QUIRK'S

Marketing Research Review

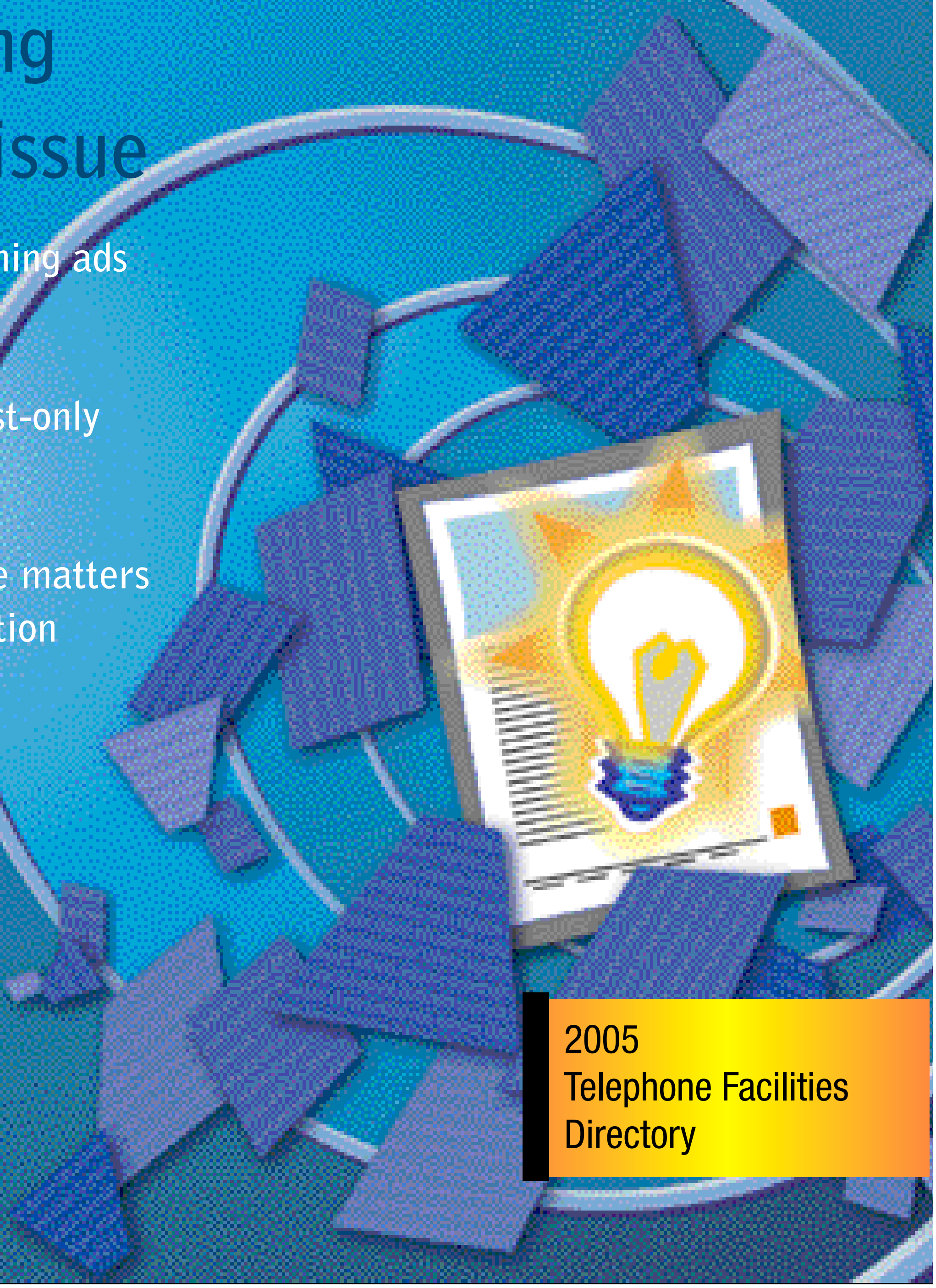
APRIL 2005

Advertising research issue

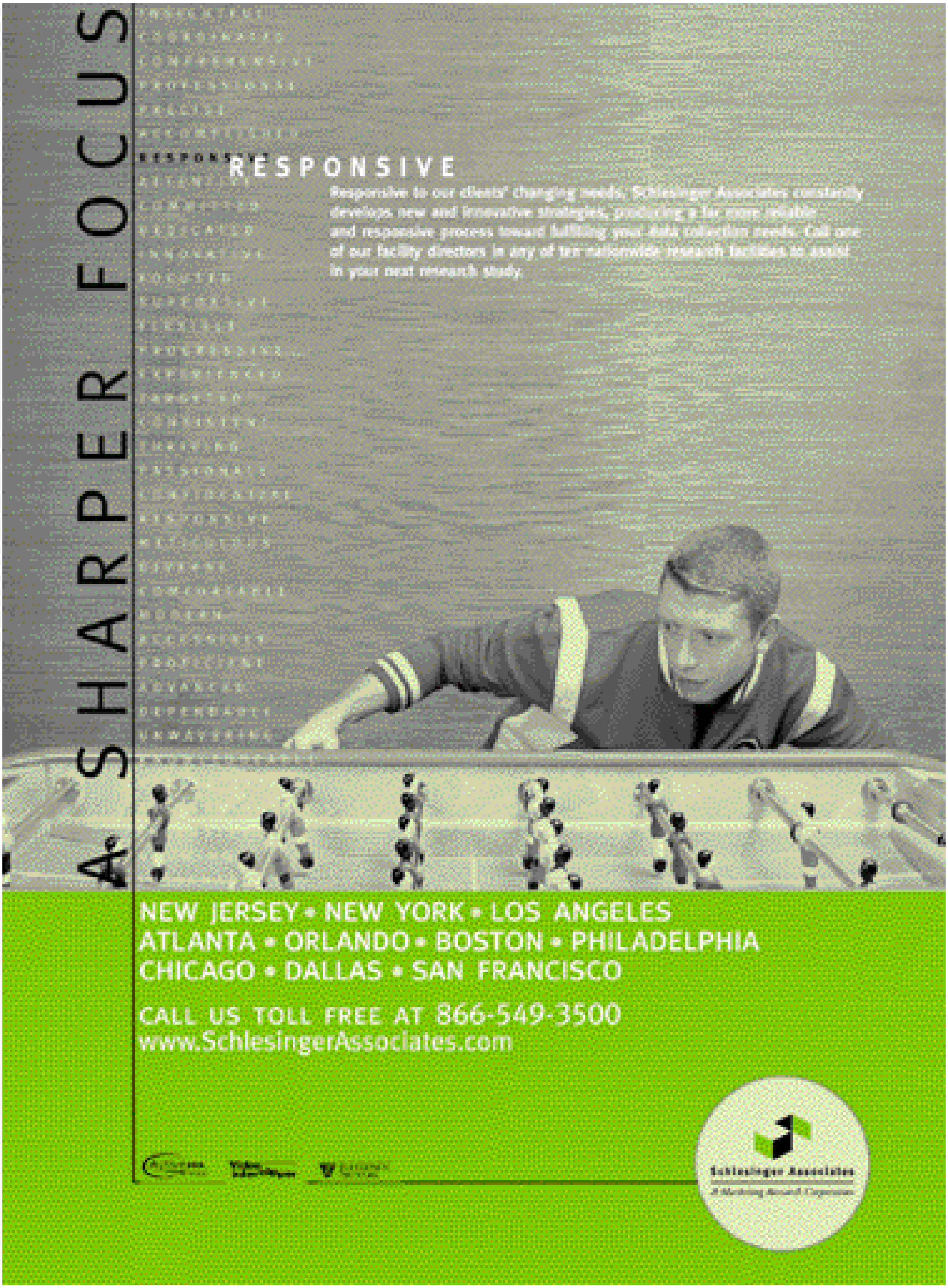
> Are award-winning ads more effective?

> Pre-post vs. post-only studies

> Why experience matters more than emotion



2005 Telephone Facilities Directory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Volume XIX Number 4

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Illustration by Jennifer Coppersmith

Publisher Emeritus
Tom Quirk

Associate Publisher
Evan Tweed

Editor
Joseph Rydholm

Production Manager
James Quirk

Directory Manager
Steve Quirk

Directory Assistant
Shawn Hardie

Marketing Manager
Dan Quirk

Advertising Sales
Evan Tweed
952-224-1919

Lane E. Weiss
415-461-1404

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In case you missed it...

news and notes on marketing and research

Customer-bonding through blogging

The blog has arrived as a marketing tool. In the Enterprise column in the March 1, 2005 *Wall Street Journal*, Riva Richmond offered several examples of small firms that have raised their profiles by hosting a company blog. For some enterprises, a blog makes perfect sense as an outreach tool: San Francisco-based online DVD rental firm GreenCine's successful blog features film reviews, interviews and festival news. But even firms that don't at first blush seem like top blog candidates are making it work. Organic dairy product maker Stonyfield Farms has a hit with its popular blog The Bovine Bugle, in which Jonathan Gates, one of Stonyfield's organic milk suppliers, details life on a family farm. "He doesn't even talk about Stonyfield, and I couldn't care less if he does," said Stonyfield CEO Gary Hirshberg. Perhaps that's the key: Don't commit a faux blog. Keep the content real and commercial-free or risk alienating someone who took time from their busy life to seek out your site. A blog is "as intimate and personal as somebody sitting in your kitchen," Hirshberg said. "It's a great privilege to be able to have that kind of dialogue." The conversation comparison is an apt one. For while blogs may not hold the same sale-generating promise as traditional advertising, in an era of media and marketing oversaturation, they stand out as an enticing way to establish and nurture a long-term company/customer relationship from which both sides benefit.

("Blogs Keep Internet Customers Coming Back," *Wall Street Journal*, March 1, 2005)

John Q. Public as tastemaker

Looking for another way to spread the word about your product or service? Consider BzzAgent, a Boston firm that brings a new meaning to the term viral marketing. The idea behind BzzAgent - enlist consumers to talk up a new product at parties, at work or the local coffeehouse - isn't new. Depending on your viewpoint it's either a sign that traditional advertising is growing less effective by the day or an example of how a good idea, creatively executed, can take on a life of its own. The real shocker is how enthusiastic BzzAgent's 60,000 volunteer guerilla marketers are. While they ostensibly earn points for their buzz-generating efforts, most of them seem to care more about the jolt they get from being one of the hidden persuaders.

("The Hidden [In Plain Sight] Persuaders," *New York Times Magazine*, December 5, 2004)

Can wellness come in a big box?

Minneapolis-based electronics giant Best Buy has opened a store called EQ-life in a Twin Cities mall. The 18,000-square-foot store, which aims to be a health-and-wellness superstore, features a spa, a Caribou coffee shop, and a pharmacy along with selling iPods, laptops, magazines and cosmetics. A local health clinic will hold seminars in the store and keep educators, dietitians and nurse practitioners on hand to answer customer questions. "In our research, consumers told us they were trying to achieve balance," said EQ-life president Mike Marolt. "To me, it's really about bringing together in one place our ideas on how health, wellness and technology can work together to achieve the balance they're seeking in life."

("Wealth in Wellness Beckons Best Buy," *Star Tribune*, January 20, 2005)

Apparently clothes don't make the Boomer

One unforeseen problem as Baby Boomers age: they appear to be less interested in buying clothes. After peaking in 2000 at $175.7 billion, sales of men's and women's apparel declined the following three years, according to data from NPD Group. Many Boomers are focused on their impending retirement and are also facing insurance and health care costs. Spas, cosmetics and vacations have replaced shopping as a mood-lifter for some Boomer women. And apparel seems to be losing out to the lure of iPods, flat-screen TVs and other home furnishings. And it's not just Boomers who feel this way. "Technology is so wearable now - the products are fashion-oriented and cool-looking - you can take them with you. And just like clothes, you can show them off to your friends. The cameras you can wear like an accessory. Even the ring tones on your cell phone say something about you," said 26-year-old automobile interior designer Gypsy Molina. Families of all stripes have added recurring costs that weren't prevalent years ago for things such as Internet access, cell phones and cable TV, leaving less money available for apparel purchases. As a result, some clothing makers are branching out into new ventures. Liz Claiborne Inc., for example, is now offering branded bedding, wallpaper and carpeting.

