplish your goals. For example, the organization may want to explore customer response to different policy changes. By partnering with program managers, the research team can utilize its talents to establish test-and-control scenarios and offer other program guidance and analysis. Or maybe there is an opportunity to data-mine traditionally unanalyzed customer data files to glean pertinent insights that may be further investigated using the customers' e-mail addresses and the team's online survey tool. Capitalizing on any of these alternative solutions, you may dis-

cover that with little to no research expense the organization's needle can be influenced.

Competitive intelligence function

If your research team doesn't manage the competitive intelligence function formally, now is the time to build it.

In these economically-challenged times, staying too insular and taking your eyes off the competition could prove catastrophic. Historically, downturned economies have ignited

> ***In these economically-challenged times, staying too insular and taking your eyes off the competition could prove catastrophic.***

rivalry, inspired price wars and fueled other competitive actions. It is imperative to closely monitor the competition during these times, which is also an activity that can often be accomplished with little monetary investment.

Analyzing and assessing the other players in the market space does not require advanced espionage tools. There are several cost-effective and ethical ways to execute a reasonable competitive knowledge operation, including simple public-domain and Internet searches, skimming through the trades and dialogues with sales reps and others with daily life in the field who may observe the competition.

There are also several free Internet tools to help execute competitive intelligence investigations and yield a wealth of information, including:

- company/trade Web sites to access annual reports, financial filings and personnel moves;
- Google Alerts to receive e-mail notification whenever competitors are in the news;
- WatchThatPage.com to stay informed of changes to important competitor Web pages;
- online job boards (e.g., Monster, CareerBuilder) to identify the positions for which competitors are recruiting; and
- free Web analytics services such as Compete.com to observe competitors' Web traffic and actions.

For information, such as trending data or product launch announcements, that a competitor once had online but is no longer available, visit Archive.org to bring back that Web page you saw last year.

With this intelligence you can create meaningful debriefs to offer key stakeholders and sales channels comprehensive overviews of major competitor organizations. These competitive-intelligence reviews should incorporate any information on the organization's recent and upcoming strategies, new and pending product launches, sales figures/projections and marketing collateral. Partner with sales and marketing leaders to develop marketing strategies to exploit the competitor's weaknesses, combat their strengths and position your business as the stronger option in the marketplace.

Never easy

No matter the external economic environment, whether it's good or bad, it is never easy to manage and lead a corporate marketing research function. Yet distressed economic climates accentuate the need for researchers to put on their creative hats to develop strategies and supporting programs to stretch the budget and still yield organizational results. By following some of the above suggestions, you and your department can emerge from these tough times stronger, more focused and with a higher internal profile. | Q

Do more with less

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health care research

By Andrew Aprill and Matt Campion

Seeking the correct diagnosis

How to make sure your physician surveys are giving you accurate information

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snapshot

In online research with physicians, three parties - the doctors, the client company and the research vendor - are responsible for ensuring data quality. This article outlines steps to follow to ensure that each stakeholder holds up their end of the bargain.

Remember that big decision you made last week and the physician-based market research findings that influenced your decision-making? Did you ever stop to wonder who answered your survey questions and if they provided thoughtful responses? As pharmaceutical market research continues its rapid migration to online surveys, data quality is increasingly being questioned by end users. We applaud this scrutiny and offer the following systematic approach to maximizing the quality of physician-based survey data.

Step 1: *Assess panel quality and examine the physician authentication process.*

While there are many ways to recruit physicians to participate in online surveys, one popular method is to recruit from established physician panels. Panels are attractive because they can provide fast, reliable and cost-effective access to physicians that are ready and willing to participate in online surveys.

Before they are ready to serve you, panel providers have to construct their panel by recruiting members. Common recruitment methods include mail, fax-blasting and telephone. Frequently, physicians recruited via these methods are offered some type of sign-up incentive. Sometimes panels are created from preexisting networks of physicians where membership offers benefits beyond the opportunity to participate in surveys. Whatever the panel construction approach, the key is that the panel provider has established a relationship with panel members that results in robust and reliable response rates.

Methods to verify that the person joining a panel is indeed a physician and not a clever layperson registering as a physician in order to earn lucrative honoraria vary widely across panel providers. Survey stakeholders should examine the verification process of their panel provider by asking the following questions:

- How was the panel created?
- Is the panel a genuine panel with an established relationship with opted-in physicians or simply a database?
- What is the specific process for gathering physician credentials?
- What credentials are gathered and how secure are they?
- Are these credentials matched against an official database of known physicians?
- Is the credential-matching process an automated "hard" match or a manual "fuzzy" process requiring human intervention?
- Are physicians verified at the time of registration or after the fact?
- What other safeguards are used to discourage fraud?

Step 2: Monitor and manage physician survey-taking behavior.

Panel management and monitoring can also impact data quality. Like verification, it is the panel provider's responsibility to adhere to these panel management principles, and it is the survey stakeholder's responsibility to confirm that these principles are being followed. Keep in mind that though verified physicians are taking your survey, they may not always provide thoughtful responses to your questions. Since Internet surveys are self-administered, participants are in control. While most physicians take their survey participation seriously, there will always be a few respondents who seek to "expedite" their participation. Following are five things to insist on from a panel provider:

- Blacklisting of speeders/cheaters – those physicians who repeatedly demonstrate disengaged behavior while taking surveys.
- An established privacy policy certified by an outside agency (e.g., TrustE).
- Adherence to the CAN-SPAM Act.
- Whitelisting with major Internet service providers to ensure delivery of e-mail invitations.
- Systematic purging of non-responders.

The primary symptom of disengaged behavior is a physician who completes the survey significantly faster than his or her peers. In addition to speeding through a survey, other signs of a disengaged physician

include straightlining rating-scale questions (e.g., rating everything a 4 on a seven-point scale), giving internally inconsistent/illogical answers and failing trap questions (e.g., "Doctor, if you are reading this question you will know to circle a 5 in the answer categories below").

While a handful of physicians speeding through a survey and providing less-than-thoughtful answers may seem insignificant, such behavior can cause significant skews in study data and misleading findings.

There are two ways to address this problem, each occurring at different times in the online survey process:

Pre-survey warnings. Make clear at the beginning of any physician survey that in exchange for fair-market honoraria respondents are expected to take the appropriate time to thoughtfully answer questions. It should also be pointed out that their survey-taking behavior will be monitored in real time and if any suspicious behavior is detected they will be warned to stop it or their participation will be terminated and they will not receive their honorarium.

Real-time monitoring of survey-taking behavior. Today's survey platforms are sophisticated enough to allow tracking of response times on a question-by-question basis. To prevent physicians from completing surveys too quickly, "speed bumps" can be inserted into surveys. These speed bumps warn physicians that they are completing the survey faster than their peers and to slow down and give thoughtful answers to each question. Straightlining through answer grids or failing trap questions should trigger similar warnings or survey termination.

While pre-survey warnings and real-time monitoring of survey-taking behavior may address the respondent who has agreed to participate with good intentions, these interventions only serve to exacerbate the problem for one particular respondent type. Namely, the respondent who has no intention of providing thoughtful responses, but who is only interested in collecting an honorarium - or worse, who has malicious intent to provide bogus answers. These people will alter their behavior so as to not be detected by any active monitoring, making it that much more difficult to find and remove them from a dataset.

Impact the interpretability

At this point in the process, we have verified that we are interviewing real physicians and are monitoring their behavior during the survey to encourage them to "do the right thing" and take our survey seriously. But what happens if they don't?

There are several areas where the influence of unmotivated respondents can impact the interpretability of research results. Two key areas include univariate statistical testing and multivariate statistical analysis.

In univariate statistical testing, the goal is to understand differences between different items or respondent groups. For example, in pharmaceutical research, we often compare different specialties on their attitudes, interests and opinions about different products. In the case of comparing physician specialties, unmotivated respondents who straightline blur the true differences between different specialties and can result in "no statistical difference" when in fact there is a difference.

Another typical example involves physicians rating different products on the same set of attributes (e.g., efficacy, safety, etc.). The straightliners as well as the "tree trimmers" (i.e., respondents who make random patterns of responses in an attribute battery, resulting in patterns that resemble a tree) hide real differences in product perceptions, leading to a potential false conclusion that there are no statistical differences between the products on those attributes.

In multivariate analysis, the behavior of unmotivated respondents can lead to statistical problems in multivariate models as well as misleading conclusions from the analysis. Using the same example, a regression analysis predicting likelihood of product use based on product ratings on different attributes can be hampered by two factors. First, the correlation between product attributes is increased with straightliners and decreased with tree trimmers, which leads to a lack of statistical significance on the relationship between the product rating on the attributes and the likelihood of product use. Second, the relationship between the likelihood of product use and the rating on the product attributes is inflated by straightliners, leading to a faulty statistical relationship that may change the interpretation of the relative importance of each attribute in predicting the likelihood of product use. On the other hand, tree trimmers will reduce the strength of the relationship between particular product attributes and the likelihood of use, leading to a false conclusion of weak or no statistical significance. Both of these effects lead to biased conclusions in different directions.

At this point we hope you are asking, "OK, so how do we fix this problem?"

Step 3: Analyze respondent responses and validate data sets.

Reputable marketing research firms have a process for checking the validity of data files prior to beginning any analysis. In the not-too-distant past this was a laborious, subjective undertaking. However, most commercially-available data-analytic software packages today have a specific routine that makes data cleaning fast, efficient and objective. Basically,

The takeaway changed

A study was commissioned by a client who was introducing a novel therapeutic agent that required infusion. A key marketing issue was whether MDs perceived infusion therapies to be inherently more risky than traditional oral therapies in this class. Our goal was to understand how perceptions of infused therapies as risky would affect intent to use this new product.

Our validation process was applied to the data and indentified X percent of the sample as "unengaged respondents." A regression analysis was performed on the complete data set (including the unengaged) and the validated data. The analysis of the cleaned data produced a better regression model, with an increase in model fit (a 5 percent increase in r^2 after X percent of the sample was removed).

Also, the interpretation of the results changed. The conclusion from the uncleaned data showed that a physician who perceived no more risk associated with infusion therapy was more likely to use the client's product. Once the unengaged respondents were removed from the data, the conclusion was actually reversed: physicians who perceived more risk with infusion therapy were less likely to use the product. A key management takeaway completely changed when unmotivated respondents were included in the analysis.

these routines uncover outliers in a data set (based on criteria set by the end user), which then allows those outliers to be removed from the analysis. Most often this is done at the response-item or question level rather than at the respondent level. For example, on a question asking about monthly patient volume, an answer of three compared to all other answers in the range of 300 would be identified as a clear outlier that should be dropped from inclusion for that specific question.

For questions that have a wide range of potential responses, this is a fairly reliable way of identifying outlying responses. However, there are limitations to data-cleaning approaches that rely heavily on identification of response outliers:

- Such an approach is less sensitive to questions that have a more limited range of potential responses, such as a rating scale.
- The validation is completed at the question level not the respondent level.

The key is to be able to identify a respondent who is not engaged, who provides responses that are not actually representative of his or her opinions and behaviors.

It is entirely possible that many of this type of respondent's answers would fall within an acceptable range and thus go undetected by standard data-cleaning routines. But if these respondents remain in a data set, any conclusions drawn from the research can be inaccurate or downright misleading (see sidebar).

Obviously, this type of respondent should be removed from any data set before beginning analysis. The real question is how to accomplish this in an objective, responsible fashion.

Removing a respondent from a data set should only be done as a last resort, and with clear, objective information as to why they were removed. Respondents should not be removed simply because their answers "look funny" or are counterintuitive. And without an objective standard, there are ethical considerations that weigh on the decision to remove a respondent. Doing so could very well change the conclusions drawn from a study.

The approach that we take in evaluating survey respondents proceeds in three phases:

1. Questionnaire design
2. Unusual response detection and respondent scoring
3. Review by a domain expert

Questionnaire design

The questionnaire is designed with domain-specific checks for logical consistency. For example, the same domain-specific question is asked in different ways in an attribute battery so that a respondent who has a logically consistent opinion would answer one question positively and the other negatively. These types of domain-specific checks are built into a questionnaire to identify logically inconsistent data that could greatly skew results.

Unusual response detection and respondent scoring

The domain-specific questions are coded into a respondent scoring program which creates a score for each respondent based on the number of inconsistencies for that respondent. A report is generated that identifies respondents who could potentially skew research conclusions with their responses.

Review by a domain expert

The results from phase two are used to identify respondents who warrant further review. The report builds a case for further investigation by domain experts who review each respondent's data individually to determine if the pattern of responses builds a logically consistent story for the research. It could be that the unusual response pattern provides some critical insight that offers new information that should be considered in the conclusions of the research. Without a critical review by domain experts, this type of respondent might be removed automatically by a software program.

Chain of responsibility

In marketing research, as with most things in life, there is an easy way to do things and then there is the right way to do things. Validating survey respondents, monitoring real-time responses and systematically evaluating those responses all fall into the category of "the right way." However, marketing research clients cannot assume that all of these steps are being taken by vendors simply because it's the right thing to do.

There is a chain of responsibility as it relates to data integrity and all parties involved in that chain share responsibility for ensuring that marketing decisions are being made based on valid information: The client has a responsibility to inquire about what steps are being taken; the vendor has a responsibility to proactively initiate processes to ensure greater validity; and the respondent has a responsibility to be engaged and provide thoughtful responses. The impact of any marketing research project is only as strong as its weakest link. | Q

health care research

Address the participant - not just the disease

Use care, preparation when conducting medical qualitative research

By Mary S. Hurley

Respondents in medical market research studies can be characterized in many ways, such as the type of condition/disease stage they face, length of time since initial diagnosis, speed of disease progression, physical limitations or demographic characteristics. In addition, participants in medical or pharmaceutical research almost never enter the market voluntarily. Unlike luxury-car buyers, fashionistas or even grocery shoppers, these respondents are rarely self-selecting. They are in the market because a medical professional has diagnosed a condition that would benefit from treatment. Participants' reactions to this can range from gratitude that something is available to help them to resentment that they need this help or frustration about the current state of available treatment options. Any one or a combination of these variables can result in challenges to working with respondents in a given study. This article identifies key issues for qualitative researchers and suggests approaches for maximizing the value of the experience for both participants and clients.

Nature of the condition

One important consideration in working with respondents in medical market research is the nature of the condition they face. Obviously, the more life-threatening or debilitating the condition, the more emotional a respondent's reactions to the condition and related issues may be. Cancer and end-stage kidney disease are but two examples of conditions that can lead to very emotional discussions and interviews. However, even respondents with seemingly less-threatening conditions may need to express their feelings. The following are a few suggestions for working with respondents facing these threats.

