



2009 General-Market & Multicultural Discipline Usage Survey  
Top-Line Findings

This report examines the probability of corporations to utilize multicultural (African-American, Hispanic and Asian) advertising agencies to create general-market work in the United States. The report is directional as the sample size and number of respondents is a fractional percentage of the total number of corporations in the United States currently utilizing marketing and advertising services.

**Objective:**

Ascertain directional likelihood of a corporations' willingness to employ multicultural advertising agencies for the creation of general-marketing work.

**Methodology:**

The Multicultural Marketing & Discipline Usage survey was administered via email with an embedded link sent from Icy Williams, Associate Director, Corporate Supplier Diversity Leader of Procter & Gamble to 77 marketing and diversity directors of large corporations on January 8, 2009. Companies receiving email participation were (in no order), Bell South, Toyota, Verizon, General Motors, Boeing, Kroger, AOL, Mercedes Benz, Lockheed Martin, Johnson Controls, Wal-Mart, Dell, Honda, Altria, American Airlines, Archer Daniels Midland Company, Army & Air Force Exchange Service (AAFES), Cargill, Colgate-Palmolive, Miller Coors, Exxon Mobil, Frito Lay, Hallmark, Ikon, JC Penney's, Johnson & Johnson, JP Morgan Chase, Pfizer, Pitney Bowes, SC Johnson, Shell, Monsanto, Target, Coca-Cola, Denny's, Con Agra Foods, Kellogg Company, Safeway, McCormick, Sodexo, Chevron, Abbott, Tyco, Cisco, Caterpillar, Boyd Gaming Corporation, Highmark, Time Warner, Darden, Medtronic, Prudential, Master Card, GSK, United States Postal Service, Humana, Hilton, Ernst & Young, Aetna, Price Waterhouse & Coopers, Freddie Mac, University of Pittsburgh, FedEx, IBM, Hewlett-Packard, Nike, Texas Instruments, MeadWestvaco, Ryder, AT&T, Ford, and Chrysler. Additionally, The New England Minority Supplier Development Council (NEMSDC) embedded a survey link in its' newsletter on January 12 and January 20, 2009 for corporate member participation.

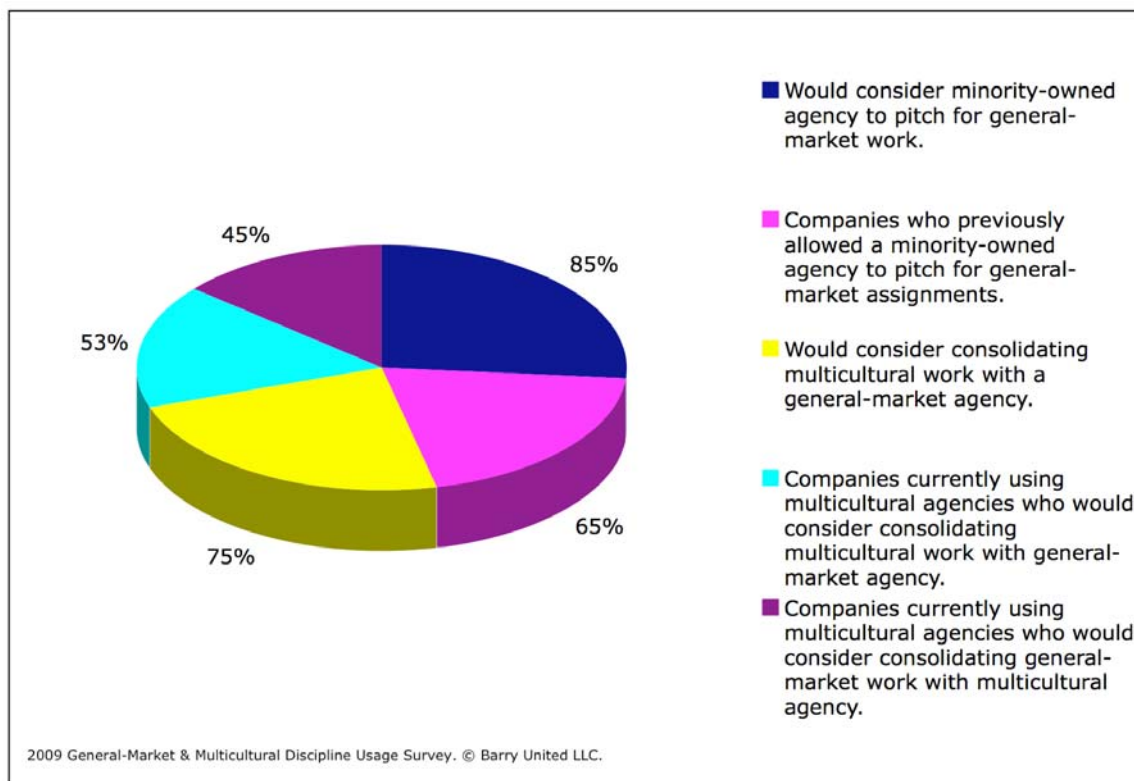
The survey was anonymous. No company or personal data was captured from respondents. A total of 18 questions were asked. 29 total survey respondents. Survey results calculated from total qualified starts. Tabulation automatically generated. Survey concluded on January 22, 2009.

