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Migraines demand multiple therapies

Migraine sufferers often rely on a complex regimen of various prescription and OTC medicines, as well as alternative therapies to prevent or relieve pain, according to a survey from DrugVoice, a Hoboken, N.J., health care market research company.

Despite the medical advances of recent years, patients often remain unsatisfied with migraine treatment. Less than half of migraine patients were satisfied with their medical care, with those seeing neurologists or

headache specialists noticeably more satisfied. "Even the most innovative products are not thoroughly meeting patient expectations, particularly along the dimensions of recurrence of headaches and prevention. Clearly, significant unmet need continues to exist in this market and products with meaningful advantages have a good chance of success," says Melissa Krauth, DrugVoice president.



Many migraine patients face eco-

nomie barriers in accessing drugs to relieve their headache pain. A significant number of patients report that health insurers' limits on the number of doses in a given month forces them to ration medicines carefully or pay for expensive medicines out-of-pocket. "Many patients have specific rules about what to take when, often reserving their most effective medicine for the absolute worst headaches. This not only reduces patient satisfaction, but must also be negatively impacting productivity in the workplace," says Krauth.

"Placing limits on abortive, preventive, or other migraine treatments can actually cost managed care more money by forcing severe migraineurs to go to the ER for treatment," says Michael John Coleman, executive director of MAGNUM, a migraine patient advocacy organization, and a director of the World Headache Alliance.

DrugVoice research reveals that patients are active participants in the migraine care process, and often do not view their physicians as fully understanding their needs. Switching among products is extremely common, as patients look for options that consistently and completely alleviate migraine pain. "Many patients are in the driver's seat when it comes to selecting a migraine therapy. Over 50 percent of product switches are initiated by the patient, mostly due to side effects or efficacy that falls short of expectations," Krauth says.

An opportunity exists for pharmaceutical and health care companies to tap into this vein of consumer activism and more thoroughly understand the patient's perspective. Those who fail to do so risk being left behind by consumers who have moved on to

continued on p. 44

Leave me alone; get me a Kleenex!

When it comes to being sick, solitude can be infectious. According to a national survey, 73 percent of Americans who have had a respiratory tract infection said they prefer to be left alone, while 25 percent said they like to be pampered. Adults aged 55 years and over were more likely than younger people to report that they like to be left alone, the survey found.

Women are more likely than men to feel guilty that they are not able to fulfill responsibilities, while men were more likely to feel bored when ill. Only 6 percent of people said they enjoyed the time away from responsibilities, findings reveal.

And men were more likely to report that a spouse or partner cares for them when they are ill, while most women say they take care of themselves.



The survey also found that 51 percent of people with respiratory tract infections such as bronchitis, sinus infections, ear infections and pneumonia spend their time sleeping. About 20 percent watch television, 13 percent read and 3 percent spend time on the Internet.

Ten percent of Americans say they are not paid when they are sick and 8 percent

report that their employer gets angry. Women were more likely to report that their bosses are understanding when they call in sick.

The survey of 2,022 Americans aged 18 and older was conducted by Princeton, N.J.-based Opinion Research Corporation International for Bayer Corporation.

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Names of Note

Jimmy Jozwiak has been promoted to vice president/operations at *Eagle Research*, Atlanta. In addition, **Jane Lounsbury** has been promoted to report production coordinator and **Yujia Chen** has been promoted to assistant controller.

of *BAIGlobal Inc.*, a Tarrytown, N.Y., research firm.

Donna Stetson has been promoted to research director in the Boston office of *Modalis Research Technologies, Inc.*

ident in charge of advertising research.

Davis Masten, co-founder of *Cheskin Research*, Redwood Shores, Calif., has been elected to the board of directors of TRUSTe, an independent organization dedicated to building consumer trust and confidence in the Internet.

Milwaukee-based research firm *Market Probe, Inc.* has named **Dale Watts** vice president and branch manager of its new Atlanta office.

Cincinnati research firm *Burke, Inc.* has promoted **Dan Evarrs** to vice president, *Burke Customer Satisfaction Associates*. In addition, **Kim Bastian** has been named account executive at *Burke CSA*. And **James**

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Jozwiak

Davidson

Andrew Davidson has been named vice president of client services for the competitive tracking services division

United Information Group, the market research business of *United Business Media*, has appointed **Phyllis Macfarlane** as the new CEO of its U.K. research agency, *NOP Research Group*. She succeeds **Ivor Stocker**, who becomes chairman of the company. Macfarlane will assume responsibility for the firm's European network of companies.

Menlo Park, Calif., research firm *Knowledge Networks* has named **Matthew Mc Nerney** senior vice pres-

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New audience response system from Ortek

Ortek Data Systems, a Beaverton, Ore., maker of audience response measurement systems, has introduced its new wireless Express 700 model. The portable electronic polling system can survey a gathering of as many as 200 respondents. In an Express meeting, attendees are provided with handheld keypads called Responders. Each member of the group can privately answer the moderator's questions by pressing a button on their own Responder. After each question, group response data is electronically collected and a summary of the answers is displayed as a graph. For testing of audio/visual creations and presentations, a companion model, Express 700C, can monitor moment-to-moment responses for several hours. In

addition to the keypad, the 700C Responder also has a dial, which is the preferred mechanism for registering continuous responses to TV commercials, movies, music, and speeches. For more information call James Strelchun at 503-626-0171.

E-com research service, Internet/TV convergence lab from NetRatings

NetRatings, Inc., New York-based provider of the Nielsen//NetRatings Internet audience measurement services, and Rochester, N.Y., research firm Harris Interactive Inc. have introduced an e-commerce research service focused on online consumer spending, behavior and attitudes. The new service, eCommercePulse, integrates e-commerce survey data collected from

Harris Interactive's survey panel with data and insights from the Nielsen//NetRatings audience measurement panel.

eCommercePulse is a single-source e-commerce intelligence service for merchants, investors and suppliers. Covering more than 300 e-commerce sites across 14 vertical markets, eCommercePulse provides integrated monthly reports on e-commerce behavior, trends and spending (both online spending and offline spending that result from online shopping). Armed with this consumer shopping information, which includes market-level and site-level traffic, purchaser and revenue share and customer satisfaction metrics, companies will be able to make informed business decisions. In addition, eCommercePulse provides companies with a platform of pre-screened Harris Poll Online consumers that can be tapped for additional customized research. The markets covered by eCommercePulse include books, music, video, clothing and apparel, computer hardware and peripherals, computer software, consumer electronics, fitness and sports equipment, health and beauty, travel services, auctions, flowers, gifts and cards, home and garden, and toys. For more information visit www.harrisinteractive.com or www.nielsen-netratings.com.

Nielsen Media Research and NetRatings Inc. have also launched the Convergence Lab, an ongoing consumer research laboratory designed to electronically measure television viewing and Internet activity as they occur in the same sample households. The first data from the panel are to be reported to customers this month.

To date, more than 190 households, representing approximately 500 persons with access to the Internet, have been recruited into the research sample, and Nielsen Media Research expected to reach 200 sample homes by February, and 250 households later

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The color of data

Many focus group companies seem to think that good data comes out of beige rooms. We happen to think otherwise.

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News notes

The NPD Group, Inc., a Port Washington, N.Y., research firm, has announced a shift in business strategy

that will allow it to focus on the transformation of its syndicated tracking businesses to Web-based marketing information portals in selected vertical markets. Personalized portals will con-

tain tracking information on consumer behavior and attitudes, retailer and e-commerce product movement, third-party content, feeds and links.

With the shift in strategy, NPD has



The Advertising Research Foundation (ARF) will hold its annual conference and infoplex at the New York Hilton on March 5-7. For more information visit www.arfsite.org.

Sawtooth Technologies will hold the following seminars near the company's offices in Evanston, Ill.: conjoint analysis: theory and practice, March 12-13; introduction to the ACA System, March 14; introduction to choice-based conjoint, March 15. The seminars are designed for researchers who have had little or no practical exposure to the techniques. For more information call Sue Tavitas 847-866-0870 or visit www.sawtooth.com.

The Analytical Group will hold its biannual WinCross and WinQuery software conference on March 18-20 at the Hilton Scottsdale Resort & Villas, Scottsdale, Ariz. For more information call 800-946-2767 or visit www.acsinfo.com.

Upside Events, Inc. and Convergence Mediagroup will hold "project Y," a marketing summit that will analyze the behaviors, attitudes and motivations of today's youth culture, on March 19-21 on Treasure Island in San Francisco. For more information visit www.projectY.net.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on global health care on April 1-3 in Geneva, Switzerland. For more information visit www.esomar.nl.

Tragon Corporation will hold a workshop titled "Consumer Research Strategies for Brand Management" on April 3-4 at the Hyatt Rosemont, Rosemont, Ill. For more information call 800-841-1177 or visit www.tragon.com.

Canada's Professional Marketing Research Society (PMRS) will hold its annual conference in Ottawa on April 24-25. For more information visit www.pmrs-aprm.com.

The Institute for International Research (IIR) will hold its International Market Research Forum on April 25-27 in Coral Gables, Fla. Registration for this conference includes registration for IIR's concurrent Multicultural Market Research Forum, which features panels on youth and urban markets. For more info visit www.iir-ny.com or call 888-670-8200.

Anderson, Niebuhr & Associates will hold a workshop on questionnaire design and use on April 26-27 at the Holiday Inn Select - International Airport, Bloomington, Minn. For more information call 800-678-5577 or visit www.ana-inc.com.

The San Francisco Chapter of the American Marketing Association will hold a conference titled, "Qualitative Technology: 2000 and Beyond," on April 27 at the Crowne Plaza Hotel Union Square, San Francisco. For more information visit www.sfama.org or call Jan Newman at 650-579-5590.

Anderson, Niebuhr & Associates will hold a workshop on questionnaire design and use on May 3-4 at the Holiday Inn On the Bay in San Diego. For more information call 800-678-5577 or visit www.ana-inc.com.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on Latin American marketing research on May 6-8 in Mexico City. For more information visit www.esomar.nl.

Tragon Corporation will hold a workshop titled "Designing Product Success Through Descriptive Analysis" on May 7-9 at the Sheraton Palo Alto, Palo Alto, Calif. For more information call 800-841-1177 or visit www.tragon.com.

The Mystery Shopping Providers Association (MSPA) will hold its annual conference on May 16-19 at the Bahia Resort Hotel in San Diego. For more information visit www.mysteryshop.org.

IQPC will hold a conference titled "Maximizing Online Market Research Strategies," including case studies by Visa, Motorola, and Microsoft, on May 16-17 in Chicago. For more information call 800-882-8684 or visit www.iqpc.com.

The American Marketing Association (AMA) will hold its Energy Marketing Research Conference at the Hotel Inter-Continental Chicago on April 29-May 2. For more information visit www.ama.org.

The American Association for Public Opinion Research (AAPOR) will hold its annual conference on May 17-20 at the Hilton Montreal Bonaventure in Montreal. For more information visit www.aapor.org.

signed a contract to sell its custom marketing research business and assets to French research conglomerate Ipsos. Under terms of the contract, Ipsos will acquire the HTI Consumer Panel and other NPD consumer panels used for mail and telephone research, branded ad hoc research products, proprietary marketing models, and several tracking businesses known as the Custom Research businesses. A new company will be formed with 75 percent of the rights for NPD and 25 percent of the rights for Ipsos to manage and develop the NPD Online Panel. Ipsos and NPD will have exclusive access to this Online Panel, to continue NPD's development of a panel for custom and proprietary research efforts. The acquired Custom businesses will be known as Ipsos-NPD and will be operated as an independent company, within the Ipsos group of multinational research suppliers.

FocusVision, a Stamford, Conn.-based firm that transmits live focus groups from a network of facilities

using video communications technology, has standardized on the group video communications products of Polycom, Inc., a Milpitas, Calif.-broadband communication firm. FocusVision will expand its use of Polycom's ViewStation systems for its current video deployments in focus group facilities worldwide and in its network.

Western Wats Trax has opened a call center in Laramie, Wyo. The 50-station center will be used primarily for consumer tracking studies via telephone and the Internet. Tim DeGraw will manage the new facility.

SPSS MR now has worldwide rights to sell the ARCS interactive voice response system from DBM Associates, Whitehouse Station, N.J.

United Information Group, the market research business of United Business Media, announced that as of February, the company's head office would be bi-located in the U.S. and

the U.K. The chief executive's office has been relocated to New York, while the operational and financial functions will continue to be managed from London. This move reflects the importance of the U.S. market to the company. In 2000, 55 percent of UIG's revenues were sourced from the North American market.

Fifty leaders of the marketing research industry have initiated a network of research users and providers from around the world. In January, research industry leadership gathered for the first time in Geneva, Switzerland. **The Research Leadership Summit (RELEAS)**, organized by the Advertising Research Foundation and the European Society for Opinion and Marketing Research, is envisaged as a three-year process with annual meetings and continued action and feedback in between. The emphasis is on identifying and addressing the challenges and opportunities facing the

continued on p. 51

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TURF redux

By Gary M. Mullet

Editor's note: Gary M. Mullet, an applied statistician, is president of Gary Mullet Associates, Inc., an Atlanta research firm. He can be reached at 770-931-1060 or at gmmullet@mindspring.com.

As with many other analytical tools, there's been a recent revival of interest in TURF analysis. While it never completely fell out of use, recent journal articles (see references 1, 3, 4) have demonstrated the benefits of this powerful technique. In what follows, we'll dredge up the historical roots of TURF, followed by an example on real data. Finally, we'll discuss some extensions and warnings.

History

The consensus of several colleagues and myself is that total unduplicated reach and frequency (TURF) analysis was introduced to the research community in the early-to-mid-1970s via an article in the *Journal of Advertising Research*. The exact date and title of the paper are lost in the recesses of our collective failing memories. (If any of

y'all could provide the exact citation we'd be grateful.) A major purpose of TURF was to provide purchasers of magazine advertising a more cost-effective method of allocating scarce funds.

As conceived, TURF had both the reach and frequency components built-in. We shall see subsequently that modern research practices generally separate these two pieces of the total picture. In oversimplified form, the early versions of the technique would ask respondents to examine a list of magazines and then place a check mark next to those that they regularly read at least three out of any given four issues, say. This comprised the unvarying frequency portion of TURF — that is, frequency was always three out of four issues.

The value of the originally conceived TURF can perhaps be seen in the following (over)simplified example. Let's assume that a manufacturer of kitchen sinks and faucets is trying to decide where to place ads for a new line of products. The choices are limited to only three and

continued on p. 40

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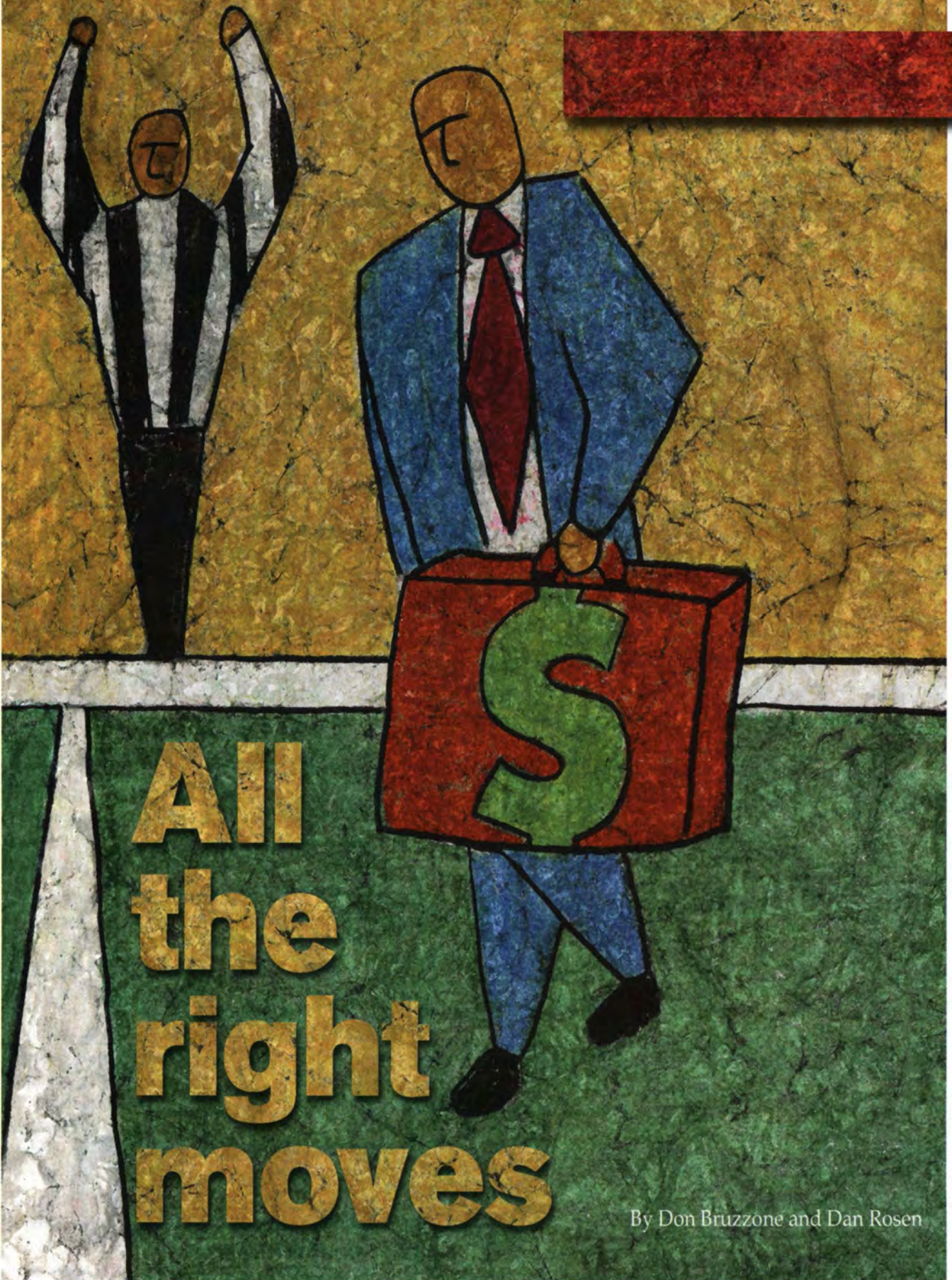
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By Don Bruzzone and Dan Rosen

Advertising movies during the Super Bowl

Editor's note: Don Bruzzone is president of Alameda, Calif.-based Bruzzone Research Company. He can be reached at 510-523-5505 or at donbruzzone@bruzzone-research.com. Dan Rosen is senior vice president, Warner Bros. This article is adapted from a presentation delivered at the Advertising Research Foundation (ARF) Conference on Entertainment Research in Beverly Hills, Calif., on November 2, 2000.

Dan Rosen: I am here with Don Bruzzone, who is going to present the results of a study he fields every year, measuring the effectiveness of a very specific kind of TV advertising.

A few years ago, my management

was wrestling with the idea of spending a lot of money to run a commercial on the Super Bowl. There was great debate within the studio management. Some felt that we absolutely had to be in the game — everyone watches it, and the commercials on the Super Bowl are always remembered and talked about for a long time after the game. Of course, filmmakers were especially excited about having spots for their picture on the game. But it costs millions of dollars to run a 30-second spot on the Super Bowl, and some members of upper management didn't think it was necessarily the right thing to do.

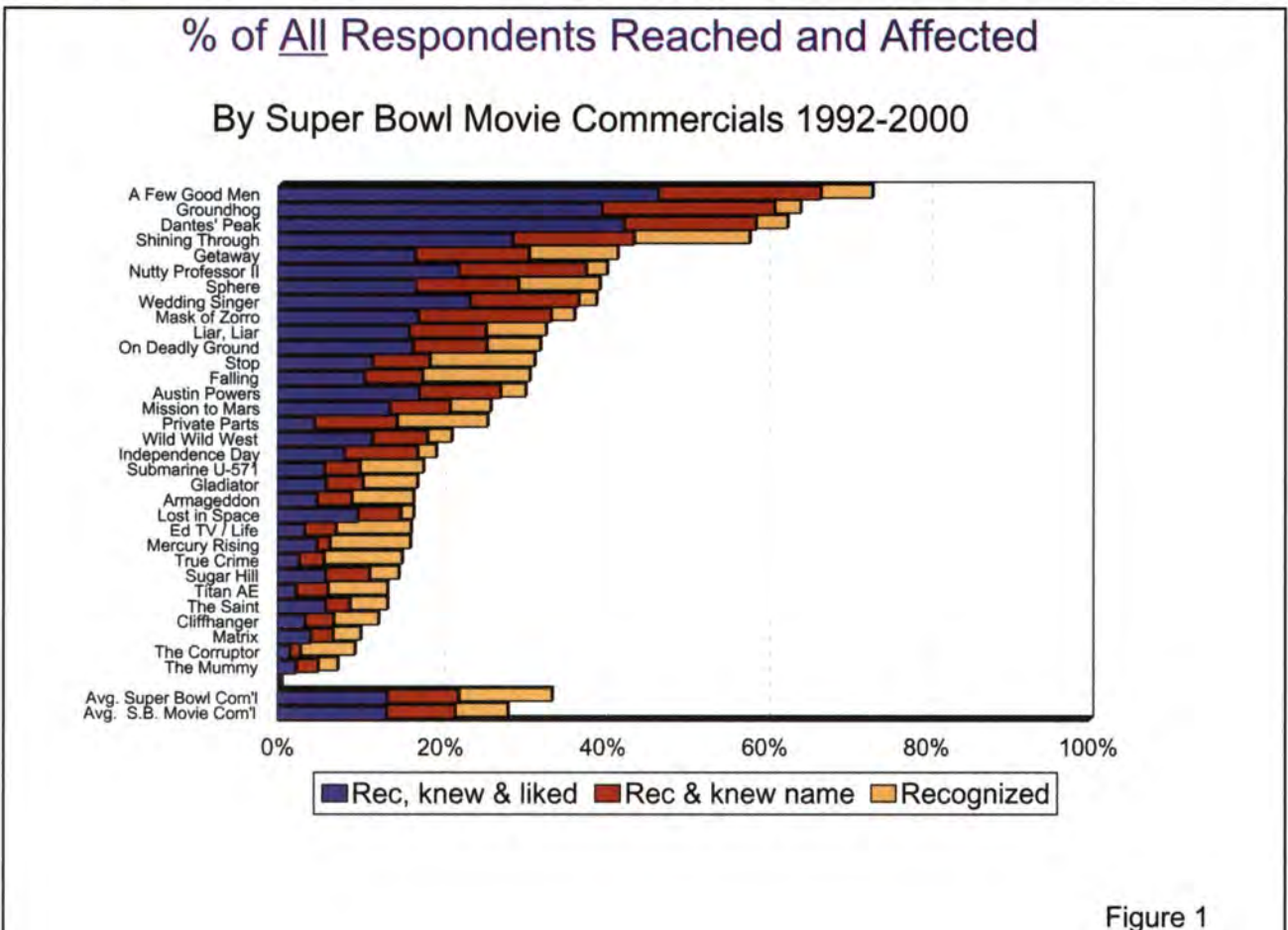
So I looked around to see what opportunities there were to find out how well spots on the Super Bowl

actually worked, and that's how I found Don. He had been tracking response to Super Bowl advertising for about nine years, and had a body of data showing how well specific commercials performed. How well they were recognized, remembered, enjoyed, etc. So I did some business with him, and that's what made him think I might be willing to join him in this presentation. I said okay, but I'm going to let him tell you how his research works and what we learned from it.