("As Consumers Find Other Ways to Splurge, Apparel Hits a Snag," *Wall Street Journal*, February 4, 2005)

Pinot noir: quaffable and ascendant

In the Academy Award-winning movie *Sideways*, the central character, an incorrigible wine snob named Miles, extols the virtues of pinot noir while dismissing merlot as he and a friend explore the wineries of California's Santa Ynez valley. According to research from ACNielsen, while pinot noir sales have been on the rise for several years, the varietal has, in fact, enjoyed especially strong sales since the movie's release on October 22, 2004. The ACNielsen analysis reveals that pinot noir sales in the U.S. are at record levels, reaching nearly 370,000 cases (one case is equal to nine liters of wine) for the 12 weeks between October 24, 2004 and January 15, 2005 - up nearly 16 percent versus the same period a year earlier. Before the movie came out, pinot noir represented 1.1 percent of all table wine sold in the U.S. through the combined food/drug/liquor store channel. In the four-week period ending January 15, 2005 the varietal had grown to 1.4 percent of all table wine sold. In California, pinot noir had grown by almost a full point to just over 2 percent of total table wine sales. Merlot, despite Miles' disdain, continues to sell well and still ranks as the largest red varietal, ahead of cabernet sauvignon. It represented 11.6 percent of all table wine sold in the U.S. through the combined grocery/drug/liquor store channel prior to the movie's release. For the four weeks ending January 15, 2005, it was up to 12.2 percent.

Consumers shopping less often in traditional grocery stores

Continuing a long-term trend, consumers made fewer trips to traditional grocery stores in 2004 as they sought greater savings, variety or convenience in other retail outlets, according to a study from ACNielsen, Schaumberg, Ill.

ACNielsen's Channel Blurring study showed that the average American consumer made 69 trips to the grocery store in 2004, down from 72 in 2003. Every year since 1995, when ACNielsen U.S. began its annual analysis of consumer shopping patterns, the grocery channel has experienced declines in shopping frequency. That year, U.S. households made an average of 92 trips to stores in the channel. The findings are based on an analysis of data from the ACNielsen Homescan consumer panel.

"There are certainly pockets of innovation within the grocery store channel where retailers are succeeding. However, as a channel, consumers are shifting their trips to formats where they can either save more money or accomplish more of their shopping in one trip," says Todd Hale, senior vice president, consumer insights, ACNielsen U.S.

Dollar stores have enjoyed the strongest long-term growth in household penetration - driven by the channel's rapid expansion - while supercenters have grown the most in terms of shopping trips. The traditional mass merchandise channel continued its losses in both household penetration and shopping frequency in 2004, as more mass merchandisers either converted traditional stores to supercenters or closed poor performing stores. Shopping frequency in warehouse club stores, drug stores, and convenience stores remained flat. Both drug stores and convenience stores slipped slightly in terms of household penetration.

"One hopeful sign for the grocery channel is that several chains have rolled out or are experimenting with new store formats. Others are increasing their use of micro-merchandising and marketing to better meet the unique needs of shoppers within their trade areas. Only time will tell, but those efforts toward differentiation may help stem the loss of shoppers to other formats," Hale says. For more information visit www.acnielsen.com.

Appearances count in direct mail

According to a study by Baltimore marketing firm Vertis, 63 percent of adults say that an interesting-looking package makes a difference as to which direct mail they open. For 51 percent, a special offer or discount will make a difference as to whether or not they open the direct mail.

Twenty-four percent of adults who read direct mail have visited a store in the past 90 days, prompted by receiving a retailer's direct mail piece, according to research conducted by Vertis and reported in its Customer Focus 2005: Retail Direct Marketing study.

"With the huge number of products competing in the marketplace, consumers are always seeking information on the prices and selections available to ensure they are getting the best value," says Therese Mulvey, vice president, marketing research, at Vertis. "Adults have become more receptive to using direct mail to obtain this information, and it has proven to be an effective medium for retailers to connect with new customers."

Of the direct mail readers surveyed, 33 percent of older Baby Boomer (1946-1955) women said they visited a new store in the past 90 days based on direct mail received from a retailer. Similarly, of the adults surveyed, 28 percent of Generation X (1965-1976) men who read direct mail visited a store where they typically do not shop based on direct mail. Twenty-six percent of female Generation Y (1977-1994) direct mail readers said they visited a new store based on direct mail.

Of the total adults surveyed, 25 percent of those with a household income of $30,000-$50,000 who read direct mail said they visited a store where they typically do not shop due to direct mail.

As for the types of retail direct mail that women read, 94 percent of female younger Baby Boomer (1956-1964) retail direct mail readers said they read mail from discount stores, compared to 83 percent of older Baby Boomer women. Ninety-five percent of female younger Baby Boomer retail direct mail readers said they read information from a department store, compared to 84 percent of Generation X (1965-1976) women. Ninety percent of female Generation Y (1977-1994) retail direct mail readers said they read grocery direct mail, compared to 85 percent of older Baby Boomers. Seventy-five percent of female older Baby Boomer retail direct mail readers read

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names of note

New York-based *NetRatings, Inc.*, has named **Iris Cumberbatch** senior financial services analyst in the strategic analysis group.

John V. Colias has joined *Decision Analyst*, Arlington, Texas, as vice president and director of the advanced analytics group.

Randy Smith has joined the Chicago office of *The NPD Group* as group president. Smith will specifically manage NPD Foodworld, NPD Automotive, NPD Canada and the firm's interests in Latin America.

Kimberly-Clark Corporation, Dallas, has named **Kim Feil** vice president and senior marketing officer. Marketing research will be among her new responsibilities.

Feil **Connolly**

Research International (RI) has announced a number of new hires. **Marc Papanicola** has joined Research International France as director of quantitative services. **Catherine Connolly** has joined Research International as group human resources director and she will become a member of the group board. She will be based at the group office in London. **Yvette Wikstrom** has been named vice president in the tracking division. **Vassilis Bakopoulos** has joined Research International USA as a senior vice president in the ad hoc, non-CPG division. **Pamela Hampton** has been named director of outsourced data collection in the operations division. **Kathy Brewers** has joined Research International in Minneapolis as research manager, ad-hoc CPG. **Rebecca Tancredi** has joined the RI HR team as talent development and training manager. She will be based in Chicago. **Zarana Patel** has joined RI's Super Group as a senior research manager. **Christine Turk** has been promoted to client service director. At RI Qualitatif, **Michael Chapman** has been named senior research manager. In the Chicago office, **Gregory Young** has been named systems support technician and **Candace Adams** has been named vice president.

Bellomy Research, Inc., Winston-Salem, N.C., has named **Gabbie Serang** marketing sciences analyst. **Ed**

Serang **Hardman**

Hardman has joined the company as director of marketing sciences.

Tim McDougall has been named chief marketing officer for the NBA's *New Orleans Hornets*. Marketing research will be among his new responsibilities.

Global Market Insite, Seattle, has named **Scott Weinberg** sales director, Minneapolis; **Ron Franscella** sales director, Los Angeles; **John Reid** sales director, New York; and **Jack Breeden** sales director, Seattle.

NPD Techworld, Port Washington, N.Y., has named **Clint Wheelock** vice president-wireless research.

Millward Brown has announced a number of new hires and promotions. Promotions: **Leila Buckley** to associate account director, client service, Millward Brown UK; **Ben Blake** to associate account director, client service, Millward Brown UK; **Dianne Borges** to vice president, Millward Brown IntelliQuest. New hires: **Burt Leiman** has been named managing director of Greenfield Consulting Group, Westport, Conn.; **Monica Garcia** has been named head of the new business development unit, Millward Brown Mexico; **Nitesh Lall** has been named account director, Millward Brown Sydney, Australia; **Anna Meadows** has been named director, qualitative, Millward Brown Sydney, Australia.

J.D. Power and Associates, Westlake Village, Calif., has named **Tom Donnelly** executive director of automotive client services. **Charlie**

Vogelheim

Vogelheim has been named vice president of automotive development. And **Steven D. Wood** has been named senior vice president and general manager of the health care division, which is based in Mesa, Ariz.

Annie Weber, senior vice president, *Roper Public Affairs*, has been named to lead the firm's new Washington, D.C., office.

Elizabeth Ellers has joined *America Online, Inc.*, Dulles, Va., as senior vice president, heading the market research

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product and service update

Add one-on-ones to online surveys

Denver online research firm iModerate LLC has introduced its new proprietary technology which allows researchers to incorporate real-time, in-depth, one-on-one interviews with live moderators into an online survey. The technology is suitable for a range of research projects including ad tests, brand, image and message tests, and tracking studies. It is designed to work with other data collection tools, allowing clients to use iModerate while retaining their current survey research provider. For more information contact Adam Rossow at 303-333-7883 or visit www.imoderate.com.

Skip the usual CAPI tools with Bellview Hall

U.K. research software firm Pulse Train has launched Bellview Hall, a system designed to streamline venue-based market research and data collection and reduce associated costs. Bellview Hall is a turnkey solution that combines Pulse Train's secure Web-based interviewing platform Bellview Web with portable PCs, wireless networking and a variety of devices on which to run Web browsers. This eliminates the need for paper and data entry during venue-based research activities, and allows researchers to dispense with traditional computer-assisted personal interviewing tools. It also removes the need for transferring questionnaires and data to and from a large number of laptops.

Bellview Hall supports all question types (single, multiple, quantity, text and open-end) and various formats, such as grids and drop-down boxes. It also includes full multimedia support, including image, sound and video files. The system incorporates full logic and data checking to ensure data is clean and ready for analysis.

A flexible user interface allows full customization. Support is also provided for creative question design using Flash, JavaScript or Active Server Pages, providing flexibility for screen layout. For research projects requiring real-time data analysis, users can add Pulse Train's Pulsar Web survey analysis tool. For more information visit www.pulsetrain.com.

MI Pro Research Studio integrates MARSC system

Cincinnati-based research software firm MI Pro USA is now offering a new module for its Research Studio software. Research Studio is an integrated data collection, analysis and data mining software framework for market researchers. The new module allows integration of Research Studio with the MARSC Panel Management system, produced by Centurion Marketing Systems Ltd. The MARSC system facilitates the recruitment and management of respondent panels of any size. The new interface from MI Pro allows Web interviews conducted within the MI Pro Research Studio to send their completion status back automatically to the MARSC panel administration system. This eliminates the need for manual status transfer between the two systems. MI Pro USA is the U.S. operation of MI Pro AS, a Norwegian software and consulting company. For more information visit www.mipro-usa.com.

System serves as tactile reference frame

Car maker Renault and French sensory marketing firm Quinte&sens have introduced the Sensotact tactile reference frame, which aims to serve the same purpose for touch-related sensations as the Pantone system does for colors. The product is designed to develop tactile ID's for designers and marketers, help classify products in sensory databases for R&D services, and respond to technicians' or engineers' objectives and schedules. Sensotact is composed of 10 descriptors and 50 references that interact throughout the conception process of the product, from the design until the market research. Renault has used Sensotact's reference frame as a communication tool with other countries - particularly with Japan, where its partner Nissan is located - to facilitate exchanges and avoid misunderstandings. For more information visit www.sensotact.com.

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research industry news

News notes

The board of **United Business Media plc** has appointed its financial advisers, Dresdner Kleinwort Wasserstein and Allen & Company LLC, to conduct a strategic review of **NOP World**, including developing NOP World further, expanding it through strategic alliances or selling it.

Netherlands-based **VNU** announced that the U.S. District Court for the Southern District of New York has dismissed with prejudice all remaining claims in the antitrust case against its **ACNielsen** business unit by **Information Resources Inc.** (IRI). In a company statement, Rob van den Bergh, chairman and CEO of VNU, stated: "ACNielsen has consistently said from the beginning of this case that IRI's claims were without merit and brought to chill competition. The court's decision clearly demonstrates that ACNielsen acted lawfully and that the allegations made by IRI were unfounded. Competition belongs in the marketplace, and not in the courts. We are gratified that the trial court has dismissed this case and are confident of our position on any appeal."

In an order issued on December 3, 2004, the court ruled that the economic analysis on which IRI relied to establish its pricing claims was inadmissible as a matter of law. The court ruled that IRI's expert report on liability and damages, to the extent it relied on the improper analysis, could not be presented at trial. After that ruling, IRI advised the court that the pricing claims were the foundation of its case and, without the evidence excluded by the court, there was "little left of its case to try." The parties then agreed to enter into a stipulation providing for a final order and judgment in the trial court.

In February, New York-based **Nielsen Media Research** launched a branding advertising campaign to heighten awareness about who Nielsen is and to inform multicultural audiences about Nielsen's role in television ratings. The campaign will focus on key media outlets in the metropolitan Detroit area, along with other media markets across the country. Nielsen has partnered with ad agency Burrell to create and execute the campaign. It includes print, radio, online and cinema advertising, targeting Asian, African-American, Arabic and Hispanic consumers and opinion leaders.