Plan time to address these issues. While respondents vary in how close their emotions are to the surface, qualitative researchers should anticipate that at least some participants will need time to express their fears, hopes and general feelings about their conditions, even if this is not an intended part of the research. Allocating time for respondents to express their feelings, if they choose to do so, early in the interview gives them an opportunity to move beyond their emotional reactions and be a more effective participant in the main part of the research. Extending the length of the interview/focus group or limiting the number of issues addressed

snapshot

Because medical market research respondents are not self-selecting, qualitative researchers are advised to take time to learn about their needs and limitations - emotionally and physically - and do what they can to meet respondents as they are.

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in the discussion can make time for dealing with emotional issues. Having a plan for transitioning respondents from the exploration of feelings into the main part of the interview is also important. Failure to address this issue can lead to rushing through some parts of the discussion or falling seriously behind schedule.

Be prepared to show personal empathy. Respondents whose emotions are close to the surface may not be able to control them, even in a businesslike interview setting. These emotions can surface at any point in a discussion, even if they have already been addressed earlier. Expressing empathy provides an opportunity to create a bond with the respondent that often leads them to be more cooperative as the interview progresses. It also eases feelings of embarrassment over having lost control among respondents who value personal control.

Consider the human aspect when choosing a qualitative methodology. Respondents who share a particular condition often bond with each other very quickly in a group setting. This can be of great value to the research process but it can also be difficult to control. The need or desire to share experiences can overwhelm the group and make it difficult to keep a discussion on track. It can also be emotionally exhausting for the researcher to lead several very intense discussions among emotionally-vulnerable people in a short time period. Allowing additional time for each discussion, using more structured exercises to keep the group moving and having smaller groups are ways to work around these issues. Longer breaks between sessions can also help researchers recover their emotional energy for the next discussion. If the goals of the research do not require a group, one-on-one depth interviews may be a better choice for working with people who face more threatening conditions.

Additional interviewing challenges

Newly-diagnosed participants and those who have recently learned their disease is progressing can present additional interviewing challenges. In addition to the possibility that they are more emotionally vulnerable than participants who have been in a stable disease state for some time, they may also be less knowledgeable or more confused about their condition/stage of disease and the options available to them. Here are a few tips for dealing with newly-diagnosed or newly-informed participants.

If possible, elicit information about diagnosis and progression during the screening process. Directly explore these issues at the beginning of the discussion. Obtaining information about these issues during the screening process is very helpful. However, even if this information is captured during screening, it is still possible that a respondent has suffered a setback or received other adverse news about their condition since being recruited. The opportunity to explain their current diagnosis and, if need be, express their feelings about it can provide important information for the research, as well as help the respondent be more productive during the main part of the discussion. Again, it is important for the researcher to express empathy when appropriate and transition effectively to the main part of the interview.

In focus groups, consider placing recently-diagnosed respondents in a separate discussion. This will allow for better exploration of these patients' issues and a clearer understanding of how those issues impact the subject of the research. Recently-diagnosed patients sometimes agree to participate in research as a means of learning more about their condition. They may ask more questions than longer-term patients or show confusion about their condition, treatment options and prospects. This can slow the pace of discussion and make it harder to accomplish the goals of the research.

If low incidence rates or other constraints lead to the inclusion of recently-diagnosed patients, be prepared to work with them. If possible, check screening information to identify how many respondents have been recently diagnosed. Adjusting one-on-one interviews to accommodate these issues is relatively easy. In a focus group setting it may be useful to include specific questions to address the issues of the recently-diagnosed. This will give them an opportunity to discuss their experiences and feelings, hopefully leading them to more effective participation in the main part of the discussion.

Varying physical capacities

Research participants with some diseases/conditions are physically handicapped or have varying physical capacities depending on how they feel day-to-day. This latter group can

be particularly difficult to identify because their handicap is not always visible and may not even be a result of the condition being researched. Nevertheless researchers need to be prepared to work with them as effectively as possible.

Be prepared to accommodate participants' basic physical needs. This may include removing chairs from around the focus group table when some (or all) respondents use wheelchairs, having facility staff available to help participants get into and out of the focus group room, accommodating drivers/caregivers in the facility waiting area, being willing to valet-park respondents' vehicles, offering help with coats and boots in inclement weather, calling cabs and making refreshments easily accessible in the waiting area and focus group room. Making these accommodations is easier when the number of people who will need them is known at the outset, based on screening information. However, some of these needs may arise on an ad hoc basis.

Be prepared for varying respondent energy levels. Patients in more severe disease stages, or those simply having "a bad day," may have difficulty sustaining the focus and energy needed to be optimal research participants. This may lead to interviews or discussions that go slowly, lack the desired depth of response or simply need to be ended earlier than planned. If working in a disease category/disease stage that is very debilitating, plan the most efficient interview possible by limiting topics and questions to those most relevant to the research issues. Keep materials to be reviewed and exercises as simple as possible, while providing step-by-step directions. If working with an individual respondent who is having a bad day, be prepared with a prioritized list of issues/exercises that are critical to accomplishing the goals of the research and attempt to complete these, if they are within the respondent's capacity.

When working with obviously ill respondents, be prepared to show empathy and appreciation for their efforts. Severely ill respondents often make major personal efforts to participate in research. Attending to their physical needs, making the interview as efficient and pleasant as possible, allowing enough time to avoid rushing (and creating stress) and acknowledging respondents' contributions all help accomplish the goals of the research.

Diverse set of respondents

Recruiting criteria for medical market research studies typically focus on the presence/severity of a condition, current use of treatments/agents/devices, and often, health insurance coverage. Recruiting criteria often exclude characteristics that would be commonplace in other studies (such as education, income, employment status, etc.) because they are irrelevant to defining the target market and could make recruiting too difficult, especially for low-incidence conditions. This may result in a very diverse set of respondents, challenging the researcher to work with people of varying ages, education and income levels or English-language skills. Some suggestions for addressing these challenges include:

Ask recruiters to note observable characteristics or volunteered information, even if the issues are not on the screener. Carefully reviewing both the screener information and recruiter notes can help prepare the researcher for the range of respondents participating in a particular study. Respondents sometimes volunteer that they have difficulty walking, hearing or seeing, and it is possible to observe that someone has difficulty speaking English. Respondents may also volunteer that they are coming from a long distance, will be brought to the facility by a caregiver, or that they are due at work immediately after the discussion. Some respondents acknowledge they are forgetful when speaking to recruiters. Knowing these things in advance can help the researcher (and facility) be ready to meet the respondents' needs and adjust the guide to maximize the value of each interview.

Keep study materials and exercises as simple as possible.

Study materials should be reviewed by researchers before they are finalized. Use of medical jargon or technical terms that are unfamiliar to those outside of the medical profession should be avoided in materials developed for patients. If such terminology must be used, it should be clearly defined for the respondent. In an international study, translated materials may need to be reviewed to make sure they are easily understandable to native speakers of the language in which interviewing will be conducted. This should include a check of syntax, spelling and the appropriate use of idiomatic expressions. These efforts help avoid respondent confusion/distraction, save time during discussions and maximize what is learned from the research.

Be prepared to help respondents having difficulty. If respondents are struggling with written material it may be necessary to read it with them sentence by sentence. In a one-on-one setting it can be useful to sit on the same side of the table with a respondent (instead of sitting across from them) to read material or do written exercises. This makes it easier for the respondent to point out problems and also creates the sense of a shared task. As a result the respondent is less likely to feel inadequate, which can lead to unresponsiveness. In a focus group setting, it may be useful to ask respondents to work together on exercises, rather than having the moderator single out individuals for special assistance or attention.

Be prepared to adjust the tone of each interview. Many medical conditions affect large segments of the population, leading to respondents with a wide range of education levels, facility with the English language, occupations and ages. For example, diabetics can be attorneys or sales professionals as easily as they can be retired grandmothers and fast-food workers. Researchers may need to adjust the tone and style of their interviewing after meeting each respondent, to maximize what can be learned from the research. In a focus group setting, it may be useful to use ice-breaker exercises early in the session to make respondents feel more comfortable with each other and the group setting.

Extra time and care

Qualitative research with medical market research participants can be far more complex because of physical and emotional limitations, and preparation is the key to success. Disease knows no demographic limitations, and neither should the research regarding it. From recruitment to day-of activities, taking the extra time and care to accommodate respondents with conditions that affect their ability to participate can improve the research results. Acknowledging that medical market research participants don't elect to qualify for such studies and meeting the participants' physical and emotional needs can help make the interviews richer and more comfortable. So research the participants before the research begins, and don't forget to empathize. | Q

health care research

Go with the (patient) flow

A look at the buying process model

By Sharon S. Paik

An increasingly dynamic and interactive health care marketplace has necessitated an equally dynamic evolution of research tools to help today's brands succeed. In the past, physicians were the dominant influencer of a brand's success. Patients were highly trusting of their caregivers, there were fewer barriers regulating a physician's prescriptions and pharmaceutical brands were aimed at large patient populations (i.e., depression, hyperlipidemia, hypertension, osteoporosis), treated by physicians who were generalists. Accordingly, pharmaceutical companies primarily focused marketing activities toward physicians via heavy detailing by sales reps. Brands such as Prozac, Lipitor and Fosamax became blockbusters in the 1980s and 1990s through this relatively straightforward approach.

As the industry evolved and health care shifted from a primarily physician-focused and product-centric environment, changes occurred in market that included involvement of other key influencers, particularly among patients. The consumer awareness movement and resources on the Internet have encouraged patients to manage their health more proactively. Other changes also occurred: managed care organizations are more prevalent and influential, nurses have taken on greater responsibilities and the ranks of health care players have been expanded to include caretakers and family.

Additionally, while it has become increasingly more difficult to get me-too products approved, new technologies have reinvigorated drug discovery in less common therapeutic areas. Personalized medicine has become a viable aspiration. Amid this environment, progressive pharmaceutical marketers are beginning to assess their marketing objectives using a more comprehensive approach. They need to gain a greater understanding of the market, their customers and their customers' motivations.

These emerging trends create a need for new research tools to support pharmaceutical brand decision-making. One such tool is the buying process approach. Though it is referred to by other names, such as patient flow mapping, patient dynamics, market mapping and market flow modeling, it is most commonly known as the buying process.

snapshot

This article explains a method called the buying process approach, which helps pharmaceutical firms closely examine how patients move through the health care system. By identifying areas where problems occur and understanding how those problems affect patients' use of health care brands, marketers can design strategies to overcome roadblocks.

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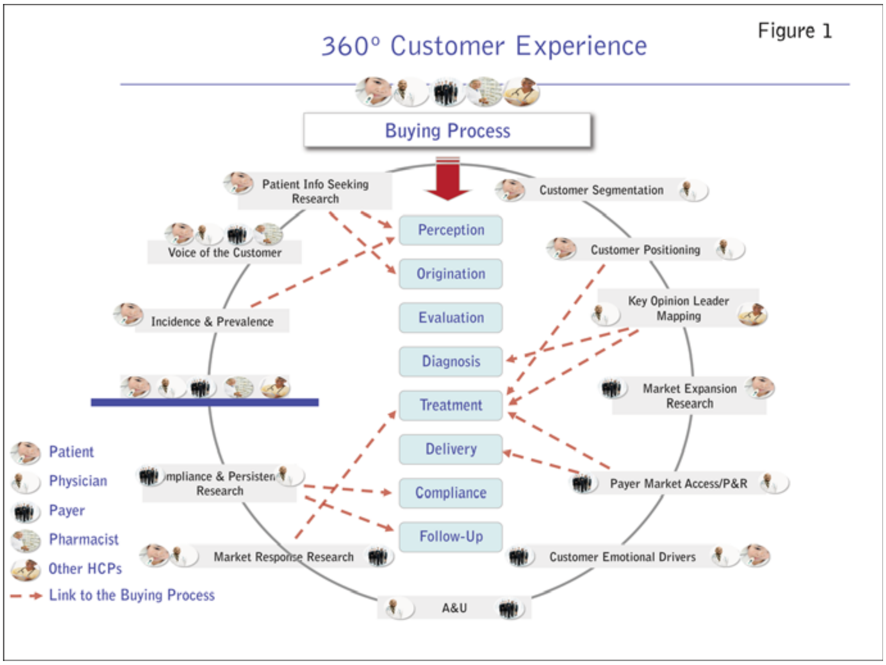


Irrespective of its name, we strongly believe the analytic process behind it is critical, as it provides insights to help marketers prioritize their resources in a complex health care system. It is also flexible enough to identify how to reprioritize in the face of new market developments.

Full range of factors

With fewer product launches, it is more important than ever to maximize brand potential with targeted marketing strategies. In an increasingly dynamic external environment, marketers must adapt their brand strategy to the full range of factors that can influence the success of their brand. These factors may begin with traditional notions of brand features and benefits but need to go further and include characteristics of physicians, patients and the full range of the environment in which they interact to achieve effective health care.

As shown in Figure 1, the "360° customer experience" is an approach to research that addresses the changes in the health care market. It helps marketers understand the multiple customer types who impact the success of a brand and their "balance of influence." Many of the research techniques are interrelated with the buying process, since both have a common goal: to provide a comprehensive understanding of the customer experience.

The buying process is a key component to the 360° customer experience. The model is designed to uncover key decision points in a given market, as well as the critical actions and perceptions that drive behavior at each point. In this way, one can understand how patients come to use a brand.

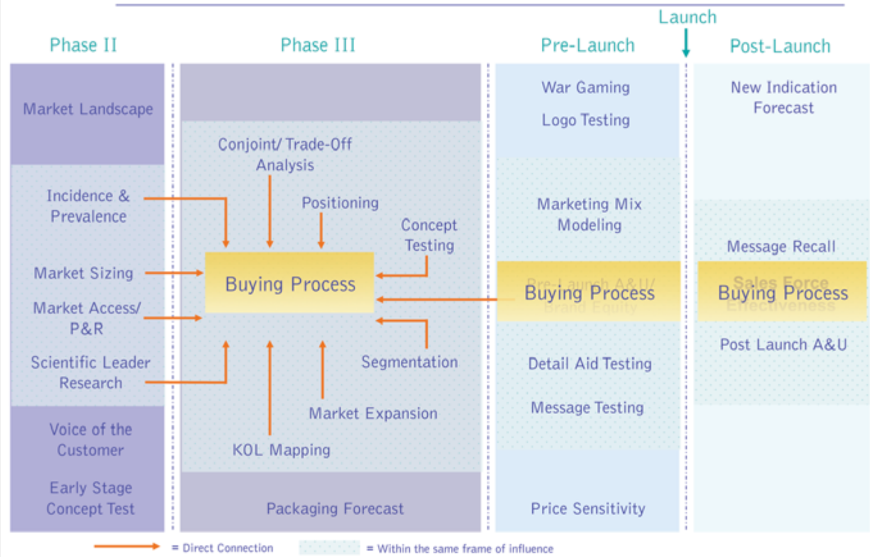
The central player in the buying process is the patient. At the simplest level, the buying process aims to outline the series of events that a patient goes through as they move through the health care system. The model aims to provide a blueprint of the process for any brand to map its opportunities by following the patient, remembering that patients seldom think in terms of products or services but rather in terms of their personal needs.