The wide differences in performance

Don Bruzzone: Figure 1 ranks the 32 movie commercials that have appeared

continued on p. 56



Editor's note: Dick Scott is president and chief planning officer of Edelman Scott Inc., a Richmond, Va., advertising agency. He can be reached at 804-643-1931 or at dickscott@edelmansscott.com.

It's common for respondents to be given tasks to complete prior to attending a focus group session. These bits of pre-group homework can include relatively painless endeavors like using a product in their home, taking photographs of important facets of their lives, or keeping track of purchases or TV viewing habits.

Some aren't so painless. Just ask the respondents who were asked to give up mayonnaise for a week.

This cruel request was imposed on four groups of 45 mayo users in an attempt to uncover the substance's allure and thus help reposition the Duke's mayonnaise brand of Richmond, Va.-based C.F. Sauer Company. The research project was developed and managed by Richmond-based Edelman Scott Inc., C.F. Sauer's agency of record, and used to drive an award-winning television advertising campaign.

The Duke's story

Duke's is the leading brand of mayonnaise sold in the Southeast. On the market for 75 years, the product is more than a mere condiment; generations have made it a family tradition. But prior to the research, Duke's hadn't enjoyed any promotion since 1950 and the times were changing rapidly.

Sales information showed — true to typical geographic market churn — that the market's landscape was beginning to shift. The challenge was to protect and increase share while building awareness among two separate audiences — the Southern “natives” who knew and loved the

brand, and the Midwest and Northern “migrants” who brought their other brand loyalties with them.

Wants and needs

Understanding the consumer's motivation to buy is critical to a brand's success. One of the biggest mistakes companies often make is to go where many have been before without thinking about the consumer's wants and needs. To deliver truly effective marketing communications, companies must always begin and end their efforts by listening to the customer.

To help companies listen to the consumer, Edelman Scott created an approach called MarketVision, which takes out the “I thinks” and replaces them with “the market says” — the kind of information that drives all

communications planning, including branding and positioning. Because at the end of the day, does it really matter what a CEO or an advertising agency thinks will drive a consumer response? Not really.

What really matters is designing communications efforts targeted to



A different kind of mayo clinic

Ad agency uses focus groups to help reposition Duke's mayonnaise

By Dick Scott

what the consumer wants and thinks. What will prompt the decision to buy? Or the decision to prefer one brand over another? What does the consumer need to make his or her life better, to solve a problem or to enhance a lifestyle?

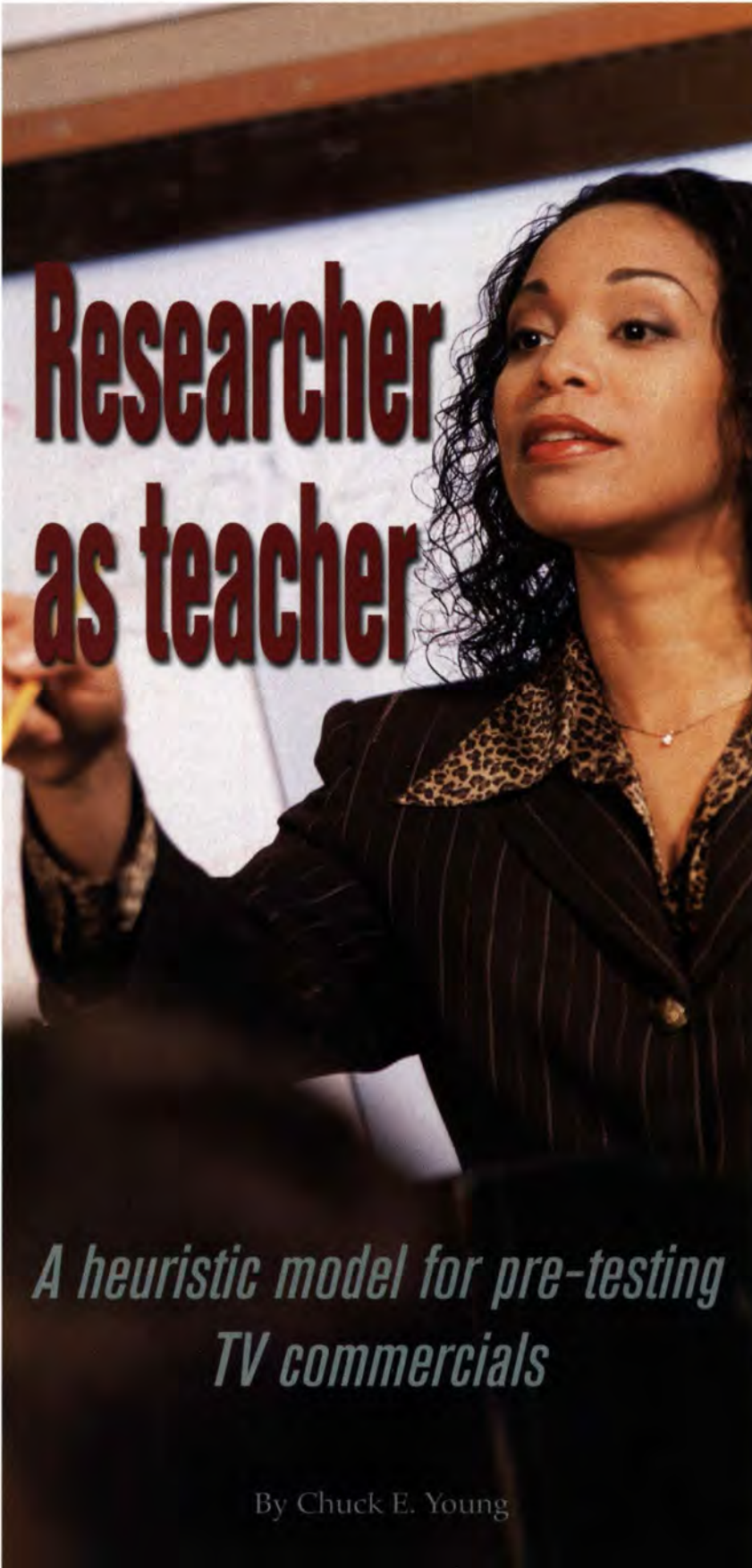
This approach takes the techniques of the typical research toolbox and adds the strategic thinking of a marketer to drive each step along the way. It begins with a focused visioning session followed by product benefit and positioning identification that is then tested and validated by the marketplace. The process can take anywhere from two to six months to complete. Out of it comes the "something" that a company's communications efforts must do in order to drive sales or awareness rather than a listing of attributes, which leads to advertising that only reaches parity instead of breaking away from the pack.

Goals defined

A four-hour visioning session
continued on p. 55

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Editor's note: Chuck E. Young is CEO of Ameritest, an Albuquerque, N.M., research firm. He can be reached at 505-856-0763 or at chuck@ameritest.net.

When I first started in this business, a wise old researcher told me that a researcher has two jobs: first, to learn something useful that your clients didn't know before; second, to teach them what you found out. Over time, I learned that the second job is the harder of the two. It is also the more important, because it is the key to making sure that the research you do actually makes your clients smarter and gets used.

This is particularly true of advertising pre-testing. No form of research is more fraught with barriers to learning. The issues raised by pre-testing generate high anxiety for everyone around the conference room table with a vested interest in the advertising.

Confusion and anxiety do not, as a rule, form an ideal emotional climate for the learning process. Clarity and calmness are required.

How do we move beyond these limitations and become the teachers our clients need us to be? We must provide our audience with a shared mental model.

To borrow from Peter Senge's well-known book on learning organizations, *The Fifth Discipline*, "The effectiveness of a leader is related to the continual improvement of the leader's mental models." In other words, the decisions clients make based on pre-testing research are as much a function of the mental models they have about how advertising works as they are of the information that you provide them.

Don't think your clients can all agree to use the same mental model? Think again.

A brief history of advertising pre-testing

First, let's remember why our clients all have different mental models.

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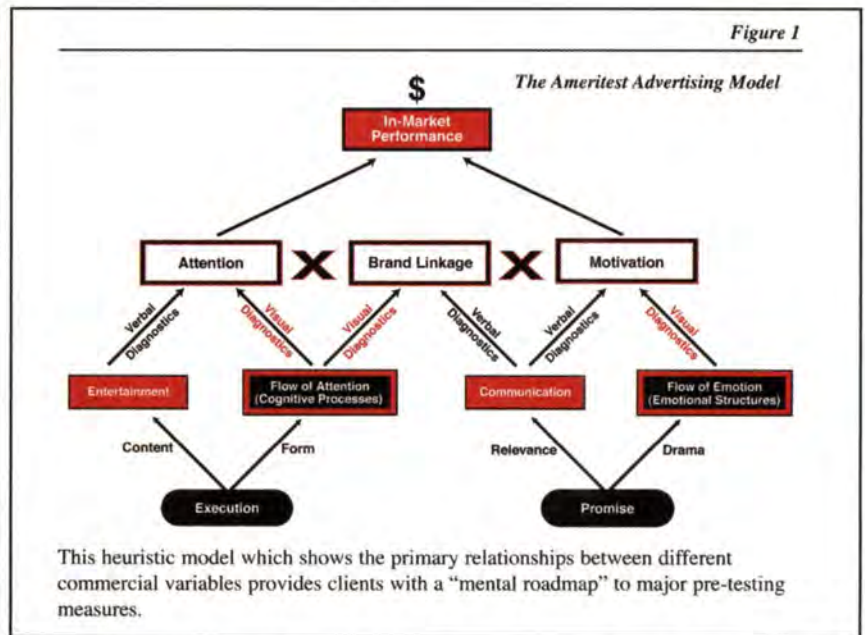
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Figure 1



Dating back to the early days of television, the first widely used pre-testing measure was Burke's Day After Recall Score, which said effective advertising should leave some kind of memory trace in the consumer. Unfortunately, after many years of empirically trying to correlate recall scores with sales results, a number of advertisers, such as Procter & Gamble, concluded that recall was missing something important. So, researchers searched for something else to predict sales. In the '70s, pre-testing research shifted its focus to measuring motivation, such as the Research Systems Corporation's ARS measure of persuasion.

In the '80s, another pre-testing company, ASI, now IPSOS-ASI, found that recall could be better understood when its two component variables were separated: the attention-getting power of the commercial execution and the linkage between the brand and the commercial.

Meanwhile, other researchers argued that the likability of the commercial was key — a result empirically confirmed over a decade ago by a famous Advertising Research Foundation validity study¹.

Most researchers also agreed that communication of a strategic selling proposition was the key to effective advertising, a point of view that continues to sell a great many focus groups to this day.

Creatives, who appear to have dif-

ferent mental models of advertising than researchers, have always intuitively felt that the entertainment value of a television commercial matters, that it's important to be fresh and different to stand apart from the crowd.

What about emotion? Emotion sells. So, on a parallel track, advertising agencies, like the Leo Burnett agency, developed complex methods of coding and analyzing the verbatims from open-end questions and constructed batteries of diagnostic ratings statements to profile viewer response to commercials on multiple dimensions.

And finally, a number of researchers believe that pre-testing shouldn't just be copy-testing. After all, we are attempting to describe the consumer's viewing experience. These researchers experiment with non-verbal techniques: brain waves, galvanic skin response, voice pitch analysis, and picture sorts.

So, like blind men arguing about elephants, the debate goes on to this day. No wonder clients are confused and creatives are skeptical!

Is the real question, "Which of the above measurements is the correct one?" Consider this: many smart people have been working on this problem for many years and each theory is probably right to some degree. From a teaching standpoint, the real problem may be one of synthesis and interpretation, not measurement.

If the goal is to help clients to make

smarter decisions about their advertising, and therefore become leaders in their business categories, researchers should ask themselves: "How do I fit these different ways of measuring the advertising experience together into a more complete and intuitive description of the advertising?"

One answer to this question is the Ameritest Advertising Model, shown in Figure 1.

A heuristic model

In this heuristic model, information is arranged in a hierarchy that bridges the divide of report card systems and diagnostic systems.

At the top is what pre-testing is supposed to predict: in-market sales results. One level down are the evaluative measures that provide the report card portion of the analysis. Two levels down are the diagnostic measures that are correlated with, and therefore explain, the evaluative measures above.

The arrows in the model highlight the primary relationships between the different variables measured and hence provide a road map for interpreting the data.

Both report card and diagnostic systems use evaluative measures in an attempt to explain why a commercial is or isn't working. Examples of evaluative or report card systems would be ASI and ARS; examples of quantitative diagnostic systems would be Diagnostic Research, Inc. (DRI) and our firm.

You will recognize the report card variables as the fairly conventional ones discussed in the history section of this article. Different systems measure these variables in somewhat different ways.

Essentially, the model says that for any commercial to be effective it must accomplish three things:

- 1) It must get noticed and attract an audience.
- 2) The audience must know who is sending the advertising message.
- 3) Once the commercial has the audience's attention it must sell them something — i.e., motivate sales in the short run or at least create a positive predisposition for sales in the long run.

Other variables are important only insofar as they help to explain the variables of attention, brand linkage and motivation. For example, entertainment value is not important in and of itself but because it is an important predictor of attention.

The same is true of liking. On the face of it, it may be possible for a commercial to not be well-liked and still be effective. Wisk's "Ring Around the Collar" campaign is a widely mentioned example.

But, intuitively, getting into the conscious mind of the consumer and selling the brand is always the bottom line for advertising!

Verbal versus visual

Also in Figure 1, we introduce visual diagnostics. To fully describe the total advertising experience — the aesthetic plus the semantic — it is necessary to complement the traditional verbal measures of advertising research with non-verbal measures.

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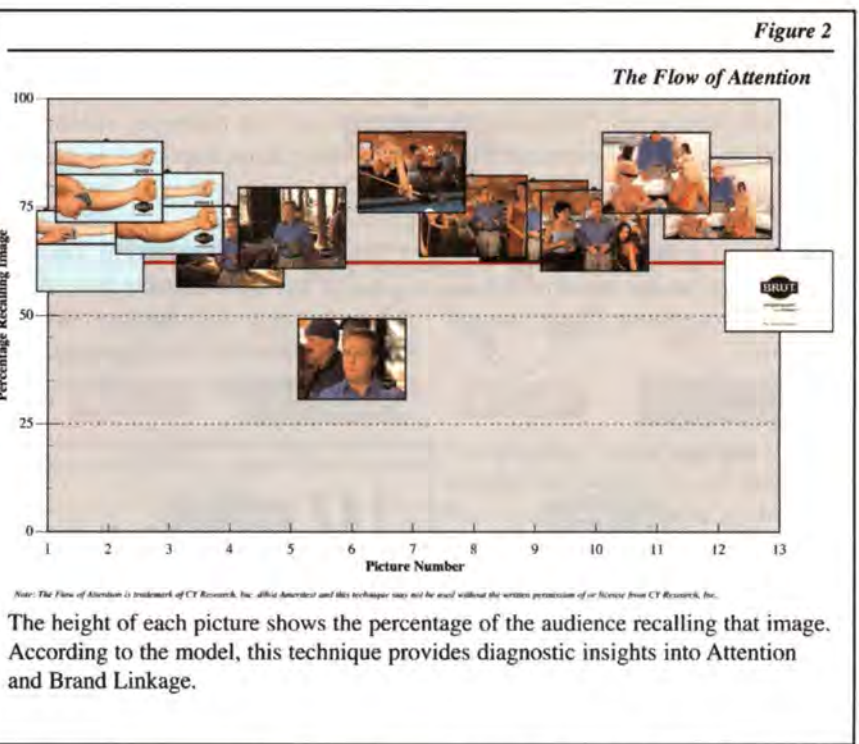
The old adage that a picture is worth a thousand words is simply untrue. There is aesthetic information in a picture that cannot be put into words, just as you cannot fully articulate what you feel when experiencing a joyous piece of music.

So, how do we measure that which cannot be expressed in words? The non-verbal approach used in our system is based on a simple picture-sorting technique².

In brief, during this part of the interview, respondents are either handed a shuffled deck of photographs or are shown the images on screen in a CAPI interview. These playing card-sized images, typically 10 to 30 pictures for a 30-second ad, are taken from the commercial itself. This deck of photos provides a natural vocabulary for respondents to use when describing their visual experience of the advertising, without using words!

Armed with this new vocabulary, respondents first sort the pictures on the basis of recall: those pictures they remember seeing in the ad and those they do not. This data is collected to create a Flow of Attention graph for the ad (Figure 2).

Analysis of the pattern of recall, shown in the example in Figure 2, is an important predictor of commercial



attention and brand linkage. Basically, this technique measures how viewers process the images in the commercial on a cognitive level. It tells us which images the viewers find meaningful, if they are able to follow the storyline, and if they are giving the brand the focus required for good brand linkage.

From a teaching standpoint, the Flow of Attention helps clients make the paradigm shift from thinking of the human eye as a recording device, like

a camera, to thinking of it more as a computerized search engine that actively sorts through the information. Selective perception is the filter that alters an advertising message from what the agency intended to what the viewer actually understood.

Just as the Flow of Attention helps us to better understand attention and brand linkage scores, a Flow of Emotion graph helps us explain motivation scores. Using the same deck of images, the respondents sort the deck of pictures into six piles based on their feelings as they watched the commercial, from strong positive to strong negative response. This second picture-sorting exercise allows us to model the affective emotional response to the commercial.

Execution versus strategy

When clients are presented with unfavorable pre-testing results, they often wonder, "Is this telling me I have a bad execution or a bad strategy?" While historically the rule has been to use pre-testing to evaluate executions, not strategies, understanding the client's strategy is important for interpreting pre-test results.

When validating our system, a lack of correlation was found between the attention-getting power of an ad and its motivational impact, as shown in

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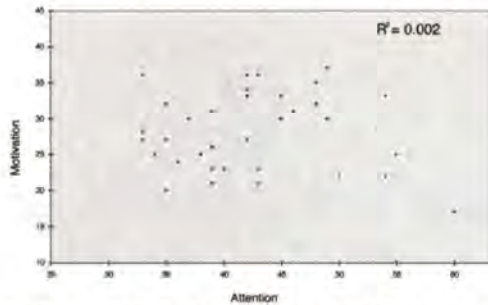
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Figure 3

Attention and Motivation are Independent Variables



Attention and Motivation are uncorrelated or independent variables. Hence the need for multiple measures of ad performance.

Figure 3. Attention and motivation are independent variables! This lesson should be at the top of your teaching list.

Knowing that an ad has the ability to break through clutter and attract an audience tells the client nothing about whether or not the audience will act on the ad's message. Conversely, knowing that the ad's strategic message has the power to motivate a viewer does not mean the ad will break through.

The recent frenzy of dot-com advertising provides us with many examples of self-indulgent ads that caught our attention but did not motivate us to act. An effective commercial has to do both.

This model reinforces this important idea. The left side is primarily about the advertising execution. The right side is about the strategic message being communicated. This is the creative yin and yang of advertising.

The model shows us that attention is a function of two primary aspects of the execution:

1) Entertainment — Does the execution entertain or reward viewers with an enjoyable or likeable or unique experience in return for the 30 or 60 seconds that they are asked to spend with the client's message?

2) Flow of Attention — Is the execution a well-edited piece of film that captures and maintains the viewer's attention over time, focusing their thoughts and feelings on the important ideas and images in the commercial at a pace that they can easily keep up?

Motivation is also a function of two

dichotomous constructs:

1) Communication — How relevant, believable and brand-differentiating is the strategic promise you are communicating to your customer?