As part of the campaign, Nielsen will roll out print ads featuring the faces of adults of various ages and ethnicities merged together, to illustrate the com-

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Calendar of Events April-June

The Advertising Research Foundation will hold its annual convention on April 17-19 at the Embassy Suites Hotel, New York. For more information visit www.thearf.org.

ESOMAR will hold a conference on panel research on April 17-19 in Budapest, Hungary. For more information visit www.esomar.org/panel2005.

The U.K.-based Association for Qualitative Research and the U.S.-based Qualitative Research Consultants Association will co-host the worldwide biennial conference on qualitative research, themed "Qualitative Transformations: Creating a New World Map," in Dublin, Ireland on April 17-19. For more information visit www.qrca-aqr-conference.info.

IIR will hold a brand identity and package design conference on April 18-20 at the Plaza in New York. For more information visit www.iirusa.com.

ESOMAR will hold a conference on retail industry research on April 19-21 in Budapest, Hungary. For more information visit www.esomar.org/retailing2005.

Anderson, Niebuhr & Associates will hold a questionnaire design and use workshop on April 7-8 in Minneapolis and on April 28-29 in San Diego. For more information visit www.ana-inc.com/workshops.html.

Salford Systems will hold a data mining training conference and workshop on May 3-5 in Madrid. For more information visit www.salforddatamining.com.

The Business & Industrial Group will hold its annual business-to-business research conference on May 11-13 at the St. Pierre Marriott, Chepstow, England. For more information visit www.bigconference.org.

The American Association of Public Opinion Research will hold its annual conference on May 12-15 at the Fontainebleau Hilton Resort, Miami. For more information visit www.aapor.org.

ESOMAR will hold a conference on the fragrance industry on May 15-17 in New York City. For more information visit www.esomar.org/fragrance2005.

ESOMAR will hold its Global Cross-industry Forum 2 (The Client Focus) on May 17-19 in New York. For more information visit www.esomar.org/globalforum2005.

The Marketing Research Association will hold its annual conference in Chicago on June 1-3 at the Marriott Chicago Downtown. For more information visit www.mra-net.org.

The American Marketing Association will hold its annual Advanced Research Techniques forum on June 12-15 at the Coeur d'Alene Resort, Coeur d'Alene, Idaho. For more information visit www.marketingpower.com.

ESOMAR and the Advertising Research Foundation are co-sponsoring the Worldwide Audience Measurement conference (online, outdoors/out-of-home, print, media mix, radio, TV) on June 19-24 in Montreal. For more information visit www.esomar.org/wam2005.

Canada's Professional Marketing Research Society will hold its annual conference and trade fair on June 19-21 in Halifax, Nova Scotia. For more information visit www.pmrs-aprm.com.

The Travel and Tourism Research Association will hold its annual conference, themed "The 3 R's: Research, Results and Rewards," on June 12-15 at the New Orleans Marriott. For more information visit www.ttra.com.

By Michael Lieberman

Unearthing TURF

Over the past few years the awareness of totally unduplicated reach and frequency (TURF) analysis has grown. In fact, this useful, powerful technique has become more sophisticated, developing into more and more advanced applications than we originally envisioned when the technique first emerged in the 1970s.

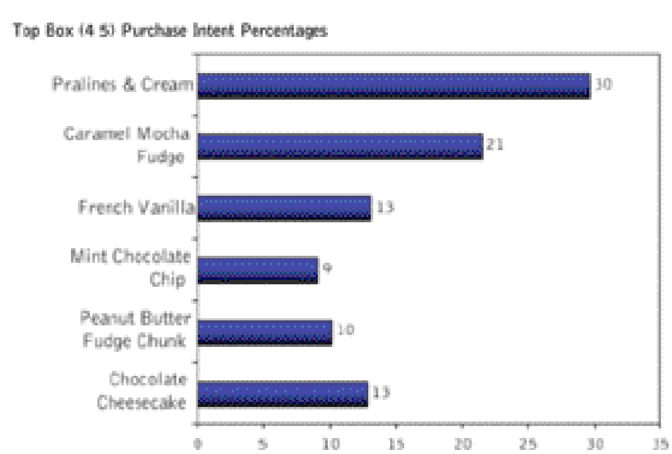
TURF is often used to answer such questions as, "Of the 50 magazines on my list, which combination of five have the largest readership?" or "I have a budget of $10,000 - what are the optimal media outlets I should buy in?" or "What kind of market share will we gain if we add a new line to our current brand?" or "Which 10 of 20 flavors should my ice cream shop display?"

In the following piece we are going to present the most popular uses of TURF, such as maximizing reach and minimizing costs for media markets; calculating the incremental value to the full line of adding additional possible products; attracting the largest number of consumers with the fewest number of varieties; and projecting budgetary choices. An elegant upshot of TURF is that it not only allows the researcher to assess all possible combinations of brands or products on the list, but also points to the winners. In TURF literature, this process of determining the winners is referred to as optimization.

Editor's note: Michael Lieberman is founder and president of Multivariate Solutions, a statistical and market research consulting firm. He can be reached at 212-656-1711 or at michael@mvsolution.com.

Finally, we will have a look at TURF deliverables, including ranked results (optimization), bud-

Figure 1: Purchase Intent Frequency



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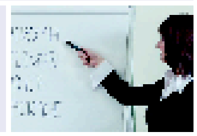

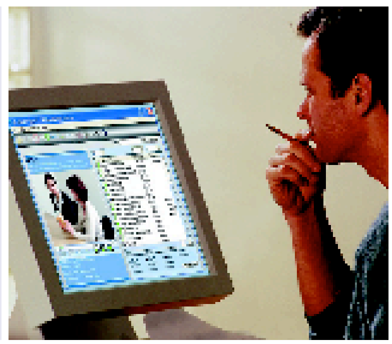

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getary forecasts, and a TURF simulator that our clients find useful. It allows them to combine any what-if scenarios they like, or to pass it along to their client for the same purpose.

Components of TURF

TURF has two named built-in components, reach and frequency. In effective research, these two these pieces are generally separated, though they are often linked and both are universally presented with the final results. Understanding their simple meanings is a necessary prerequisite for understanding TURF.

Basically, frequency is the total number of people who will choose or purchase each product shown. For example, of 100 people 50 will purchase *Sports Illustrated*. The frequency for *Sports Illustrated* is 50. Sixty will purchase *People* magazine (they could also be the same people purchasing *Sports Illustrated*). *People's* frequency is 60.

Reach is the number of people who will purchase *at least one* of the products shown. Said another way, reach displays the unduplicated (no person is counted twice) percentage of people who will choose a combination. For example, *Sports Illustrated* has a frequency of 50, *People* has a frequency of 60, and *Time* has a frequency of 40. Out of the hundred people, 80 have read *at least one* of these magazines. That is the reach.

Figure 2: Maximum Unduplicated Reach

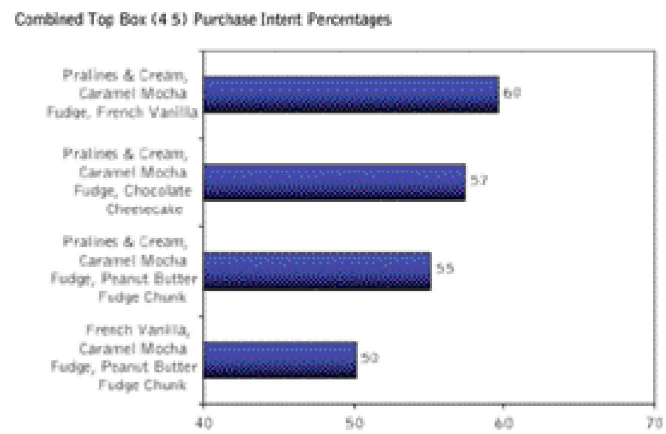


Figure 3: Happy Package Design Frequency

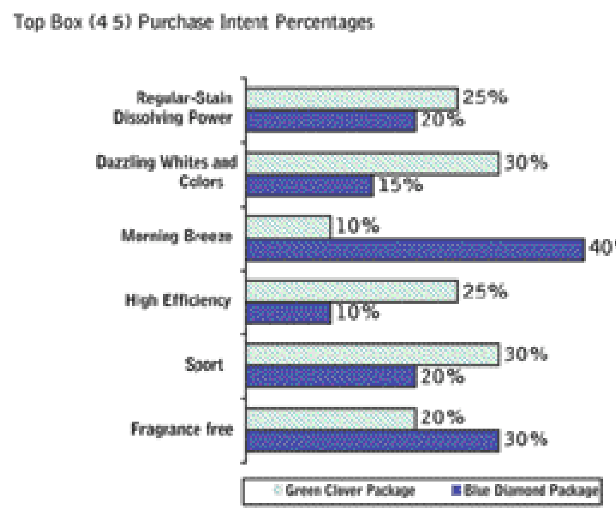


Figure 4: Happy Brand Package Reach

Definitely/Probably Will Purchase

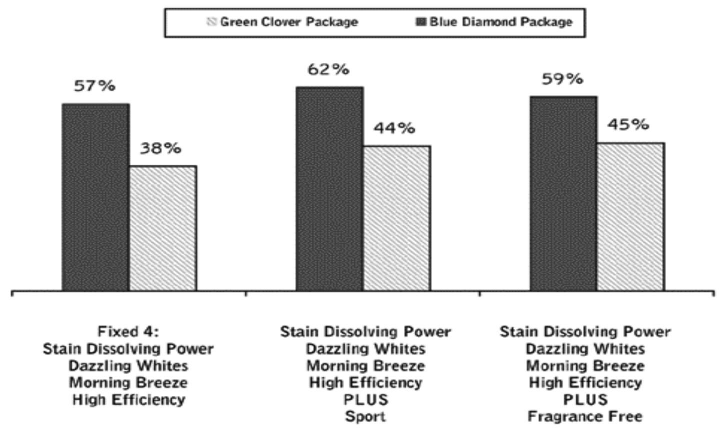


Figure 5: Happy Detergent Brand Lines
'Next 10' Market Share

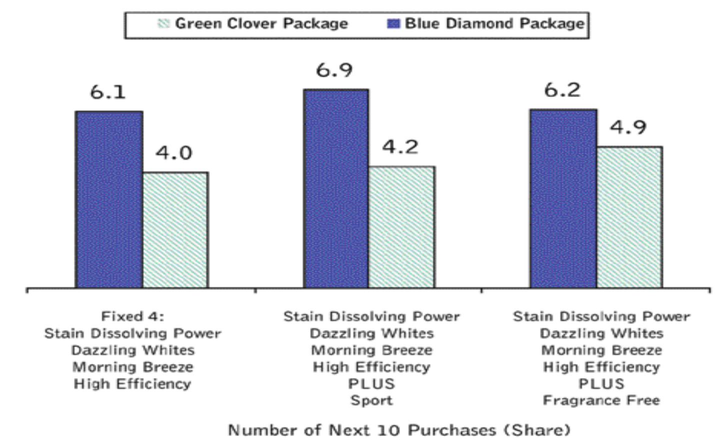


Figure 1 illustrates a simple example of an ice cream shop that only has room for three flavors but currently has six in stock. Respondents were asked, on a five-point scale, purchase intent for any of the six flavors shown. Top two box purchase intent is then calculated and shown as percentages. The frequencies presented illustrate the simple favorites of this store's customers.

Which combinations of three, though, would tickle the tongues of most of the customers? Shown in Figure 2, we see that reach drops off by a few percentage points if you substitute caramel mocha fudge with French vanilla. Peanut butter fudge chunk, well, it just doesn't add much to the mix, even if combined with French vanilla and caramel mocha fudge. The ice cream store owner has his answer.

Variation on theme

In a disguised example, Happy Detergent wished to accomplish two goals in one TURF analysis. Two measurements were involved to not only determine which combinations of products would sell better, but which of two package designs would be more appealing to consumers. The latter is derived by assessing

Table 1: Please check all publications you currently subscribe to:

	Frequency	Cost/Weight
Vogue	67%	5.0
Good Housekeeping	50%	4.0
Working Mother	47%	2.0
Marie Claire	46%	3.0
Essence	39%	2.0
Bridal Guide	35%	1.0
Woman Today	16%	2.0

Table 2

	Reach	Cost/Weight
Vogue - Marie Claire - Essence	86%	10.0
Good Housekeeping - Working Mother - Bridal Guide - Essence	85%	9.0

Table 3

	Reach	Cost/Weight
Vogue - Marie Claire - Essence	86%	10.0
Vogue - Good Housekeeping - Bridal Guide	80%	10.0

reach percentages.

In addition, there was a caveat. Four of the brands were "fixed," meaning that Happy Detergent already offered these products, and that fact wasn't going to change despite the upcoming research results. The aim of the project was to measure the four fixed brands (perhaps for future phasing out), determine which new package works the best, and which additional brand would improve market share the most.