Why they do it

Through the application of primary research methods, we can explore what patients do, why they do it and how we can predispose them to the appropriate use of a product. The buying process is systematic and structured in that it explores the cascade of events that a patient experiences as they cope with their disease - from the first time they recognize their symptoms to their evaluation, diagnosis and, ultimately, fulfillment and compliance of the treatment they are offered.

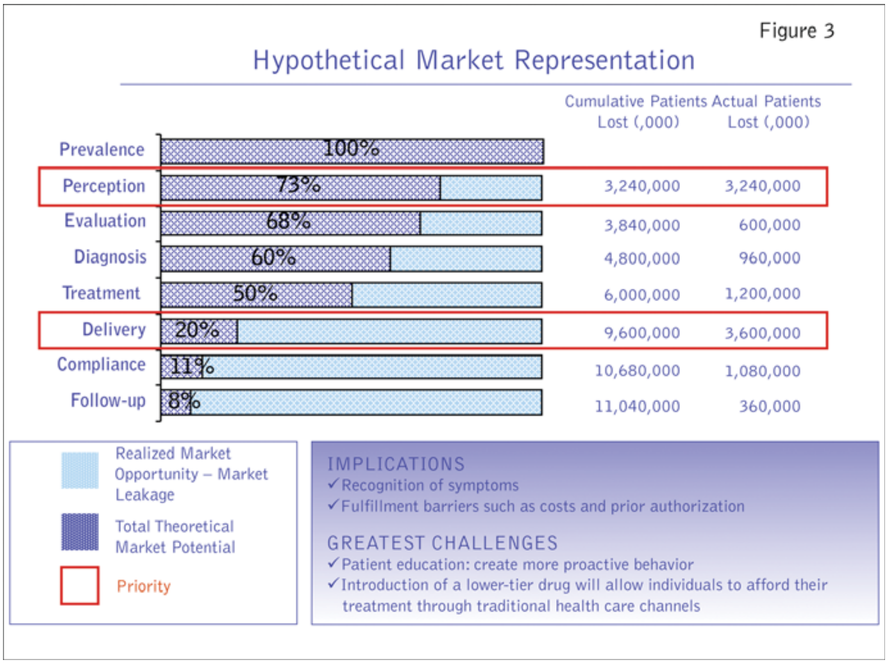
Figure 2

The Buying Process... Where Does It Fit?



The common steps (leverage points) through the buying process are:

Perception: Will a person perceive a problem exists?
Origination: Where do they begin to solve their problem?
Evaluation: Who do they talk to about their problem?
Diagnosis: How is the product identified and confirmed?
Treatment: What treatments are available?
Delivery: Do patients fill their prescription?



Compliance: Will the patient comply with their treatment?
Follow-up: Is the treatment successful or does the problem still exist?

When patients make a buying decision - that is, to take a therapy - that decision represents the culmination of a process. It may take place almost instantaneously or stretch out over a long period of time, but it is a process, not an event. Time is a very important element here, given that it's never uniform, and each patient goes through the system within their own time frame. This provides an opportunity to understand how long it takes a patient to go through the various points in the process, including where especially lengthy periods of time elapse, so that we can help the patient move through the system efficiently.

No matter how long the process takes, the buying decision always begins when a patient becomes aware of a need. Once they have identified that need, they begin to search for and explore possible avenues for meeting that need. While gathering information, they refine and evaluate all of the buying criteria that will affect the decision to purchase and narrow the field of choices to the best few alternatives.

Mapped out in detail

The discernable steps and sequences that the patient takes through the process can be mapped out in detail using the common leverage points as the primary anchors. Patient flow-mapping provides marketers with a graphical flowchart of all key stages throughout the process, quantifying the number of patients who take a specific action or step at each stage from the perspective of the various stakeholders, including patients. The flowcharts allow marketers to identify the most common path taken by patients and determine where and how this path can be changed to facilitate greater brand use.

Each patient is considered to be unique and has their own path through the health care system. For that reason, patients provide their individual experiences, while physicians provide information for specific patients or patient types. While patient experiences are the basis for analysis, these kinds of experiences need to be evaluated not only from a patient perspective but also from the perspective of other key players in the market, including physicians. Obtaining both the prescriber and patient standpoint allows for pinpointing differences in customer perceptions. Frequently, identifying which issues patients and physicians see differently provides significant insight into appropriate allocation of marketing dollars to maximize returns for the brand. Moreover, these perceptions are not limited to physicians and patients but can also include pharmacists, payors, nursing professionals, caretakers, etc.

Let's consider a hypothetical patient, Tom, a typical, middle-aged male, who has a stressful job: a market researcher on the vendor side. How does Tom progress through the health care system?

Despite "eight hours of sleep every night," Tom is always tired and has been complaining about it incessantly to everyone. His symptoms have started to make an impact on this life, and like most men, he doesn't go to his doctor until pushed or nagged.

After his wife makes the appointment to see his primary care physician (PCP), Tom finally goes for the annual physical, the first time in five years. His PCP determines that all systems are fine with Tom, with the exception of general fatigue.

Therefore, the PCP recommends

behavioral and lifestyle modifications, such as getting to bed at a regular time, reducing job-related stress, and to return for a checkup in six months.

About a year-and-a-half later, Tom falls asleep at the wheel and almost gets into a car accident. Again, his wife pushes him to see his doctor. So, Tom returns to his PCP, and he is even more tired and run down, despite changing to a job that he says is less stressful: a market researcher on the client side.

What's next for Tom, now that his PCP could not help him with his symptoms?

Tom's PCP refers him to see a specialist. It takes his PCP office over a week to complete his referral paperwork. Once he receives the referral, Tom calls the specialist's office to make an appointment for a month later. Tom postpones his appointment twice. He finally sees the specialist nine months after the referral.

The specialist diagnosed Tom and told him to schedule a follow-up appointment to discuss treatment options. (The specialist is identified as a key influencer in the buying process system.) Tom agrees, but it takes him three weeks to call for the follow-up.

Tom postpones his appointment once and eventually sees his specialist 12 weeks after the first consultation. (Further delays in the process.) The specialist provides him with two prescriptions, four educational booklets and information about patient-support groups.

The specialist thinks he did a thorough job explaining the treatment options. However, Tom is overwhelmed and fear sets in after he walks out of the office. He is concerned about the side effects of the medication and how they will affect him.

Tom needs time to digest all of this and think it through. Tom is frustrated with the specialist's treatment recommendations and he takes the initiative to look for alternatives and possibly get a second opinion.

In the end, Tom doesn't continue on in the health care system. He falls out at the treatment and delivery points in the process.

The buying process was able to identify the points of opportunity to intervene, including moments in the timeline that can be shortened in order to help Tom continue through the system. Also, you could have the specialist be a key influencer in the process by providing education to encourage desired behaviors from both him and Tom.

Provide an understanding

The buying process can be used for both new and in-line products. For new products, the model can provide an understanding of a new category, including insights into areas that may not have yet been covered extensively. This approach should be executed two to three years prelaunch in order to have adequate time to initiate any necessary strategic initiatives prior to launch and to aid in the development of targeted marketing. Conversely, for in-line products, the buying process can help assess fundamental changes in the market (such as new competition, generic/therapeutic substitution and/or policy changes) and provide an integrated perspective on the health care market. Once a product is introduced into the market, the tool can be used to track a brand's performance post-launch. The buying process can also measure the impact of major market events that can improve a brand's success (see Figure 2).

A graphical representation that highlights the market leakages at various points (Figure 3) can provide a visual snapshot for the areas of priority and opportunity. In Figure 3, the entire width of the horizontal histogram represents the total theoretical market potential. We can see a numerical snapshot that depicts the cumulative and actual market leakage - where, at each step, we lose some portion of the market's potential patient population - and what potential remains. Thus in this hypothetical disease process, there is only a realized market potential of 8 percent that actually follow through to the end of the buying process and are being successfully treated.

Examination of these leakage points show targeted prioritization of needs and opportunities. To determine which marketing efforts should be pursued, we consider the largest areas of market loss, the feasibility of impacting change and the cost of initiatives at each level. Subsequently, we can determine where marketing efforts should be focused to increase the optimal realized market value and the subsequent number of prescriptions. Once the priorities in the health care system have been identified (leverage points), it is critical to influence desired behaviors among targeted customers at these points to achieve the maximum business opportunity. Behaviors need to be reinforced or changed at these points in order to move the patient through the system. Each strategic action must be tailored to the relevant customers and to the specific behaviors that address the key business opportunity.

Regularly monitored

Behaviors and preferences are constantly changing, and this has been both complicated and accelerated in recent years by the vast increase in product choices and new product entrants. Therefore, the market must be regularly monitored for these changes. The blueprint of the health care market will shift as customers are offered new benefits that enhance their experiences. If you have developed a sound model, it will constantly feed into the brand development process, helping to identify, understand and react to any shifts that occur. Drastic changes can be implemented for every shift, but only for those that will provide the best business opportunities. Understanding which ones are worth the investment and time will be essential to maximizing marketing dollars.

Furthermore, the analysis of the buying process helps boost brand potential in a volatile market by understanding patient actions within the marketplace. In a market where brand growth is slowing, the patient becomes a key player. By increasing the depth of understanding of patients and their experiences within the health care system, pharmaceutical marketers can demonstrate the distinct value of their brand to consumers. Through targeted marketing, relationships can be built with patients, enhancing their lifetime value.

The systematic analysis of the buying process can help determine how to interact with patients in a way that will increase compliance, persistence, and brand loyalty. It can help increase the total number of prescriptions by identifying and quantifying the size and feasibility of targeting niche populations. The identification of niches with unmet needs in the market serves to maximize the total number of patients who can benefit from use of the brand. Moreover, market obstacles can be identified and overcome, helping provoke change in consumer actions and increasing fulfillment rates.

Not be enough

For a brand to be successful, it is generally agreed that it must possess a significant competitive advantage, such as an improvement in treatment outcomes, a cost benefit or improvement in compliance. But the presence of such advantages may not be enough. Marketers need to fully understand the range of internal and external market environments that may impact the customer today and in the future. The buying process identifies current actions and helps to facilitate positive customer actions, thereby linking all the key players to a mutually-beneficial goal: satisfying the patient's needs. | Q

health care research

Faster than a speeding survey

Rules of the road for online research with physicians

By Terri Maciolek
and Jeffrey Palish

Picture yourself strapping on your helmet, pulling on your racing gloves and sitting behind the wheel of your bright red Ferrari. You turn the key and feel the exhilarating thrust of the engine as the green flag is lowered and you put your foot, full force, on the gas pedal. You smile. As long as you reach the finish line, you can drive as fast as you want and take as many shortcuts as you can find, right?

Such is the situation sometimes with online surveys. As we all know, critical decisions are often based upon online survey results and, in the pharmaceutical industry we often have somewhat of a blind faith that physicians dutifully and conscientiously respond to all of our many questions.

But, truth be told, physicians are humans too and, like the race car driver, they sometimes go too fast or cut corners in completing our online surveys. What can we do, as makers of the Ferrari, to minimize the likelihood of their actions jeopardizing the quality of our data? In this first of two articles, we examine the perspective of the "car" (i.e., survey vehicle or questionnaire) and what is being done to catch the "driver" (i.e., physician or respondent) who might be speeding or taking shortcuts.

There are essentially three dimensions for researchers (and clients) to consider: 1) making sure the driver has a valid license to drive; 2) catching drivers who go over the speed limit and/or fail to read the road signs; and 3) giving the driver a well-tuned car to drive. While physicians who respond to our surveys are generally safe and experienced drivers who provide the industry with reliable and valid survey data, we need to worry about the few who do not, as preserving the integrity of our data is paramount.

snapshot

Physicians expect and should receive an enjoyable time when they take a survey out for a spin, but there are several safeguards that researchers and panel vendors must take to ensure that everyone emerges unscathed when the trip is over.

Building block

Clearly, verifying a physician's "license to drive" is essential and without question, the fundamental building block for physician-generated data. For obvious reasons, online physician panels have brought new challenges in this regard.

There are numerous physician validation processes[1]. (See related article "Seeking the correct diagnosis" on p. 22 of this issue.) As an example, the Epocrates physician panel uses a process in which physician opt-in requests are checked against the American Medical

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Association (AMA) Masterfile (which is updated quarterly) to assure physician authenticity. Individuals attempting to register are taken through a series of questions (e.g., name, date of birth, medical school attended, year graduated, etc.) that attempt to verify the person in real-time. This information is checked against the Masterfile. If any of these data do not match perfectly, the registrant is informed that he or she could not be verified. If the physician passes the verification process, their AMA Medical Education Number is appended to his or her record and he or she is then eligible to be invited to participate in upcoming surveys.

Array of traps

The use of an array of traps to catch our crafty drivers should be standard at this point when conducting online surveys.

- **Knowledge traps** can be used to determine if a respondent is actually the type of professional that he or she claims to be. For example, if a respondent is taking a survey as a dentist, you might place a question in the upfront qualifications section that queries the number of surfaces on a particular tooth.

- **Speed traps** benchmark a respondent's progression through the survey at various points against an average expectation (typically determined via a pretest). Speed traps serve several functions: 1) to pace or slow down an otherwise conscientious respondent; 2) to reduce the temptation of a potential speeder; and 3) to eliminate the repeat offender (and thus, invalid data) from the survey.

  A speed trap is best initially placed about one-fourth to one-third into the survey (depending upon survey length). It flags speedy responders, makes them aware they are completing the survey at an abnormally fast pace, and asks them to please slow down and give thoughtful responses (it also gives the surveyor an opportunity to remind the respondent of the time commitment to which he or she has agreed). Another bump is similarly placed about halfway through completion (again, based upon an average time-to-completion benchmark) at which point the same "slow down" reminder is used, with a clear explanation that continued speeding will result in termination (and no compensation).

Clearly, then, if speeding continues the respondent is terminated without remuneration and informed as to why.

- **Logic traps** are intended to improve the quality of response via a cross-check process. The fundamental premise is that if a question is asked multiple ways, the answer should be the same and if not, perhaps the respondent is not keeping his eye on the road. Inconsistent answers provide another opportunity to warn the respondent to give thoughtful responses or risk termination.

- **Attention traps** may indeed be the simplest to implement although, particularly with physicians, they need to be executed tactfully. For example, during a rating task you might insert an unrelated attribute or statement to be rated to flag straightliners or inattentive respondents. Here again, a gentle reminder to slow down upon first offense is recommended (but termination seems clearly warranted upon repeated offense with explicit warnings, as suggested above).