2) Flow of Emotion — How much emotion have you tapped into with the power of film to make your brand's promise seem "larger than life" and even more compelling?

In short, the key to motivation is communicating a relevant idea in a dramatic way.


Teaching model

We consider our model a teaching model. It was designed to make our clients smarter users of pre-testing

research so they can make better decisions about their advertising.

One of the funny things about models is that you never stop building them. After all, they are, by definition, simplifications of the real world that is always evolving. That was Peter Senge's point.

There are other non-verbal techniques being developed that offer potentially interesting insights into advertising other than the approach we currently use. We are doing some experimental work with brainwave analysis that looks encouraging, for example.

But it is more than an academic exercise to build heuristic models. If teaching clients to use research to make better decisions about advertising gives them a competitive advantage in the marketplace, then improving your model over time is a way of sustaining that competitive advantage. This is the ongoing challenge for pre-testing research. 

Notes

¹ Russell I. Haley and Allan L. Baldinger, "The ARF Copy Research Validity Project," *Journal of Advertising Research* 31 (March/April 1991).

² For a more complete description and validation of the technique, see: Charles E. Young, "Creative Differences Between Copywriters and Art Directors," *Journal of Advertising Research* 40 (May/June 2000).

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Klutch Swenson
Disqualified Respondent #68



Editor's note: Hal Spielman is CEO of MSW Group (formerly McCollum Spielman Worldwide), a Great Neck, N.Y., research firm. Art Klein is vice president/co-director of the MSW Interactive division. They can be reached at 516-482-0310.

For almost three years MSW Group has been actively experimenting with the use of the Internet for its communication research services. Our objective was to investigate and understand the strengths and weaknesses of the Internet so that our clients could take advantage of this exciting approach to gathering information from targeted consumers.

MSW Group's heritage is in communication research of all media, but researching the effectiveness of television commercials is a major part of our activity. In spite of advances in

technology, computers currently do not function like television sets (due in part to bandwidth constraints); thus utilizing this medium for research is extremely difficult. The main problem is that video files are huge; in order to download video files, the material has to be compressed to the size of a small window, which results in a loss of resolution. The same size and resolution problems exist when video is streamed in real time to a computer. These video issues were particularly problematic for MSW Group since within our system, commercials are tested within program context. Prior to the introduction of our AD*VANTAGE/ACT Online, low-resolution video material was streamed or downloaded to the respondent's computer and appeared in tiny video windows. One objective was to overcome this problem and

deliver full-screen, full-motion TV-quality material of whatever length of time was required to simulate true TV program viewing.

We chose to focus on adapting our AD*VANTAGE/ACT copy research procedure. We did so not only because of its complexity and software demands of combining video with questions, but because of the large body of pre-existing validation studies with this technique and measures.

The complexity of this service stems from an approach that requires multiple exposures of the advertising. Unaided awareness measures are taken after the first exposure in a program, persuasion is taken both before any exposure and after second exposure and then extensive diagnostics are taken after the third exposure. In addition, there is the optional opportunity to execute a scene-to-scene

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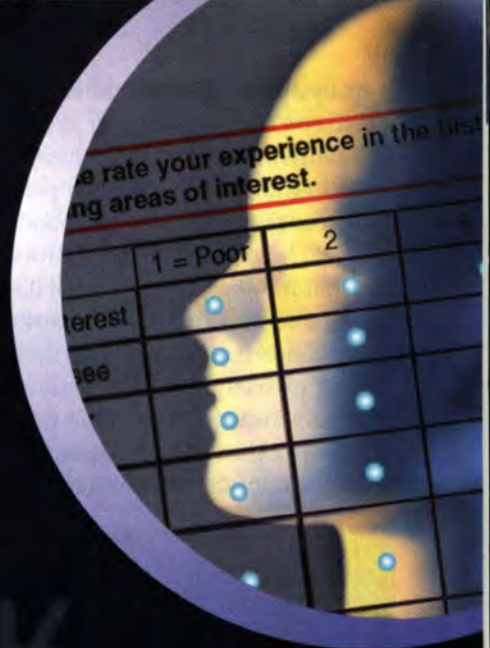
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Even the persuasion measures ("Consumer Commitment Persuasion") — actually a pre- and post-executed sequence of brands and frequency-of-use questions — requires full-screen, full-color display of the competitive set of brands. This is an important refinement in the accuracy of our procedures since consumers frequently make their purchase on recognition of the package shape and color of the contents (e.g., "I buy

the green stuff.").

Thousands of online, experimental interviews were conducted using a variety of Internet service providers, online panel companies, survey software companies and multiple Internet "field services." In the course of experiments we came to understand the various advantages and shortcomings of each of these alternatives.

The results of these extensive experiences led us to what we have come to refer to as the four S's of online research — sample, software, security and service. Let's look at each one separately.

Sample

To most professional researchers this seems an issue of obvious importance. But to non-professionals this is often overlooked. Bodies filling out a questionnaire do not a "sample" make. We have all heard the horror stories of product managers fielding studies on their own because "they know what they want and can do it quickly." Of course, they frequently fail to provide sample guidance to the field service and then are stuck trying to understand and make management decisions on whatever data has been dumped on them from inappropriate respondents.

It quickly becomes apparent that getting quality target samples of consumers who have not been involved in ad research studies for at least one year requires an extraordinarily large base of online households. In general, existing online panels could not meet our volume needs or provide consistent targeted respondents necessary to match samples from test to test or from wave to wave. We found that the only way for us to perform the type of research we conduct online was for us to find a partner that had the ability to sample the entire Internet.

Do differences in the online sample exist when compared to census data? Yes they do. In general, they skew slightly higher in income and education, slightly lower in age (though these are changing rapidly). However, it is extraordinarily rare that a request is made for a test sample to reflect the

census. It is almost always a target sample of that product's consumers that must be delivered — and consistently for each test. Our comparative studies showed how close we actually were to today's primary source of interviews: the mall.

Importantly, the real issue is: Can we produce a targeted sample for our clients in any research venue? The answer is yes, and we can do it online.

Software

MSW has for many years used software specifically designed and developed for use in our videotape or touch-screen research systems for offline research. However, we had to go further in the technological control of the interview process and the means of exposing the stimuli. We wanted full graphics and multimedia integration that would be full-screen, full-motion, TV-quality viewing that would carry up to an hour of TV programming into the respondent's home and simulate the actual on-air viewing experience. Moreover, the viewing and questionnaire had to allow for a fully interactive experience for the respondent on whatever questionnaire design we, or our clients, devised.

For example, one option our clients requested was a scene-to-scene analysis. We wanted respondents to rate each scene in a commercial and then have their strongest and weakest replayed so that they could capture verbatim reasons for those ratings. (Note: This is a very simplified description.) The software had to be sufficiently sensitive to sort these ratings and pull up the appropriate scene for the respondent's comments.

This same software ability was required to execute our three-step brand selection process from the package visual display in our Consumer Commitment Persuasion measure.

Through the touchy-feely experimental effort we were able to find and adapt the appropriate software that would allow for the above and permit a virtually unlimited number of simultaneous interviews so that all studies could be executed quickly and no study need ever be turned away for



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Security

This issue really has more facets than a diamond. We were clearly concerned about security of respondents. The need for anonymity has been much in the headlines these days. Many states have legislation pending on this issue. (CASRO and CMOR are actively attempting to protect the research industry from destructive legislative infringement.)

Further, to prevent ballot stuffing and respondents attempting to qualify for studies of their own choosing, a rather complex multi-screening procedure is employed that overcomes these problems. Each screener brings us closer to selecting and interviewing the target consumer.

Still another facet of security extended to the material being studied. This was overcome by the use of a patented encryption system applied to a home-delivered CD-ROM. This CD-ROM can only be brought to life through the online survey software. Once used, this CD (which cannot be copied, saved, printed, or cached in the respondent's computer) becomes a useless coaster. This procedure makes it virtually impossible for a competitor to see test material. Respondents do not know in advance what product or category is the subject of the study and the CD-ROM itself can only be activated by participation online. (Note: Again, this is a very great simplification of the test mechanics.)

Servicing

Our mantra has always been "It's not the numbers, it's what they mean." Simply getting data more quickly or less expensively is useless unless it is quality data and is translated into useful and actionable information. Our executives have been going through training on the strengths (and, yes, the weaknesses) of Internet research. Important as this venue may be, it is not right for all studies or samples and certainly has its own design demands. Our account staff have learned to supply each client study with the most efficient recommendation for study

design, venue and constructive analytics derived from our combination of evaluative and diagnostic measures, and years of experience.

Certainly in the general sense, it is possible to access Internet users quickly and cheaply. "Down and dirty" has always been available as an excuse for getting some kind of "research" on the table. But is management willing to risk major decisions (or even minor ones) that affect the sale of their brands on cheap, questionable-quality

research? Clearly, the position taken by Vince Vaccarelli, the research director of Xerox, that the value of research should be thought of in relation to the size of the issue on which it impacts, is a very meaningful one. It is a challenge that all research directors must deal with. Quality information leads to quality management decisions. If the funding or time made available is inadequate to do a quality piece of research, you might as well flip a coin and save the money. *TC*

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By Pat Moody

Editor's note: Pat Moody is director of marketing and new business development in the electronics division of Fleetwood Group, Inc., a Holland, Mich., maker of portable response systems. He can be reached at 800-257-6390 or at nbd@fleetwood-group.com.

Wireless group response systems are starting to become a frequent sight in focus groups. These systems combine handheld keypads, computer software, and (usually) a projection device. When used by a skilled moderator, these systems create an interactive environment that can inspire honest feedback and generate quality data that can be instantly sorted in myriad ways.

Using response systems is both simple and straightforward. At the beginning of a session, each group member receives a handheld keypad. During the course of the session, a moderator uses the software to pose a series of questions to the group while each member responds using his or her keypad. Generally, these questions involve simple multiple choice or Likert scale (strongly agree to strongly disagree) responses. However, depending on the type of response system, group members can also rank order options, compare alternatives, process lists, or even indicate their point-in-time response to a stimulus (which is sometimes useful in niche research like speech critique or advertising testing). After the computer receives the group's input, the results are tallied for immediate display to the moderator, group members, and/or observers.

Speed — the immediacy of tabulating group responses — is the most apparent characteristic of research sessions that employ response systems. Researchers can gather a lot of information from numerous people in a short period of time. Also, they can view and manipulate the data live. Granted, doing things fast can sometimes present a risk to accuracy. However, electronic tools actually increase the accuracy of focus group research in several ways:

- With response systems, data is immediately stored on the computer. This avoids data entry errors that can occur when converting paper information into electronic files.
- Using wireless keypads instead of a

.com - typically a commercial web site;.gov- typically a government web site;.net - typically an internet service provider web site;.org - typically a non-profit or industry organization web site; 56k Line - a line (telephone Line) capable of carrying 56,000 bits-per-second; Ad Server - a computer where internet advertisements, primarily banners, reside. These ads are called up from these servers and loaded onto your screen; Avi - Video for Windows format - *.avi; B2B - Business to Business; B2C - Business to Consumer; Backbone - A high-speed connection within a network that connects shorter, usually slower circuits. Also used in reference to a system that acts as a "hub" for activity; AD*VANTAGE/ACT Online® - the world's only in-program online television commercial research service

used to identify you the next time you use our website. Some cache is local on servers so they don't have to call up information from other servers and computers far away; SIFTER - An economical approach of our Copy Development System; Int - Computer; Cookies - A "cookie" is a small file that identifies you the next time you use our website. We use this information about your favorite subjects, and later use that information to recommend particular books; DNS - Domain Name System; the method used to convert Internet names to their corresponding Internet numbers; Domain - A part of the naming hierarchy. Syntactically, a domain name consists of a sequence of names or other words separated by dots; DSL - Digital Subscriber Line; Extranet - is a private extended Intranet that links business partners, suppliers, and customers, supporting their business processes; Firewall - is software or hardware that prevents unauthorized access to a network; Flame - A piece of mail or a Usenet posting which is violative; IC - A development screening system that is designed to identify both strategic and message strengths and weaknesses prior to committing to expensive animatics and/or pre-finished commercials; FTP - File Transfer Protocol - used to transfer files from one computer to another; GIF - Graphics Interchange Format; Header - The portion of a packet, preceding the actual data, that contains addresses and error-checking fields. Also part of a message or news article; Hostname - The name of a computer (e.g., www.widener.edu); HTML - HyperText Markup Language; HTTP - Hypertext Transfer Protocol - used for transferring documents commonly on the World Wide Web; Hyperlinks - buttons or text that's "hot" i.e. clicking it jumps you to another web site or web page; Internet number - The dotted-quad address used to specify a certain system. The Internet number for the site cs.widener.edu is 147.31.254.130. A resolver is used to translate between hostnames and Internet addresses for computers to work together using a common set of protocols. With interoperability, PCs etc. all work together allowing one host computer to communicate with and take advantage of other computers in a network of connected computers that provides many of the same services as the Internet, but is not accessible by the public; IP - Internet Protocol Address; ACCU*TRAK® - Accurate, recognition based online tracking; IRC - Internet Relay Chat; ISDN - Integrated Services Digital Network; ISO - International Organization for Standardization, Coordinator today; ISP - Internet Service Provider; JavaScript and Java - programmable languages that are put into use on the World Wide Web; Photographs - Photographic Expert Group; Kernel - The level of an operating system or networking system that controls the functions hidden from the user. In a Unix system, the kernel is a program that coordinates the scheduler, and system calls. This program is always running while the system is operating; LAN - Local Area Network; Any physical network technology that operates at high speed over short distances (up to a few thousand meters); LDAP - Lightweight Directory Access Protocol - used to look up users in public address books; mail gateway - A machine that connects to two or more electronic mail systems (especially dissimilar mail systems on two different networks) and transfers mail messages among them; mail path - A series of machine names used to direct electronic mail from one user to another; mailing list - A possibly moderated discussion group, distributed via email from a central computer maintaining the list of people involved in the discussion; MAP - Internet Message Access Protocol - used to retrieve email or bulletin board messages; Medium - The material used to support the transmission of information, such as coaxial cable, optical fiber, or electromagnetic wave (as in microwave); Modem - the device that enables a computer to communicate via voice over the phone lines and provides your connection to the Internet; MPEG - Moving Picture Experts Group; Multiplexing - The division of a single transmission medium into multiple logical channels supporting many simultaneous transmissions; Multiple FTP - Several FTP lines, logins, and SMTP connections, all going at the same time; Net - A network of computers connected by cables or wirelessly; Netpage - A program that allows you to use a computer to create and edit documents that look like handwritten notes on a page; Net - A network of computers connected by cables or wirelessly; Netpage - A program that allows you to use a computer to create and edit documents that look like handwritten notes on a page; Net - A network of computers connected by cables or wirelessly; Netpage - A program that allows you to use a computer to create and edit documents that look like handwritten notes on a page.

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show of hands or verbal responses (“all those in favor...”) allows participants to respond anonymously, which may encourage more thoughtful and honest responses.

- Once group members realize that they will not be singled out for criticism or suffer political consequences for their answers, they become less likely to follow the lead of a dominant personality. They may also more willing to participate, which further improves response rates and sample accuracy. This can be especially important when discussing sensitive topics.

- Because a moderator can clarify questions or options to all group members at once, this group survey method avoids many biases common to one-on-one interviews or individual self-paced techniques.

The researcher’s perspective

Opinion Polling Service, Teaneck, N.J., specializes in the technical and logistical sides of focus group research. It typically works with independent focus group moderators, supplying the

equipment and technicians needed to conduct the research so that the moderator can focus on leading the group. The company has been using a wireless response system called MeetingNet in focus group settings for several years. MeetingNet is a group survey and analysis solution for Windows PCs consisting of wireless response hardware manufactured by Fleetwood Group, Inc. and software that Option Technologies, LLC (OTI) developed for use with it.

“From a strictly logistical standpoint, the fact that the response system is wireless and portable provides us with an important advantage over our competitors,” says Hal Meier, president and project director of Opinion Polling Service. “The system is not hardwired into a particular location, so our technicians can travel with the system to wherever the focus group research needs to be conducted. Group members can be drawn from a variety of locales, ensuring a more diverse mixture of responses and opinions.”

Wireless group response technology can also increase the audience’s interest

and participation. “Allowing group members to view data as it’s generated increases their level of interest,” Meier says. “Now, some clients may not like the idea of allowing focus group members to see the data; they may fear that this will taint the data or lead the group astray. But in my experience, some of the very best — and most interesting — focus group research that I’ve ever seen came out of groups where the respondents could see how their fellow group members answered particular questions. Seeing how other group members answered led them into all types of wonderful conversations and noticeably increased their participation.”

Wireless group response systems increase the amount of data available to focus group researchers, Meier says. “In a typical focus group research project, a moderator may work with eight different focus groups in four different cities. If there are 10 people in each group, then there are a total of 80 different people who are interviewed. And if those 80 people all voted on the same set of questions, then surely you would want to find a way of tallying their voting patterns or preferences. The response system allows us to track the numbers and compile all the data at the end of the project.

“The system software also allows us to add questions during focus group sessions, which gives the moderator the ability to react to feedback that he or she receives from the group in real time. We can create not only new questions but also new crosstabs for referencing purposes. To be able to react like this in a group setting within the span of seconds allows the moderator to pursue new avenues that may not have been evident before the research started.”

Another group response system user is Reality Check, a St. Louis research firm that conducts group interviews to help clients decide how to position their products, understand their brands, and evaluate advertising. Typically, it arranges for a group of 30 to 60 people to meet in a hotel ballroom or large focus group facility. The firm’s personnel lead the group through a quantitative questionnaire using a group response system also consisting of Reply-brand wireless hardware plus Unity software developed by Communications Technology

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International (ComTec). They then follow up with several smaller focus groups after the general session to gain an in-depth understanding of the answers given in the quantitative session.

Clients can unobtrusively observe these focus group sessions from a backroom, and they can watch the results being graphed in real time. Before the company began using the system, says Jim Chastain, president of Reality Check, some clients would question the results of quantitative research because they couldn't get a feel for the respondents used in the study. "Using response system technology, our clients can attend the sessions, observe the results, and also observe the people responding to their product or brand," Chastain says.

Combined benefits

According to Mark Fite of Option Technologies, two characteristics of the wireless response system allow focus group researchers to increase the value of their research. First, the speed of the system permits moderators and clients to identify patterns more quickly in the data being generated by the focus group. And second, the moderator can then drill down and uncover the valuable insights they are trying to identify, whether they are audience reactions or pre-conceived beliefs.

In terms of expense, Meier says that the cost of conducting focus group research with his firm is roughly comparable to the cost of videoconferencing on a per day basis. This will vary somewhat depending on the individual circumstances (mainly due to travel costs). Conducting focus group research on short notice on a particular day will cost more. The more days of research involved, the more advance notice given, and the more flexible the schedule, the lower the cost per day will be. The equipment is not the major cost. The technicians and travel, as usual, account for much of it.

Of course, response systems can also be purchased. Starter kits begin around \$3,500. These kits include 10 keypads, a base station, and basic polling software. When more sophisticated survey, quantitative analysis or decision support software applications are substituted for the basic software, the kit price can range from \$4,000 to \$8,000. Additional key-

pads can generally be purchased for \$250 or less. So if a customer routinely uses the system a few times per year, buying may prove to be a better investment than renting. But first consider the value of getting someone skilled to run the equipment for you — which is where the research firms come into play.

Valuable element

Wireless group response systems are now adding a valuable quantitative element to the focus group process. They

generate individual, demographic, and group data that can be analyzed immediately and in multiple fashions. This releases moderators to focus more on exploring ideas and identifying segmented interests, rather than worrying about how to collect all of the data necessary to support an interpretation of what happened in the group. With response systems, "what happened" is automatically documented, thereby providing more time to figure out what it means. *TC*

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Lessons from Florida



Looking at the
election debacle
from a research
perspective

By Dick McCullough

Editor's note: Dick McCullough is president of Macro Consulting, Inc., a Palo Alto, Calif., research firm. He can be reached at dick@macroinc.com.

In their recent battle to be president of the United States, George W. Bush and Al Gore, Jr. virtually ran a dead heat. And it took the system an agonizing month and a half to sort it all out, globally showcasing a substantial amount of dirty laundry in the process. What went wrong? Who really won? How can we keep it from happening again?

The answers to these questions don't come from the law. They don't come from politics. Or even the U.S. Constitution. They come from market research.

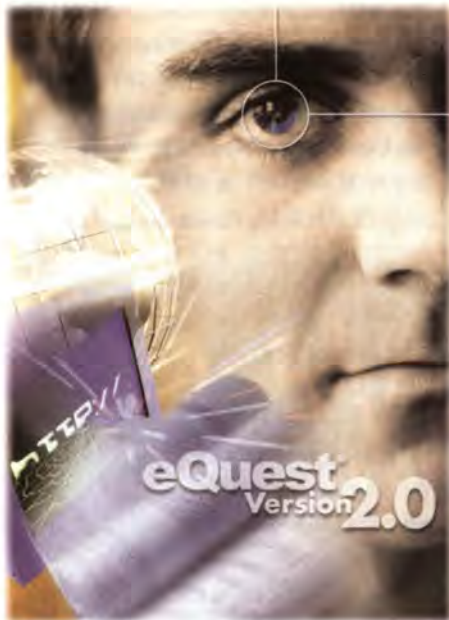
Think of the presidential election

as a really big market research study. Any good researcher will tell you that the first step in conducting a successful market research project is to define your research objective in clear, measurable and actionable terms and then get the entire project team to understand and agree to the objective.