Which will be part of the line (fixed brands in bold)?

- **Happy Regular – Stain Dissolving Power**
- **Happy Dazzling Whites and Colors**
- **Happy Morning Breeze**
- **Happy High Efficiency**
- Happy Sport
- Happy Fragrance Free

A follow-up measure was asked, yielding a far richer lode of information. The two questions were:

- Looking at all of these Happy brands, please tell me which statement on this card best describes how likely you would be to buy each of the specific types of Happy detergent you see here if they were available where you regularly shop? [for each package]
- Assuming that (Happy brand) was available in the store where you shop, how many of your next 10 purchases of laundry detergent would be for this particular variety of Happy?

We see from Figure 3 that there are large differences (as shown by the frequencies) between perceptions of the Green Clover and Blue Diamond Packages. Which, though, is more effective? Figure 4 (reach) gives the answer.

So, we have a winner. Happy Detergent should go with the Blue Diamond. Looking at projected market share (Figure 5), Happy Sport would get around seven (6.9) of the next 10 purchases among this consumer sub-group.

If for some reason, however, Happy decided to go with the Green Clover package (perhaps it is less expensive to produce), our TURF analysis indicates that Happy would be better off with Happy Fragrance Free than Happy Sport.

Budget reach - a TURF pricing model

The next problem has to do with two questions. The first, "What is the best bang for the buck?" The second, "What is the best buck for the bang?" Rephrased, the first would be, "What is the best reach for a budget of, say, $5,000?" The second, "What is the minimum cost to get a reach of 80 percent?"

To illustrate, I will use a simple mix of women's publications in which a client may potentially advertise. As part of the data-gathering process an online survey asks readers to which publication they currently subscribe. They are listed in Table 1 along with the costs to place an ad in each in measured units.

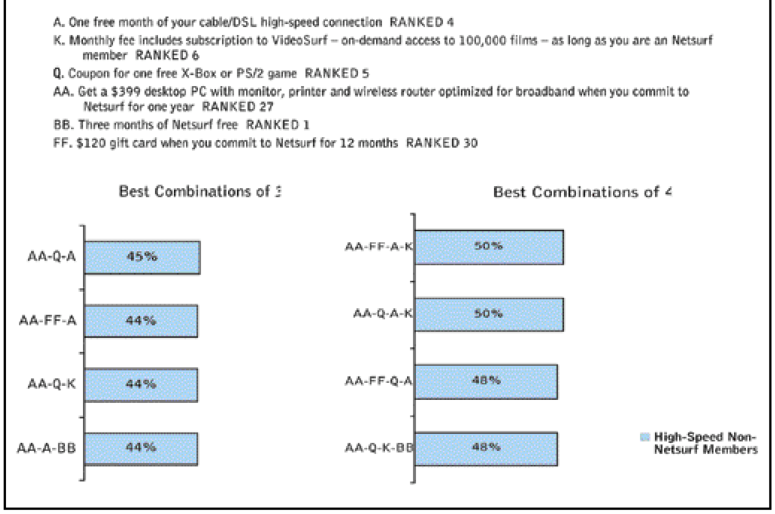
Let's say the goal is for a certain reach. For example, if you had to reach 85 percent of the audience, what is the least expensive configuration of ads (Table 2)?

In our TURF software we would enter only one parameter, projected reach, then calculate the cost of scenarios that match. In our example above, where we are looking for 85 percent reach, two buy scenarios have been returned. One has a slightly higher reach, but the second buy, with four less-prestigious publications rather than three higher-priced magazines, is less expensive. Perhaps it is a better buy.

The second method of optimizing budget would be to enter in a cost. Using our example, say we would like to spend $5,000, and each $500 is worth one point. So, we are looking to spend 10 points (Table 3).

Here we again have two scenarios that emerge. However, the second, with two major magazines, has less of a reach than the first. So, we go with *Vogue-Marie Claire-Essence*. Again, the only parameter entered in the model is the amount of money the client would like to spend. TURF calculates the reach for all emerging choices.

Figure 6: Reach Scores - Subscription Likelihood Among High-Speed Non-Netsurf Members



Assessing the myriad

It is not hard to select three out of six ice cream flavors or five of six Happybrands, but what if the task was to select between the top 10 to 20 combinations of three or four options packages among 25. In our hypothetical example an emerging Internet broadband company (which we will call Netsurf) would like to test 35 options among broadband Internet users. Below is the survey question:

"Suppose (OFFER) was offered to new Netsurf for broadband. Please tell me how likely you think you would be to subscribe to Netsurf for Broadband service in the next six months if this special offer were available?"

If we are looking for three out of 35, there would be 6,545 combinations to assess. If we are looking for four, there would be 52,360 possible combinations. If Netsurf wanted 10 out of 35, we would need to assess 183,579,396 different reach percentages. Listing out each and every one would drive the client crazy.

These days, though, it is simple (given large amounts of computing power) to run our proprietary program and calculate all 52,360 combinations of four (for example). Each is given a label, sorted high-to-low, then presented with the frequency and reach. We can test as many combinations as the client would like to assess.

Would a combination of the top frequencies receive the highest reach if three, or four, offers were publicized in one campaign? Figure 6 examines the top combinations and shows that TURF reveals that reach can often emerge differently than raw frequencies. That is, the top three and four combinations are not necessarily the top ranked individual offers.

Finally, another feature that clients enjoy is a TURF simulator, provided in Microsoft Excel, that allows the client to plug in any combination of offers to see what the reach might be. These do not necessarily need to be among the top scorers. It is possible that Netsurf would like to see the difference between certain middle-scoring offers, to test the drop-off if a higher-scoring combination makes a change, or to take the highest-scoring four-offer combination and see what adding other offers affects reach.

Figure 7 shows an abbreviated version of the Netsurf simulator (it would be difficult to show all 35 attributes within the confines of Figure 7). However, please note the "1" indicating the included offer and the "0" next to ones that are not shown in the current options. Also included in the simulator is each frequency for individual offer.

Figure 7: Subscription Likelihood Among High-Speed Non-Netsurf Members
TURF Simulator

Netsurf TURF REACH SIMULATOR
CURRENT HIGH SPEED NON-NETSURF
TURF ANALYSIS

OFFER	1=included	Frequency
A. One free month of your Cable/DSL high-speed connection	1	19%
B. Free training for equipment that works with Netsurf for Broadband	0	13%
C. Loyalty card from Best Buy that entitles you to 10% discounts on purchases.	0	6%
D. $20 rebate on $200 Canon Photo printers	0	4%
Y. $20 rebate on PDA (Palm or Windows CE) - synch your email, calendar and contacts	1	2%
Z. $100 rebate on any notebook computer with Intel Centrino (built-in wireless)	0	7%
AA. Get a $399 Desktop PC with monitor, printer and wireless router optimized for broadband	1	27%
BB. 3 months of Netsurf FREE	0	16%
CC. Discount price plan ($9.95 vs. $14.95) when you commit for 1-year	0	14%
II. Get 2 Netsurf movie downloads each month while an Netsurf member	0	13%
JJ. $10 Gift Card for each month you stay an Netsurf member	0	7%
Projected Reach	40%	

Value is added

These days brand managers are looking for the edge. They are turning more and more to the marriage of good research and advertising know-how to get there. The above mix of TURF methods - whether it includes brands, products, net profit, or total dollar sales - is the process by which value is added to the client/agency relationship. |Q

"Wow. That project was truly enjoyable."

Can we talk about your next project?

We're asking outright for the opportunity to show you how we can give you all the gain without the pain on your next research project. And we are quite serious – and quite successful – at delivering on that claim.

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> by the numbers

By Philip Moore

Wanted:

a better choice in discrete choice

I hope one of three things will happen as a result of this article:

1. Someone with better knowledge of the current state of vendor offerings will direct me to the right place, or

2. Someone smarter than me will tell me why this approach is methodologically unsound and should not be pursued, or

3. Someone will recognize the power of fully leveraging computer-administered discrete choice and build the tool.

Discrete choice is a terrific tool for isolating brand equity. As far as I am concerned, that issue is resolved. Consider, however, a retailer like Sears trying to measure its brand equity in a discrete choice study with consumers of appliances. Now you have Whirlpool, Maytag, Kenmore, Amana, Sunbeam, Frigidaire and many other brands complicating my ability to isolate the contribution of the Sears brand to the choice decision. If you fail to specify the brand of appliance in the design, i.e., the discrete choice card just says "a washing machine," then a respondent loyal to the Kenmore brand will likely have higher utility for Sears than a fan of Maytag. If you do specify Kenmore in the design, then the Maytag fan will probably generate lower utility scores for Sears, even if they would love to buy a Maytag from Sears.

The interaction of retailer brand and product brand gets even more complicated if brands within the product category have staked out different price space. Consider automobile brands. A respondent whose relevant range of products is Geo, Kia and Hyundai will balk at the price points on discrete choice cards constructed with BMW or Porsche. Their negative utility scores for ABC Automotive would have nothing to do with the retailer and everything to do with the research design.

What I need is a tool that will leverage the power of the computer to construct and administer a discrete choice card set, using table queries based on responses to initial

Editor's note: Philip Moore is market research manager, CarMax, the Auto Superstore, Glen Allen, Va. He can be reached at 804-747-0422 x4831 or at philip_moore@carmax.com.

screening questions. The tool would allow the respondent to make choices based on relevant product brands and price points, with the retailer's brand equity expressed in percentage of price paid.

In case this tool does not exist or someone wants a more concrete example to critique, here is exactly what I have in mind. My discrete choice has three attributes: vehicle class, retailer and price. The levels for the vehicle class attribute are: new, certified used, non-certified used. The levels for the other two attributes are all constructed based on respondent input.

Q1. What is your five-digit zip code?

Q2. What type of vehicle are you most likely to purchase the next time you buy? (small sedan, large sedan, SUV, minivan, etc.)

Q3. What make of vehicle are you most likely to purchase the next time you buy? (all the brands that offer the specified type in Q2: Acura, Audi, etc.)

A query against my dealer database will give me the closest franchised dealer for any brand and my biggest competitor for market share in the respondent's zip code. This gives me my retailer levels.

A query against my make/model database will give me the average sales price for any make/type combination. For example, the respondent tells me they are likely to buy a large sedan (Q2) made by Buick (Q3) so my query goes and finds the average new selling price for a Buick LeSabre (P). My price points are simply 0.75(P), 0.85(P), P, and 1.15(P).

Now I have the following attributes and levels for the discrete choice:

<u>Vehicle class</u>
New
Certified used
Non-certified used

<u>Retailer</u>
Closest franchised dealer of specified brand to respondent's zip
Largest market share competitor in respondent's zip
Client retailer (me)

<u>Price</u>
15 percent above average price of specified make/model
Average price of specified make/model
85 percent of the average price of specified make/model
75 percent of the average price of specified make/model

Now I interpret the utility score for client retailer as the independent contribution of my brand to the choice decision. At least that is what I will do once I find the application that makes this possible. I look forward to hearing from anyone who has assistance to offer! | Q

By Joseph Rydholm
Quirk's editor

Emotion detector

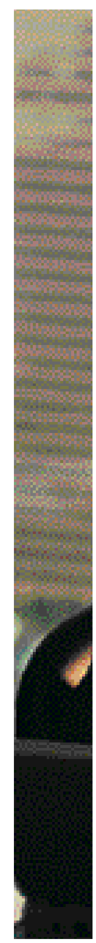
An online survey instrument gives American Express valuable insights for developing its advertising and marketing programs

While starting and running a business involves countless rational decisions – choosing a banker, developing marketing and business plans – there is also a lot of emotion involved. One moment you're celebrating landing a new client and the next you're stressing about cash flow.

With so many things to worry about, it's comforting to have resources to fall back on. That's one of the ideas behind the many services – from credit and charge cards to a variety of other programs – offered by New York-based American Express.

These services appeal to a customer's rational side but American Express is mindful of the importance of addressing the emotional aspects of business in its marketing and advertising, as a way to attract new customers and to cement the bond with current ones.

For help in finding ways to do that, American Express turned to Brain Surgery Worldwide, Inc., an Atlanta-based market research firm. Brain Surgery uses a 30-minute online survey to uncover the emotions and the emotional drivers behind a particular topic. Respondents, who remain anonymous during the survey process, first identify the emotions they experience when they consider the topic, and then express the reasons for those emotions. The survey elicits the intensities of the emotions and also assesses and corrects for the emotional states of the respondent at the time of the survey, as well as their general emotionality. It determines the importance of the issues surrounding the purchase process by aggregating emotion intensity scores for a statistically significant number of respondents.