We suggest that it is incumbent upon the research agency to inform the panel provider of crafty drivers who are caught in these traps and terminated upon repeat and explicit real-time warnings. It is then the responsibility of the online panel provider to start a process by which the respondent is eliminated from that provider's online survey invitations, should there be multiple transgressions.

Furthermore, real-time warnings seem essential in both the short and long term to (hopefully) have respondents slow down and be more engaged while completing a survey, as well as create a positive impact on future participation. Real-time warnings and traps are fair and provide opportunities to reiterate the rules of the road. That way, respondents cannot complain when they are pulled over and given a ticket for violating the rules (i.e., speeding and/or cheating).

As a final safety net, it seems prudent to also check the data on the back end after all surveys are completed using a good data cleaning process. Each respondent data record should be manually checked for straightlining, replicated answer patterns, illogical answers, etc., as inevitably, one or a few aberrant respondents will beat the real-time traps and warnings yet still provide invalid or unreliable responses. As such, it is often a good idea to anticipate (both tactically and financially) the need to oversample by a few respondents to allow for the discarding of suspected bad drivers while still allowing for full quota fulfillment.

Broken-down jalopy

While we as researchers and panel providers must ensure that the "bad guys" are caught, we must also remind ourselves that nobody wants to drive a broken-down

Research Company Spotlight - Physicians

Below is a list of firms from our Researcher SourceBook™ specializing in research with physicians.

Advanced Focus
212-217-2000
www.advancedfocus.com

all global
44-20-7729-1400
www.allgloballtd.com

Answers & Insights Market Research, Inc. » SEE AD 39
317-815-9901
www.answersandinsights.com

Blackstone Group
312-419-0400
www.bgglobal.com

Carlin Qualitative Reseach, Inc.
914-332-8647

Chamberlain Research Consultants, Inc.
608-246-3010
www.chamberlainresearch.com

Connell + Associates
201-445-9215
www.connell-associates.com

D/R/S HealthCare Consultants
704-362-5211
www.drmsimon.com

Diagnostics Plus, Inc.
814-238-7936
www.diagnosticsplus.com

DoctorDirectory.com, Inc.
828-255-0012
http://clients.doctordirectory.com

Douglass Results
415-377-3664
www.douglassresults.com

Edge Healthcare Research, Inc.
615-385-9315
www.edgehcr.com

e-Rewards Market Research » SEE AD 3
888-203-6245
www.e-rewardsresearch.com

Fact Flow Research
312-341-8117
www.ffrfocusfacility.com

Focus Groups of Cleveland » SEE AD 44
216-901-8075
www.focusgroupsofcleveland.com

Focus Latino » SEE AD 38
512-306-7393
www.focuslatinomarketresearch.com

Focus Market Research » SEE AD 53
612-869-8181
www.focusmarketresearch.com

Focus Market Research » SEE AD 53
480-874-2714
www.focusmarketresearch.com

Focuscope, Inc.
708-386-5086
www.focuscope.com

Forever Young » SEE AD 38
512-657-5129

Franklin Communications
973-625-8811
www.fc4research.com

Greenfield Consulting Group
203-221-0411
www.greenfieldgroup.com

Health Care Testing, Inc.
818-986-9640
www.factsnfiguresinc.com

Iseman & Associates
513-421-2333
www.dianeiseman.com

iServices
973-599-3535
www.iservicesgfk.com

JRA, J. Reckner Associates, Inc.
215-822-6220
www.reckner.com

JRA: Global Healthcare Research Services
215-822-6220
www.reckner.com

JRA: Philadelphia/Center City
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Just The Facts, Inc.
847-506-0033
www.justthefacts.com

Kinzey & Day Qual. Market Research
804-339-2748
www.kinzeyandday.com

The Leede Group LLC
763-595-5824
www.leede.com

Leibowitz Market Research Associates, Inc.
704-357-1961
www.leibowitz-research.com

M/A/R/C Research
800-884-6272
www.MARCresearch.com/strong

MARDEC, Inc. Medical Marketing Research
303-444-1525
www.mardec.com

Market Insight, Inc.
814-231-2140
www.mkt-insight.com

Market Research & Analysis Field Staff, Inc.
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www.medimix.net

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The Olson Research Group, Inc. » SEE AD 15
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PinPoint Research
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Point Research Services, LLC
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Probe Research, Inc.
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www.riccagroup.com

RNB Research: Fieldwork Specialist for India
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Robin Cooper Research Group, Inc.
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S I S International Research, Inc.
212-505-6805
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Sabena Qualitative Research Services » SEE AD 51
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www.qual.com

Shugoll Research
301-656-0310
www.ShugollResearch.com

Strategic Eye, Inc.
717-520-9013

Survey Sampling International
203-567-7200
www.surveysampling.com

Survey Service, Inc
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www.surveyservice.com

USA/DIRECT, Inc.
973-726-8700
www.usadirectinc.com

WorldOne Research » SEE AD 30
44-20-7252-1118
www.w1-research.com

jalopy. No physician providing his or her time and effort to complete an online questionnaire wants to suffer through an uninspiring or confusing survey.

Good survey design and question-writing cannot and should not be circumvented or ignored in online surveys. The basics still apply, such as questions that are clear, non-repetitive, grammatically correct and concise. The length of the survey itself (time to completion, number of questions) must also be acceptable, clear and specific in the invitation to participate. In addition, with the capabilities of the online medium, it is easier to deliver surveys that are visually pleasing, enjoyable and, especially for physicians, intellectually stimulating.

In part two of our article next month, we'll share with you physicians' perspectives on what tempts them to speed or take shortcuts and what we can do, as an industry, to make online surveys a positive experience. | Q

[1] Frost & Sullivan White Paper "Unmasking the Respondent: How to Ensure Genuine Physician Participation in an Online Panel." December, 2008.

multicultural research

Tapping into their connections

The multicultural world of social media marketing

By Felipe Korzenny and Lee Vann

Social media is now ubiquitous. Usage of blogs, social networks and video-sharing sites is increasing rapidly and millions of people now look to social media Web sites as their primary source of news, opinion and entertainment. As we witness this dramatic shift from traditional to social media, we believe it's important to examine its cultural dimensions - that is, who is driving this shift, what are the cultural factors behind it and what are the implications for marketers seeking to reach specific ethnic/cultural groups via social media?

We recently conducted an analysis of newly-collected data to examine the patterns of social media behaviors of different ethnic/cultural groups in the U.S. The data comes from the Florida State University Center for Hispanic Marketing Communication, with the support of DMS Research, from a national online sample of nearly 2,500 people with approximately 500 cases in each of the following cultural groups: Hispanics who prefer English; Hispanics who prefer Spanish; non-Hispanic whites; African-Americans and Asians in the United States.

We aggregated information to find out what ethnic/cultural groups are more likely to visit social networking sites. We found broad diversity in social media behaviors among different ethnic/cultural groups and that emerging minorities visit social networking sites more frequently than non-Hispanic whites. In general, ethnic minorities visit social networking sites more frequently than non-Hispanic whites (Figure 1).

We then broke out the data for social networks MySpace and Facebook (Figure 2). Again, minorities lead the way, with English-preferring Hispanics being twice as likely to visit MySpace regularly than non-Hispanic whites. The relative importance of emerging minorities as compared with the traditional majority points to a major shift in social influence.

We also looked at the demographic, cultural and market factors that drive ethnic minorities to social networks. This data is interesting, but in order for these findings to be useful and actionable for us as marketers, we need to determine the reason for the strong representation of ethnic minorities on social networking sites and how to best engage with this audience. We believe that there is a mix of factors that make social media particularly appealing to emerging minorities.

Demographically, ethnic minori-

snapshot

The authors present findings from a survey of social media usage among ethnic groups and argue that as these outlets become more and more a part of multicultural consumers' lives, companies that incorporate them into their marketing plans will earn the loyalty of these segments.

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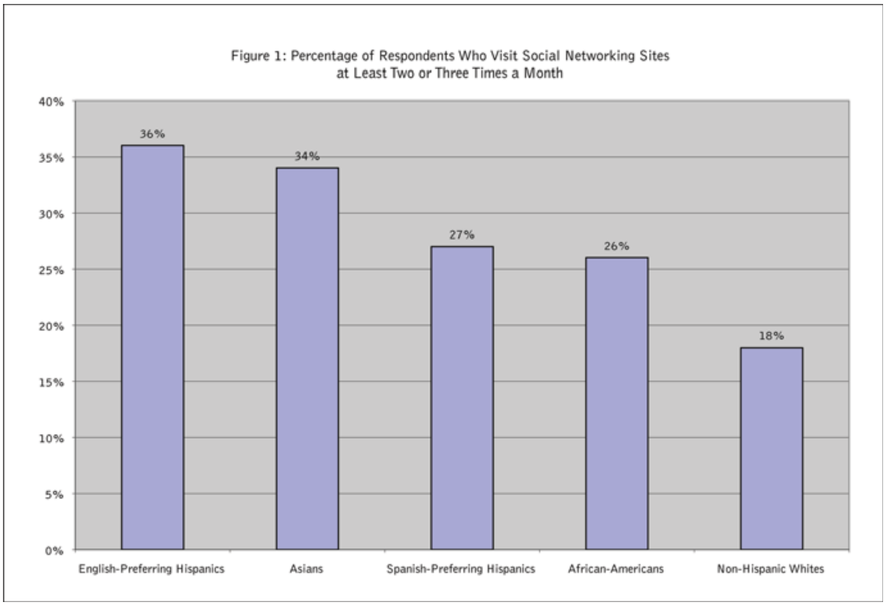
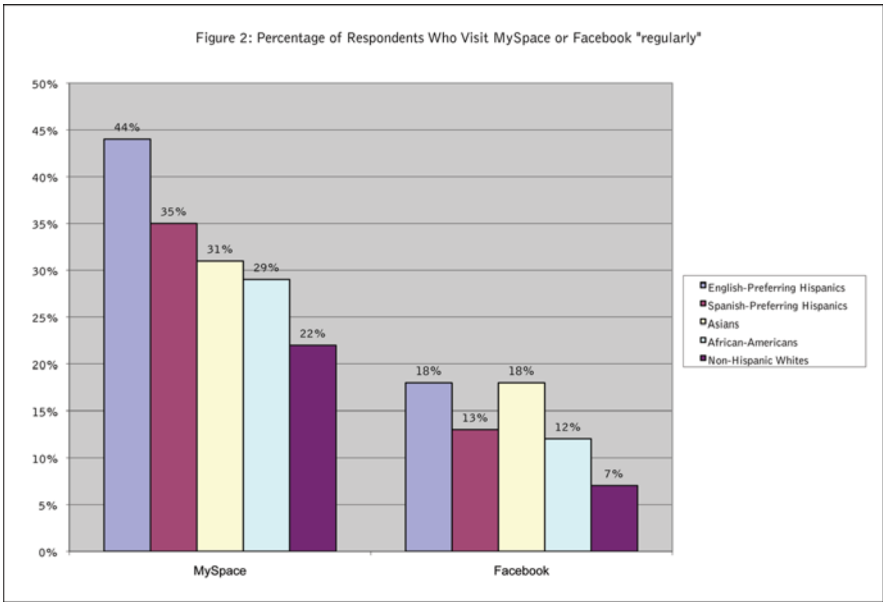




ties are younger than non-Hispanic whites. It's no secret that younger people in general are more likely to adopt new technologies, particularly technologies that enable communication and provide social connectivity. This age gap between minorities and non-Hispanics only partially explains the gap in social media involvement.

In order to analyze the influence of age on social media behavior, we divided respondents into two segments, those 35 years of age and younger and those 36 years of age and older. Figure 3 shows that people 35 and younger of all cultural backgrounds are more likely to use social media, with Hispanics who prefer to communicate in Spanish lagging behind. Young Spanish-preferring Hispanics may lag because they are likely to be newer to the Internet and also because their friends and relatives are less likely to be online due to economic and access factors. While Hispanics in general are aggressively getting online, those less acculturated are still somewhat less represented in the digital realm today.

When examining the usage of social networking sites among those 36 and older, we find that that older Hispanics, regardless of language preference, are more active especially when compared non-Hispanic whites within the same age group.

This substantiates the notion that age is only a partial explanation for the higher usage of social media among Hispanics and other ethnic minorities. Culture and market factors also play an important role in promoting online social connectivity among these groups.

Collectivistic values

Culturally, ethnic minorities tend to be drawn to collectivistic values and often look to one another to help guide decisions and opinions. In addition, ethnic minorities are more likely to use social networks to communicate with groups of family and friends who are geographically dispersed. Social media facilitates such collective sharing of information and communication.

In addition, market forces are driving ethnic minorities to use social media. There is a dearth of culturally-relevant and in-language content available online. As a result, ethnic minorities tend to be proactive and create and share their own content and social networks are ideal platforms for publishing and distributing such original content.

Social networking services allow people to organize and enhance their relationships online, but regardless of technology, culture is still the glue that bonds people together. Marketers seeking to reach ethnic minorities through social media must reinforce and connect with the culture of their target audience if they seek to strengthen their clients' brands on social networks. Doing so requires a strategic, long-term approach that should include the following elements:

Define your objectives. Using social media can accomplish a number of business objectives. Do you want to advertise a new product? Gather research? Provide customer service and build goodwill? Knowing what you're trying to do will make it much easier to determine how to do it.

Understand your audience and be strategic. A successful social media strategy requires a clear definition of objectives, an understanding of your audience and a strategy for engaging them. Consider the cultural motivations that are driving your target audience to social media. Are they there to talk about music? Are they keeping in touch with relatives overseas? Are they there to connect and share their collective culture? What language are they using? They may be doing all of these things and more, but if you can determine what's drawing your audience to social media in the first place, you'll have a better chance of engaging them when you join their conversations. Building and maintaining conversations with a target audience requires research, careful planning and a strategic approach.

Engage your audience with timely and relevant content. Ethnic minorities are turning to social networks to express themselves, connect with their culture and communicate with each other. To be successful, marketers must be open to engaging audiences with timely and relevant content that stimulates feedback and sharing. Engaging in meaningful conversations is the goal of social media marketing and doing so requires a deep understanding of needs, openness to negative commentary and dedicated resources. A social media presence is worthless if it lies dormant.