What was the objective here? Before the election, although never explicitly stated, most people would probably have said the objective of our little research project (the national election) was to choose a president. But it turns out, this objective is not necessarily clear or measurable, although it has proven to be actionable in the extreme. After the election, the objective that each candidate implicitly assumed shifted

subtly. Bush's lawyers based their arguments on the assumption that the objective was to win the election. In their arguments, Gore's lawyers assumed the objective was to discern the will of the people. Apples to oranges. Politics.

If the objective was to win the election, then the issue is simply who got the most votes within the rules of the game laid out prior to November 7. And Bush wins. Winning the election is clear, measurable and actionable. Also technical, rigid and perhaps irrelevant. What if the person winning the election is not the person most people wanted to be president? Are we happy with that? If not, and if we say we want the objective to be to discern the will of the people and we also want the rules of the election



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to be such that the will of the people is discerned, then we are faced with some classic market research issues.

The first issue is sampling error. Only about half of eligible voters actually vote in any election. Does that half accurately reflect the will of the other half? Probably not. It is often said low turnout favors the Republicans and high turnout favors the Democrats. You may say the voting half doesn't need to reflect the will of the non-voting half. That if someone chooses not to vote, that's his or her problem. Okay with me. But you've now changed your objective to discerning the will of the people who voted. And that's the Gore view. The Bush view is one step farther out: their objective is to discern the will of the people who voted correctly (they would say "legally"). And we're back to arguing about objectives (see how important it is to get that straight at the beginning?).

But the really big issue is measurement error. Measurement error is the difference between what the voter meant to do and what he actually did. So if I wanted to vote for Gore but I actually voted for Buchanan, that would be measurement error. If I wanted to vote for Gore but I actually failed to punch out a chad completely and was officially counted as a no-vote, that would be measurement error.

In an election, as in any research project, there are two types of measurement error: random and systematic. A random error affects all votes with equal probability and, therefore, would not affect the outcome. That is, it wouldn't affect one candidate more than the other. If all voters voted in exactly the same manner, say the old punch card system, all voter punch cards were handled in the same way and to the same degree, and all votes were counted in the same machine (or at least in exactly the same way), there would still be errors in the counting. But those errors would be randomly distributed across the two candidates. The win-

ning candidate would be extremely likely to reflect the will of the people (at least the people who voted).

But if there are differences in the way the voters vote (punch card vs. optical scanner), or the way the votes are counted (machine vs. hand), then the error terms are no longer random and equally distributed. These new error terms could favor one candidate over the other. For example, if Bush supporters more often voted using procedures yielding fewer no-

**In an election,
as in any
research
project, there
are two types
of measurement
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and systematic.**

votes than procedures that Gore voters used, there could be an error favoring Bush. Then Bush could win the election but not reflect the true choice of the people. Another example: if no-votes are hand counted by different people using different criteria, say Broward County vis-à-vis Palm Beach, then another systematic error could occur. And of course, if no-votes are counted in some counties and not others, then once again a systematic error term would have been introduced.

A brief sidebar: since there has

been no substantive claim of any fraudulent or intentionally malicious behavior by either side, I will ignore dishonesty as an error source. Same for system or machine malfunction.

I haven't yet mentioned exogenous effects such as the networks calling Florida for Gore before precincts in the Panhandle had closed, thereby discouraging up to 20,000 Bush supporters from voting at all. Or military absentee ballots where the military, not the voter, failed to get a postmark on the ballot, thus disqualifying an otherwise valid measure of voter intent. But these are just other examples of systematic error. Even inclement weather could introduce a biasing effect. Bad weather could be a source of systematic error if the weather affected voter turnout only in a predominantly pro-Gore or pro-Bush geographic area. It would be a source of random error if it affected pro-Gore and pro-Bush voter turnout equally. I'm sure you can imagine dozens of scenarios containing either or both systematic and random errors.

Those of us who collect data for a living, be it in market research or any of a number of other fields, know there is always, always error in the data set. The key to getting the right answer is not eliminating all error. That is impossible. It is minimizing non-random or systematic error. Random error generally won't mislead you, especially with a large sample size. Systematic error is much more likely to.

So what do we do here? Ideally, we would collect every vote in exactly the same way. And going forward, it's obvious that we need to substantially revamp our voting procedures nationwide so that everyone within a given state votes in the same way as everyone else in that state. Fairness demands it.

But what should we have done with this election? With this data? Once the data is collected, it's too late to change the data collection procedure. The cow is out of the barn, as my grandfather would say.

In market research, we recognize imperfections exist in data. We don't generally throw out the study because of it. We first design studies with minimal systematic error. We next ensure that there is no question of fraudulent data. We assume the random error doesn't affect the results. Next, we make every effort to clean and edit the data set to insure it is as accurate and as complete as possible. That would be analogous to

doing hand counts (but everywhere and in exactly the same way). And finally, forced by practical realities, we assume, given an absence of malicious intent or mechanical malfunction, that any random or systematic errors that remained occurred equally often to both sides and cancelled each other out. At this point, we let the chips fall where they may.

Too bad politicians aren't researchers. ☹

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Data Use

continued from p. 16

the costs for a full page in each are about equal. So a data collection agency is contracted to determine which of the three potential vehicles are read (at least three out of four issues) by how many respondents. After 1,000 interviews with members of the target audience are completed, the following data summary is given:

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- House and Grounds* (B) 50%
- Kitchen Expressions* (C) 30%

A few things are readily apparent. First, placing an ad in each of A and B will not deliver 110 percent of the audience — there must be some overlap or duplication in readership. In fact, depending on the degree of duplication, an ad in A and another in B will deliver between 60 percent and 100 percent of those in the target market (we're neglecting the issue of sampling error until later). Likewise, ads in both A and C will deliver between 60 percent and 90 percent of the audience and, finally, using both B and C will give us between 50 percent and 80 percent. Without further information about the degree of joint readership we cannot come up with the optimal media plan (those of you who are fortunate or, maybe, unfortunate enough to recall the term "Venn diagram" will know what's needed here). And that's what a TURF analysis

computer program does — counts the unduplicated audience for all pairs, in our simple case, of magazines. Unduplicated readership is expressed in the number or percentage of our respondents who read A or B or both, and so on for each other pair of magazines.

No big deal for selecting two out of three magazines but what if the task was to select the best four out of 10, say? Then we would have 210 possible sets of four to examine and I promise that if you tried to make a list of all 210 combinations of four letters from the letters A-J you would not have a fun time. And performing an ad hoc tabulation of the combinations would drive you even further up the wall. That's why back in the dark ages of computing, where the computer was fed information on punched cards (frequently and erroneously called IBM cards), the inception of TURF analysis programs was a major contribution to marketing and advertising research.

Reach

Today everyone has ready access to a desktop or laptop computer with lots of ROM and RAM and a high clockspeed. So within reason — about which more later — it's quite a simple task to separate the reach component from the frequency component of TURF. I'm sure that a while huge majority of TURF studies conducted by contemporary marketing researchers look at each of the two parts separately, there are certainly more than a handful that do reach and reach only. The following table shows the results of an actual study, although disguised somewhat for proprietary reasons.

Respondents were asked, on a traditional five-point scale, purchase intent for each of three (we sometimes do only a few concepts in spite of the capability to do many, many more) concepts. The actual printout from a TURF (REACH) computer program follows.

Total Unduplicated Reach Analysis
Reach based on Top Box

Sets of size 1 (3 possible combinations):

Rank	Label	Percent	Number
	TOTAL	100.00	201
1	Albatross	33.83	68
2	Condor	25.87	52
3	Buzzard	14.93	30

Sets of size 2 (3 possible combinations):

Rank	Label	Percent	Number
1	Albatross - Condor	44.28	89
2	Albatross - Buzzard	42.29	85
3	Buzzard - Condor	36.32	73

Sets of size 3 (1 possible combinations):

Rank	Label	Percent	Number
1	Albatross - Buzzard - Condor	51.74	104

For each set or combination of items, we get an identifying label, the percentage of respondents reached by the

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combination (based on our total sample size) and the actual number so reached. Notice a couple of things that the program also does. First, it tells you the total possible number of combinations of the given size. No big deal with only three items, but it's a nice addition for, say, the number of combinations of 13 items out of 25 possible (5,200,300). The program then sorts the combinations from high-to-low in terms of reach. Again, not a big deal for three concepts but a big, big deal for the 5,200,300 noted above. You have the information to calculate that 31 respondents were very favorable to both Albatross and Condor, although I can't imagine why you'd want to for most projects.

The proprietary reach program that I use gives a couple of other nice options. First, you don't have to print all of the combinations. You can limit your output to the top 20 or 25 or . . . combinations (plus ties, which are given automatically) — your choice. Again, no biggie, but a good way to save a few trees when you start printing output from a more substantial analysis. Another feature is that you can specify the maximum number of combinations or subsets that you want to consider. If, for instance, you are doing a TURF analysis for a potential line extension and you have, say, 25 possible items that could be added, there's no sense calculating and printing anything above four items if that's the most that will ever be added. (These two options also are in operation on the frequency program that I use, and so won't be mentioned again below.)

Frequency

Step two in the total TURF analysis is to compute the stated purchase frequencies for various combinations of the same concepts. Generally, these are based only on those who gave the criterion answer to the question we use for reach. In our case this is top box on the five-point PI scale. In the case in hand, the item is low-priced and multiple purchases within and between products is possible. The question was originally phrased to reflect purchase behavior within a particular time period, e.g., one month, one week, etc. The frequency portion of the output looks as follows:

Total Unduplicated Frequency Analysis
Reach/Frequency based on Top Box

Rank	Label	Number	Total Score	Subset Mean	Total Mean
1	Albatross	67	10834	161.70	53.90
2	Condor	52	7527	144.75	37.45
3	Buzzard	30	6184	206.13	30.77

Rank	Label	Number	Total Score	Subset Mean	Total Mean
1	Albatross - Condor	88	18361	208.64	91.35
2	Albatross - Buzzard	84	17018	202.59	84.67
3	Buzzard - Condor	73	13711	187.82	68.21

Rank	Label	Number	Total Score	Subset Mean	Total Mean
1	Albatross - Buzzard - Condor	103	24545	238.30	122.11



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The left side of the table gives the same information as we saw in reach: the rank and the combination label. We have some new information as well. "Number" indicates the number of respondents (out of 201) who gave a top box score and a non-zero purchase frequency. This column will always be less than or equal to the corresponding numbers in the reach table for the following reason. As anyone who has been in marketing research for more than a week or so can attest, there are almost always respondents who will tell you that they really like your concept(s) but that they will not ever purchase any. So, too, in our case.

The second column is nothing more than the total number of purchases, summed across all of these respondents who had earlier given a top box answer. The next two numbers are means — the first ("Subset") comes from dividing the total score by the entry in the number column. The second is based on total sample; here n=201. We use the subset mean to examine the output for products that appeal to a relatively few respondents, but may be purchased relatively often (or in larger quantities) by those very respondents. Buzzard is such a concept. Only 30 respondents gave it a top box score but those 30, on average, say they will buy a lot more of it than those who like either of the other two concepts (note that there is some overlap, as determined by the previous reach analysis).

As with reach, we can now determine which combinations of two or three or . . . will be purchased with the highest frequency, on average. In other words, when we get to

combinations of two or above, the total score consists of the sum of all items in a given combination. These will rarely be individually equal. In addition to the options mentioned above for the reach program, the frequency algorithm allows the user to sort the data by either the total mean (as was done above) or the subset mean. Note that we have now separated reach and frequency, which the earliest TURF analyses did not do.

Some variations and caveats

Let's start with some "be carefuls." If you give purchasers in a given category, say soft drinks, a series of concept statements to evaluate, chances are pretty good that they will be positive to many, if not most. When we then ask the frequency question, even if we limit it to those

**It's not unusual,
especially in reach
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the top of the list.**

which evoke a positive response originally, many will answer with big answers to most concepts. It might be better to constrain their frequency response to their actual behavior. That is, if someone buys, say, a case of soft drinks each week, have them allocate a month's purchases over both the major existing brands and the concepts. Otherwise, the concepts are probably going to show larger sales in the TURF analysis than will actually occur. Some researchers allow for this by including both existing products and concepts in the entire data collection process and analysis, for both reach and frequency.

Don't overwhelm either the respondent or your analyst. Having people evaluate, for example, 60 items, especially in a low-to-moderate interest product category, will most likely yield data which aren't going to be helpful at all. Additionally, 60 items puts a tremendous strain on the analytical program. If, for example, you want to select 15 items from 60 that have the greatest reach, your computer will have to evaluate 5.32×10^{13} possibilities, keep them

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in memory and sort them. Probably better to keep the task smaller for everyone concerned.

It's not unusual, especially in reach analysis, to have several sets of combinations of a given size with equal or near equal appeal at the top of the list. For example, Conklin, et al (2), list the reach of all 10 possible combinations of three items from six potential concepts. The top three all reach 119 respondents, the next two appeal to 118, then we see 117, 115, 114, 113 and 111, respectively, for the final five combinations. While we doubt that any analysts would seriously propose that any of the three tied combinations are substantively better to offer the public than either of the next two, this is not an atypical situation and has occurred quite often in studies we've been involved with. If possible, the researcher should next perform the frequency analysis to help clarify the issues. In fact, when frequency is considered, it's not out of the question for the last place combination from reach to move up to first place, especially if the reach number is as close to the top as that above. Another tiebreaker is to consider the profit/cost variable, as noted below.

For the more statistically-minded, it's a relatively easy task to carefully run significance tests on the results of either reach or frequency. Remember that the tests are to be either on nominal or metric dependent (repeated measures) data and, then, with careful bookkeeping you can decide which of the top reach or frequency numbers are significantly different from which others. You can also

determine whether, say, the top combination of three items is significantly different from the best one of four items, in terms of either reach or frequency. Again, this is somewhat painstaking but may yield very positive results.

Now on to some extensions. Since reach and frequency are now analyzed separately, we have added great flexibility to the total package of TURF analysis. For instance, we can easily include selling price, net profit or other financial data when setting up and then running the frequency analysis. We are then going to be looking for combinations that maximize, say, total dollar sales or total profit. We could also look at production time, particular raw materials consumed and so on and so on. It's an easy matter to weight the stated number of purchase by any relevant quantity.

In summary, successful use of either or both parts of TURF analysis, while not a panacea, is limited only by your own ingenuity. **79**

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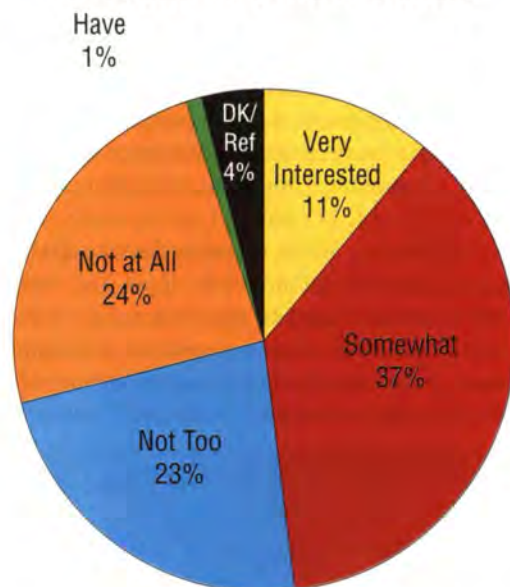
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Internet users interested in smart cards

A significant number of Internet users express interest in smart cards, according to a recent research study by Atlanta-based Synergistics Research Corp. entitled, "Credit Cards: Online Opportunities." Close to half of the Internet users in the

study say they are very or somewhat interested in obtaining a smart card. Interest tends to be more widespread among younger respondents and credit card revolvers. Only 1 percent of the respondents indicate they currently have a smart card. Large numbers of those who express interest in smart cards identify useful applications for this type of card. Nine in 10 smart card prospects say that a smart card would be useful for making purchases on the Internet. More than eight in 10 prospects indicate that it would be useful for keeping records of purchases in order to receive discounts, for storing personal financial information such as account numbers and

Interest in Smart Cards



(Base=1,226 Internet users/major card holders)

balances, and for loading cash value onto the card from a checking account. For more information contact Genie M. Driskill at 800-423-4229 visit www.synergisticsresearch.com.

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Hispanics favor Spanish-language ads

Critical segments within the Hispanic population are more receptive to Spanish-language advertising, according to Simmons' 2000 Hispanic Study. The study found that:

- 50 percent of Hispanics say they remember more about an advertisement if it is in Spanish.
- Hispanics living in Houston and Miami are 24 percent and 20 percent respectively, more likely to agree to having greater retention when it comes to Spanish-language advertising.
- One in three Hispanics believe that Spanish-language advertising provides the best source of information for making purchasing decisions (42 percent of Cuban Hispanics support this concept).
- Almost half (47 percent) of all Hispanics say they are loyal to companies who advertise in Spanish.
- More than half of all Hispanics (57 percent) say they rely on TV to

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Consumers view most product and service brands as commodities

Despite billions spent on marketing and branding every year, most companies have commoditized their products and services, according to a new study, "The Commoditization of Brands and Its Implications for Marketers," by Copernicus, a Newton, Mass., research firm, and Chicago-based Market Facts.

None of the 51 product and service categories studied are becoming more differentiated over time and 90 percent are declining in differentiation,

with banks, bookstores, bottled water, credit cards, discount stores, and fast-food restaurants leading the pack in becoming much more similar and having the least brand differentiation. By "commoditized," Copernicus and Market Facts mean a company's products and services are amazingly similar to competitor products and services in features, advertising, and price.

The study also found that consumers view low price as more important than brand name in 28 out of 37 product categories, particularly when selecting bookstores, bottled water, gas stations, office supply stores, pet supply stores, and rental cars.

"It's astounding to see the huge range of products and services that are becoming commoditized," says Kevin J. Clancy, chairman and CEO of Copernicus. "Consumers can't see differences between major brands in most categories, and as a result, many are buying based on price. If compa-

nies want to increase their margins — maybe even survive — they must learn how to develop value-add brands that set them apart from the competition in their customers' minds."

Market Facts asked consumers to rate the leading brands in each of 48 product and service categories in terms of whether they are becoming more similar or different over time. Copernicus translated the measures of brand differentiation into a scale that ranged from +100 (much more similar) to -100 (much more different). More positive scores indicated increasing similarity between brands and a move towards commoditization.

The leading brands that received the highest similarity scores:

• 45: for Visa and MasterCard; 40: Staples and Office Depot; 38: Pets.Com (now defunct) and PetsMart.com; 37: L'Oreal and Clairol.

The study also asked consumers to evaluate the brands in general in 51 product and service categories. The categories receiving the highest similarity scores include:

• 37 for credit cards; 36: office supply stores; 35: bottled water; 34: bookstores.

The categories perceived as least similar — or most differentiated — include:

• -2: political parties; 2: jewelry; 7: liquor.

Conducted among a nationally-representative sample of 615 men and women, age 18 or older, from Market Facts' Consumer Mail Panel, the study investigated the performance of 51 different product and service categories (both old and new economy businesses) in terms of whether they are becoming more homogenous (i.e., the brands are becoming more similar or commodity-like) or heterogeneous (i.e., differentiated) over time.

The questionnaire used three different measures: the first asked respondents to evaluate whether the two leading brands in a category were becoming more similar or different;

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The advertisement features a woman in a headset smiling, with several concept board proofs displayed in front of her. The proofs include:

- A "Lemon Tree" concept board with the text: "Nothing freshens like the taste of lemon. And nothing tastes more like lemon than our NEW Lemon Tree." Below it, it says "Fast 888-222-2222" and "Lemon Tree is now with thousands of new customers. We're at 888-222-2222."
- A "Delaware's Snack Treats" concept board with the text: "Introducing Delaware's Snack Treats. A whole new taste perfect for the whole family." Below it, it says "Our Delaware Snack Treats are a delicious new snack... made with quality ingredients and are perfect for the whole family. Delaware's Snack Treats are now available in Delaware, Maryland, Virginia, and North Carolina. To learn more about us, call 1-800-ART-PRONTO or visit us online at www.artpronto.com. Delaware's Snack Treats are a delicious new snack... made with quality ingredients and are perfect for the whole family. Delaware's Snack Treats are now available in Delaware, Maryland, Virginia, and North Carolina. To learn more about us, call 1-800-ART-PRONTO or visit us online at www.artpronto.com.
- A "pronto Your Concept Board Proof" board with the text: "pronto Your Concept Board Proof" and "Proof On-line ANYWHERE!"

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the second queried respondents about the category as a whole; while the third focused on whether a low price vs. brand features or benefits were becoming increasingly more important to respondents. For more information contact Kevin Clancy at 617-630-8750 or visit www.copernicus-marketing.com or www.market-facts.com.

E-shoppers overestimate past purchases

As e-commerce companies continue to struggle to build profitable consumer franchises in the digital economy, a new study by comScore Networks, a Reston, Va., firm that monitors online purchasing, shows that the use of consumer surveys to measure online buying behavior may have contributed to the demise of many companies by producing inaccurate estimates of market size.

In the offline world, it has long been known that consumers are apt to forget the details of their purchasing of many products and that they tend to overestimate how much they may have spent when asked to do so in consumer surveys.

To better understand the differences between survey recall data and actual observation, comScore conducted a study by administering an online consumer recall survey to a random sub-sample of the members of its opt-in electronic purchase monitoring service. In the study, consumers were asked to recall how much they had spent online at a variety of specific e-commerce sites. Their recalled statistics were then compared to what they had actually spent as measured through comScore's electronic monitoring technology, which captures every purchase at every site.