Amy Marcus, vice president of global marketplace insights at American Express, says that while American Express has used a host of qualitative approaches (depth interviews, ethnography) to plumb respondents' emotional depths, qualitative doesn't allow for projectability. The Brain Surgery approach, which aims to quantify feelings and emotions, takes a step toward that aim. "It's important to get information on respondents' rational mindset during research but choices are often made on an emotional comfort level and we wanted to get beneath the surface and be able to explore the feelings. [The Brain Surgery technique] does that and also gives us the language that consumers use," Marcus says.

The role of emotions

The Brain Surgery survey uses a number of questions and question types to learn more about the role that emotions play in decision-making about specific products. "We use emotions to prioritize reasons for making decisions, and studying emotions allows us to uncover what is motivating or inhibiting to any audience," says Steve Blaising, vice chairman, Brain Surgery Worldwide, Inc.

"Rather than asking them questions with agree or disagree scales and things of that nature, we pose topical statements to them, such as 'If I had the ideal or best imaginable ________ for use in my business I would feel ________.' We start broad and as the instrument takes the respondent through the exercise, we narrow down to more aided types of questions in the end. A tremendous amount of information is gathered, both aided and unaided, about a client's messages, their features, functions, attributes and benefit statements. We ask the respondents to tell us why they feel this way, how strongly they feel that way and how positive and negative they are about their feelings," says John Carr, Brain Surgery Worldwide chairman and CEO.

A typical study will generate over 10,000 lines of verbatim data and 150,000 words, which are coded and analyzed by a psychologist team led by Brain Surgery's Dr. Stephen Curtis. "The cognitive statements allow Dr. Curtis, who invented the tool, to decode the brains of the respondent base. When you do this with 300 to 500 respondents, that is a lot of information, and it allows us to attach a mathematical algorithm and scores to the power of the emotion behind why a respondent is going to do something or not do something. We can project this into a client's market to give them an understanding of who is loyal and how many of them are there, how reliable is that base, who is ready to defect and how many of them are there," Carr says.

"We also uncover the gap between what the market is giving them and what they want - in other words, unmet needs," says Blaising.

After Curtis and his team finish the coding, the information is passed to the Brain Surgery business analysis group, which produces a perceptual positioning as one of its deliverables. "The positioning says, here is where the market perceives the brand's strengths and weaknesses versus competitors. When we look at this compared to the set of unmet emotional needs we get higher-order, more emotional benefits that historically most brands are not connecting to their basic features and benefits. You can leap ahead of your competitors by quite a large margin if you begin to talk about your brand wrapped with these higher-order benefits, versus the ones you have been presenting," Carr says.

In their own words

One of the key aspects for American Express was being able to capture the respondents' feelings in their own words. "More and more people are recognizing and starting to quantify how important emotion is. I think there is a real missed opportunity there for businesses to be aware of and make better use of the power that emotion has," Marcus says.

"The verbatims from respondents give the client the language of the customer," Carr says. "You can take messages and benefit statements written by the marketing department and test them, but those are in the marketing people's language. Instead, we get the respondents' language, which allows us to say to the client, 'Look, you used this word in your benefit statement but when you get it into creative you really ought to use these other kinds of words.'"

Level of reassurance

Armed with the customers' language, rather than focusing on making bold claims in advertising, Carr says firms can use something called factual reassurance. "Using the findings from the research, clients can create advertising that provides what we call factual reassurance. Instead of getting an over-the-top promise of the type that has been the hallmark of a lot of advertising and marketing, consumers want a level of reassurance. It could be playing off of a fear in a nice way, it could be humor, or it could just be their own language played back to them in a way that lets them connect it to a benefit that they hadn't really thought about before."

"We are able to prioritize what we need to deliver and communicate and differentiate what is really important versus what is nice to provide," Marcus says. "With this technique, you don't just get numbers and charts, but a particular segment speaking in their own words. And [the Brain Surgery] analysis gives you a perspective on what those words mean and how important they are and how emotionally weighted they are, because the more emotion the language has the more you need to listen to it."

"We unlocked the truly emotionally gripping parts of the brand and the higher-order benefits that are connected to what the brand is about from a feature-and-function standpoint," Carr says. "We looked at questions like, what did the market really want and how close were they to giving them that? We found there was a certain profile about what makes somebody loyal and excited and we also found out about what made people disappointed and what makes them feel bad, and we were able to determine how those feelings led to choosing one product over another in a parity battle."

There may be eight to 15 reasons why a customer wants to buy or doesn't, Carr says. "Usually four of those reasons make the key driver list and those are the four that require the most work and they also include the brand's strengths, because you never want to leave the strengths behind. But we find clients are so over-focused on the features and the functions that they end up not really speaking to the personal self-interest of the customers."

"It's the balance of those drivers in a message that will make that message optimal," Blaising says.

"Even if we have a market with a lot of anxiety about a product - this happens in pharma a lot - we are able to say, there is some anxiety, here is how much there is, here is why it is there, and here are words you can use that are reassuring to this segment of the market. You aren't going to make your product instantly attractive, but you can move their minds to a neutral state, and once they are there, you can then begin to use language to move them toward a more positive feeling toward your brand," Carr says.

Priority of messages

Marcus says the information gleaned from the research has been helpful on a number of different levels. "We wanted to have a priority of messages to different targets. We have to do different things for different targets and we were able to differentiate what one group needs to hear versus another. And not only what they need to hear but what we need to deliver on. We are protecting our brand and we have a lot of integrity with our brand and we never want to promise something that we aren't going to be delivering."

For American Express, the Brain Surgery approach hasn't replaced other types of research. Rather, it's another valuable tool in the toolbox, Marcus says. "It has helped us get an important framework. We were intrigued by the opportunity to get a more organized and quantified understanding from a greater number of people. When you do qualitative you can get this stuff but it's not projectable and here was a way to do it on the Internet. In a traditional research setting respondents might be private about a lot of the feelings they have, so the online method is a good medium. It's on their terms and might enable them to reveal more than they would on certain subjects in a focus group." | Q

advertising research

Pre-post vs. post-only studies

By Don Bruzzone

When you want to measure the effect advertising has had, is it better to conduct before-and-after surveys, or can a single survey conducted after the advertising do the job? That is not an easy call. There are arguments on both sides.

There has long been a pervasive feeling among researchers that to show if advertising changed things, you have to know how those things were before the advertising appeared. That applies to virtually every measure you might use: awareness of the product, perceptions of the product, interest in buying the product, etc. But there is one exception: "lift." It can be the lift in awareness, or the lift in buying interest, that is associated with noticing the advertising.

Use of lift is growing

The growing use of recognition-based tracking has made the measurement of lift more feasible. Recognition is the most accurate way of splitting a sample into those who noticed the advertising and those who didn't.

When telephone surveys are used for ad tracking the typical question is, "Do you recall seeing any advertising for Brand X in the past month?" When a respondent says yes, they may be thinking of advertising Brand X conducted six months, or a year ago. Or, they might even be thinking of a competitor's advertising. But when you show the advertising to them and ask, "Do you remember seeing THIS before?" you get a massive increase in accuracy. Then you can accurately split the sample into those who noticed the advertising, and those who either ignored it or never had a chance to see it. That is the key to determining if there is anything significantly different about those who were reached by the advertising. And, that in turn, is the key to measuring lift.

Measuring 'lift' is changing the balance

Two of these measures are the most common. They measure increased awareness and increased buying interest among those reached by the advertising. For the first, you typically ask respondents which name comes to mind first when they think of the products in that category. For the second, respondents can be asked to assume they are in the market for the product today. How likely would they be to

Editor's note: Don Bruzzone is president of Bruzzone Research Company, Alameda, Calif. He can be reached at 510-523-5505 or at donbruzzone@bruzzone-research.com.

buy each of a number of products in that category? Both need to be asked before any advertising is shown for that category.

Both measures are essential. They show if overall improvements in awareness and buying interest were related to noticing the advertising. They provide solid evidence of a link between the improvement and the advertising.

They also have a classic limitation: Many researchers feel those who already think highly of a product or brand are more likely to notice its advertising. So higher levels of awareness and buying interest can be found among those who recognize advertising - without any real change having taken place among those who recognize the advertising.

There are two basic ways of controlling for this: the pre-post approach where two surveys are conducted, and the post-only approach where a careful evaluation of more circumstantial evidence is needed.

The pre-post approach

Here, the same people are interviewed before and after the advertising. This shows how many individuals did not have top-of-mind awareness before the advertising, but did after noticing the advertising. Similarly, it would show how many were not interested in buying before, but were after. In short, this approach shows how often actual changes took place in an individual's awareness and buying interest.

But, like experiments in any field, you need to guard against the research itself having some inadvertent effect on the results. In pre-post ad tracking the most common effect is that the first interview sensitizes some people and makes them more likely to notice subsequent advertising. In the post-advertising wave they are more likely to recognize the advertising, and if the advertising is effective, the number affected by the advertising would be higher than among the public at large.

The solution is the same as in most experimental research: the use of both test and control groups. Those interviewed before are the test group, and a matched group, only interviewed once after the advertising, is the control group. The control group shows if the number reached and affected was overstated by the results from the reinterviewed test group. It also provides the most comparable base for measuring any overall changes in the marketplace since the advertising started. But again, the test group is the group where we learn if individuals actually change after being reached by advertising.

The pre-post approach is the most expensive, but it provides the most conclusive results.

The post-only approach

Even though pre-post tests are best, a great deal can still be learned about the effectiveness of advertising from a single wave of interviewing after the advertising appeared. With today's pressure to come up with usable answers at the lowest possible cost the question is, can the additional cost of before-and-after surveys be justified?

Our firm has accumulated several types of key evidence during the 28 years we have been conducting recognition-based ad tracking. The evidence shows the number already favorably predisposed is not the main driver of recognition or any other measure of the number reached and affected. This means, to a large extent, that the actual differences in the impact of advertising can also be seen in post-only surveys. The winners and losers are likely to be the same as in before-and-after surveys.

First, for the sake of argument, say the number that like the brand does have a strong effect on the number that will notice its commercial.

Then, we would expect to find a strong relationship between market share and recognition. We don't find that.

• The percent that buy the product being advertised has no significant relationship to the percent that recognize a commercial for that product. As an example, for the 58 Super Bowl commercials aired during the 2004 game, differences in the number using the product being advertised accounted for less than 2 percent of the differences in recognition. None of our other measures of the number that were both reached and affected showed a closer relationship. Any effect that market share has is more than offset by differences in other factors, primarily the quality of the execution.

This shows that for most products, most of the time, the problem can be ignored and differences in lift can be taken at face value. A large amount of lift means an effective commercial, a small amount means a less effective commercial. However, there is no guarantee this applies to the advertising for every product. There could still be categories where recognition is related to use.

• People notice lots of advertising that has no effect on them. So, reaching more people is no guarantee in and of itself that more people are going to be affected. But this means that in categories where buying is related to recognition, the actual impact of the advertising can still be seen as long as factors that cause that impact are stronger than the effect the other factors have on recognition.

• Our syndicated post-testing of all Super Bowl commercials provides solid evidence that differences in ad quality cause massive differences in impact. Over the years we have collected 119 cases where a commercial was only aired once on the Super Bowl and never again until we had finished our interviewing. So they all had essentially identical exposure, and it was under perfectly normal conditions - an unusual opportunity for research. Yet we found the top 20 percent had been noticed by four times as many as the bottom 20 percent. And more to the issue raised above, the number showing signs of having been both reached and affected was eight times greater among the top 20 percent.

The factors that cause those differences in overall impact are stronger than the factors that cause differences in recognition. They will stand out, even in cases where recognition has been inflated by a high market share.

• Further, insofar as being favorably predisposed to a product causes any increase in the likelihood of noticing its commercials, the amount by which it increases recognition is likely to be somewhat constant. It won't cause people to notice commercials they have never been exposed to. A case can be made that, if you like Product A enough to buy it, the amount by which that increases recognition of Product A commercials is likely to be the same as the amount by which recognition of Product B's commercials is increased, if you like Product B enough to buy it.

If that is true, awareness and buying interest should always tend to be higher among those who recognized commercials than among those who didn't. The average amount of difference could be taken as the "normal" amount of overstatement that is found in post-only measures of lift. Then, greater than average differences could be considered "real" increases because they are greater than the amount that can be accounted for by the normal level of overstatement.