Critical audiences

Few marketers are proactively targeting ethnic minorities online and even fewer are leveraging social media to do so. A first-mover advantage is available for those who devote the time and resources to engage these critical audiences in ways that they find meaningful. The fact is that we now have an unprecedented ability to reach and interact with ethnic minorities; and companies that deliver value to these segments today will be rewarded with their long-term loyalty. | Q

Figure 3: Percentage of Respondents 35 and Younger Who Visit Social Networking Sites More Than Two or Three Times a Month

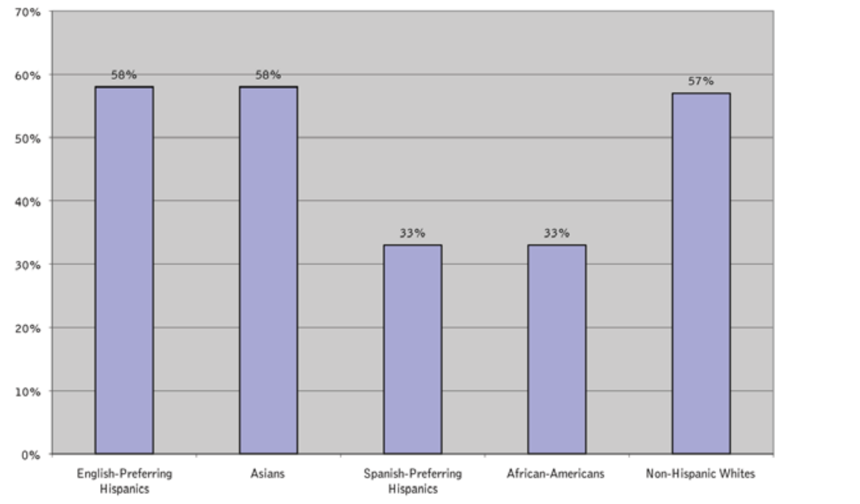
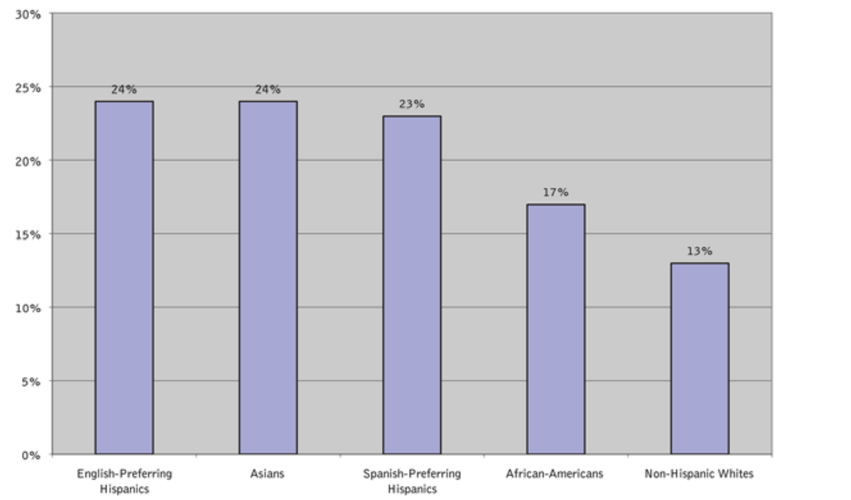


Figure 4: Percentage of Respondents 36 and Older Who Visit Social Networking Sites More Than Two or Three Times a Month



multicultural research

A culture of their own

Marketers need a special approach when targeting Latino youth

By Angelina Villarreal

There's a different generation of Latinos growing up in the U.S. It's a generation that's the product of two cultures - Hispanic and American. And their unique, bicultural heritage dramatically shapes their perspectives and behaviors.

Today, Latino teens make up 20 percent of all U.S. teens; 23 percent of kids under the age of five are Latino. The social and economic environment in which they live is different from that of the general market, and this is expected to have a significant impact on how they see the world and their consumption habits, both now and into their adulthood.

The growing presence of this demographic has important implications for marketers. As the number of Latino youth continues to grow, this is a group that can't be ignored. And given their unique bicultural background, it's not adequate to lump them in with other general-population youth or adult Latinos. To capture their business, marketers must reach out to this group specifically. The first step in doing so is to understand who they really are.

Significantly younger

Latinos are the fastest-growing minority group, and overall they are significantly younger than the rest of the consumer market. Today, about 34 percent of the Hispanic population is under 18 years of age, and about one in every five teens is Hispanic. By 2020, the number of Hispanic teens is expected to increase by 62 percent, compared to 10 percent of teens overall. Regional statistics are even more compelling. For example, in Los Angeles, 65 percent of children under 10 are Latinos. In Fresno, Calif., it is 70 percent, and, in McAllen, Texas, it is more than 90 percent.

The great majority of today's Hispanic children are born in the U.S. Most of these children have parents who were born outside the U.S. Consequently, Hispanic children are born and raised in two worlds, experiencing two cultures.

Also, with Latinos under 18, the language they speak does not define their identity or how they identify themselves. Many speak both English and Spanish.

Latino children and teens play a more important role in their families than their general-market counterparts.

snapshot

Reaching Latino youth with marketing messages requires a degree of nuance, for while they respond well to some traditional cultural elements, others don't have an impact. The author argues for an approach that recognizes and reflects the blended nature of their bicultural, bilingual lifestyles.

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They are often the official family translators since, in many cases, they understand English better than their parents and grandparents. They are the innovators of the family, bringing product knowledge they acquire from media and school straight to their homes. To some extent, Latinos under 18 are the family's trendsetters, as they are exposed to a greater variety of products and services than their parents. Their media and online consumption is high and, being bilingual, their exposure is broad. They are shoppers (with their families) from the early ages, and they are given the power to influence family decisions and purchases.

Responds negatively

While young Latinos define themselves as Latinos, this group responds negatively to messages incorporating Latino stereotypes. In addition, some of the cultural elements used in traditional Hispanic-targeted advertising are not effective with this group. Examples of traditional cultural elements that simply do not work with Hispanic youth are: Hispanic food, Hispanic music, strong and vibrant colors, the exclusive use of the Spanish language, etc.

These elements do not work because this segment of Hispanic youth lacks the emotional connection that most adult Hispanics still have to them. Young Latinos are growing up in the United States. They are part of a multicultural generation and exposed to a variety of foods and music; their lifestyles, values and mindsets are no longer exclusively Latino but a blend of different cultures and influences. In comparison, their parents (for the most part) grew up in Latin America and were exposed to a single culture (from their country of origin).

Marketers need to develop a new cultural formula to communicate with Hispanic youth as the traditional Hispanic cultural formula will not work; this new formula needs to recognize the blended nature of the Latino youth lifestyle.

Music and technology

Appealing to this demographic is not merely about language anymore. Today, perhaps what best defines the Latino youth identity is their music and technology use. For Latino youth age eight to 18, music is the new "language" that most clearly differentiates them from the rest of the market.

As a result, approaching this market through this channel is an easy way to get connected to them. However, their tastes are constantly changing and evolving, so just keeping up can be a challenge. Often for the under-18

Latino crowd, geographic region plays a strong role in defining their musical preferences and their overall attitudes and behaviors. For example, there are significant differences in the preferences of Latinos Angelinos versus Latinos Tejanos. With some simple research, these different groups can be reached just by customizing your company's aim for each market.

Technology also connects well with Latinos under 18. Nine out of 10 Latino teens go online at home and/or at school on a weekly basis. They use the Internet to stay connected with their friends, much like the general-market teens. In vogue now is the use of MySpace, Facebook, YouTube, latinteenblog.com, latinalist.net and many other social networks, which allow the Latino youth to self-express and have fun at the same time (see related article on p. 48). Latino teens are heavy users of electronics, including gaming devices (Wii, PlayStation, etc.), cellular phones and iPods.

Overall, traditional media (print advertising, radio, newspapers, etc.) does not work well with this target. Instead, two specific mediums are important when targeting this group: television and the Internet. Both sources are multilingual and multisensory - a key combination for this target.

Social networks help them to stay connected with friends and family and are also used as a learning tool and a way of exchanging ideas and points of view with others with whom they normally would not have daily or weekly contact if not for the Internet.

Like their general-market peers, young Latinos say that they cannot live without their cellular phone or Internet access as both of them help them to stay connected and are considered key communication mediums used daily or almost daily by most young Hispanics. The Internet is perceived as the main learning device among young Latinos.

And, while younger and older Hispanics watch television, the role of television is different across generations. For the older generation, television fulfills three different roles: 1) as a way to stay connected with Latin-American events; 2) as a learning tool (new products, services, new product uses, etc.); and 3) as an entertainment device. Among Hispanic teens and children, television is mainly used for entertainment, while the Internet helps them to stay connected and to learn about new products, services, ideas, etc.

Like any other youth group

In many ways, Latino children and teens think and behave like any other youth group. However, marketers should know that there are also ways in which Latino youth behave very differently than general-population youth. They grew up against a backdrop of two very different cultures, and being Latino is still very much an important part of their makeup; so to reach them you need to communicate on their terms.

It's important to understand that reaching this bicultural group is not simply about the language you use, but first understanding and addressing their way of life. Again, the key to this emerging Latino market is in appealing to their love of music and technology.

That said, it should also be noted

Research Company Spotlight - Hispanic Research

Below is a list of firms from our Researcher SourceBook™ specializing in research with Hispanic consumers.

Accurate Research, Inc.
972-647-4277
www.accurateresearch.com

Advanced Focus
212-217-2000
www.advancedfocus.com

Affordable Samples, Inc. » SEE AD 20
800-784-8016
www.affordablesamples.com

AIM Research » SEE AD 46
915-591-4777
www.aimresearch.com

AIM/LA
714-755-3900
www.aimresearchnetwork.com

AIS Market Research
800-627-8334
www.aismarketres.com

American Language Services
800-951-5020
www.alsglobal.net

Athena Research Group, Inc.
951-369-0800
www.athenamarketresearch.com

Atkins Research Group, Inc.
323-933-3816
www.atkinsresearchinc.com

Blackstone Group
312-419-0400
www.bgglobal.com

Bravo Bi-lingual Services & Recruiting
704-365-2685
www.cross-cultural.net

BRC Field & Focus Services
602-258-4554
www.brc-field.com

C R Market Surveys, Inc.
312-376-1250 x1
www.crmarketsurveys.com

C&R Research Services, Inc.» SEE AD 49
312-828-9200
www.crresearch.com/

Cheskin Added Value
650-802-2100
www.cheskin.com

Chicago Focus
312-755-0720
www.thefocusnetwork.com

Colorado Market Research Services
303-758-6424
www.ruthnelsonresearch.com

Corona Research
303-894-8246
www.coronaresearch.com

CRG GLOBAL, INC.
386-677-5644
www.crgglobalinc.com

Cultural Horizons Inc.
816-941-7000
www.cultural-horizons.com

DataPrompt International
312-423-4100
www.datapromptintl.com

Delve
800-325-3338
www.delve.com

Directions In Research, Inc. » SEE AD 63
800-676-5883
www.diresearch.com

DLG Research & Marketing Solutions
713-795-5503
www.dlgresearch.com

Doyle Research Associates, Inc.
312-863-7600
www.doyleresearch.com

DSG Associates, Inc.
800-462-8765
www.dsgai.com

Eastern Research Services
610-543-0575 ext 306
www.easternresearch.com

El Paso Field Research Service
915-584-8938
www.epfrs.com

Encuesta, Inc.
800-500-1492
www.encuesta.com

Eureka Facts, LLC
866-693-2287
www.eurekafacts.com

Experian Simmons
212-471-2850
www.experiansimmons.com

Facts 'n Figures
818-986-6600
www.factsnfiguresinc.com

Fieldwork Boston, Inc. » SEE AD BACK COVER
781-899-3660
www.fieldwork.com

Fieldwork Chicago-Downtown, Inc. » SEE AD BACK COVER
312-565-1866
www.fieldwork.com

Fieldwork Chicago-North at Harmswood » SEE AD BACK COVER
847-583-2911
www.fieldwork.com

Fieldwork Chicago-O'Hare » SEE AD BACK COVER
773-714-8700
www.fieldwork.com

Fieldwork Dallas, Inc. » SEE AD BACK COVER
972-866-5800
www.fieldwork.com

Fieldwork Denver, Inc. » SEE AD BACK COVER
303-825-7788
www.fieldwork.com

Fieldwork East, Inc. » SEE AD BACK COVER
201-585-8200
www.fieldwork.com

Fieldwork Los Angeles, Inc. » SEE AD BACK COVER
949-252-8180
www.fieldwork.com

Fieldwork Minneapolis, Inc. » SEE AD BACK COVER
952-837-8300
www.fieldwork.com

Fieldwork New York at Westchester » SEE AD BACK COVER
914-347-2145
www.fieldwork.com

Fieldwork Phoenix at Scottsdale, Inc. » SEE AD BACK COVER
480-443-8883
www.fieldwork.com

Fieldwork Phoenix, Inc. » SEE AD BACK COVER
602-438-2800
www.fieldwork.com

Fieldwork Quantwork » SEE AD BACK COVER
888-TO-FIELD
www.fieldwork.com

First In Focus Research
919-510-0445
www.firstinfocus.com

Focus & Testing, Inc.
818-347-7077
www.focusandtesting.com

Focus Coast to Coast,Inc.
972-386-4500
www.focuscoasttocoast.com

Focus Groups of Cleveland » SEE AD 44
216-901-8075
www.focusgroupsofcleveland.com

Focus Latino » SEE AD 50
512-306-7393
www.focuslatinomarketresearch.com

Focus World International, Inc.
732-946-0100
www.focusworldinternational.com

Focuscope, Inc.
708-386-5086
www.focuscope.com

4Sight Market Research » SEE AD 54
800-676-5883
www.diresearch.com

Galloway Research Service
210-734-4346
www.gallowayresearch.com

GENESYS Sampling Systems » SEE AD 17
800-336-7674
www.genesys-sampling.com

Greenfield Consulting Group
203-221-0411
www.greenfieldgroup.com

Harvest Research Center
515-243-0785
www.harvestresearchcenter.com

Herrera Communications
951-676-2088
www.herrera-communications.com

Hispanic Consumer Research
212-939-0077
www.hispanic-consumer-research.com

Hispanic Focus Unlimited
956-797-4211
www.hispanicfocusunltd.com

Hispanic Marketing Insights
513-777-0289
www.hispanicminsights.com

Hispanic Research Consultants
972-450-5400
www.hispanicresearchconsultants.com

Hispanic Research Inc.
732-613-0060
www.hispanic-research.com

Horowitz Associates, Inc.
914-834-5999
www.horowitzassociates.com

House Market Research, Inc.
301-948-8800
www.housemarketresearch.com

House of Marketing Research
626-486-1400
www.hmr-research.com

The Hunter-Miller Group, Inc.
773-602-1420
www.huntermillergroup.com

ICR
484-840-4300
www.icrsurvey.com

IMAGES Market Research
404-892-2931
www.imagesusa.net

Insight Research Group
212-584-2323
www.insightresearch.biz

Insights Marketing Group, Inc.
305-854-2121
www.insights-marketing.com

Insights Research Center
888-755-9911
www.insightsresearchcenter.com

Interviewing Service of America, Inc. » SEE AD 55
818-989-1044
www.isacorp.com

Juarez & Associates
310-478-0826
www.juarezassociates.com

Just The Facts, Inc.
847-506-0033
www.justthefacts.com

Karchner Marketing Research, LLC
610-489-0509
www.kmrinsights.com

Korzenny Research & Consulting
850-925-7977
www.korzenny.com

L & E Research
919-782-3860
www.leresearch.com

Latin Facts Research, Inc.
818-986-4820
www.latinfactsresearch.com

Leibowitz Market Research Associates, Inc.
704-357-1961
www.leibowitz-research.co

Lighthouse Research and Development
801-446-4000
www.go-lighthouse.com

Lightspeed Research
908-630-0542
www.lightspeedresearch.com

Research Company Spotlight - Hispanic Research

Below is a list of firms from our Researcher SourceBook™ specializing in research with Hispanic consumers.