The study identified a substantial gap between shoppers' recollection and their actual online purchases and site visits. Overall, consumers over-

estimated their past online purchasing by 55 percent. For example, those consumers who shopped at Amazon.com claimed they spent an average amount of \$85 per month on that site, while their actual purchases amounted to a lower \$67 on average per month. Barnesandnoble.com customers recalled spending \$60 per month on average, with an actual purchase amount of \$46 per month. The degree of overstatement varied considerably by site. For more information visit www.comscore.com.

Video game sales declined last year

U.S. video games hardware, software and accessory sales declined 5 percent in 2000 compared to 1999, according to The NPD Group, Inc., a Port Washington, N.Y., research firm. Video game sales totaled \$6.5 billion in 2000 vs. \$6.9 billion in 1999.

While dollar sales were down, unit sales were up slightly. According to



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NPD, unit sales rose 1 percent to 191.4 million in 2000, compared to 188.6 million in 1999.

Video game console hardware and software dollar sales were down 20 percent and 4 percent respectively. However, the portable category showed significant growth in 2000. Portable software sales rose 26 percent in dollar terms and 28 percent in unit terms. Another strong performer was the portable accessories category. This category was up 56 percent in dollars and 76 percent in units compared to last year. The continued growth of the portable category was driven in part by the popularity of the Pokemon games. Pokemon's impact is illustrated by the fact that four out of the 10 top-selling video game titles for the year were Pokemon Game Boy and Game Boy Color titles.

Video game software accounted for more than 63 percent of the industry's units and dollars in 2000. The decline in software sales contributed to the year's moderate decline. At the same time, quality licenses and strong gaming content fueled extraordinary sales for products that featured Pokemon, Tony Hawk, WWF, Zelda, Grand Turismo and NFL properties.

"The video game industry experienced a decline in overall dollar sales of five percent," says Richard Ow, NPD interactive entertainment account manager. "But this was to be expected, as the video game industry was going through a transitional period. The bear stock market and low consumer confidence also contributed to a slow year in overall retail sales. The Sony PlayStation and Nintendo 64 systems are entering their sixth and fifth years, respectively, in the U.S. market. While both systems may have already reached their peak in hardware sales, their software continues to sell.

"Lower price points for these systems across all categories affected the overall dollar growth. Sega's Dreamcast and Sony's new PlayStation 2 represent the beginning of a new generation of console systems that will continue to build

their market share in 2001. Microsoft's X-Box, Nintendo's Game Cube, and new portable Game Boy Advance will all be making a debut this year. With each system sporting its own uniquely powerful gaming and entertainment qualities, the transition from the 32/64-bit generation into the next generation of gaming will mark the beginning of an exciting new video game cycle."

Sales of the total U.S. interactive entertainment market, which includes PC entertainment and video game software, were flat at \$5.7 billion for both 2000 and 1999. Interactive entertainment software unit sales were up 5 percent for the year, totaling 200.5 million units vs. 191.8 million units for the prior year. PC entertainment software performed well in 2000, with an 8 percent unit growth over 1999. For more information visit www.npd.com.

Plastic surgery more accepted

Cosmetic surgery may not become as popular as coloring your hair, but a survey in *Modern Maturity* and *My Generation* magazines shows that more and more Americans are getting a little nip here and a little tuck there. The survey, conducted by Roper Starch Worldwide Inc., Harrison, N.Y., found that:

- 55 to 64 is the "age of cosmetic surgery." Nearly one in 10 women in this age group — more than twice the rate of other groups — has had some cosmetic surgery and almost 16 percent expect to have it in the future. By comparison, only four percent of Boomers age 45 to 54 have had some form of cosmetic surgery, with about nine percent who say they will have some form of cosmetic surgery in the future.

- Cosmetic surgery is no longer a widespread taboo. Three out of five Americans believe in principle that if someone is not happy with how they look, there's nothing wrong with their getting elective cosmetic surgery.

- Sixty percent of women and 35

percent of men would take advantage of the "cosmetic surgery deal of a lifetime" — surgery that was free, safe, and done so well that no one would know.

• Nearly half of all Americans know someone who has had cosmetic surgery. No longer just for aging movie stars and the very wealthy, cosmetic surgery has entered the American dream.

The survey also overturns a few myths about appearance and aging.

Myth: Americans are dissatisfied with how they look. The survey found that an overwhelming majority — 92 percent of women and 94 percent of men — are "completely" or "somewhat" satisfied with how they look for their age.

Myth: After 30, it's all downhill. Wrong. The survey found that people think the average peak of attractiveness is 38 — not 18 or even 20.

Myth: Men look more distinguished as they age; women just look older. In fact, 65 percent of men and 60 percent of women believe that men and women are equally likely to "grow distinguished-looking" as they age.

Myth: It's better to be pretty on the outside than pretty on the inside. Mom was right. Three out of five surveyed say that inner beauty counts more than looks "in the real world."

Myth: Appearance is extremely important to most women. In fact, the survey found that spending time with family, having a fulfilling relationship with a spouse or significant other and "feeling good about myself" were much higher priorities than appearance.

Roper Starch also conducted a separate online survey with 500 respondents who've had cosmetic surgery and found that, for the most part, they have bought into the myths. They believe that good looks count more than a great personality; they are far more likely to have gone on diets to lose weight, color their gray hair, and use Retin-A to reduce wrinkles; and they are less satisfied with the way they look for their age.

Roper Starch Worldwide Inc. conducted telephone interviews among a

national cross-section of 2,008 Americans age 18-plus from September 11-October 2, 2000. The margin of error for the entire sample

is ± 2 percentage points at the 95 percent confidence level. For more information visit www.aarp.org/mmaturity or www.mygeneration.org.

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Product & Service Update

continued from p. 12

this year.

Television sets in the research lab are equipped with Nielsen People Meters, the same methodology used for nationwide audience measurement by Nielsen Media Research. Internet activity — including usage, online buying, and exposure to banner advertising — is measured using software from the Nielsen//NetRatings service, the same methodology used to track Internet activity in household and workplace panels throughout the U.S.

Some examples of the type of data that Nielsen Media Research will be reporting from the Convergence Lab include:

- correlation, if any, between overall TV viewing and Internet surfing;
- correlation, if any, between types of programs watched on TV and content surfed on the Internet;
- correlation, if any, between specific programming outlets or programs viewed and the likelihood of

these viewers visiting related Web sites;

- instances of simultaneous usage of the TV and the Internet.

The information will be used to determine how TV programming and promotion drive Web usage and traffic — and vice versa. For more information visit www.nielsen-netratings.com.

New version of MeasureCast

Portland, Ore.-based MeasureCast, Inc. has announced a new version of its streaming audience measurement service. Among the new features is network reporting, which enables MeasureCast customers to sort, classify, and organize audience data by state, geographical region, and format from the network level down to groups of stations. For example, media rep firms can roll up all of their client stations to show potential advertisers the breadth of their networks. Users also have the ability to perform side-by-side network comparisons. The MeasureCast Streaming Audience Measurement Service also offers daily trend, rank, demographic composition, and hour-by-hour reports.

The MeasureCast demographic composition reports now offer aggregate audience statistics for station groups. In addition, the improved reports provide confidence interval statistics that give a more precise measure of audience demographics. MeasureCast has also improved the overall usability of its service by adding one-click access to key reports, and buttons that lead to station owner information. Customers wishing to perform additional audience analysis can now export reports to popular spreadsheet applications. For more information visit www.measurecast.com.

Reporting module added to mantaINSIGHT

Ottawa-based Manta Corporation has added an advanced reporting

module to mantaINSIGHT 3.0, the firm's e-survey solution. With mantaINSIGHT, survey creation, deployment, monitoring and reporting are all Web-based. The new reporting module, which contains nine new report types and a wide variety of filtering functions, allows users to create graphical or text reports that summarize pertinent information obtained from a single survey — as well as include trend data from previous surveys. The new reporting options are in addition to the product's existing charting, text and tabular reporting capabilities. For more information visit www.mantaINSIGHT.com.

SmartViewer 2.2 from SPSS

Chicago-based SPSS Inc. has released SmartViewer Web Server 2.2, the firm's distribution and content management tool for sharing interactive reports from SPSS, the company's flagship software. Version 2.2 includes new features designed to make navigation easier and content more secure.

SmartViewer Web Server now offers:

- Keyword searching — Users can now quickly locate documents by searching for keywords and other metadata associated with each report.

- Enhanced security — Encryption technology has been added to ensure that sensitive information is transmitted in the most secure manner possible.

- Solaris and Oracle compatibility — SmartViewer Web Server is now available for the Solaris operating system and is fully compatible with Oracle databases. This combination provides a complete distribution solution for the Unix platform.

With SmartViewer Web Server, users can rearrange rows, columns and layers with SPSS' pivoting technology and slice and dice reports to reveal the information that matters most to them. For more information visit www.spss.com/svws or call 800-543-2185.



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Research Industry News

continued from p. 15

research industry.

The industry leaders present at RELEAS — the research industry's first global leadership summit — agreed to take action on a number of key priorities which include:

- Repositioning the industry, based on a new enlarged industry vision, further expanding its contribution to business and society. Detailed plans to realize this goal, including specific milestones, were put in place.

- Uniting industry forces worldwide to address legislative and regulatory issues related to research. Leaders urged the industry to create a global group to address these issues, using a proactive approach to safeguard access to information — vital to decision-makers at all levels — provided by research. Further consultation to finalize plans for monitoring, identifying common positions and lobbying has been agreed. Initial plans for financing and gaining active support were outlined.

- Creating a universal privacy policy, including a no-spam statement for the research industry, promoted by a common "quality seal." This project is an agenda item for immediate follow-up action.

- Strengthening the dialogue between users and providers of research. In response to the transformation of industry conditions, products and service offerings, summit attendees agreed it is important to forge an ongoing dialogue between users and providers of research. Several proposals were presented to further strengthen the effectiveness of this joint role. Proposals to promote the value of research as a vital input for decision makers were also developed.

Fairfield, Conn., qualitative research and consulting firm **Dialogue Resource, Inc.** has launched a new Web site at www.dialogueresource.com to cele-

brate its 15th anniversary.

Bay Area Marketing Research, Randallstown, Md., is now offering live and on-demand Internet focus groups in the Baltimore area using the ActiveGroup system.

San Diego-based **Cardiff Software, Inc.**, a supplier of forms processing and business automation solutions, has enhanced and expanded the Cardiff Certified Platinum Reseller Program. A key element of the program expansion is the opening of six regional channel managers' offices in North America as well as an increased investment in local marketing programs worldwide. In a related announcement, Cardiff named Emmanuel de Boucaud vice president of worldwide channel sales.

Rochester, N.Y., research firm **Harris Interactive** announced in January that its polling site (www.harrispollonline.com) was among the 50

most visited Web sites in the United States in November 2000, according to the Media Metrix "Top 50 Web and Digital Media Properties" report issued December 18, 2000.

Acquisitions

Nuremberg, Germany-based **GfK Group** has acquired a 65 percent stake in Orange Interactive Research, a Swedish Internet research firm. GfK also took a 19.9 percent holding in Caribou Lake Software, a U.S. e-commerce and database marketing firm.

North Adams, Mass., research firm **MindBranch, Inc.**, has acquired majority control in Outsource Korea, Inc. Headquartered in Seoul, Outsource Korea helps Korean corporations identify, source, and manage their business-information purchasing, which includes consulting, market research, and advisory services. With the acquisition, Outsource Korea will gain access to MindBranch's collection of reports, newsletters, and direc-

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Alliances/strategic partnerships

The Software Support Professionals Association (SSPA) has launched an online market research center. Through a partnership with online research provider **InsightExpress**, SSPA's Supportgate.com community members can create customized customer satisfaction surveys on the Web. The SSPA Market Research Center will allow customer service and support professionals to gauge customer support satisfaction levels daily, weekly and monthly, access Web satisfaction levels, profile Web site visitors and test market new service and support products.

Indianapolis-based research firm **Walker Information and TManage Inc.**, an Austin, Texas, provider of remote workforce management services, have entered a strategic partnership to evaluate attitudes and perceptions of teleworkers (those who work from home or other non-office location) for their employers. In this partnership, Walker Information will develop an online survey for TManage to administer among their clients' employees, particularly teleworkers.

The survey will capture information about teleworkers' commitment and loyalty to their employer and overall job satisfaction. The goal will be to produce an accurate measure of the employees' opinions about telework and productivity levels.

TVG, Inc., a Fort Washington, Pa., research firm, and **WebSurveyResearch**, an Internet research firm serving the health care industry, have formed a partnership designed to deliver online primary marketing research surveys to assess physicians' awareness of and attitudes and behaviors toward the use of pharmaceutical and medical products. Under the terms of the letter of intent, TVG will become a charter member of WebSurveyResearch, gaining access to the WebSurveyResearch physician panel for performing marketing research. TVG will develop the questionnaires and analyze the data. WebSurveyResearch will host the surveys on the Internet and provide the raw data to TVG. The next phase of the partnership will allow both companies to tap into the TVG physician database.

Symmetrical Resources, a Deerfield Beach, Fla., media and marketing information firm, has

announced a market and data research partnership with digital media company **RMS Networks**, Fort Lauderdale, Fla. Under the terms of the agreement, Symmetrical has licensed to RMS Networks its data assets, including Simmons Market Research Bureau, and will provide its Advanced Analytic Solutions consultative services. RMS Networks plans to utilize the national consumer purchasing, lifestyle and behavior data for the development of new in-store television networks, programming content, new business partnerships and future sales strategies. Additionally, Symmetrical will conduct product movement studies to analyze the effectiveness of RMS programming in influencing product and brand sales, as well as develop a methodology to measure RMS Networks national audience size.

San Diego-based marketing information firm **Claritas Inc.** has signed an agreement with **Simmons Market Research Inc.** that will allow it to build new products and support existing ones with Simmons media and lifestyle survey data. As part of the agreement, Simmons will give Claritas its National Consumer Study, a syndicated, multimedia survey measuring adults 18+ and their product consumption, media habits, attitudes and opinions, as well as access to its studies of kids, teens and Hispanics.

Rochester, N.Y.-based research firm **Harris Interactive** has entered into an agreement with Chicago software firm **SPSS Inc.** to purchase the source code rights for the Surveycraft online interviewing platform. Harris Interactive has been using Surveycraft software as its central Web-interviewing engine for more than two years.

Wilton, Conn.-based research firm **Greenfield Online, Inc.** and **Advertising.com, Inc.**, a Baltimore advertising services company, have announced a partnership that will combine their respective experience in technology and marketing research to advance online brand advertising and wireless advertising. The firms have developed a product that will let mar-

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keters measure the effect of a campaign's impact online, even when consumers do not interact with advertisements.

New York-based **YOUResponse Inc.** and **CLT Research Associates Inc.**, have formed a strategic alliance to provide marketing research services for online businesses. Companies can gain real-time buyer and non-buyer shopping cart abandonment monitoring and measurement tools through **VISITOResponse**, a survey-based visitor profiling and data analysis system designed to gather information by intercepting visitors as they exit a site without completing a purchase.

Greenfield Online Mexico, an online marketing research company based in Mexico City and a division of Wilton, Conn., research firm Greenfield Online, has formed a strategic partnership with **El Sitio Mexico**, a Mexican Internet portal. A campaign of banner advertising and pop-up site intercept windows has been used on the El Sitio Mexico site to attract members of the El Sitio Web community for participation in the Greenfield Online Mexico consumer panel. These panelists will participate in future online surveys that will provide insights into the habits, attitudes, and activities of Mexican consumers.

Awards

Macworld magazine has awarded SPSS for Macintosh the 16th Annual Editors' Choice (Eddy) Award. The first Mac version of its statistical analysis software released by Chicago-based **SPSS Inc.** since 1995, SPSS 10.0 for Macintosh won the award in the Best Data Management Software category.

The Web site of **Northwest Research Group**, Seattle, was named one of the best small business sites by *Inc.* magazine in its second annual Web Awards.

New accounts

Atlanta-based **CompuCredit Corporation**, marketer of the Aspire Visa card, has retained **J.D. Power and Associates**, Agoura Hills, Calif., to val-

idate its ongoing internal satisfaction research.

Phoenix-based hotel chain **Best Western International** and **Sterling Research Group, Inc.**, a St. Petersburg, Fla., research firm, have started a new guest satisfaction measurement program. As part of the company's newly refined focus on quality, Best Western is partnering with Sterling Research Group, Inc. to implement a guest satisfaction measurement program that will be tested in 125 hotels nationwide. "Gathering very specific feedback and information from guests about their stays will provide valuable brand information as well as property level 'report cards' designed to help hotel owners and managers enhance their service and operations," says Si Sloman, vice president of operations for Best Western International. "This program, which starts March 1st, will provide Best Western hotel owners and operators with a tool for better understanding and acting on the things that matter

most to our guests."

New companies/new locations

Modalis Research Technologies, Inc. has expanded its London operations, opening an office at 20 New Road, Clanfield, Hampshire, U.K. Phone 44-23-9257-1420. Fax 44-23-9257-1482. Contact Paul Jackson, executive director, UK accounts. The firm has also opened a new office in Stockholm at Lillhagsvagen 11, 124 71 Bandhagen, Sweden. Phone 46-8-749-64-77. Fax 46-8-647-90-77. Contact Harry Klintebring, business development director, Scandinavia.

Star Data Systems, Inc., a North Palm Beach, Fla., research firm, has opened **MarketStar Research**, a full-service research company. Mark Eisner has been named president of the new division, which will be located in North Palm Beach. For more information call 561-842-4800.

John McKay has opened a new research firm, **Multicultural**

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Porchey Research, St. Louis, has moved to the Chapel Hill Office Center at 12935 N. Forty Dr., Suite 210, St. Louis, Mo., 63141. The new phone number is 314-453-9494. The new fax number is 314-453-9495.

Tokyo-based media and marketing research firm **Video Research** has expanded its TV audience ratings services into Taiwan, forming a new media research company. The new company, Broadcasters Market Research Co. Ltd., is a result of joint effort made by the Broadcasting Development Fund (a Taiwanese governmental organization) and Video Research. The first data is due for release in January 2002. In addition to its financial investment, Video Research will assign one executive vice president and one research and development manager to support the new company's research operations.

U.K.-based **MDL Research**, doing business as Marketing Direction, has launched an international division, Marketing Direction International (MDI), offering a full range of research services. Primary responsibility for the division will rest with John Kelly and Andy Booth. MDI, seeking partnerships with like-minded organizations throughout the world, has formed an agreement to represent White Plains, N.Y., research firm **Moskowitz Jacobs Inc.** in the U.K. and Europe.

The Ziment Group, owners of

Ziment, a health care marketing research firm, has formed **WebSurveyResearch**, a new company dedicated to conducting health care research using the Internet. The new company will take over the **WebSurveyMD.com** panel launched last spring by Ziment as a means to conduct marketing research surveys with physicians. Other panels to be launched by **WebSurveyResearch** in 2001 include **WebSurveyMCO.com** and **WebSurveyRN.com**. Plans are for **WebSurveyMD.com** to expand to over 40,000 physicians by 2002 around the globe.

Company earnings reports

Opinion Research Corporation, Princeton, N.J., announced December 2000 bookings of a record \$18 million and a record year-end backlog of \$25 million in its U.S. Market Research Group. The record bookings consist of an array of contracts, the most significant of which is in excess of \$4 million with a U.S. health care provider.

Rochester, N.Y., research firm **Harris Interactive** announced its second quarter of fiscal year 2001 results. Internet revenue expanded again in the second quarter to \$9.0 million, an increase of 102 percent compared with the second quarter of fiscal 2000 and an increase of 29 percent from the previous quarter's \$7.0 million. Internet revenues represented 62 percent of the total revenue for the quarter.

Total revenues for the quarter ended December 31, 2000 were \$14.5 million, an increase of 16 percent when compared with \$12.5 million reported for the second quarter of fiscal 2000. For the six-month period ended December 31, 2000, **Harris Interactive** reported revenues of \$26.6

million, an increase of 22 percent compared with \$21.8 million reported in the same six-month period in fiscal 2000.

Net loss for the three months ended December 31, 2000 was \$0.17 per share (\$6.0 million), compared with \$0.33 per share (\$5.4 million) in the second quarter of fiscal 2000. Loss for the first half was reported at \$0.40 per share (\$13.6 million) as compared to \$0.70 per share (\$9.6 million) for the same period of fiscal year 2000.

St. Petersburg, Fla.-based **Catalina Marketing Corporation** reported third quarter results for the period ended December 31, 2000. Revenue in the quarter grew 11 percent to \$108.8 million, compared to \$97.8 million in the comparable prior year period. Quarterly net income was \$16.9 million, or 29 cents per diluted share, versus \$16.6 million, or 29 cents per diluted share for the comparable prior year period. For the nine months ended December 31, 2000, revenue totaled \$304.6 million, an increase of 18 percent compared to \$257.2 million for the first nine months of the prior year. Net income for the first nine months of the current year totaled \$43.7 million, or 75 cents per diluted share, an 18 percent increase over \$36.9 million, or 64 cents per diluted share, for the comparable period last year.

The company's marketing research operations posted a revenue increase of approximately 22 percent over the comparable prior year period. Research operations consist of Alliance Research and the recently acquired Market Intelligence. Earnings for the research operations were equal to approximately 1 cent per company common diluted share.