**Qualifications:**

Completion of all required survey questions. Qualified starts (20 in total) are defined as respondents completing all required survey questions. No multiple responses from the same IP address were calculated.

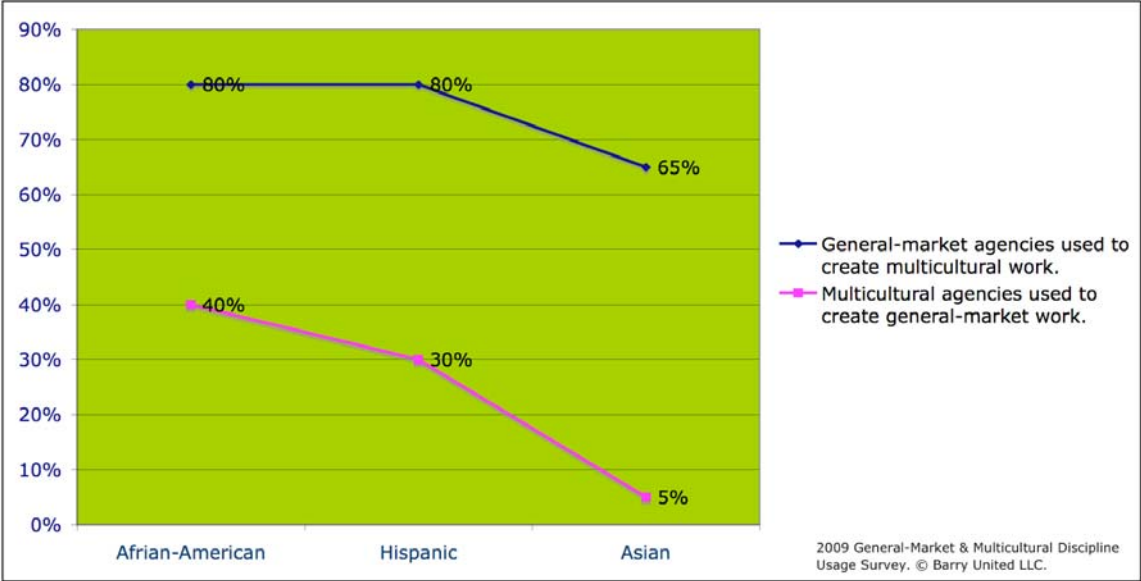
## Top-Line Findings

Overall, corporations (85% of qualified starts) would consider allowing a minority-owned general-market agency to pitch for future general-market work, if that agency possessed the same or better capabilities as their current general-market agency. Of the corporations that would consider allowing a minority-owned general-market agency to pitch for future general-market work, 65% previously allowed a minority-owned agency to pitch for general-market advertising assignments.



However, 75% would consider consolidating African-American, Hispanic and Asian specific work with a general-market agency, non-minority owned, if that agency possessed multicultural capabilities. Of the corporations that would consider consolidating multicultural work with a general-market agency, 53% currently contract an African-American, Hispanic and/or Asian agency directly. Adversely, 45% of the corporations who currently contract an African-American, Hispanic and/or Asian agency directly would consider consolidating general-market work with the minority-owned agency.

More specifically, when asked has your company utilized an African-American, Hispanic or Asian agency to create general-market work, the response was 40%, 30% and 5% respectively. Whereas, corporations that utilized a general-market agency to create African-American, Hispanic or Asian specific work was 80%, 80% and 65% respectively.