Although there is some logic to this position, there is also some data that suggests it is an oversimplification. For Super Bowl commercials, 16 percent of the time the lift in awareness was not a lift. It was negative. Unaided first-name awareness was lower among those who noticed the commercial. For the lift in buying interest the proportion of negative numbers was even higher: 28 percent. In both cases most of the negative numbers were small - too small to be statistically significant. But they occurred frequently enough to cast doubt on any assumption that results will always be more favorable among those who recognize the advertising. As such, it is further evidence that results from post-only studies can be relied on to be at least directionally correct. It appears any biasing effect from buyers being more likely to notice advertising is too small and too intermittent to have a major effect on post-only results.

Evidence on cause and effect vs. correlations

Results based on pre-post tests are more conclusive because they are based on evidence that shows cause and effect. You survey the same group before and after, and hopefully the only thing that is different for every member of the group is that they have seen the advertising. If they show higher levels of awareness and buying interest than a similar group that had not seen the advertising it is reasonable to conclude the advertising "caused" the increases.

Results based on a post-only study are like the evidence courtroom dramas refer to as circumstantial: hopefully indicative but less than conclusive. Conclusions about effectiveness rely on the fact that more favorable results are related to, or correlate with, noticing the advertising. It is not the same as the evidence in pre-post studies that shows the favorable results were caused by the advertising. One reason correlational evidence is less conclusive is you don't have any direct evidence showing what is the cause and what is the effect. They could be the reverse of what you might assume. (Like more favorable attitudes causing people to notice the ad.) There could also be some unknown third factor that accounts for changes in both. (Consider that old saw from Statistics 101: The number of churches in town is correlated closely to the number of bars. Do more churches cause more bars, or do more bars cause more churches? Neither. Population is the missing factor. Larger towns have more churches and more bars.)

Does that mean circumstantial evidence should be ignored? Certainly not. Often it is the only evidence that is available. Juries convict people every day based on nothing but circumstantial evidence. But it does mean the evidence needs to be evaluated more carefully - something this recap of pros and cons has hopefully contributed to. |Q

Virtual consumption

By Charles Young

How ads can make your brand their brand

Eyewitness testimony is notoriously unreliable for finding the truth of past events. Not because people are untruthful but because our memory of what really happened can be changed, sometimes just by the telling of it. With the power of suggestion, psychologists can create false memories of childhood about things that never really happened. Similarly, one way advertising works is by creating artificial memories that enlarge our perceptions of the brand when mixed together with our memories of actual experiences with the brand.

Some years ago I was in a meeting with the advertising team for a major food manufacturer to discuss new work they had done for one of their well-established brands. In reviewing a storyboard, one of the younger writers expressed frustration at having to allocate precious seconds of commercial time to showing product shots which merely visualized "things the consumer already knows" at the expense of storytelling time, which he felt was important for building an emotional connection with the brand.

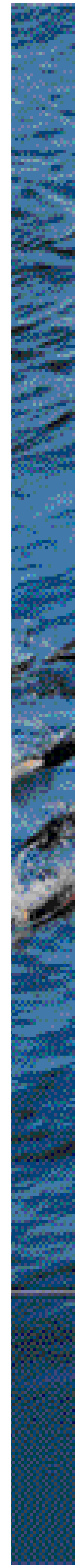
As I think now about that comment, I realize that many younger creatives operate with a mental model of how advertising works that is different from mine, particularly when it comes to food and beverage advertising. While I too believe that finding a fresh and original execution is critically important for breaking through media clutter, I also believe that showing iconic images of the product being consumed can be an important component of emotional connection.

Experience rather than emotion

The definition of emotion that many creatives operate with may be too limiting. When we talk emotion in advertising, it is often used in opposition to communicating rational sales messages about the functional benefits of a product. Additionally, emotion is a term that carries baggage, with overtones such as soft sell versus hard sell. Emotion is often a subject of debate regarding its role in advertising effectiveness. For this reason, I prefer to deal with the larger concept of experience, which encompasses emotional values such as the happiness, laughter or joy evoked by the storyteller's art as well as the equally non-rational but sensory responses generated by many effective food and beverage ads.

The grandfather of modern memory research, Endel Tulving, described

Editor's note: Charles Young is CEO of Ameritest, an Albuquerque, N.M., research firm. He can be reached at 505-856-0763.



two memory systems in the mind, both of which are important for advertising professionals to understand. The first is the semantic memory system. This is where the part of our experience that we can describe in words - as in "semantics" - is stored. Product concepts, unique selling propositions, positioning statements go here. It is rational and verbally based, and is the part of the mind that traditional advertising copy testers access.

The other memory system is the episodic memory system. This is the memory system where your personalized memories are stored. The things that happen to you - your first kiss, your last bite (real or imagined) of Ben & Jerry's ice cream on a hot summer's day, where you were and what you were doing at exactly 9 a.m. Eastern standard time on September 11, 2001 - are recorded in your episodic memory system.

As Tulving told us, "knowledge from semantic memory represents an impersonal experience bound to the present moment. [In the episodic, in contrast] remembered past events somehow 'belong' to the rememberer."

The Coca-Cola brand is not just the property of a company based in Atlanta; it somehow also "belongs" to its consumers. I believe that this episodic system is, in fact, the key to brand loyalty.

Emotions are stored in the episodic system. But so are other things. Tulving pointed out, for example, that "a mere sensation is sufficient as a source of information into the episodic system." The larger concept is experience, to which emotional response and sensory appeal are both subordinate concepts - for either of these can be important for connecting with the consumer with the promise of a relevant brand experience.

One of the characteristics of the episodic system is that, unlike the semantic system, it is changeable - like a rewriteable CD on a computer as opposed to an operating system which is read-only in the hard drive. While it is difficult to use persuasion to alter someone's belief system, because it is based on the world view tightly constructed in the semantic or conceptual part of the mind, I believe it is relatively easy to revise the memories stored in the episodic system. This can be inferred from the existence of false memories, or inaccurate eyewitness testimony. This provides much room for advertising to operate.

Amazing property

Advertising has the amazing property that it can reach through just one of our senses, sight, and activate the experiences of the other senses. A commercial can show you images of hot loaves of bread coming out of the oven and you can feel the heat on your face and smell the freshness. It can show you images of the bread being torn apart and you can feel it on your fingertips. It can show you golden butter melting on the thick slice of bread and you can taste it on your tongue. Or, the image of the bottle cap popping off a bottle of beer can release a whoosh of refreshment in your brain, even if the sound is turned down on your TV set.

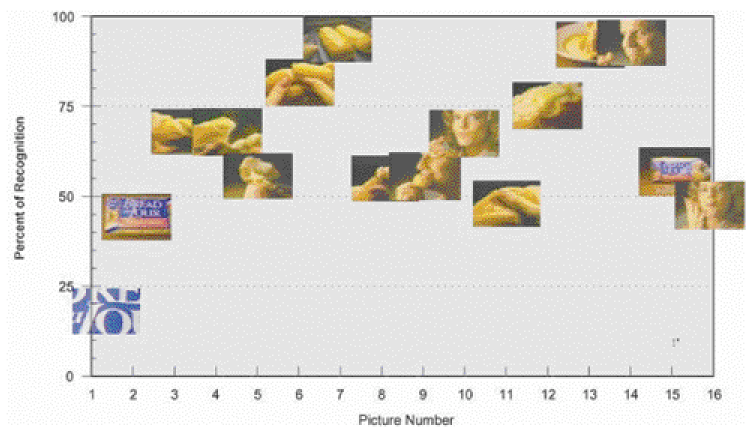
Each of these sensory experiences created by television can lead to a "virtual consumption" event which is stored in your episodic memory system. And once that memory is recorded as an experience you associate with the brand, your mind doesn't distinguish between events that really happened to you and those you only remember but never really happened!

This is the reason why advertising has the power to multiply the consumer's experiences with your brand. Suppose you sell a product that your customer actually consumes on average four times a year. And next suppose that you run advertising so that when this customer sees it they have a pleasurable virtual consumption experience six more times during the course of the year. All together then, from the standpoint of episodic memory, your customer has had 10 remembered experiences of your brand compared to just four experiences they might have had with a competitive product that did not run advertising.

To find the traces of brand memories created by advertising in the episodic system requires more than verbal probing with traditional open-ended questions and rating statements, which are more appropriate for uncovering ad effects on the semantic side. Qualitative researchers use projective techniques, metaphors and photo montage approaches to elicit the brand associations that are embedded in this part of the consumer's mind. For quantitative measurement, the Ameritest approach is to sort pictures taken from the commercial itself – which we view as the most "natural vocabulary" for describing the experi-

Figure 1
Flow of Attention® — Bread du Jour

The Ameritest Picture Sort provides a "map" of the appetite appeal being created on film in this product.



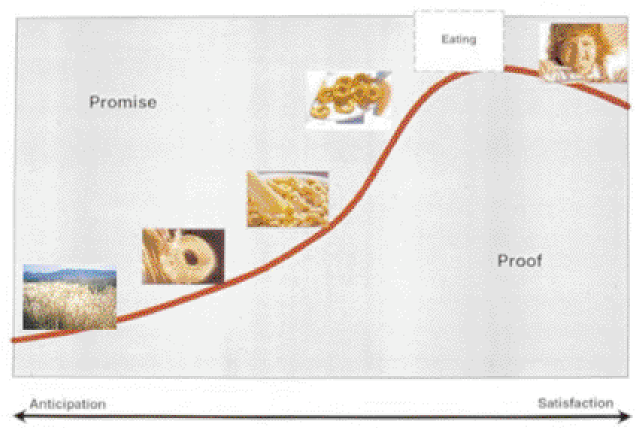
ence created by the advertising.

As an example, a Flow of Attention graph for a bread commercial is shown in Figure 1. In this graph the height of each picture is the percentage of the audience that remembers seeing that particular image in the ad when probed just a few minutes after viewing. As you can see, there is a great deal of variability in image recognition, which demonstrates selective perception in action - the intelligent eye of the consumer does a great deal of filtering of the visuals in the ad, pre-consciously selecting those images which will be allowed into long-term memory.

The peak images in the rhythmic flow of images in this ad are those in which the commercial has done a good job of activating multiple senses - fresh smells of hot bread coming from the oven, tactile images of bread being torn apart, butter dripping off the bread. Evidently, the "information" that the intelligent eye of the consumer searches for in this commercial is experiential - it answers that question, "What will this product taste like if I put it in my mouth?"

In short, what we see is a map of appetite appeal created by the camera - and a memory profile of the virtual consumption event created by this commercial. Research-on-research recently conducted by Unilever has shown that these peak visual moments of a commercial can be found lodged in consumer's memories years after the ad has been off air.

Figure 2
Product Drama



An analysis of picture-sort data across a great many food and beverage commercials has taught us that the sensory component of motivating advertising can be conceptualized as a dramatic build, analogous to the emotional build in a classic Greek play (Figure 2). We can use this curve of experience to frame our understanding of creative choices an agency creative director makes as he or she creates product drama with advertising film.

In its totality, this idealized curve represents the range of different images that form our experience of a product, from the promises made by images that anticipate the experience, to the proof of satisfaction delivered by smiling actors who have just consumed the product. Importantly, this curve is not a formula for creating exciting product drama, but rather it shows us the continuum of choices the creative director faces in deciding how to show the product in an ad.

Leo Burnett's classic Heinz ketchup campaign from the 1970's, built around the song "Anticipation," is a memorable example of effective advertising that operates entirely on the left side of this continuum. Like sex, much of the excitement involved in creating virtual consumption is anticipatory.

Other ads do their work by focusing completely on the right side of the curve, the satisfaction side of the story. Again a classic campaign, the famous Pepsi Challenge, suggests the role that proof, rather than visual promise, can play in selling product.

Product drama, however, like emotional storytelling, must in general have a progressive pattern, a build where the least important information comes first, the next most important later, the critical experience last. The rising shape of the product drama curve reminds us that, like the reveal in emotional storytelling, you do not keep the audience's interest by giving it information, but by withholding information until the timing is ripe to deliver it. Simply showing a product beauty shot early in a commercial can be a way to undermine the product drama of the experience.

Many ways

There are, of course, many ways to tell a product story. A creative might choose to tell the story of the product from the beginning, by showing the wonderful ingredients the product is made of - in a cereal commercial, for example, the camera may pan across fields of grain, it may linger on the golden drops of honey; a fast-food commercial may show the meat sizzling hot on the grill, green and red toppings from the garden tumbling in slow motion through the air. How you create anticipation is simple: you build the product on screen in front of the eyes of the consumer.

Another, less frequent approach to creating appetite appeal is to destroy the product on camera. In the bread commercial, fingers tear the bread apart! In the soft drink ad, the cola explodes into the air. On camera, messiness trumps neatness as your inner child prepares to consume the product.

Next, moving up the anticipation curve, the creative may use the camera to rehearse the act of consumption in the mind of the consumer: the cereal fills the bowl, the milk is poured on top, the full spoon is lifted from the bowl. In the fast-food commercial, the camera prepares to consume the sandwich as a stand-in for the consumer.