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Mayo

continued from p. 21

kicked off the Duke's process. Goals were defined, deliverables were identified and ways to achieve goals were discussed and agreed upon. In order to create a meaningful session, one that encouraged honest voices from all product channels, we had to involve key stakeholders from the CEO to the field sales managers. Without these voices present in one room, at one time, the session would be off track.

The visioning session resulted in 15 core statements about the product which were explored by respondents in the focus groups. The statements focused on attributes like creaminess, tartness and price. From the original 15, five were identified as the winners to be taken to the validation stage.

Surprisingly strong emotional elements were revealed during the process. In addition to abstaining from mayo consumption for a week, focus group participants were asked to keep food diaries about their feelings. Many were reduced to cheating. And nearly every person confessed that it was harder than they thought to give up mayonnaise. Their reasons may have differed, but the difficulty was certainly there.

We found that the mayonnaise category was surrounded by nostalgia, evoking memories of holidays, picnics and stories of family. Positioning statements about attributes (such as "no additives") were rejected as customer benefits.

An advertising campaign was developed to position Duke's mayonnaise amidst the category leaders, an approach which we knew appealed to those migrants from outside our markets. Television was used as the ideal branding medium because its memorable audio and visual components. The creative execution tapped into the position revealed through quantitative research: "Natural, wholesome ingredients for over 75 years" coupled with an "emotional comfort."


In one of the ads — the award-winning "Big Cookie" — a grandmother cooking with Duke's takes offense at

the announcer's suggestion that her mayonnaise of choice is the secret to her culinary genius. "I've baked cookies bigger than you," she says, glaring into the camera.

In four months, Duke's market share grew three percentage points. Duke's unaided brand awareness increased 18 percentage points and one-third of Duke's target audience could recall the television spot and its sponsor. In addition, Duke's share of unit growth exceeded category growth

by 7.8 percent.

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Super Bowl

continued from p. 19

on the Super Bowl since 1992 by recognition: the number that recognized them as commercials they had seen before. The darker bars show the other two measures used in evaluating the number that they reached and affected. The gray bars show the number that also remembered who they were for. The dark bars show the number that recognized them, knew who they were for, and liked them. Likability is the measure the ARF's

industry-wide validity study found to be the most predictive of a commercial's actual effect on sales (Haley & Baldinger, 1991).

The first thing to note is that the percent that recognized them varied widely, from over 70 percent to under 10 percent. These results were for commercials that all had essentially the same broad initial exposure on the Super Bowl. Almost half of the population was watching under perfectly normal, real-world conditions. So it provided an unusual opportunity to find out what caused some to perform

Recognition and Regular Movie Attendance by Age

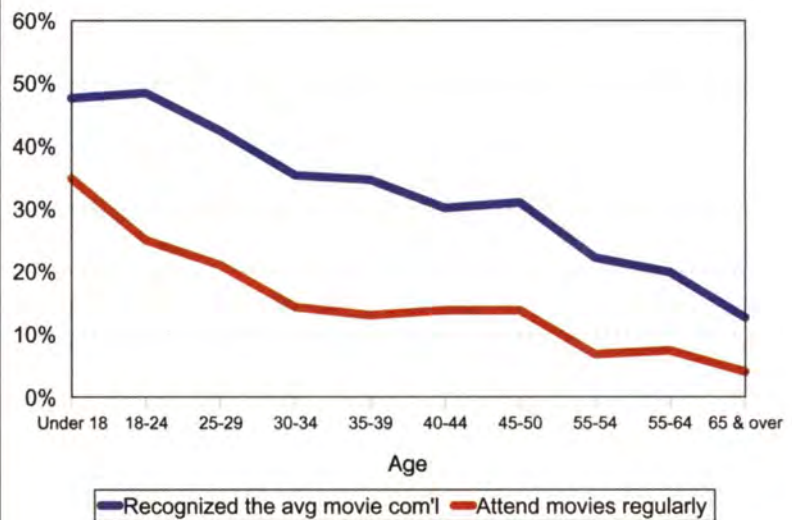


Figure 2

TV and Super Bowl Viewing by Age

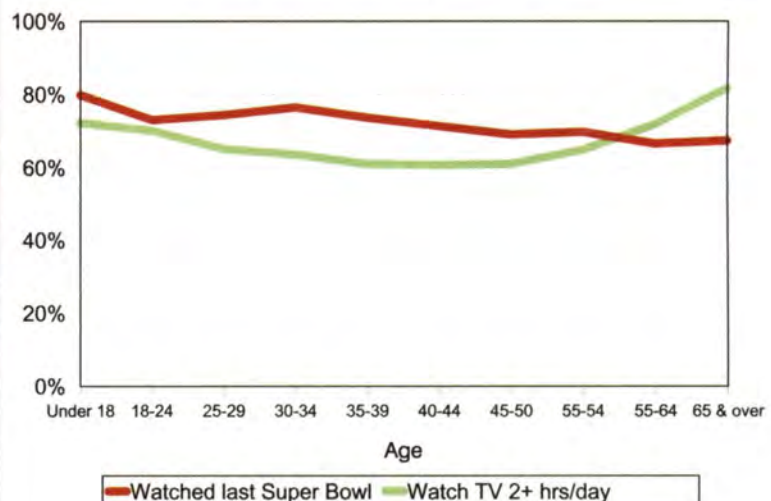


Figure 3



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% of Respondents Under 30 Reached and Affected

By Super Bowl Movie Commercials 1992-2000

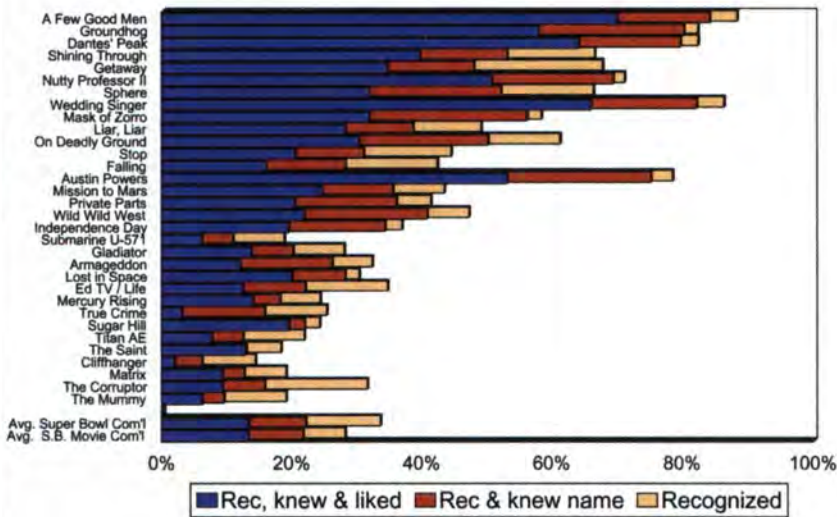


Figure 4

% of Respondents 30 + Reached and Affected

By Super Bowl Movie Commercials 1992-2000

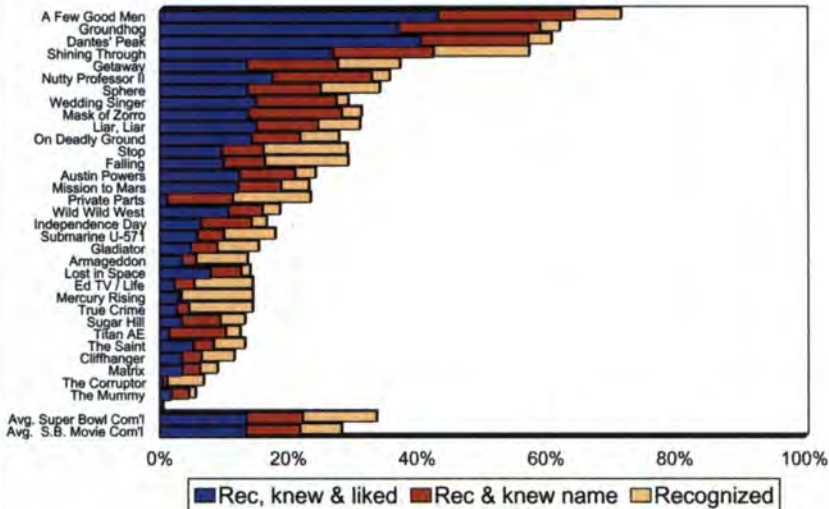


Figure 5

ahead of our story.

An average of 300 people across the country were surveyed about each commercial. It was done a couple of weeks after each game to see if the commercials had a lasting impact. A broad battery of diagnostic questions was asked. A wide variety of information about the respondents and the amount advertisers spent airing these commercials after the Super Bowl was obtained.

At the beginning we did this by mail using photo board questionnaires. In recent years we have found the job can be done better, faster and cheaper online. That incidentally is from the title of a recent article in *Quirk's* that describes our Super Bowl methodology and the benefits we find in online surveys in greater detail (Bruzzone & Shellenberg, 2000). Mining this unique database showed a great deal about why some of these commercials reached and affected so many more than others.

The key segments of the market

First, we found two types of people were more likely to have noticed these commercials: younger respondents and those who go to the movies more frequently. Figure 2 shows the percent that recognized the average movie commercial declined dramatically by age, matching the pattern found in the percent that go to the movies regularly, which also drops rapidly with age.

People of all ages watch the Super Bowl and TV in general (see Figure 3). So, the evidence is quite conclusive. Younger respondents were more likely to notice these commercials. Older respondents were more likely to forget that they had ever looked at them. In effect, their mind ignored them.

The next pair of charts ranks the

much better than others.

It is also worthy of note that by these measures, the Super Bowl movie commercial that reached and affected more people than any other in the past nine years was for the film *A Few Good Men*, the commercial that contained these memorable lines:

Tom Cruise: "All I want is the truth!"

Jack Nicholson: "You can't handle the truth!"

It's noteworthy because that may be a theme for this presentation. We have some findings that may not sit too well with the powers that be. There are two in particular that could provide an opportunity to see how well they can handle the truth. But, we are getting

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| New Orleans | Dec 18-20 | Chicago | Apr 9-11 |
| New York | Jan 8-10 | Seattle | May 7-9 |
| Dallas | Jan 30-Feb 1 | Detroit | May 30-June 1 |
| San Francisco | Feb 26-28 | Denver | June 18-20 |
| 104. Designing Effective Questionnaires: A Step by Step Workshop | | | |
| San Francisco | Oct 30-Nov 1 | San Francisco | Mar 5-7 |
| New Orleans | Dec 4-6 | Chicago | Apr 16-18 |
| New York | Jan 22-24 | Detroit | June 4-6 |
| 105. Adapting Questionnaires for Specific Marketing Research Applications | | | |
| San Francisco | Nov 2-3 | San Francisco | Mar 8-9 |
| New Orleans | Dec 7-8 | Chicago | Apr 19-20 |
| New York | Jan 25-26 | Detroit | June 7-8 |
| 106. Internet Marketing Research Methods and Applications | | | |
| Miami | Nov 30-Dec 1 | Atlanta | Mar 22-23 |
| New York | Jan 16-17 | Seattle | May 10-11 |
| San Francisco | Feb 22-23 | | |
| 201. Getting the Most Out of Traditional & Online Qualitative Research | | | |
| New York | Nov 9-10 | Chicago | May 1-2 |
| New York | Jan 18-19 | | |
| 202. Focus Group Moderator Training | | | |
| Cincinnati | Nov 7-10 | Cincinnati | Mar 6-9 |
| Cincinnati | Dec 12-15 | Cincinnati | Apr 24-27 |
| Cincinnati | Jan 9-12 | Cincinnati | June 5-8 |
| 203. Specialized Moderator Skills for Qualitative Research Applications | | | |
| Cincinnati | Mar 12-15 | Cincinnati | June 11-14 |
| 205. Qualitative Research with Children | | | |
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% of Regular Moviegoers Reached and Affected

By Super Bowl Movie Commercials 1992-2000

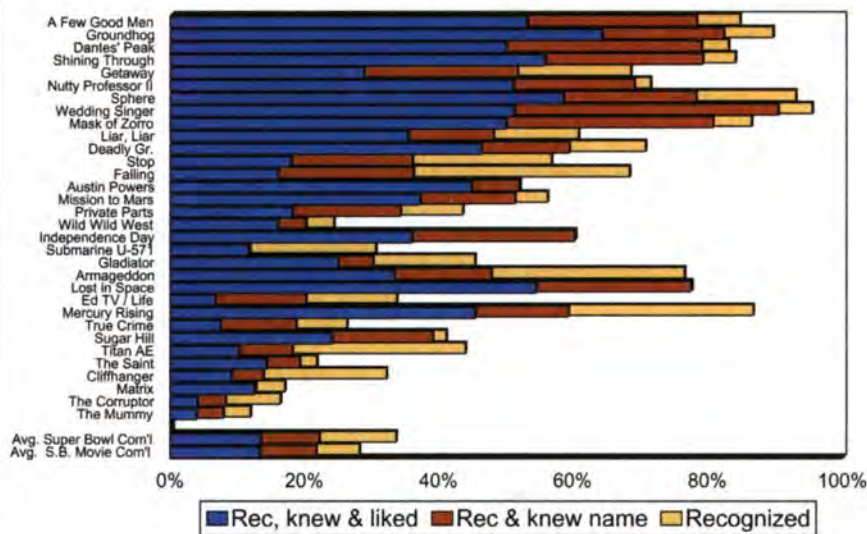


Figure 6

% of Non Moviegoers Reached and Affected

By Super Bowl Movie Commercials 1992-2000

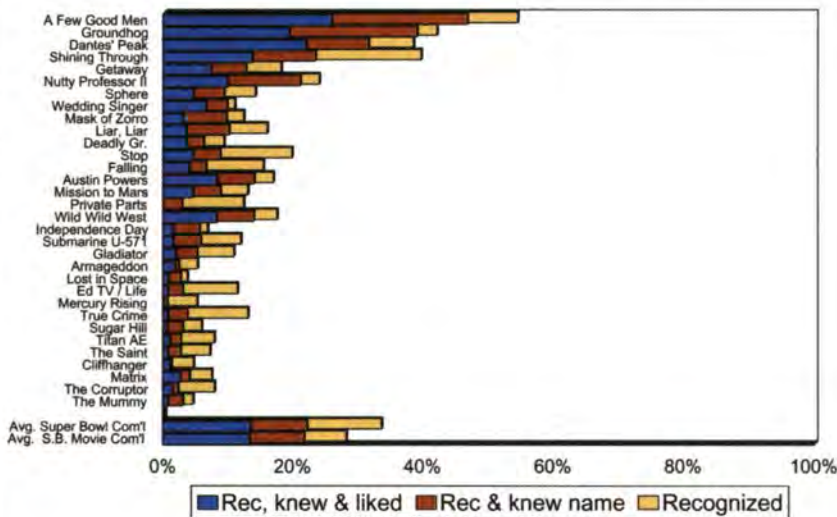


Figure 7

mercials performed much better among regular moviegoers, particularly when compared to the results in Figure 7 showing the number of respondents who indicated they didn't go to the movies either regularly or occasionally. We will be exploring the reasons for this momentarily.

Segmentation strategy

Dan Rosen: Now we have to make some strategic decisions: Normally, we would concentrate our spending on regular moviegoers, because they buy most of the tickets. But sometimes we have a picture that we think will attract people who don't go to the movies very often, thereby expanding our box office potential. One way is to split the buy and go after both audiences, which seems like the safest approach. I think Don has something to say about these alternatives.

Don Bruzzone: I've been known to refer to that last alternative Dan mentioned as the Great American Cop-Out: Do a little of each, not so much because it is right, but because it protects you in the boardroom from those who might climb up your backside and accuse you of picking the wrong strategy. What is the best strategy? We'll leave the answer to that particular conundrum for another talk, and move on to the information you will need whatever strategy you adopt.

Expenditures

Respondents were surveyed two to four weeks after each game to see if the commercials had any lasting effects. During this period some of the Super Bowl commercials were aired again many times while others were never aired again. The next series of charts will show that differences in the amount spent to air the commercials during the month following the game

commercials in the same order as on the first chart. It shows that younger respondents were more likely to be reached and affected by all the movie commercials. And, with a few interesting exceptions, the commercials that reached and affected the greatest number

tended to be the same for both old and young.

Differences are more dramatic when the results among regular moviegoers are compared to those who didn't even say they went to the movies occasionally. Figure 6 shows a number of com-

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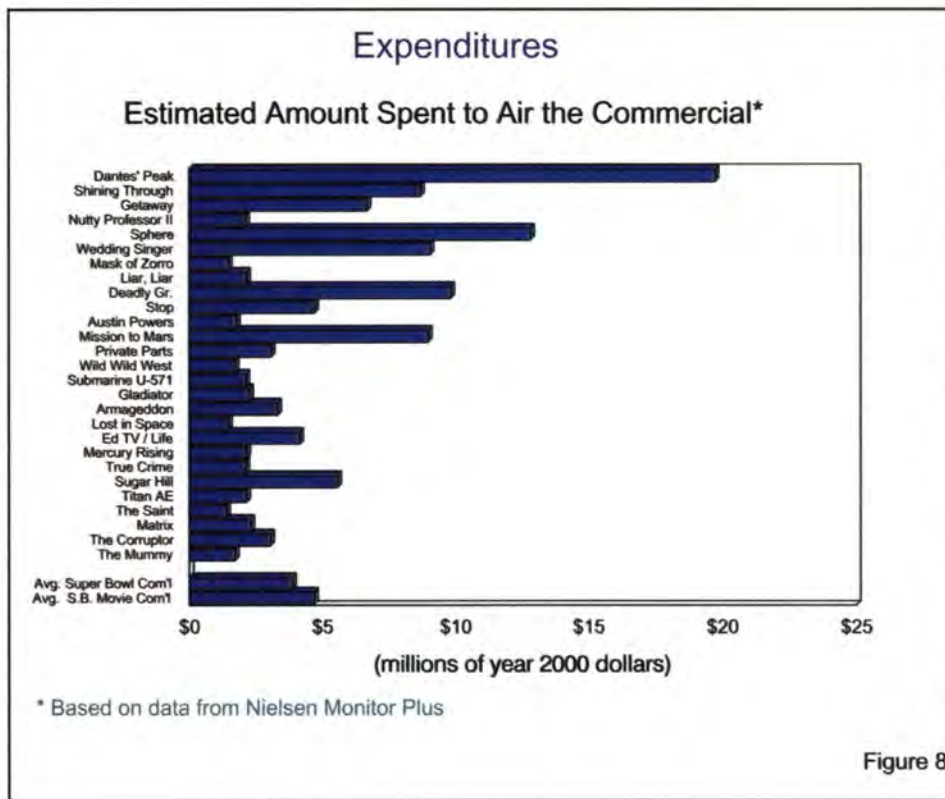


Figure 8

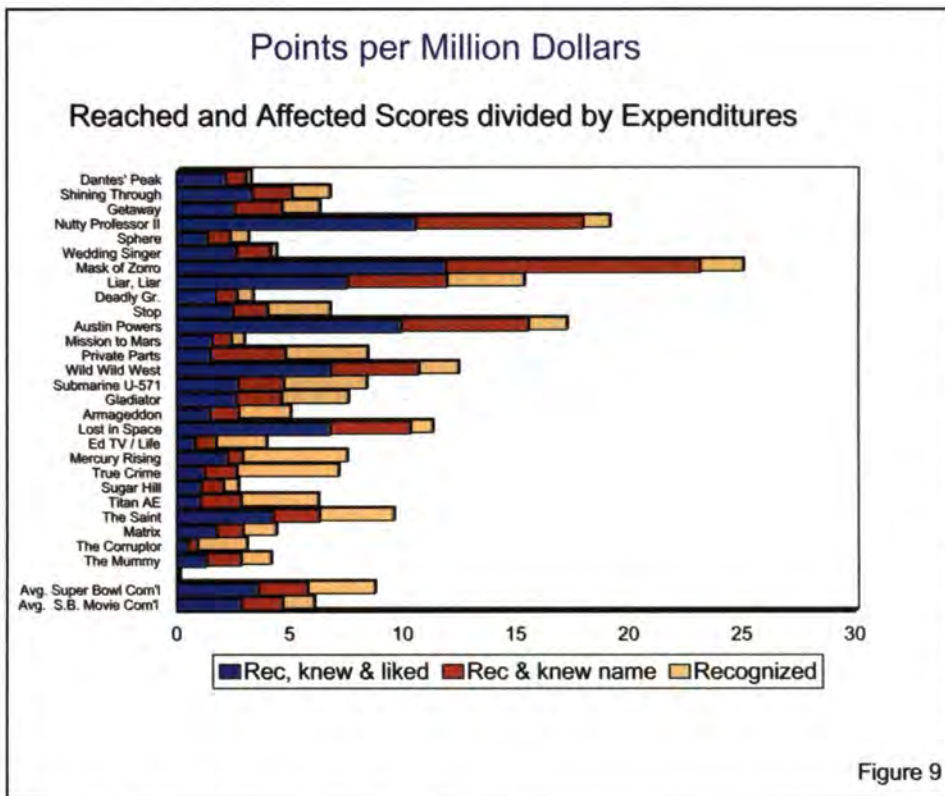


Figure 9

accounted for about half of the differences in the number that noticed the commercials. It also provides some important evidence on the declining return you get when you keep a commercial on the air with a heavy schedule. It is the first of those potentially controversial findings alluded

to earlier.