LRW (Lieberman Research Worldwide)
310-553-0550
www.lrwonline.com

LW Research Group
818-501-4794
www.LWresearchgroup.com

M G Z Research
847-397-1513

Market Decisions Corporation
800-344-8725
www.mdcresearch.com

Market Ease Urban Focus
312-654-9910
www.market-ease.net

Market Research Dallas
972-239-5382
www.marketresearchdallas.com

MarketTools, Inc.
415-957-2200
www.markettools.com

Mars Research
954-771-7725
www.marsresearch.com

Metropolis Research
216-371-9979
www.metropolisresearch.com

Metropolitan Focus LLC
212-792-5106
www.metro-focus.com

Miami Market Research, Inc.
305-666-7010
www.miamimarketresearch.com

Micstura
786-239-7380
www.micstura.com

Millward Brown, Inc.
212-548-7200
www.millwardbrown.com

MOLA Market Research & Consulting, LLC
858-271-7334
www.MOLAresearch.com

MRSI (Marketing Research Services, Inc.)
513-579-1555
www.mrsi.com

Mulberry Street Market Intelligence
253-858-0130
www.msmarketintel.com

Multicultural Solutions, Inc.
310-378-2388
www.multicultural-solutions.com

National Opinion Research Services
800-940-9410
www.nors.com

New American Dimensions » SEE AD 54
310-670-6800
www.newamericandimensions.com

New World Hispanic Research
305-860-0122
www.nwhr.net

New York Focus
212-867-6700
www.thefocusnetwork.com

NODO
52-55-5254-4242
www.nodo-research.com

Opinion Access Corp.
718-729-2622
www.opinionaccess.com

Pacific Market Research
425-271-2300
www.pacificmarketresearch.com

Perceptive Market Research, Inc.
800-749-6760 ext. 4012
www.pmrresearch.com

Persuadable Research Corp.
913-385-1700 x302
www.persuadables.com

Peryam & Kroll Research Corp.
773-774-3100
www.pk-research.com

Phase III Market Research
530-587-8800

Phoenix Multicultural
213-228-0300
www.phoenixmi.com

Precision Research Inc.
602-997-9711
www.precisionresearchinc.com

Q & A Research, Inc.
415-883-1188
www.QAR.com

Q&M Research, Inc.
708-479-3200
www.qandm.com

Q&M Research, Inc.
708-479-3200 ext. 3217
www.qandm.com

Recruiting Resources Unlimited, LLC
718-222-5600
www.recruitingresourcesllc.com

ReRez
214-239-3939
www.rerez.com

Reyes Research
805-278-1444
www.reyesresearch.com

Reyes Research
805-289-1555
www.reyesresearch.com

Reyes Research
661-872-4433
www.reyesresearch.com

Rieger Research Inc.
619-225-0030
www.riegerresearch.com

Rincon & Associates
214-750-0102
www.rinconassoc.com

RTi
203-324-2420
www.rtiresearch.com

S I S International Research, Inc.
212-505-6805
www.sisinternational.com

Savitz Field and Focus - Atlanta
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www.savitzfieldandfocus.com

Savitz Field and Focus - Chicago
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www.schwartzconsulting.com

Strategy Research and Consulting, LLC
520-623-9442

Survey Sampling International
203-567-7200
www.surveysampling.com

Taylor Research, Inc.
800-922-1545
www.taylorresearch.com

361 Degrees Consulting
626-309-0532
www.361degrees.net

UCTranslations
212-679-2255
www.uctranslations.com

Venture Marketing Associates, Inc.
901-795-6720

Voter Consumer Research
281-893-1010 ext. 101
www.vcrhouston.com

Western Publication Research
760-434-1223
www.LatinoPrintNetwork.com

WestGroup Research
602-707-0050
www.westgroupresearch.com

Worldbridge Language Services
310-477-8678
www.worldbridgeservices.com

Zebra Strategies
212-244-3960
www.zstrategies.net

that, while the Spanish language is not a critical element for connecting with this group, it is still important. For Latino youth, Spanish is very much a part of their lives, with their parents and older relatives communicating regularly through these means. Therefore, using Spanish as part of an overall English-marketing message is very acceptable and even expected in many cases. Incorporating both languages into your message effectively reflects who these youth are - living amongst two cultures.

And while Spanish-language works, the traditional Hispanic cultural formula commonly used in Hispanic-targeted advertising does not. As mentioned above, a new Hispanic cultural formula needs to be developed for this new generation of younger Latinos.

There are also significant regional differences among Latino youth that need to be taken into consideration. It's no longer the country of origin that best defines these youth (like in the case of their parents and grandparents), but their current geographic region. Each region (e.g., Los Angeles, Miami, etc.) represents a blend of heritages, which creates its own unique cultural environment.

Finally, it's important to remember that the identity of Latino youth continues to evolve as they move into adulthood. This is a market to watch today and in the years to come. They have, and will continue to have, a significant impact on consumption trends and the overall U.S. economy. | Q

multicultural research

Off the grid, out of reach

Latinos are going cellular. Can we?

By Pablo Smith Ogarrio

As researchers have stated emphatically over the past few years, the Latino population has become a major force in the U.S. economy. According to the U.S. Census Bureau, there will be 47.8 million Latinos living in the United States by next year, representing 15.5 percent of total U.S. residents. This number is expected to double by the year 2050 to 102.6 million, representing 24.4 percent of the total U.S. population. Along with this dramatic surge, U.S. Latino purchasing power is also supposed to increase significantly. According to *Hispanic Business*, U.S. Latino purchasing power stood at $870 billion in 2008 (9.3 percent of total U.S. purchasing power), and it is projected to reach as much as $1.3 trillion within the next 10 years.

As a result of these compelling numbers, we as market researchers need to figure out how to reach out effectively to the ever-growing Latino community so that we can provide our clients with the most accurate research results.

Up to this point, the most common quantitative research technique has been landline CATI phone interviewing. While this method of research has been quite effective and offers reliable results, it is becoming increasingly more challenging to reach certain segments of the population who no longer use landlines. In fact, the National Center for Health Statistics (NCHS) estimated that 22 percent of Latino adults lived without landlines in 2008. Therefore, in the year 2009, we must ask ourselves what steps we need to take to connect with those members of the Latino community who are effectively "silent" and thus unreachable in our studies.

One possible way to reach Latinos without landlines is cell phone research, which has gained considerable attention recently within the industry. This type of research certainly has potential because Latinos rely more on their cell phones than the average American. According to the 2008 Pew Internet & American Life Project, 56 percent of Latinos said they used their phones to send or receive a text message, play a mobile game, send or receive e-mail, access the Internet, play music, instant-message or get a map or directions, compared with 50 percent for African-Americans and 38 percent for whites.

In addition, cell phone usage is

snapshot

The industry faces a number of obstacles in attempting to conduct cell phone research with Latino consumers. Despite these hurdles, the decline in landline phone usage may force researchers to develop cell phone-based research programs to keep a growing and important market segment accessible for research.

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especially high among younger Latinos, a demographic that market researchers are often striving to reach. Latinos aged 18 to 34 use an average of 1,200 minutes per month, compared to 950 minutes for the general population, according to San Francisco-based Telephia, which provides syndicated consumer research to the telecommunications and media industries.

Though there is no conclusive evidence as to why Latinos use cell phones more than the general population, several studies have indicated that there are cultural factors at play. For example, Latinos tend to have larger and stronger family connections, which spread across the country and often into Latin America. As a result, they need to use their cell phones more often to stay in touch with family and friends.

As a Mexican-American myself, I can attest that the great majority of my Latino friends and family rely entirely on their cell phones to reach me and none of them currently have landlines. While my circle of family and friends certainly do not constitute a scientific study, it does speak to the prevalence of cell phones amongst Latinos.

Given the fact that Latinos use their cell phones frequently, it seems logical that market researchers would benefit from using cell phone research to connect with those Latinos that are underrepresented in our studies. It is more probable that conducting studies with cell phones in conjunction with landlines would yield a more accurate representation of the Latino community. However, before taking steps in this direction of cell phone research, we as an industry must address several challenges:

Legal obstacles

In 1991 Congress passed the Telephone Consumer Protection Act (TCPA), which makes it illegal for solicitation calls to be made to wireless phone numbers without clear permission from the individual to whom a number has been assigned. Telemarketers cannot randomly call cell phones without prior consent. However, since we are only gathering opinions without the intent to sell, we as market researchers are exempt from this rule. Given that many Latinos already struggle with living in a country where their native language is not officially spoken and often prefer to remain under the radar, going through all these tasks to fulfill the requirements of the TCPA might be perceived as burdensome to many Latinos.

Cell phone sample

On top of the challenge of having the TCPA in place, it is already difficult to locate a representative sampling of Latinos, some of whom live in the shadows due to various personal, economic and legal reasons. And when we are able to locate a representative sampling of Latinos, we also face other challenges, such as defining interviewing and calling parameters, working with cell phone providers to find appropriate numbers that can be dialed for research purposes, not being able to screen for disconnects and not being able to pinpoint geographic locations of cell phone numbers.

Financial concerns

With cell phone research, there are financial challenges that need to be overcome for both the researcher and the survey participant. For the researcher, cell phone studies can be much more costly than landline studies. For example, researchers must always manually dial respondents, as outlined in the TCPA guidelines, which prohibit auto-dialing. As a result, researchers must spend more money and time on training research interviewers for cell phone studies which have significantly more rules and regulations than landline studies.

Likewise, Latino respondents also incur costs in cell phone studies. Many Latinos have tight budgets and elect to use cell phones that have pre-paid minutes. Thus, if they consider participating in a study, they have to think twice about whether they want to use their cell phone minutes. And, of course, if researchers should decide to provide financial incentives to overcome this hurdle, they then pay more money out-of-pocket for a cell phone study versus a landline study.

Safety

Unfortunately, because people use cell phones in all different types of locales and often use cell phones while participating in other activities, safety becomes an issue. For example, if a Latino respondent were driving a car or watching children at the pool while responding to a survey, their attention could be diverted from the activity they are doing and accidents could occur. Researchers certainly do not want to be held responsible for injuries while a respondent participates in one of their surveys.

Accuracy

When people talk on cell phones, they often speak in public places where the level of privacy may be compromised. For example, they might be speaking on their cell phone at a relative's home or out on the town with friends. As a result, respondents may not be as forthcoming with answers that they may feel are sensitive in nature. Of course, an interviewer can attempt to ascertain whether the respondent is in an appropriate place to take a survey, but the researcher has little knowledge of whether the respondent is being truthful.

Not underestimate the value

In closing, though there are many challenges to Latino cell phone studies and more investigation is needed, we as an industry should not underestimate the value in pursuing this type of research. We need to stay on top of the curve and push ourselves to figure out how we can best utilize cell phone research to our advantage.

Already some of the dilemmas mentioned above may have some solutions. For example, we can all work on training our interviewers to ascertain whether respondents are located in appropriate locations where personal safety is not an issue. Others hurdles, however, like the Telephone Consumer Protection Act, are likely here to stay for some time and will require more work on our parts to overcome.

No matter what the future holds, it will be interesting to see where our industry goes with cell phone research, or perhaps, in this particular case, where the Latino community takes us with their cell phones.

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compared with 18 percent of non-members; 38 percent of HSA owners discussed health expenses with their physicians, compared with 27 percent of non-members; and 34 percent of HSA owners developed a budget for health expenses, compared with 18 percent of non-members.

HSA owners are also more engaged in health and wellness. For example, 43 percent of HSA owners participated in health screenings, compared with 30 percent of non-members. In addition, 25 percent of HSA owners reported exercising regularly, compared with 14 percent of non-members.

CDHP members with HSAs are more likely to access preventive care services than are CDHP members without such accounts or non-CDHP members. For example, 69 percent of HSA-eligible CDHP plan members with HSAs had regular checkups, physicals or preventive health screenings, compared with 64 percent of HSA-eligible CDHP members without HSAs and 62 percent of non-CDHP members.

CDHP members with employer-sponsored coverage are much more likely to open HSAs when their employers contribute to the accounts. Seventy-one percent of members who received some employer contribution either have already opened or plan to open an HSA, compared with 48 percent of CDHP members who did not receive an employer contribution to the accounts. For more information visit www.bcbs.com.

Consumers spending less on prescription drugs

Consumers say they are spending an estimated 3 percent less on prescription drugs in 2009 versus 2008 thanks, in part, to the economic downturn, according to Kurt Salmon Associates (KSA), a New York consulting firm. The decline is likely the result of a continued shift toward lower-cost generic drugs and an increasing number of consumers who are looking to save money by self-prescribing or simply reducing overall drug consumption. KSA's analysis suggests that retailers that can manage consumers' perceptions of price - as much as price itself - are the most likely to be successful in the prescription drug category.

For example, many retailers have adopted discount and generic drug programs, and retailers with a value orientation are winning the share war in this economy. Wal-Mart has been the most successful at marketing its discount drug offering and grew its customer base 9 percent over the past year. The share gains for value-based retailers come at the expense of the stores that consumers perceive as having higher prices. Rite Aid lost a disproportionate amount of market share to Wal-Mart (approximately 2 percent over the past year) because consumers believe it has higher prices. Consumers give Target high price-to-value scores.

Prescription drug users are increasingly price-sensitive. In January 2009, 20 percent of prescription drug consumers cited price as a reason for switching retailers, up from 16 percent in 2008. Yet despite the increasing importance of price perception, location remains the No. 1 reason why consumers choose a particular retailer for prescription drug purchases. Walgreens and CVS continue to maintain share based primarily on convenient locations.

Price-sensitive consumers are responding to discount prescription drug programs. More than half (57 percent) of Wal-Mart pharmaceutical shoppers cited the retailer's $4-generic-drug program as a main reason for their choice of retailer. For more information visit www.kurtsalmon.com.