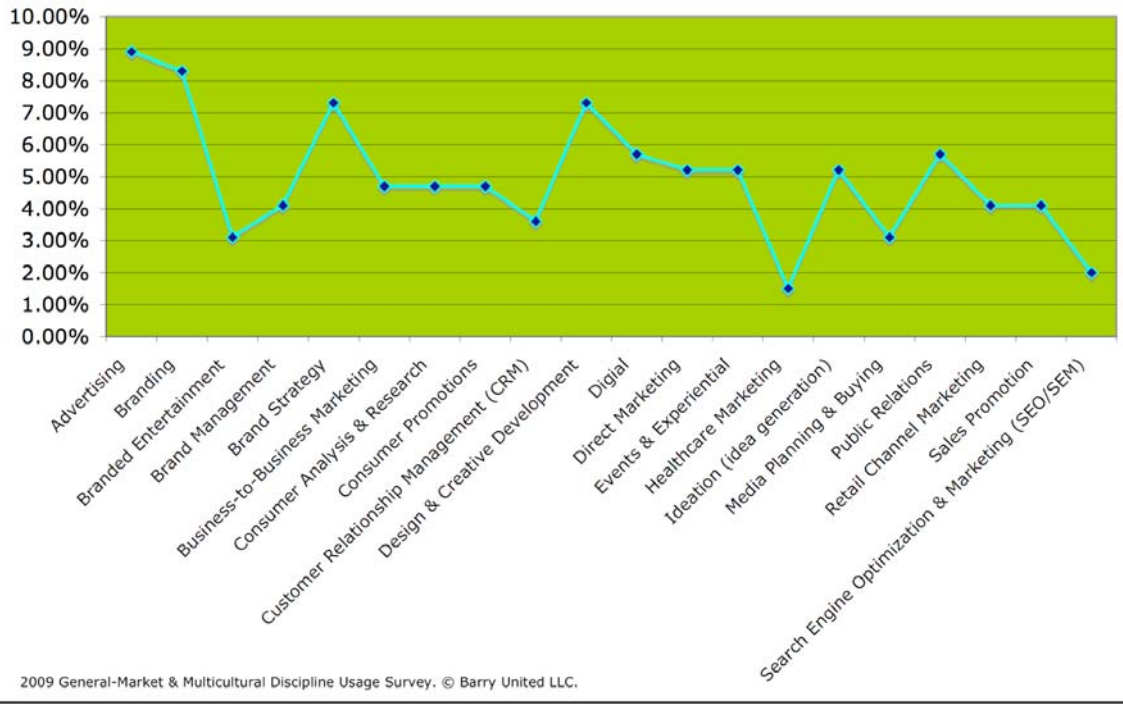


With this, we conclude a greater likelihood for corporations to consolidate multicultural work with a general-market agency than vice versa, given 69% of corporations that have allowed minority-owned agencies to pitch for general-market advertising assignments utilized a general-market shop to create African-American and Hispanic work. Nevertheless, African-American and Hispanic minority-owned agencies that possess general-market capabilities hold considerable consideration to potentially capture general-market assignments from corporations currently contracting multicultural agencies, as corporations (45% of respondents) who previously allowed a minority-owned agency to pitch for general-market advertising assignments and currently contract multicultural work directly, 22% have utilized a African-American and/or Hispanic agency to create general-market work.

Of all respondents, 60% directly contract multicultural work to an African-American, Hispanic and/or Asian specific agency. 25% currently does not contract a multicultural (African-American, Hispanic and Asian) agency, nor does their general-market agency create multicultural specific work.

100% of corporations who directly contract multicultural services include women & minority-owned advertising and media agency expenditures within the company’s total supplier diversity spend.

### Agency Capabilities of Importance to Companies



## End ##

About Barry United LLC:

Barry United is an advertising consultancy company, which helps businesses profit from America's full buying power. The company holds expertise in, and is not limited to, advertising, consulting, ideation, research, analytics, strategic planning and channel marketing. For more information on Barry United LLC, log on to [www.barryunited.com](http://www.barryunited.com) or contact Barry Wade, Managing Partner, at [b.wade@barryunited.com](mailto:b.wade@barryunited.com). All rights reserved © 2009 Barry United LLC