Then comes the climactic moment of consumption - the moment the product is actually eaten - though perhaps it occurs discreetly off-screen; like sex in a '50s romantic comedy, it may be better left to the imagination. And on the other side of consumption, the promises created by anticipation are replaced by proof of satisfaction, the denouement of the bite and smile.

The product visuals that have just been described, of course, may be embedded in the larger trajectory of an executional storyline, involving social setting and characters, dialogue and plot. But later, it is those images of product that reassemble in the episodic memory, flashing like the shards of a mirror reflecting something exceptional that the viewer remembers having consumed, that add to our storehouse of experiences with the brand.

Build loyalty

Short term, advertising exists to create sales. But long term, advertising must build brand loyalty to pay off over time. Through virtual consumption, ads can create the personal experiences that makes your brand their brand. | Q

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advertising research

The visual impact of award-winning ads

By Karsten Weide and Christian Scheier

Do award-winning ads indeed do a better job of gaining readers' attention? Are they better at getting the message across?

Whatever consumers do, wherever they go, they are confronted with an ever-growing number of marketing messages. One common estimate puts the number of messages that vie for the consumers' attention at over 3,000 a day. This, and the ever-increasing pressures of everyday life, have taught consumers to shut out most advertising. Studies indicate that a print ad has about 2.1 seconds to gain the reader's attention and get its message across.

Advertisers' No. 1 concern today is that their messages get ignored. How do you make advertising stand out? Common wisdom is that breaking with recipients' expectations is a good way to gain attention.

That is where "creative" ads come into play: The idea behind these ads is to break with ad design's current conventions to garner more attention. Since awards for ads supposedly pick ads that are particularly creative, awards should be a good way to predict the effectiveness of an ad.

Testing the visual impact of ads

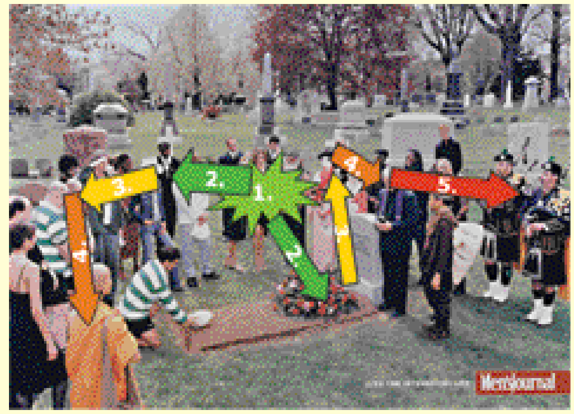
We have used a method to compare award-winning and "regular" print ads to find out if this is true. This software-based method, called AttentionTracking, was created at Cal Tech and developed by MediaAnalyzer for commercial applications. It allows the online testing of advertising to gauge its visual impact. It employs the PC's mouse as a pointing device to record, in real time, where respondents look when they see an ad. When shown an image on their PC screen, respondents continuously click on whatever they are looking at and the AttentionTracking software records their clicks.

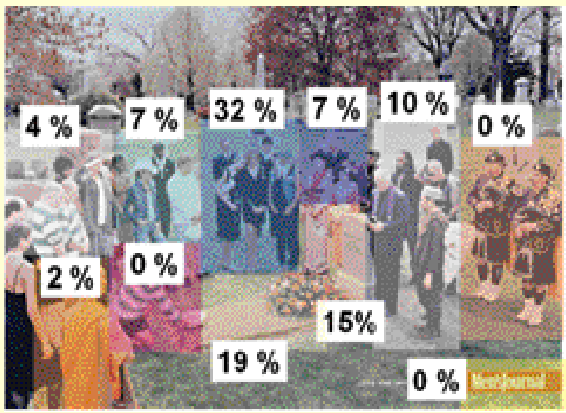
Creative ads can work - if they're done right

The test

We tested 12 U.S. print ads, six award-winning ads and six regular ads with 200 respondents mirroring the general U.S. population. The award-winning ads were picked from events such as the One Show, the Euro Effies and the ADC Young Guns.

Editor's note: Karsten Weide is president and CEO of MediaAnalyzer Software & Research USA, Somerville, Mass. He can be reached at 617-623-3348. Christian Scheier is co-founder and CEO of MediaAnalyzer Software & Research GmbH, Hamburg, Germany. He can be reached 49-40-30104240.





Figures 1a-c (clockwise from top left) - Men's Journal "Funeral." 1a: No eye-catcher, gaze not guided to brand logo - low stopping power, bad recall. 1b: Shows the scan path. 1c: Shows attention-by-region data.

For each ad, we calculated, over the aggregate of all respondents:

- the typical scan paths
- the share of attention certain pre-defined elements received (brand logo, product shot, key visuals, etc.),
- and the average time until respondents saw these elements (time-to-contact).

In addition, each respondent was asked to fill out a questionnaire.

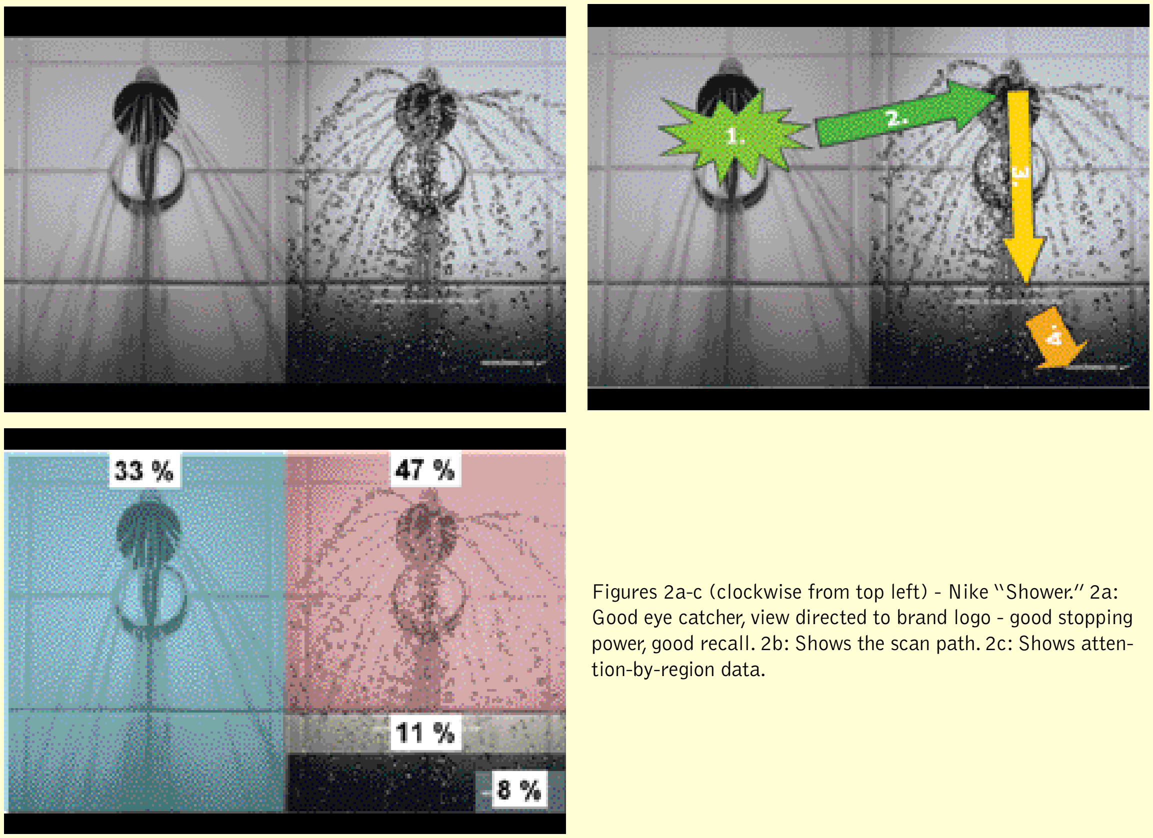
Good news and bad news

For the advertising community, there is good news and bad news. First the bad news: On average, the "creative," award-winning ads had no better stopping power than the regular ads, and they had worse brand recall results. Now the good news: Creative ads can, if done right, do an outstanding job. Let's look at some examples.

Men's Journal "Funeral"

First let's consider a "creative" ad that did not work well: the Men's Journal ad "Funeral" (Figure 1). The visual test reveals a number of things. To begin with, respondents' scan paths show that this ad misses being an eye-catcher. It forces the readers to get into its story in detail right away if they want to understand what it wants to communicate. However, most readers are not willing to make that kind of time investment anymore without knowing first if the message is relevant for them.

Secondly, respondents' attention was scattered across all the visuals that tell the story - but virtually none was spent on the brand logo. This is what



Figures 2a-c (clockwise from top left) - Nike "Shower." 2a: Good eye catcher, view directed to brand logo - good stopping power, good recall. 2b: Shows the scan path. 2c: Shows attention-by-region data.

we call the vampire effect: One or more elements of an ad suck up so much attention that little is left for what was supposed to get attention.

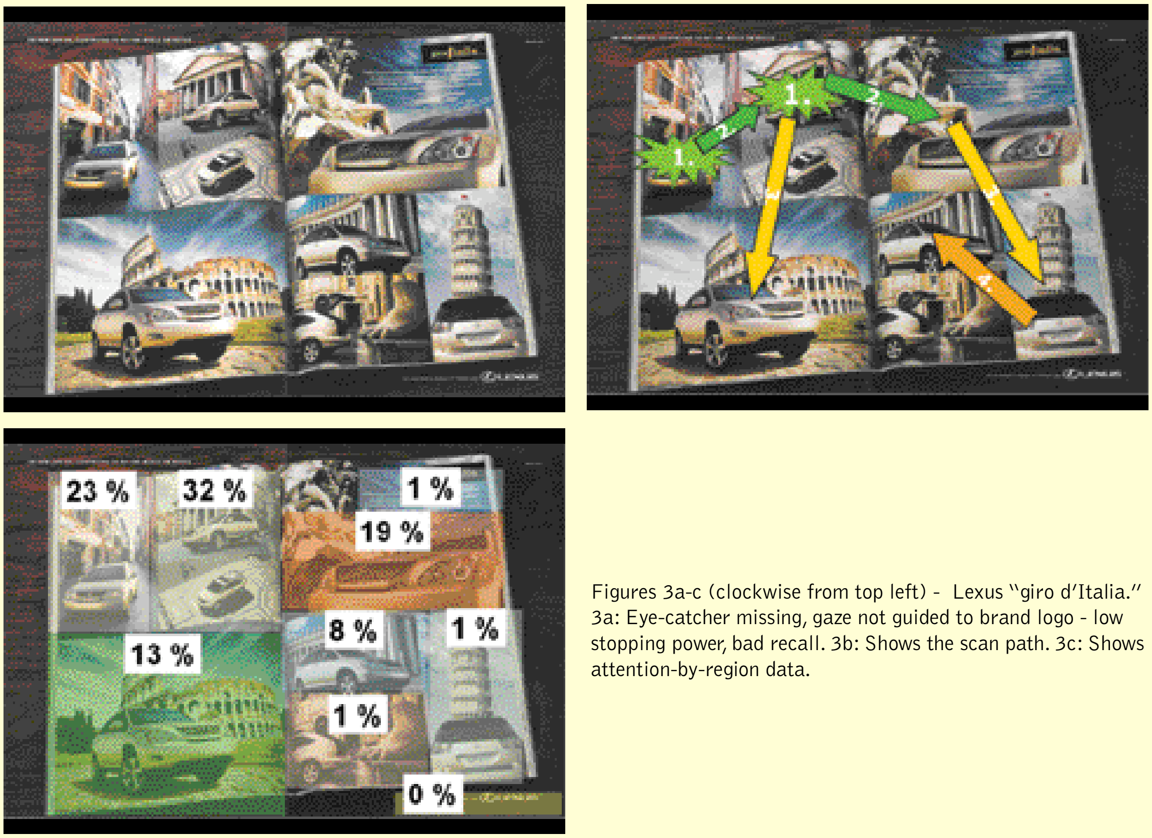
And finally, at each given point in time, different respondents looked at different things. This is what we call messy attention. It happens when an ad does not tightly control the reader's scan path. This is something you see quite often in creative ads. The scan path is unstructured, and this is another factor that contributes to less attention on the brand logo.

The result is not surprising. Even though 90 percent of respondents called the Men's Journal ad a creative one (the best value in the test), it had the worst stopping power in the test (only 10 percent of respondents said they would stop to look at it more closely). It also had one of the worst results for aided and unaided brand recall (31 percent and 14 percent, respectively, with averages of 45 percent and 20 percent, respectively).