ED pill takes top honors as most-recalled drug ad of 2008

Indianapolis pharmaceutical company Eli Lilly produced three of the top four most-recalled prescription drug and vaccine ads on TV last year. Cialis was the most often-recalled new pharmaceutical ad in 2008, recalled by viewers at a rate 55 percent greater than the average based on all new prescription drug ads launched over the past year, according to data from New York researcher The Nielsen Company. The erectile dysfunction drug ad features a couple interrupted from an intimate moment by a surprise visit from their daughter.

"Prescription drug and vaccine advertisers have learned to adjust to the obstacles that they encountered back in 2007," says Fariba Zamaniyan, senior vice president of the health care practice at Nielsen IAG. "They've found a way to deliver more memorable ads that resonate with the audience."

An execution for the antidepressant drug Cymbalta was the second most-recalled pharmaceutical ad of 2008, with a creative extending from its "Depression Hurts" campaign. The ad indexed at 151, meaning it was recalled 51 percent more often than the average prescription drug ad. Another Cialis spot - featuring a man and woman seated on an elevated spot overlooking a beach - placed fourth with an index of 127. Loestrin24 Fe, a birth control pill manufactured by Warner Chilcott, was the only non-Eli Lilly drug ad to break into the top four, with an index of 143. For more information visit www.nielsen.com.

Health coverage is important but doesn't trump cable

While some Americans are tightening their belts, not everyone is prepared to make the financial sacrifices required to keep their health insurance coverage. Only about half of Americans would be willing to cut back on certain expenses such as cell phone payments (53 percent) and cable TV (49 percent) in order afford health insurance, according to a consumer survey conducted by Kelton Research, New York, and commissioned by insurance provider eHealthInsurance, Mountain View, Calif.

Almost four in five (79 percent) of those with employer-provided health insurance would be more willing to cut back on or give up their vacation time than their health insurance coverage. Just four in 10 would be willing to pay $200 or more per month to insure themselves or their family if they lost their current jobs. Those currently covering three or more people on their health plan would be willing to part with about $318 per month for insurance if they found themselves unemployed, compared to an average of $169 for Americans covering less than three people if they were to find themselves in the same situation.

Four out of five (81 percent) employed Americans are not feeling extremely confident about job security, and, if they were to lose their job, many are not prepared for the health insurance costs awaiting them. Additionally, 34 percent who are employed right now think they're more likely to lose their job than get a raise in the next year. Almost two in three respondents predict they'd be unable to afford health insurance for longer than six months, if at all, if they lost their jobs and had to use their current savings. Thirty-two percent admit they wouldn't be able to afford it at all.

Driving this consumer sentiment is an awareness gap between the perception and reality of employer-based and individual health insurance costs: almost two in three (64 percent) who are covered through their jobs have no idea what their employers contribute towards their health insurance on a monthly basis; another 27 percent of insured Americans don't even know how much they pay themselves in an average month for health insurance; just 26 percent are aware that private health insurance is typically less expensive than COBRA coverage; one in two Americans with insurance doubt that if they lost their current coverage they'd be able to find similar coverage with another plan; and if they had to apply for a new health plan for any reason, the average insured American estimates a 31 percent chance they'd be declined. For more information visit www.keltonresearch.com.

Almost everyone buys off-brand something

Rich or poor, private-label items are common in almost every single American home. Ninety-seven percent of all households consume private-label foods on a regular basis. And American households earning less than $30,000 and those earning over $70,000 shop generic brands alike; in fact, households earning over $70,000 buy private-label items 3 percent more than households earning less than $30,000 (33 vs. 30 percent).

Tough economic times have certainly been a boon for private-label foods and beverages, but according to Port Washington, N.Y., research company The NPD Group, private-label usage has been growing over the last decade. In 2008, 24 percent of all food and beverages served in American homes were store brands, up from 18 percent in 1999.

"There is no question that private-label foods have become an integral part of American life," says Harry Balzer, chief industry analyst at NPD and author of the Eating Patterns in America study. "Furthermore, we do not hide private-label foods as an ingredient or as an additive to another dish. Today over half of all store-brand food eatings are the end dish."

Price and value are the chief reasons why consumers purchase private-label or store brands, but most respondents also feel that the quality of store brands is often equal to, or in some cases better than, name brands. For more information visit www.npd.com.

Asian-Americans strive for increased representation

Despite a positive trend in attitudes toward Asian-Americans, the majority of the general population cannot make a distinction between Chinese-Americans and other Asian-Americans; and 28 percent or more say they rarely or never interact with Asian-Americans, according to Still the "Other?": Public Attitudes Toward Chinese and Asian-Americans, a study conducted by Rochester, N.Y., research company Harris Interactive on behalf of the Committee of 100, a New York organization of Chinese-Americans.

Among the general population, 45 percent believe Asian-Americans are more loyal to their countries of ancestry than to the U.S., up from 37 percent in the 2001 survey. In contrast, approximately three in four of the Chinese-Americans surveyed say Chinese-Americans would support the U.S. in military or economic conflicts, compared to only approximately 56 percent of the general population who agrees.

Thirty-six percent of the general population thinks that Asian-Americans have the right amount of political power and influence in Washington, D.C., while only 15 percent of Chinese-Americans believe this to be true. However, 47 percent of the general population believes that Asian-Americans have too little power in Washington, with 82 percent of Chinese-Americans agreeing.

Sixty-five percent of the general population believes Asian-American students are adequately represented on college campuses, with 45 percent of Chinese-Americans agreeing and 36 percent arguing that they are under-represented. In reality, there are only 33 Asian-American college presidents in the U.S. (out of about 3,200) and, while analysis shows that among the top sector of higher education institutions (as listed in *U.S. News & World Report*'s 2005 rankings) Asian-Americans are well-represented as students (6.4 percent) and faculty (6.2 percent), only about 2.4 percent are represented in the positions of president, provost or chancellor.

Similarly, while Asian-Americans hold only about 1.5 percent of corporate board seats among Fortune 500 companies, 50 percent of the general population believes Asian-Americans are adequately represented on corporate boards, while only 23 percent of Chinese-Americans agree. Forty-six percent of the general population also believes Asian-Americans are promoted at the same pace as Caucasian-Americans, with only 29 percent of Chinese-Americans saying the same. For more information visit www.committee100.org.

Hotels - more than a place to rest your head

The needs, wants and expectations of travelers are going nowhere but up, and hoteliers would be smart to take note. From information on the hotel being made available before booking to the extra exfoliating bar of soap in the shower to throw in as a take-home item, research shows that when it comes to the travel experience, choosing and staying at a hotel is far more complicated than finding a soft place to land.

When looking for a hotel, most people (46 percent) do a little research, finding a few comparable choices and selecting the most suitable. But one in 10 simply choose the first OK one that they find. And how are those who research researching? Twenty-nine percent of potential guests use a hotel Web site more than any other research tool, topped by the French at 55 percent, according to a study from Chicago research company Synovate. The second most-popular choice lay with the 20 percent who ask colleagues, friends or relatives about hotels. This word-of-mouth approach was especially popular in the two Southeast-Asian markets surveyed (42 percent in Indonesia and 35 percent in Malaysia use this more than any other research technique). Seventeen percent of respondents primarily use review sites, led by 54 percent of Japanese respondents.

An overall 47 percent make sure a hotel caters to their technology needs before they book it and agree that technology is important in selecting a hotel. And there is a gender difference on this attribute, as 50 percent of men agreed and 44 percent of women. The highest agrees were found in Brazil (68 percent) and Malaysia (64 percent). The lowest agrees were France at 32 percent and Japan at 36 percent.

Seventy-two percent of all respondents agree that a bad hotel experience can ruin an entire trip, led by France (83 percent), Japan and Hong Kong (both 79 percent), the U.S. (76 percent) and the United Arab Emirates (75 percent). Eighty-five percent agree they will tell others about a bad experience, led by France (97 percent), Canada (96 percent), Hong Kong (94 percent) and the U.S. (93 percent). But in better news for hoteliers, 90 percent say they will tell others about a good experience, sharing the inside scoop with their friends and family. There was almost universal agreement with this from France (97 percent), Canada (96 percent), Brazil (96 percent) and the U.S. (95 percent).

Some guests arrive at a hotel, dump their bags and make a beeline for the bathroom to check out the nature and breadth of the toiletry samples. And it turns out that this is not so unusual - half of all American hotel guests are taking toiletries, no questions asked. When asked to explain their feelings about toiletry samples, an overall 26 percent of survey respondents said "They are yours; they are part of the experience." This was led by the U.S. (49 percent), Japan (43 percent) and France (41 percent), in each case with more women than men agreeing. However, despite the growing acceptance of toiletry-ownership, the overall most-popular approach remains to simply use what you need during the stay and leave the rest. Half of all respondents do this, led by Indonesians (65 percent), Malaysians (58 percent) and Hong Kongers (54 percent). The survey also found that 9 percent of respondents agreed with "You love taking them with you but always feel a shade guilty." French women most-often selected this, with 21 percent feeling slight remorse about pilfering products. For more information visit www.synovate.com.

Product and Service Update
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Prebuilt text analysis packages (categories and dictionaries) can be used out of the box to save time and can be shared and reused for specific types of surveys, such as employee, product and customer satisfaction. Text Analytics 13 offers a variety of natural-language processing techniques (i.e., multilingual sentiment extraction and semantic classification to analyze opinions and categorize any unstructured data such as surveys or Web 2.0 data). The product supports seven languages natively and an additional 30 languages through automated translation powered by Language Weaver. Users who purchase this option can translate data into English for analysis. For more information visit www.spss.com.

OTX updates its GamePlan

Los Angeles research company OTX has debuted its new business intelligence tool and tracking service GamePlan, which aims to aggregate detailed consumer data on hundreds of games on a weekly basis and project forward-looking consumer behavior surrounding those titles. OTX has partnered with game-rental company GameFly and eBay transaction data provider AERS (whose data will be combined with internal data from OTX's own GamePlan Consumer Tracker). The results aim to allow publishers and other interested parties to analyze metrics such as what games are most desirable to rent and own, and which titles gamers plan to rent or own in the future. For more information visit www.otxresearch.com.

Research-at-home: by the people, for the people

New York research start-up agency MR Junction has launched gLL (gLobaLocalised), a method designed to supply survey data which has been collected locally by home-based, native-language speakers around the world. It is designed to make CATI research local within a global context by tapping into a network of on-demand survey interviewing agents working independently, remotely and worldwide to ensure market research data is collected within the most local context (with the local population, by the local population) while still being monitored and supervised. The data is collected on a central secure server in real time.

Using the system, self-employed interviewers, supervisors and project managers are able to conduct, monitor or supervise phone surveys from home using a computer and high-speed Internet connection. For more information visit www.mrjunction.com.

NeuroFocus debuts NGame development suite

NeuroFocus, a Berkeley, Calif., research company, has introduced a suite of brainwave-based tools designed to enhance video game development and players' enjoyment. The firm estimates the tools can shave years off the game development timeline and save millions in costs. The NGame suite of products and services is intended to accelerate the development process and improve game design and players' enjoyment. By measuring players' neurological reactions to games, the suite determines how gamers interact with and respond to avatars, storylines, realism, game scenarios, in-game advertising and sound effects. Specifically, the tools can provide user-group analysis, along with design, implementation and marketing recommendations. They can also be used to examine multiplayer, social gaming and multisensory gaming effectiveness. For more information visit www.neurofocus.com.

Harris taps into kids' Brainwaves

Rochester, N.Y., research company Harris Interactive has launched Brainwaves, a new methodology created to enable children and teenagers to participate in the co-creation of new products and services. The technique uses laptop computers to bring up to 20 participants together for brainstorming and co-creation. It blends qualitative brainstorming and facilitation with quantitative voting and survey tools.

Sessions are run online and offline with children as young as nine years, and the firm also organizes 90-minute sessions in school classrooms at the end of the school day. Feedback is anonymous and all participants are able to influence proceedings equally.

Through open-text input, the data identifies issues, which are then categorized into themes, which can then be explored, ranked, polled or voted on to understand relevant and motivating areas to pursue through further questioning. For more information visit www.harrisinteractive.com.

Briefly

St. Louis communications company ej4 has released Instant Video Presenter, a software application that allows users to create newsroom-style videos quickly. The application is a video capture application, so no post-production process, compression or editing is needed. When the video is done being recorded, the file is ready to be deployed through e-mail, uploaded to the Internet or burned to CD. Instant Video Presenter includes a green screen and sells for $259.99. A free trial version is available. For more information visit www.harrisi.com/europe/pubs/brainwaves.pdf.

Feedback Partners, a new Philadelphia research bureau, has opened its doors and introduced a feedback management platform designed to provide real-time alerts, dashboards and analytical tools. On-demand reporting is delivered via a Software-as-a-Service Web portal. All reports are online; there is no software to install. For more information visit www.feedbackpartners.com.

Paris research company Ipsos has rolled out its Omnibus Tracker

Series in the Middle East and North Africa. The service provides data and market indicators on the business sectors in the territory. It also offers ongoing syndicated multinational research, rolled out across three markets (Saudi Arabia, United Arab Emirates and Kuwait), and three countries in the Levant and North African region (covering Lebanon, Jordan and Egypt). The tracker series offers six waves per year, using both CAPI and CATI methodology. For more information visit www.ipsos.com.

Maponics, a Norwich, Vt., software company has launched Maponics International Neighborhood Boundaries, a specialized spatial dataset that aims to include neighborhoods in approximately 100 cities in over 15 European Union countries by the end of 2009. Maponics International Neighborhood Boundaries is available for quarterly delivery in SHP, KML and other file formats. It can also be accessed via the Maponics Spatial API, for companies outsourcing data hosting and management. For more information visit www.maponics.com.

20/20 Research Inc., Nashville, Tenn., has launched QualAnywhere, a research tool that uses mobile devices (cell phones, PDAs, etc.) and text messaging to allow researchers to engage study participants in qualitative research essentially anytime and anywhere. Study participants are recruited and then, over a period of days or weeks, they receive predetermined questions at specified times and text back their responses. All responses are automatically gathered and sorted into the study transcript. For more information visit www.2020research.com.

New York research company Ziment has added SEGZ for channel optimization segmentation to its market segmentation suite. Channel optimization segmentation is an approach to market segmentation geared to optimizing marketing spend and channel strategy. The approach works by gathering information about targeted physicians and finding segments of physicians that differ profoundly in the ways they collect and interact with the information around them. Channel optimization segmentation can help indicate what messages to place where to influence certain physicians. For more information visit www.ziment.com.

HispanicBusiness Media, a Santa Barbara, Calif., media group, has released its latest HispanTelligence publication, The U.S. Hispanic Economy in Transition, 3rd Edition. The report is intended to provide a quantitative portrait of the growing Hispanic market and its implications for business and politics. It includes new projections on and metrics of the U.S. Hispanic economy. For more information visit www.hispanicbusiness.com/research/hispaniceconomy.asp.