First, Figure 8 provides a picture of the amount spent to air each of these commercials on the Super Bowl and during the month after the game. The commercials are listed in the same order as on Figure 1, from best remembered to least remembered. It shows

the differences in recognition are not explained by differences in expenditures. These expenditure figures are based on complete counts of all airings on networks during the period plus estimates of additional buys based on data from two spot markets. The basic expenditure data on which these estimates are based is from Nielsen's Monitor Plus service, and they have all been adjusted to show the current value of a TV media dollar.

Figure 9 shows how efficiently the commercials reached and affected people. It takes the performance scores from the first chart, showing the percent reached and affected by each commercial and divides it by the amount spent, as shown in Figure 8. The results are shown in terms of the percentage points reached and affected per million dollars spent on either the Super Bowl or during the following month.

The number of commercials drops to 27 because in one of the earlier years, 1993, no one ordered analyses of expenditures and expenditure data was not obtained for that year's Super Bowl commercials.

Return on investment

In terms of this ROI (return-on-investment) approach, we now have an entirely new set of commercials that proved to be best in delivering the most bang per buck. The differences that are accounted for by expenditures are shown on

the next two scatter charts (Figures 10 and 11). They both show that differences in expenditures account for just about half of the differences in our measures of the number reached and affected.

When you divide recognition by expenditures you get a measure of how



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Recognition vs. Expenditures

Amount Spent to Air Super Bowl Movie Commercials 1992-2000

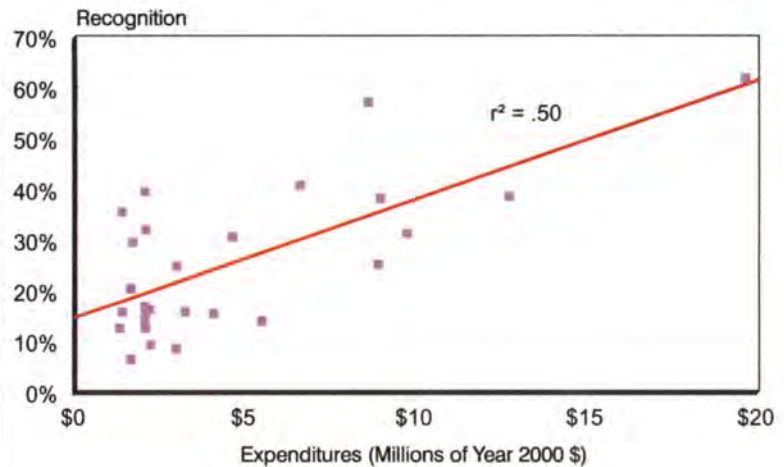


Figure 10

% Reached and Affected vs. Expenditures

Amount Spent to Air Super Bowl Movie Commercials 1992-2000

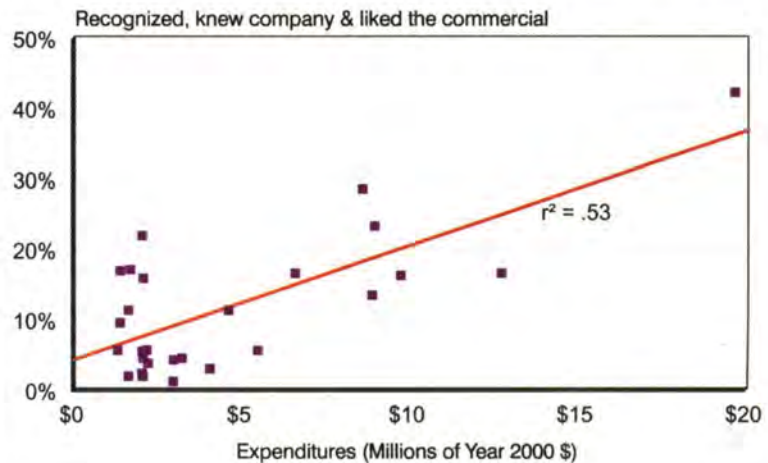


Figure 11

efficient a commercial is in capturing attention: the percent of the population that notices the commercial for each million dollars spent. In Figure 12 that cost efficiency measure is plotted against the total amount spent to air the commercial across the bottom. It shows a surprising fact. The only way to get a cost-efficient commercial is to limit expenditures to \$2 million dollars. Then you can get as much as 25 percent to notice your commercial for each million dollars. But if you spend more than \$2 million in this year's dollars, you will have a hard time getting

your efficiency up to a rate of even 8 percent per million.

These findings about Super Bowl commercials are not that unusual. They are in line with recent media research, particularly the research of John Philip Jones (Jones 1995). He conducted a major new study of the effect of advertising based on single-source data, where a household's exposure to commercials was controlled through split cable techniques and their purchases were measured through coded scanner data. He found that the first time people noticed a commercial it caused a

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Points Per Million Dollars vs Expenditures

Super Bowl Movie Commercials 1992-2000

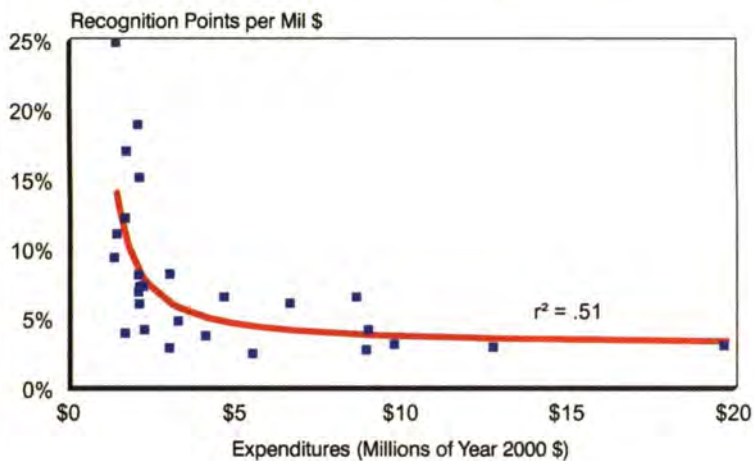


Figure 12

greater increase in their purchases of the advertised product than any subsequent exposure.

Previously the conventional wisdom was that a commercial had to be seen several times before it had its maximum impact on purchases (Naples

1979). Almost all the movie commercials in our study were being aired for the first time on the Super Bowl. What we found confirms that first airing was worth a great deal. Subsequent airings were worth much less.

You may have noticed that among

the commercials we had expenditure data for, the largest amount of money — the equivalent of 20 million of today's dollars — was spent to air the best-remembered commercial, for *Dante's Peak*. That is five million a week, an impressive amount even if you are running for president.

So you may well ask, what do you mean heavy advertising doesn't work? It produced a best-remembered commercial. So let's be clear. This data doesn't say spending a lot doesn't work. It says it doesn't work well. Figure 10 showed several commercials were able to reach half as many after spending only one-tenth as much.

That leads to a key question. How much should you spend?

Reach vs. efficiency

Dan Rosen: When we want to reach the widest possible audience and make the strongest impression, we run our campaign at the highest frequency level we can afford, especially in the week leading up to our opening. In some cases, we will also refresh the campaign, introducing new creative

"A Few Good Men"

Advertising Response Model – Among Those Who Recognize the Commercial

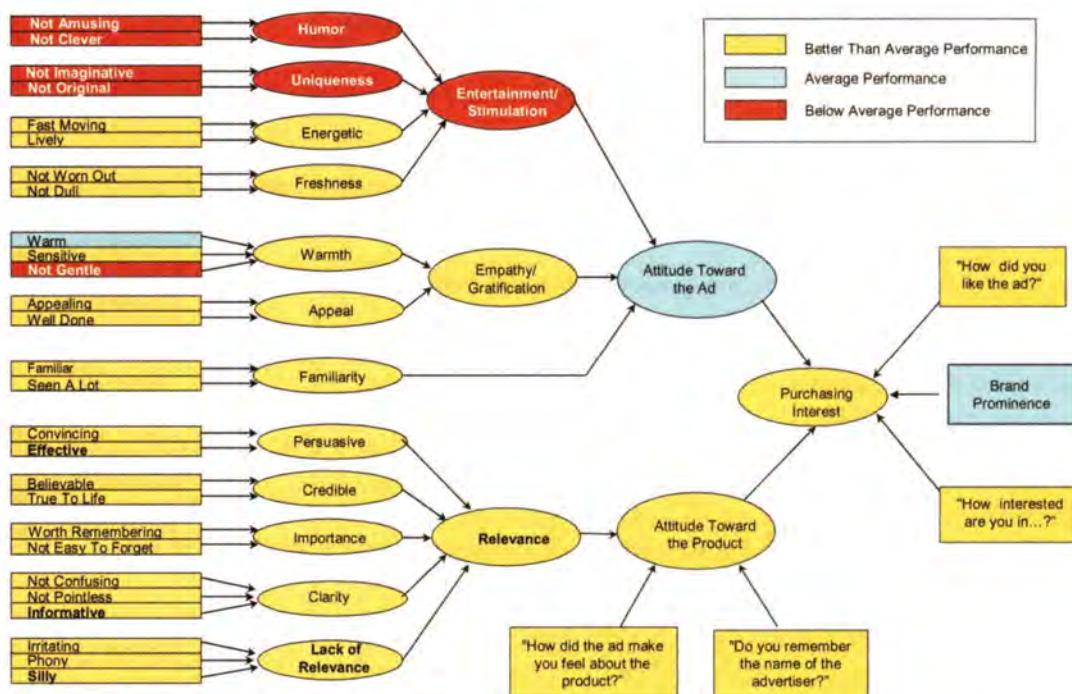
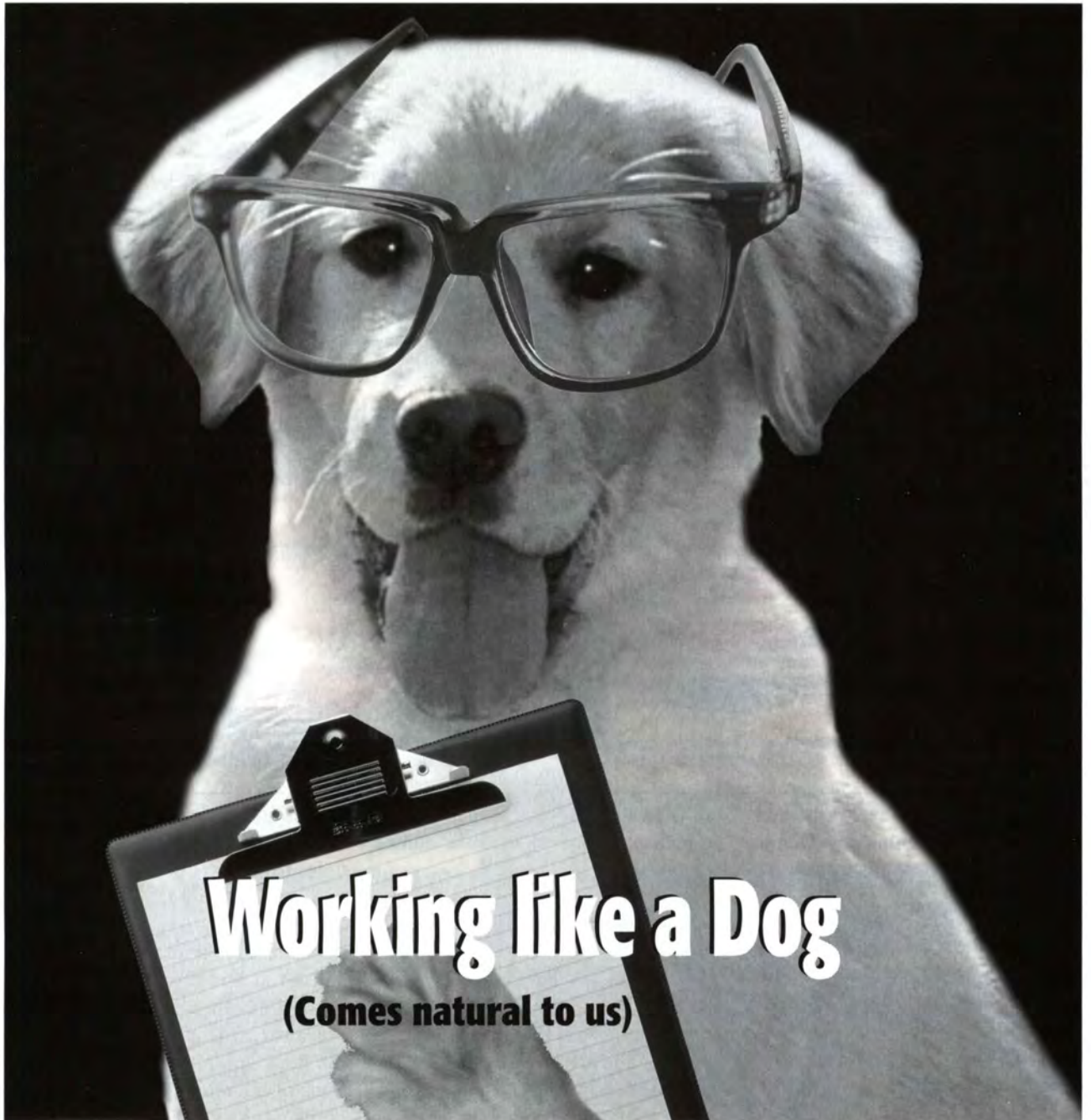


Figure 13



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"Titan AE" Advertising Response Model – Among Those Who Recognize the Commercial

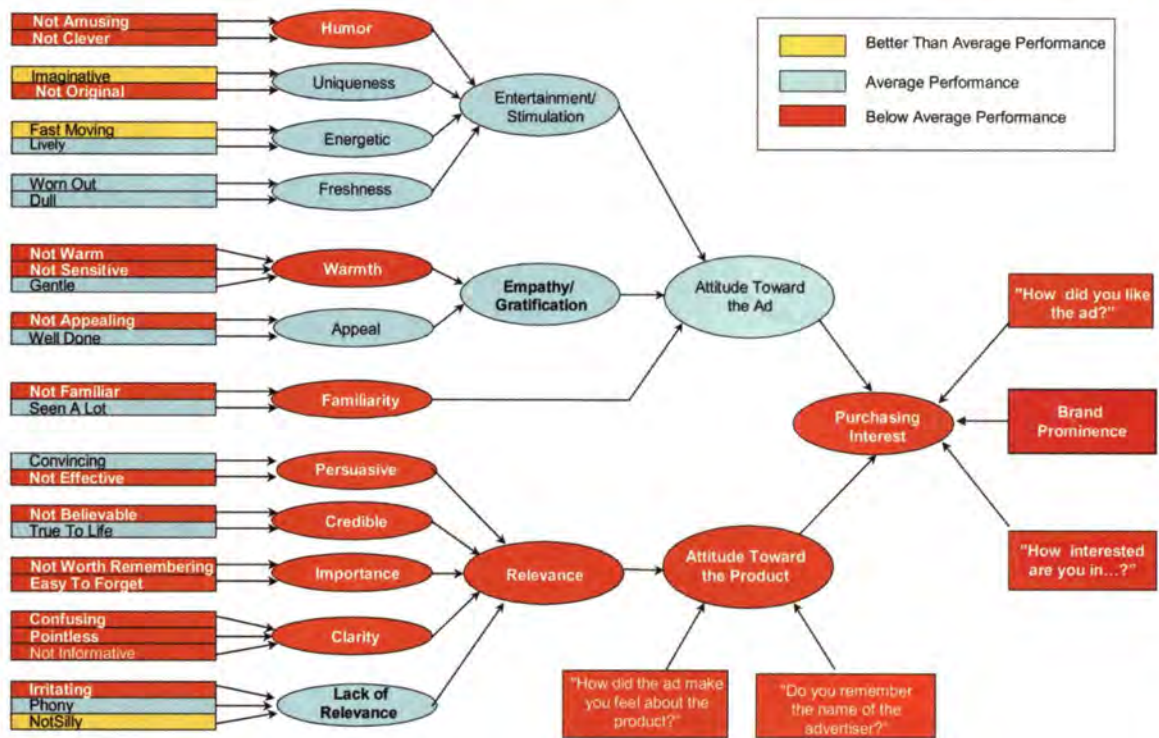


Figure 14

materials, often with reviews that come in close to our opening day. Don has learned some things about how well this can work.

Don Bruzzone: When you try switching to a new commercial, that hotshot in the boardroom may come after you: "Do you have any idea how much it costs to produce one of these commercials?" We don't mean to over dramatize the situation, but this is Hollywood, so you might try a steely-eyed Jack Nicholson type rebuttal: "Do you realize how fast you can throw away millions airing worn-out commercials?" Leaving the dramatics aside, what we are showing is a process for coming up with the numbers that

will quantify the debate, hopefully contributing to a more objective resolution of the issue.

What else accounts for the differences?

The amount spent to air these commercials only accounted for half the differences in the number they reached and affected. What accounted for the rest? We subjected the data to a variety of multivariate analyses to find out. Figure 13 shows the measures we used. It is the same battery of diagnostic measures our firm obtains for virtually all the advertising it tests. In this case it shows the diagnostic results for the best-remembered of all the Super Bowl movie commercials, the spot for *A Few Good Men*.

The boxes down the left of Figure 13 show words respondents can use to describe that commercial. These are combined into sub-clusters and major clusters as you move across the chart. Those on the top half reflect respondents' emotional, affective,

executionally-oriented reactions and end up in an overall measure of attitudes toward the commercial. Those on the bottom are the more thoughtful, rational, message-oriented reactions that funnel into an overall measure of attitudes toward the movie. Overall measures of likability, interest, awareness of the advertiser and the commercial's effect on perceptions of the movie are shown on the right and along the bottom. When any score is in the most-favorable third it is called above average and it is shown in yellow. When it is in the middle third it is called average and is shaded blue. When it is in the least favorable third it is considered below average and is red.

This advertising response model (ARM) shows that reactions to *A Few Good Men* were predominately favorable. Almost all the measures are yellow. The only area where there are a number of below-average reactions is at the top in the entertainment cluster. Respondents who recognized this commercial were not as likely to con-



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Karyn: And if we miss the event live we can always watch it the next day on our schedule.

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“Austin Powers”

Advertising Response Model – Among Those Under 30 Who Recognize the Commercial



Figure 15

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consider it as amusing, clever, imaginative or original as the typical Super Bowl commercial. This ARM shows that the strengths that accounted for this commercial's impressive success were in the areas of empathy and perceived relevance. It shows you don't have to be funny to be successful on the Super Bowl. We should also note in passing that the one area where this commercial exceeded our norms by the greatest amount was in clarity. Hardly anyone came away from that commercial feeling any confusion over what that movie was about.

Figure 14 is an example of an ARM from the other end of the success spectrum, the animated science fiction film *Titan AE*.

On this next ARM, we find hardly any performance scores that are above average and a lot that are below average. Those are concentrated at the bottom. The overall measures of likability, interest and the rest are all below average, confirming what we have already seen in the rankings. The primary driving forces are at the lower left. Those who noticed this

“Austin Powers”

Advertising Response Model – Among Those 30+ Who Recognize the Commercial

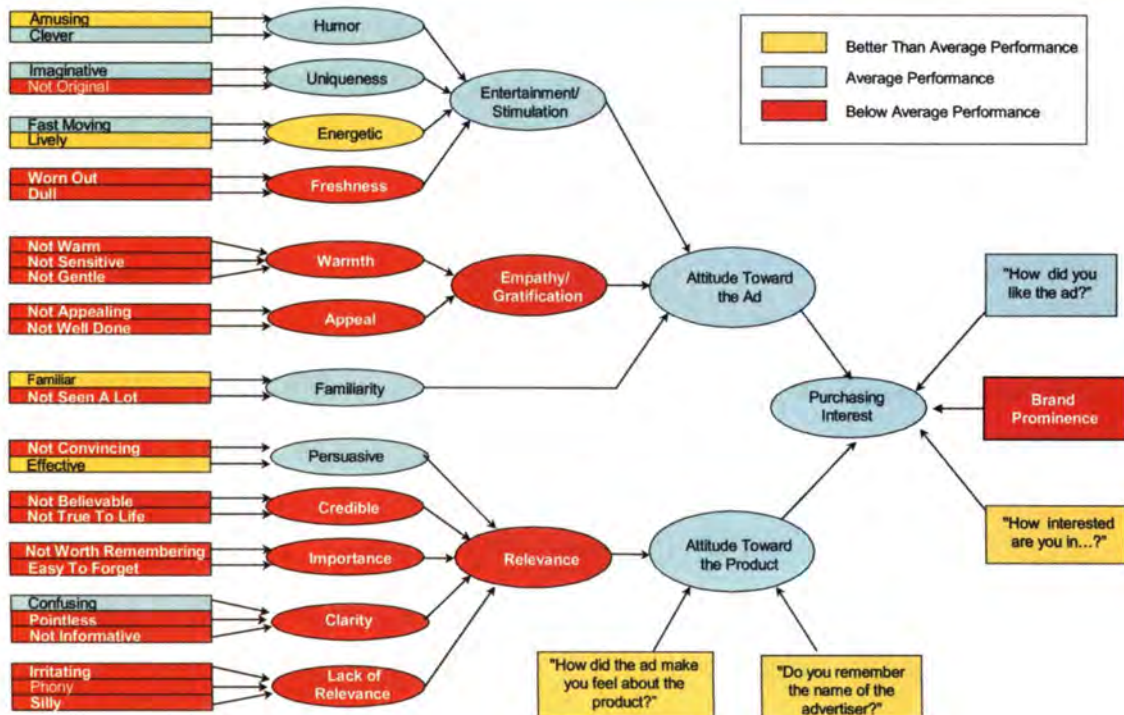


Figure 16

commercial didn't find it effective, believable, or worth remembering. The characteristic that got the lowest rating of all was clarity. Respondents found it pointless and extremely confusing.

