



A DIVISION OF PHOENIX MARKETING INTERNATIONAL

## 2005 African American Active Investor Study



The demographics of the United States marketplace are undergoing continuous change and evolution. Across numerous product and service categories, it's a far more diverse landscape than it was even a decade ago.

By 2050, the U.S. will be more than 50% people of color. Today, in the five largest cities of the U.S. people of color already make up more than 50% of their respective populations. With changes in population come emerging buying powers and new market opportunities. Taking advantage of emerging markets requires a distinct understanding of the consumers who fuel its power. Understanding emerging markets is the key to reaching and being relevant to consumer segments that will drive the US economy in the new millennium.

Juice Market Research, a division of Phoenix Marketing International, proudly presents its first syndicated research product: The 2005 African American Active Investor Study. The study surveys more than 900 African American Active Investors and highlights differences between:

- Affluent African Americans with more than \$100,000 investable assets,
- General population African Americans with assets of less than \$100,000, and
- Non-African American active investors.



Juice Market Research, a division of Phoenix Marketing International, announces The African American Active Investors Study (AAIS) a new market research product profiling the investment habits and perceptions of African American investors. More than 900 African American respondents were surveyed via the Internet from August 2004-June 2005. The first research report of its kind, the AAIS reveals which investment services companies lead the marketplace among African American active investors.

The report compares affluent African American investors with investable assets of \$100,000 plus to the non-African American general population of active investors. Data is also reported for African Americans with less than \$100,000 investable assets.

In addition to analysis by level of investable assets, the African American Active Investor Study will assess this growing market's profile by age and gender of respondents as well as by respondents' self-stated reliance on or independence from investment service counsel in managing their portfolios.

This unique report highlights the differences of these three groups in the following areas:

- **Unaided and aided investment service company awareness**
- **Unaided and aided investment service company advertising awareness**
- **Likelihood to recommend an investment services company to a friend or relative**
- **Investment service companies with whom African Americans currently have investments**
- **Companies with whom African American investors formerly had investments**
- **Company considered to be primary provider of investment services**
- **The Retention Efficiency Ratio™ (the ratio between where they currently have an investment and where they formerly had an investment)**
- **Likelihood to consider investment service companies in the future**
- **Overall impression of investment services companies**
- **Approach to investing and use of financial advisors**
- **Portfolio make-up by investment type and company.**



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# Pricing

## **Annual subscription: \$22,500**

Includes three volumes:

General Market Comparison  
(available August 30, 2005)

Advertising Study  
(available October 2005)

Volumetrics  
(available December 2005)

*20% discount for all orders received  
before September 15, 2005*

## **More about Juice Market Research:**

Juice Market Research is a leading market research resource into the consumer insights of African Americans. It is a division of Phoenix Marketing International. Phoenix Marketing International is one of the premier marketing services firms serving the travel & entertainment, financial services, consumer packaged goods, and automotive sectors. Through a combination of custom market research products, advertising and brand analytics, multicultural research and sales optimization modeling, Phoenix partners with clients to generate sound business and marketing opportunities and produce measurable sales results and a return-on-investment on marketing development expenses. Phoenix Marketing International is the only full-service market research firm with a multicultural market research umbrella to look at African American, Asian American and Hispanics, three of the fastest growing ethnic market segments.

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