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Common Knowledge, a fellow Dallas research company Toluna acquired in 2008. As of April 2, 2009, Common Knowledge officially became **Toluna USA Inc.**

Acquisitions/transactions

Majestic Research, New York, has acquired **Rood Research**, New York, in an effort to expand its offerings to include health care market research.

Omaha, Neb., research company **infoGroup Inc.** has closed a $155 million deal to sell **Macro International Inc.**, a Calverton, Md., research subsidiary of infoGROUP, to **ICF International**, a Washington, D.C., consulting firm.

The GfK Group, a Nuremberg, Germany, research company, has acquired Surrey, U.K., research company, **Ascent Market Intelligence**. The company will operate under the name GfK Ascent-MI Limited.

Alliances/strategic partnerships

The Hartman Group, a Bellevue, Wash., research company, and **GfK Custom Research North America**, a New York division of Nuremberg, Germany, research company The GfK Group, have formed an alliance to conduct Future Buy: The New Shopper Value Paradigm, a study intended to uncover business opportunities for companies looking to connect and remain relevant with shoppers in a retail marketplace.

Ipsos Reid, a Toronto division of Paris research company Ipsos, and Winnipeg, Manitoba, research company **Tell Us About Us Inc.** (TUAU) have partnered to combine Ipsos Reid's analysis services and TUAU's data collection and reporting services.

Association/organization news

Amsterdam, Netherlands, research association **ESOMAR** has launched the Young Researcher of the Year Award. The award will be presented for an outstanding original and creative piece of research that can effect change within some of the most topical and controversial issues globally. The award is part of ESOMAR's Developing Talent initiative designed to enhance the skills, know-how and expertise of future market research professionals.

Contenders must be under the age of 30, skilled in producing high-quality research with a commitment to human development, ethics and a fair and just world. An international jury of industry leaders chaired by ESOMAR will review each submission, with the three finalists invited to present at the ESOMAR Annual Congress in Montreux, Switzerland, September 15-18, 2009. For more information on the contest and how to enter visit www.esomar.org/youngresearcher.

The Marketing Research Association (MRA), Glastonbury, Conn., has called for all members of the research profession in Massachusetts to take action against regulations passed in Massachusetts that the MRA believes could hurt research with health care practitioners.

On March 11, 2009, the **Massachusetts Public Health Council** released new regulations (the Marketing Code of Conduct) with health care practitioners. By requiring the public reporting of payments to practitioners that originate from pharmaceutical and medical device manufacturers, the Code may make practitioners less likely to participate in vital survey research that provides benefit to the public. Reduced participation will lead to less research performed in Massachusetts, resulting in significant loss of jobs and income.

Julian Vermaas, senior research director of Omaha, Neb., research company The MSR Group has earned Professional Researcher Certification from the **Marketing Research Association** at the expert skill level.

Awards/rankings

EMI Surveys, a Cincinnati research company, celebrated 10 years of business in April 2009. The company was also presented with a Certificate of Recognition by the **Cincinnati USA Regional Chamber of Commerce** for its success.

San Francisco research company **MarketTools Inc.** has been named the top market research supplier in the annual survey of research decision makers conducted by **MarketResearchCareers.com**, a Stamford, Conn., market research online job database. The survey polled 600+ market research professionals, with MarketTools being ranked No. 1 in customer satisfaction out of the 18 full-service vendors rated in the survey.

The Advertising Research Foundation (ARF), New York, has named **Dr. A.K. Pradeep** of Berkeley, Calif., research company NeuroFocus the Grand Winner of its Great Mind Award for Innovation award for 2009.

Other winners of the ARF Great Mind Awards include **Joseph C. Philport**, The Traffic Audit Bureau for Media Measurement Inc., New York (Gold); **Carl Marci**, Innerscope Research, Boston (Gold); **Caleb Siefert**, Innerscope Research, Boston (Silver); **George Shababb**, TNS Media Research, New York (Silver); and **Brendan Light**, BuzzBack Market Research, New York (Bronze).

The ARF has also awarded Lifetime Achievement Awards to **Gerry Lukeman**, chairman emeritus of Paris research company Ipsos, and **Gale D. Metzger** of Menlo Park, Calif., research company Knowledge Networks.

Additionally, **Efrain Ribeiro** and **Renee Smith** of Paris research company Ipsos Global Operations together with **Tom Evans** of ESPN, Bristol, Conn., have been recognized by the ARF for their project Foundations of Quality, an initiative that examined several principles and fundamentals of online market research involving multipanel membership and its impact on data quality and respondent engagement.

The Cable and Telecommunications Association for Marketing, Alexandria, Va., has awarded **Knowledge Networks** (KN) and **NBC Universal** (NBCU) its first place 2009 Research Case Study Award for the Total Touch study KN conducted for NBCU that provided a single-source assessment of consumer exposure and reaction to Olympics coverage across media.

TruMedia Technologies, a Tampa, Fla., research company, has been named in the list of Cool Vendors in the Cool Vendors in Retail 2009 report by **Gartner Inc.**, a Stamford, Conn., IT advisory company.

New accounts/projects

Columbia, Md., research company **Arbitron Inc.** has signed a multiyear agreement with **Bonneville International**, a Salt Lake City media company, for PDA Web, a new software service for Portable People Meter (PPM) ratings. PDA Web is an online version of PD Advantage, a programming tool designed to track the top-line view of stations' performances. Originally built for the diary service, it analyzes PPM radio ratings data and allows radio station programmers to determine the station preferences of PPM respondents, when listeners are tuning in and tuning out and to what stations they are going when they do tune out.

Separately, Arbitron has begun cell-phone-only household sampling in an initial 151 diary markets for the Spring 2009 radio survey. The company plans to expand cell-phone-only sampling to all radio markets in the entire U.S. with the fall 2009 survey.

Consumer Contact ULC, a Toronto research company, has become a **Net Promoter Loyalty Partner** and has adopted Net Promoter's measurement and tracking metrics for its clients.

Ci Research, Cheshire, U.K., has been contracted by U.K. business association **Trading Standards North West** to undertake the Youth Alcohol and Tobacco Use Survey. Ci Research will record, analyze and collate 12,000 questionnaires from 14-17-year-olds and present the findings to 20 local authorities. It is the third consecutive year that Ci Research has been awarded the contract, the results of which will be used to help deal with the sale of cigarettes and alcohol to underage youth.

A new Toronto research company **Fresh Intelligence** has been selected by **Capital C**, a Canadian marketing agency, to serve as Capital C's exclusive intelligence-gathering group.

New companies/new divisions/ relocations/expansions

Research facility alliance **Focus Coast to Coast** has added three facilities in Eastern Europe to its network - **WorkLine** in Moscow and St. Petersburg, Russia, and **InMind** in Kiev, Ukraine.

Courteney Wilds has launched **CourtLynn Research LLC**, a new firm set to specialize in qualitative research. The firm is located in Woodbridge, N.J.

New York research company **ModeratorNetwork** has opened its doors. The firm will focus on providing savings on moderator fees, as well as other expenses involved in marketing research, by connecting marketing research professionals to skilled, reasonably-priced moderators and by providing an online management system for the qualitative research process. The firm is online at www.moderatornetwork.com.

Hampshire, U.K.-based **eDigital-Research** has opened a new London office. The office will be managed by Dominic Bean, head of business development. The company has also appointed Ben Benson as senior Web application developer.

Karen Gonçalves has reopened her practice, offering market research and marketing planning services. She has added professional writing to her offerings. **Karen P. Gonçalves, Marketing Consulting**, will be based in Santa Monica, Calif.

Charles Pearson has launched a new research agency named **EasyInsites**, based in Surrey, U.K. Pearson will be joined by Jo Winning, both formerly of Research Now, London.

Research company earnings/ financial news

IMS Health, Norwalk, Conn., announced first-quarter 2009 net income of $133.3 million and diluted earnings per share (EPS) of $0.73, compared with net income of $59.2 million and EPS of $0.32 in the first quarter of 2008. After adjusting for certain tax and foreign exchange hedge-related items, net income on a non-GAAP basis for the first quarter of 2009 was $68.7 million and EPS was $0.38, up 1 percent and 3 percent, respectively, year over year.

With more than 60 percent of revenue generated outside the U.S. and the strengthening of the dollar, foreign exchange had a significant impact on first-quarter revenue, which declined 8 percent to $526.9 million. Operating income in the 2009 first quarter was $100.9 million, compared with $116.4 million in the year-earlier period, down 13 percent or 20 percent constant dollar.

The Nielsen Company, New York, announced financial results for the year ended December 31, 2008. Reported revenues for the year were $5,012 million, an increase of 6 percent over reported revenues for the previous year of $4,707 million. Excluding the impact of currency fluctuations, revenues for the year increased 4.5 percent.

Reported operating income for the year was $118 million compared to $416 million for the previous year. These results were negatively impacted by $552 million and $174 million, respectively, of charges relating to certain items such as goodwill impairment charges, restructuring costs, deal-related costs and compensation agreements. Adjusting for these items, operating income increased 12.5 percent.

index of advertisers

By Joseph Rydholm
Quirk's editor

Report finds Indian-Americans at home in their new home

When marketers talk about reaching multicultural consumers, it rarely seems that they are referring to Indian-Americans. Yet this is a segment that offers, according to a recent study, much of interest to companies of all kinds.

For the study, Asian Indians in the U.S., Los Angeles research firm New American Dimensions and interTrendCommunications, Long Beach, Calif., conducted focus groups, an online survey and street interviews to better understand first-generation Asian-Indians in the U.S. The research looked at respondents' relocation patterns; their values and self-identity; their lifestyles, shopping habits and store and brand-selection criteria; and their use of technology and media.

The focus groups and street interviews involved Asian-Indians living in Los Angeles while the online survey queried a nationwide sample of U.S. Asian-Indians. For the online survey, respondents were self-identified Asian-Indians, first-generation (born in India), residents of the U.S. for at least one year, between 18 to 60 years of age, claiming to speak English "well" or "very well."

In general, these consumers are young, with a median age of 32; are likely to be married, with young kids; are highly educated (three-quarters employed in a professional or technical occupation); have high purchasing power, with a median annual household income of $85,000; and almost half own homes.

Despite their fairly recent arrival, first-generation Indian-Americans appear to be doing well at adjusting to life in the U.S. "Over half feel completely at home in the U.S.," says Sharmila Fowler, senior vice president, sales and marketing, New American Dimensions. "And two-thirds feel comfortable inviting non-Indians to their home. We asked about how they feel they are valued and treated in the U.S., and I think because there are so many Indians who do have high education and workplace skills, they feel that they are very valued, and that helps with being treated well and positively."

Many said that they had suffered from the common Western stereotype that Indians are engineers who don't speak English well. Most who mentioned encountering difficulty with stereotypes growing up acknowledged that being Indian is cool now. Respondents like that Indians are perceived as smart and hardworking and mentioned the advantages to being the subject of positive stereotyping.

American values

Though they came here for a variety of reasons - education, marriage, family, job opportunities - many say they were drawn by the same set of American values: self-determination, independence, an entrepreneurial spirit and equal opportunities for women.

Perhaps because many of them arrived already proficient in English, Indian consumers may not be viewed by marketers as requiring campaigns with special cultural references and appeals. The study found that many respondents don't require or even desire campaigns targeted directly to them. Rather, they find multiracial casts appealing and would like to see more Indian faces in advertising.

For companies who do wish to target them directly, respondents advised them to get to know the culture, to avoid missteps. Some verbatims from the research: "Snake charmer is not the way to represent us, or elephants ... you don't have to constantly show the poverty. Show development, progress. Know the culture well before marketing ... there are a lot of intelligent people from India and the more [marketers] accept that fact, they're opening more doors for Indians to spend money."

No special joy

As shoppers, they are diligent and concerted researchers when hunting for products they want to buy but they derive no special joy from shopping. Brand names can be important, if the consumer has had a good previous experience with a brand, but in general quality trumps brand cachet. While brand loyalty is not high, some brand preferences expressed in the research were for Levis, Target, Abercrombie and Fitch, Nissan and Toyota.

Though they are not early adopters of the latest technology, compared to the overall U.S. population, they're much more likely to own devices such as PCs, laptops, cell phones, digital cameras and MP3 players.

Financial goals are a high priority for Indian-Americans. They place considerable importance on job stability, financial independence and saving for the future. They index high on use of a variety of financial products: 42 percent of them have a housing loan or home mortgage and 40 percent have CDs. Money-market accounts, auto loans, bonds and home-equity loans are other commonly-used products.

As the report notes, family is a top priority of first-generation Indian Americans and appears to be a factor that motivates them to set and fulfill financial goals. They have a strong desire to provide a college education for their kids (a desire that may also be tied to the notion that education brings honor, which runs deep in Indian culture) and believe it's their responsibility to care for their elderly parents.

Maintaining connections

They tend to be more concerned with maintaining connections to family and friends in India than with sustaining Indian traditions related to clothing, holidays and marriage. "Even though they're classifying themselves as Indian, they also feel American. It's a part of their identity to play this balancing act. They are trying to hold onto some of their traditions, food and language, but there are many people who have non-Indian friends, who are doing a lot of things that are very American," Fowler says.

One facet of their heritage that they are interested in preserving is language, in part, to stay connected to India. They are active media consumers, drawing from a wide range of sources to stay abreast of news in India and the U.S. More than half watch Indian in-language and/or Indian-content TV programming on a regular basis.

Attractive segment

As the above illustrates, Indian consumers are indeed an attractive segment: an educated, financially-savvy group that embraces the values of their current home country. Marketers who reach out to them, overtly or otherwise, can expect to draw, if not their loyalty, at least their respect and consideration. Visit www.newamericandimensions.com for an executive summary of the study. | Q

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cover-to-cover

Facts, figures and insights from this month's issue

> Qualitative research with medical market research participants can be far more complex because of physical and emotional limitations, and preparation is the key to success. Disease knows no demographic limitations, and neither should the research regarding it. *(page 33)*

> A speed trap is best initially placed about one-fourth to one-third into the survey (depending upon survey length). It flags speedy responders, makes them aware they are completing the survey at an abnormally fast pace, and asks them to please slow down and give thoughtful responses. *(page 44)*

> To some extent, Latinos under 18 are the family's trendsetters ... They are shoppers (with their families) from the early ages, and they are given the power to influence family decisions and purchases. *(page 54)*

> Location remains the No. 1 reason why consumes choose a particular retailer for prescription drug purchases. *(page 62)*

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Congratulations to April's winner, Marc Beebe of IEEE Corporate Strategy and Communications, Piscataway, N.J.