We used the same approach to analyze differences between population groups. We will use the *Austin Powers* commercial as an example.

The next ARM (Figure 15) shows how *Austin Powers* performed among those under 30. Its performance was above-average in almost all areas. It lacked a bit in warmth, they didn't find it very credible, and even among those under 30 there was a greater than usual number that called it silly, phony and irritating. But those reactions were more than offset by the number that saw it as entertaining, appealing and something they personally found very relevant.

Contrast that with the reactions to the same *Austin Powers* commercial by those 30 and over. It doesn't look like they are reacting to the same commercial, but they are. This older group found its humor and entertain-

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"Lost in Space"

Advertising Response Model – Among Movie Goers Who Recognize the Commercial

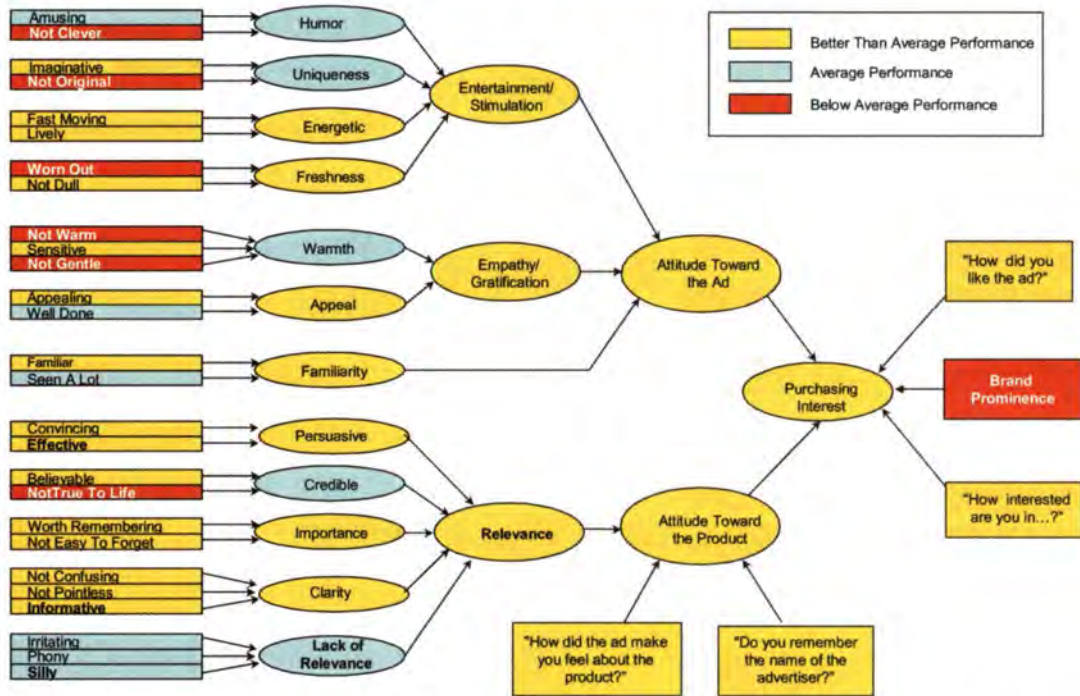


Figure 17

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ment value average, but not exceptional. Where they really got turned off was in not seeing any warmth or appeal in the Austin Powers character, or in seeing anything in the commercial they found relevant to themselves. It struck them as a commercial for someone else.

As one final example, take the differences between regular moviegoers and those who seldom or never go. The Super Bowl commercial for *Lost in Space* was one where reactions differed dramatically between the two groups and accounted for the wide difference in performance noted earlier.

First, reactions from regular moviegoers are shown on the ARM in Figure 17. All major measures are favorable. Here the most exceptional ones are the number that found it appealing, fast-moving and lively. Further, there was not a single regular moviegoer who found this commercial confusing.

Compare that with reactions from those who noticed the commercial but seldom or never go to the movies.

“Lost in Space”

Advertising Response Model – Among Non Movie Goers Who Recognize the Commercial

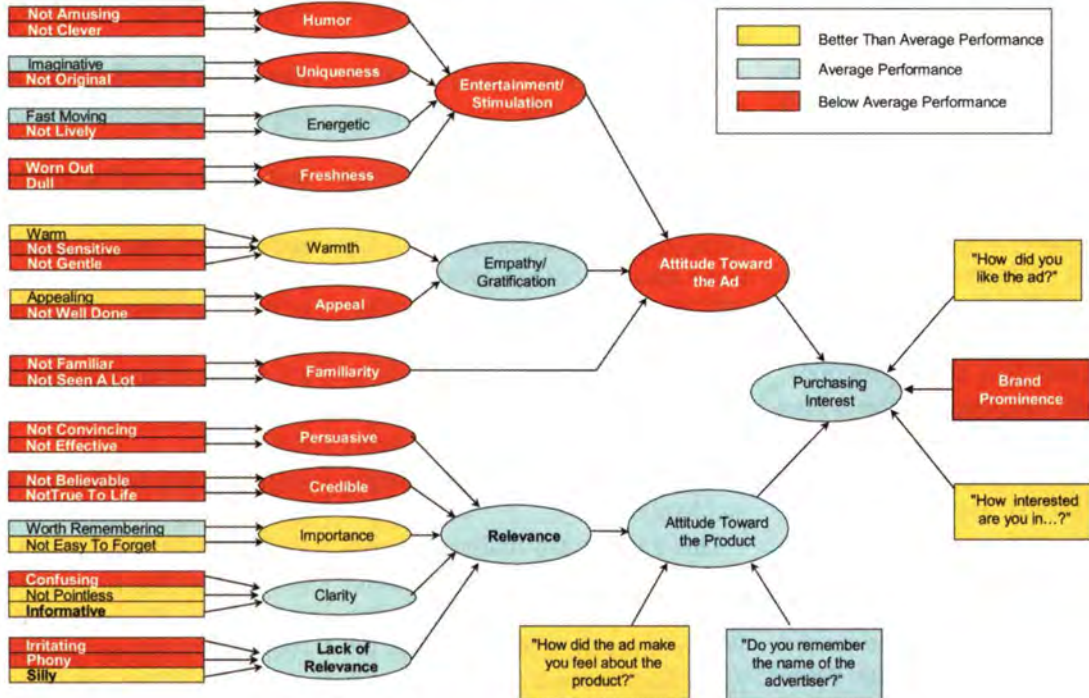


Figure 18

That is shown in Figure 18. They didn't find it entertaining. It didn't look like anything they were familiar with. That pulled the total for attitudes toward the ad down to a below-average level. They didn't find it convincing, effective or credible. And the number that called it confusing was the highest we ever found for a Super Bowl movie commercial.

Analysis

What we have been looking at is the type of data we evaluated for

every Super Bowl movie commercial. We used three types of analysis to identify the characteristics most frequently associated with success, or the lack of it: regression, discriminant analysis and CHAID. We found they were all in general agreement about the key factors driving success.

Humor

The first is one you might expect. The Super Bowl movie commercials that people were most likely to notice, and least likely to ignore, tended to be

the commercials that were the funniest and the most entertaining. In our respondents' opinions they were the commercials for *Nutty Professor II*, *The Wedding Singer*, *Austin Powers*, *Groundhog Day*, *Liar, Liar, Stop!* Or *My Mom Will Shoot*, *Wild Wild West*.

We have already mentioned well-remembered commercials that were exceptions, *Dante's Peak* and *A Few Good Men*. Their success was more than offset by the success of the humorous commercials shown above. But right off the bat we have started

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showing exceptions to the findings, something that seems to be par for any serious attempt to establish guidelines for successful advertising.

Clarity

The second major finding may come as more of a surprise: Don't confuse people.

Respondents found lots of movie commercials on the Super Bowl very confusing. This is the second of the potentially controversial findings we alluded to earlier. A study of the commercials respondents found confusing suggests two basic problems. Explosions and special effects may be the pride of the producer, but pack them all together in a 30-second commercial, without any background on what is happening or why, and you can have a commercial that a lot of people can find confusing, meaningless and easy to ignore. The second underlying problem is similar. When you have a whole movie to select shots from there seems to be a ten-

dency to select too many. It's as if those involved with the movie have grown quite attached to what they see as the great scenes in the movie, and they try to get at least a few frames of every one of them in the commercial. And, again the effect is more confusing than impressive.

The solution to confusion is to make a commercial into something that people can make sense of, something that is understandable and has some meaning. Meaningfulness can take many forms. It can be a joke. When you don't get the joke, you are likely to call the commercial confusing. When you don't understand what all the action is about, you are likely to call it confusing, not fast-moving and lively.

This ties into the finding 10 years ago that likability is the best predictor of advertising's effect on sales. We were proud to play a role in the watershed research that showed the most important characteristic of likable advertising is meaningfulness

(Biel, 1990). People don't like things they don't understand. One creative strategy that seldom worked on the Super Bowl is the suspense format, where you try to create curiosity about the unknown. It is part of the same principle. For most people it is almost unconscious. They don't have the patience for confusion in advertising. If they don't grasp the situation in the first few seconds they lose interest and start ignoring it. When you go back later you find no traces of that commercial in their memory, and no effect on their behavior. It is a lesson we found is often ignored in advertising movies on the Super Bowl.

On the other hand, when this lesson about clarity, meaningfulness and likability is followed, you can get exceptional results. Consider the two exceptions we have been talking about. There was nothing funny about *A Few Good Men*, but its content was crystal clear. It was a movie about a court-martial. *Dante's Peak* certainly

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had explosions and special effects. But you heard Pierce Brosnan say the mountain is going to blow, it did, and you saw him racing to get away. In 30 seconds you had the complete storyline for the movie.

We have already seen that some commercials did an impressive job reaching and affecting large numbers of people after much less exposure than most of the commercials got. Those were the commercials where the basic theme was clear. You didn't have to see it a second time to figure out what it was all about. Clarity is always something to strive for.

Movie stars

The third factor that contributes to success in advertising movies on the Super Bowl is certainly no surprise to Hollywood: a big name star. When people see a face they know and like they stop and pay attention. You don't have a big name star in your movie? You have to make up for that with strengths in other areas. The drivers of success are almost all interchangeable.

Empathy

Empathy provided an alternative way of capturing attention and interest. It did not account for as many of the Super Bowl successes as humor and entertainment value, but it accounted for enough to qualify as one of the major driving forces. *Shining Through*, a 1992 movie with Michael Douglas and Melanie Griffith escaping the ravages of war, reached and affected a lot of people because of the number that found it appealing and well done. Clint Eastwood's 1999 *True Crime*, about a reporter trying to save a man from execution, got the highest scores for warmth and sensitivity.

Those who feel humor and slapstick provide the only route to success on the Super Bowl have not studied the results.

Reaching and affecting the subgroups

For regular moviegoers the most

important factor was "freshness." Expenditures had less effect on this group. They noticed movie commercials even when they had very little exposure. The commercial for *Mercury Rising* is an example of a commercial that ranked much higher among regular moviegoers, where it was fourth. It dropped to 29th among those who seldom go to the movies.

Those who don't go regularly showed somewhat the opposite ten-

dency. They were more likely to be reached and affected by movie commercials that dealt with familiar themes. The commercial for *Falling Down* performed well among those who don't go to movies regularly, and whose theme they considered familiar.

Young folks were reached best by commercials that were entertaining. They were drawn to commercials they called silly. That included almost

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all the commercials we already showed as humorous commercials. But the commercial for *The Getaway* is another example of a top performing commercial that performed exceptionally well because younger respondents found its excitement very entertaining.

Older respondents were the ones for whom the amount of exposure made the biggest difference. They favored commercials they considered clever and well done. The commercial for the WWII action film *U571* is an example of a commercial that older respondents felt was unusually well done.

Summary

Dan Rosen: So, the net of all this seems to be:

- First — not a big surprise — entertainment values, and especially humor, are the most significant elements in effective movie advertising.
- Next — and again, no surprise, but often not heeded — clarity, ease

of understanding, directness of the message, don't confuse viewers...lots of Super Bowl advertising didn't work because viewers didn't understand the message.

- Of course, movie stars are the main reason why people go to the movies, and they help enormously in advertising — they get people's attention, and they make the ads memorable.

- Emotional content is also an effective element when incorporated into the advertising in the right way and not overdone...we can manipulate the viewer, but we shouldn't be too obvious about it.

- Be fresh and innovative. Don't do the same thing all the time. People get bored and tired and tune out.

- To reach the infrequent moviegoer, who tends to be older, be conventional. This part of the audience won't stay with us if they don't recognize what we are showing them. And, show it to them over and over again until it sinks in. On the other hand,

frequent moviegoers, especially the young ones, respond best to humor and even silliness.

Of course, advertising is only one part of the mix. Publicity, word-of-mouth, reviews, competition...these are all important elements in creating box-office.

But the one element we can control and measure is advertising, and I hope we have shown you some of the ways advertising works today. **76**

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Names of Note

continued from p. 10

O'Hara has been promoted to vice president, **Burke Marketing Research Client Service**.

Simmons Market Research Bureau, New York, has promoted **Kyle Langley** to chief research officer.

Research International USA, Inc., Chicago, has named **Paul Smith** senior vice president, marketing science, and **Angela Wheeler** director, qualitative services.

Westport, Conn., health care information provider **IMS Health** has announced that **Robert E. Weissman**, vice chairman and chairman of the executive committee of the board of directors, and **Victoria R. Fash**, vice chairman, have resigned their positions as directors of the board, and their positions as vice chairmen. This is the completion of the orderly transition of management that began with the appointment of **David M. Thomas** as chairman and chief executive officer in November 2000. Weissman will retire, and Fash requires additional extensive medical care following spinal surgery in December 2000. The positions of vice chairmen held by Weissman and Fash, and that of president, would not be filled, and there are no plans at present to fill the two board seats previously held by Weissman and Fash.

Disney Online, North Hollywood, Calif., has named **Dan Sherlock** vice president of marketing. In his new role, Sherlock will be responsible for new business development and will manage the market research and brand development teams.

Richard Miklautsch has been named executive vice president of **Cooper Research, Inc.**, Cincinnati.

Jack Noonan, president and CEO of Chicago-based **SPSS Inc.**, has been named president of the Chicago Software Association (CSA). As president, Noonan will serve for one year as the principal officer of the association, and will preside at all meetings over the

CSA's members, board of directors and executive committee.

MeasureCast, Inc., a Portland, Ore., streaming media measurement firm, has named **Evan Oster** vice president of research.

SPSS Inc., Chicago, has named **Peter Andrews** director of Dimensions business strategies for SPSS MR, the company's operating group devoted to serving the market research industry. In this

position, Andrews is responsible for assisting customers in adoption of SPSS MR's forthcoming Dimensions product.

Stanford Resources, a San Jose, Calif., publisher of reports on the electronic display industry, has named **Paul D. Semenza** executive vice president and chief operating officer.

Sherry Hall has been named senior project director at **MarketStar Research**, North Palm Beach, Fla.



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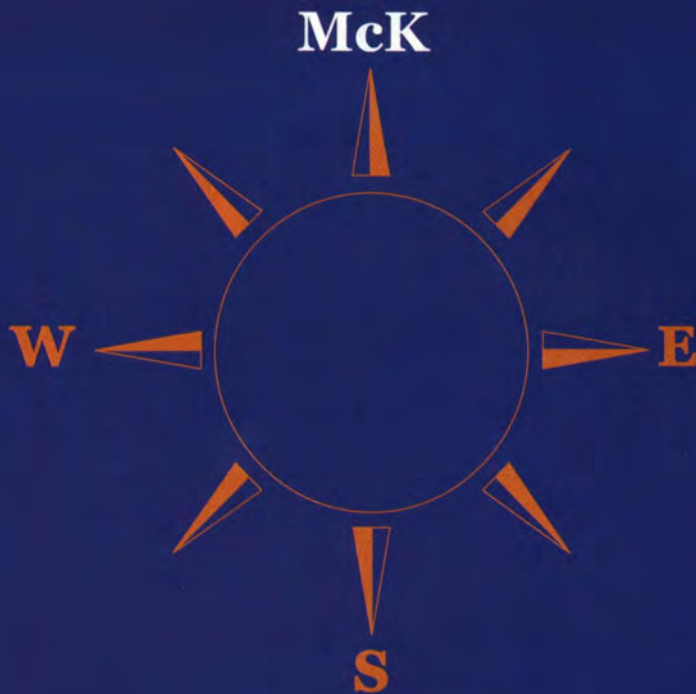
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Trade Talk

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finally realizing the fries are crummy, Burger King knew it had to make a change. So the company is promising to debut a new fry this year — one that's still coated but not *quite* as coated.

As an observer of the marketing research industry, I can't help but feel for the researchers whose surveys uncovered the need to develop a better fry. I'm sure it sounded like a great idea at the time, and one that made good business sense, given the huge profit margins on fries. But perhaps 19 pages of specs might have been a sign that attaining french fry acme day after day, batch after batch, might be impossible, especially factoring in the human element, equipment variances, etc.

The Burger King fry fiasco won't rank up there with New Coke on the list of product debacles, but it's another example of the notion that just because you *can* do something doesn't mean you *should*.

It's been a while since we last checked in at the *Quirk's* Web site (www.quirks.com). In that time, just over a year, our Webmeister Dan Quirk has been busy growing and changing the site — all for the better, we hope!

The first things you'll notice are the new look and the improved navigation. Now, on any page of the site you can see the subsections for the section you're in as well as the site as a whole.

We've also added nearly 10,000 company listings, in the form of online versions of our many print directories. In addition to the online version of the Researcher SourceBook, you can now access our directories of focus group, telephone, and mall research facilities, and search for moderators (in the Moderator MarketPlace), mystery shopping providers, ethnic research firms, and data processing and statistical analysis companies. So next time you're on the road and don't have your printed copy of a *Quirk's* directory handy, just head to the Web and access the e-version.

And by the time you read this, all of the articles from the 2000 issues should be accessible in the Article Archive. The searchable Archive stretches back to 1992, and if you find a story you'd like to share with a friend, just fill out a short form to send them a link to the article.

The Job Mart continues to be a popular feature, now holding over 100 postings, with more added every day. If you are looking for a job or looking to fill a position, check out the Job Mart.

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Trade Talk

By Joseph Rydholm, QMRR editor

French fries and Web sites

Cautious tales always make for interesting reading. “How Burger King Got Burned in Quest To Make the Perfect Fry” (*Wall Street Journal*, January 16, p. A1.) is a perfect example. I read the article with great interest, and not just because it confirmed my feeling that BK’s fries are awful, an opinion I have held since they debuted on January 2, 1998 (a.k.a. “Free Fryday”). Rather, I found the article to be a fascinating example of how logistical problems derailed a product that research indicated was a winner.

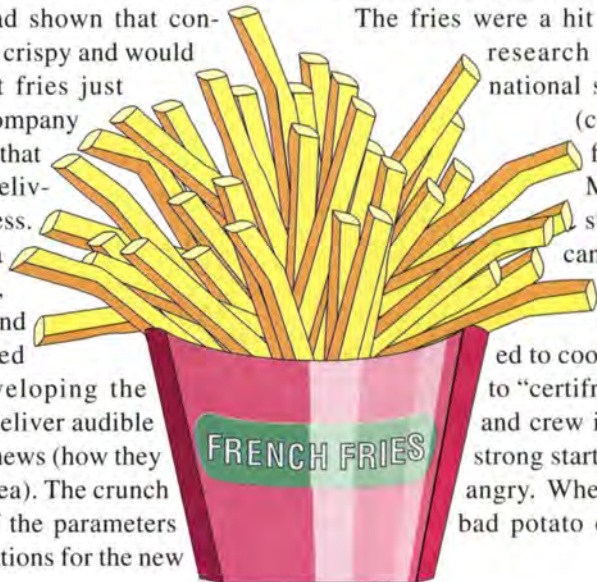
Burger King’s surveys had shown that consumers wanted a fry that was crispy and would retain its heat. The current fries just weren’t the answer, so the company hit on the idea of a coated fry that would retain heat and also deliver the sought-after crunchiness. The company rounded up a team of 100 marketing execs, food scientists, franchisees, and other personnel and charged them with the task of developing the Perfect Fry, one that would deliver audible crunches for seven or more chews (how they settled on seven, I have no idea). The crunch requirement was just one of the parameters listed in 19 pages of specifications for the new

fries.

(The article delves into such esoteric concepts as “toothpack” — the degree to which a fry sticks to the surface of a tooth — and “marriage” — in which two fries bond together by one-third of their surface. As a person who probably consumes double the 26 pounds of french fries the government says we eat per capita annually, I love the fact that there are people whose job it is to worry about how many times a fry crunches or how much it sticks to a tooth.)

The fries were a hit initially — BK’s independent research showed that 57 percent of a national sample picked its fries as best (compared to the 35 percent who favored the fries of second-place McDonald’s — which to me are still the best fast-food fries you can get, even if they aren’t cooked in beef tallow anymore). But they were devilishly complicated to cook, despite the company’s efforts to “certify” 300,000 restaurant managers and crew in their preparation. And after a strong start, sales fell and franchisees grew angry. Whether due to cooking problems, bad potato crops, or, as I suspect, people

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