Nike "Shower"

Now consider the Nike ad "Shower" as an example of an award-winning ad that works well (Figure 2).

The ad catches readers' attention with simple key visuals: the showerheads. Once readers' attention has been gained, the ad keeps tight control over what readers see, and in which sequence. Respondents' scan paths uniformly start at the left showerhead (because the cultural convention for picture stories is that they begin at the left), move on to the second showerhead, then to the claim, finally to the brand logo. This is one



Figures 3a-c (clockwise from top left) - Lexus "giro d'Italia." 3a: Eye-catcher missing, gaze not guided to brand logo - low stopping power, bad recall. 3b: Shows the scan path. 3c: Shows attention-by-region data.

of the cleanest scan paths we have seen in practice yet. Both claim and logo received a decent amount of attention (11 percent and 8 percent, respectively).

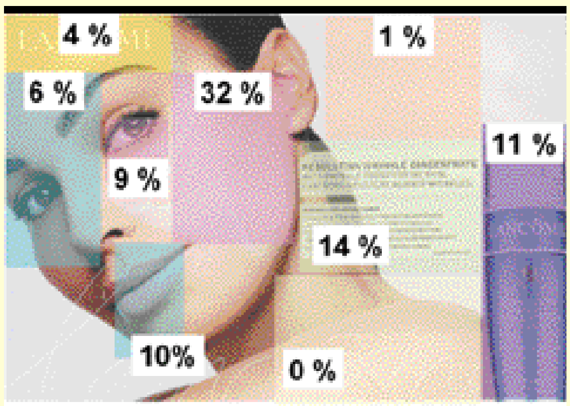
Remember, you only have two seconds to gain attention and communicate your message. And the Nike ad heeds this. You want a key visual that is strong enough to gain attention, yet weak enough to yield attention to the ad's other elements that do the communication. And to facilitate control over what readers see, you want your ad to guide readers' scan path as much as possible. In this case, this is accomplished by a mixture of design simplicity and the use of a picture-story.

The payoff: This was the only award-winning ad with both an above-average stopping power (52 percent of respondents said they would stop to look at it more closely) and aided and unaided brand recall (49 percent and 23 percent).

Lexus "giro d'Italia"

Now, as a contrast, let us look at regular ads. First, one that does not work too well: the Lexus "giro d'Italia" ad (Figure 3).

Once again, as in the Men's Journal ad, there is no commanding key visual that unifies attention to an entry point to this ad's message. There are no fewer than seven key visuals competing for attention, and there is no structure to them in terms of encouraging a particular viewing sequence. As a result, respondents' scan paths start in no fewer than three locations and then wander aimlessly across them. Consequently, all attention is



Figures 4a-c (clockwise from top left) - Lancôme "Résolution." 4a: Excellent eye-catcher, scan path guided to product and brand - good stopping power, outstanding recall. 4b: Shows the scan path. 4c: Shows attention-by-region data.

spent on the key visuals, and none on the brand logo. As in the Men's Journal ad, though the story is a potentially compelling one ("European flair, travel, adventure"), it is never connected with the brand.

Owing to the vampire effect and messy attention, this ad was the only regular ad with both below-average stopping power (39 percent) and aided and unaided recall data (38 percent and 14 percent, respectively).

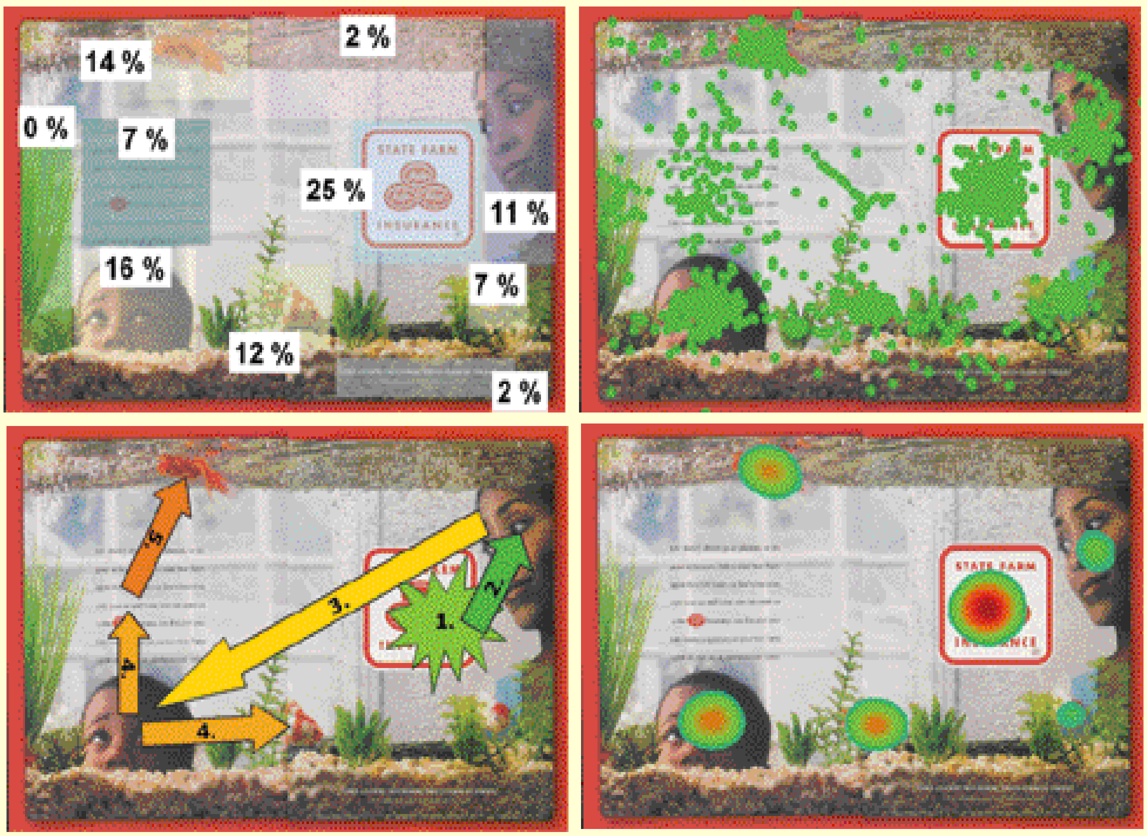
Lancôme "Résolution"

Finally, a look at a "regular" ad that worked well: the Lancôme "Résolution" ad (Figure 4).

It is an example of an ad with an excellent eye-catcher: the model's face. Our experience shows that faces work better than anything else in this regard. In general, kids' faces work best, then adult faces (male and female work equally well) and finally cars' "faces."

However, notice that after the respondents' scan paths start out at the model's face, one group switches to product shot/brand and the copy, while the other first explores the face more and only then proceeds to the copy and the product shot. This is a case where the key visual is on the verge of being too interesting in itself, yet it does not cross the line to becoming an attention vampire.

The overall design of the ad keeps fairly tight control over the scan path: Once the key visual passes attention on to other elements, it is first the product shot/brand that receives it (since it is the next-most salient element), and then the copy. The prod-



How AttentionTracking works (clockwise from top right): (1) State Farm "Aquarium" is one of the ads we tested. Respondents were told to continuously click on whatever they looked at. (2) Each green spot represents one mouse click and corresponds to one fixation of the eye. (3) All respondents' fixation points are merged into Hotspot images, showing where respondents looked. (4) Scan path graphics show the sequence in which respondents looked at the ad's elements. (5) Attention-by-region graphics display how much attention specific pre-defined regions received.

uct/brand and the copy receive 11 percent and 14 percent of attention, respectively.

All in all, the ad's design leads to the desired effects: Lancôme's "Résolution" has an above-average stopping power (55 percent), as well as excellent recall data (aided: 72 percent; unaided: 32 percent).

Another effect that helps: This ad sticks to an overall design template that Lancôme ads use. Respondents who have previously been exposed to them learned to associate the brand with this design and will more easily recall the correct brand. This works as a general rule: Go with an overall design template to support recall. Other examples for this are State Farm's red frame or the blue bars at the bottom and the top of IBM's TV ads.

Creativity and stopping power

Respondents in our test believe new creative ads would make them stop and look more closely; 86 percent said so as compared to 54 percent for new regular ads. If a friend told them about a creative ad, 78 percent said they would, if they happened to find it in a magazine, stop to study it more closely. And a surprising 16 percent said they would even actively go and look for that ad in magazines.

However, when confronted with award-winning ads, their behavior did not line up with these beliefs. On average, we did not find that award-winning ads have a higher stopping power than regular ads (45 percent vs. 47 percent).

We also asked respondents to tell us for each ad if they felt that it was a creative ad. This yielded two interesting results. First, respondents' opinions of what constitutes "creative" were not the same as those of the professional judges in the award competitions. Second, the perceived creativity of an ad and its stopping power correlated negatively. In other words, the more creative an ad was perceived to be, the less willing respondents were to actually stop and study it, in direct contradiction to what they believed they would do. Why is this? Perhaps because in our culture, it is understood that creative ads are cool or perhaps even art, but in everyday life, time is of essence, and nobody really has time to decipher a complex visual message.

So the magic formula in terms of stopping power for the professional creative person seems to be: a professionally creative ad is one that is not actually perceived to be creative by consumers, but one that uses visual design creatively to make the ad effective.

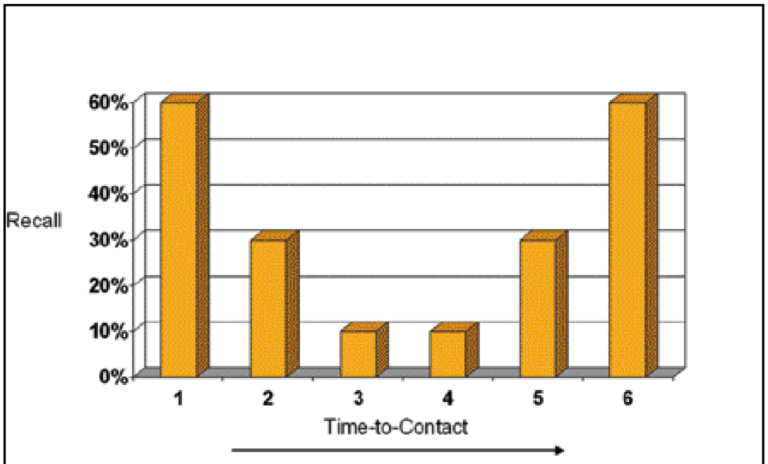


Figure 5: This chart illustrates the U-curve effect (schematized). People remember best what they see first or what they see last.

However, be aware that an ad with good stopping power can still lose the battle for consumers' attention: In our test, stopping power and recall did not correlate. In other words, an ad that gains attention does not necessarily also get the message across.

Time-to-contact and branding

On average, award-winning ads had worse aided recall results than regular ads (35 percent vs. 56 percent) and also worse unaided recall results (16 percent vs. 25 percent).

There are a number of factors that contribute to brand recall: The amount of attention the brand logo

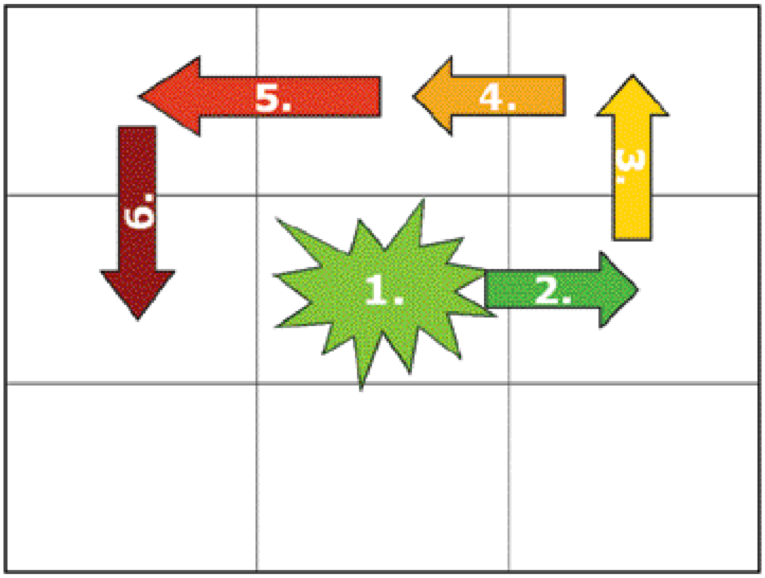


Figure 6: The merged scan paths for all 12 ads in the test. There is no Z pattern in ad perception.

garners is one, the amount of attention on the product shot is another, learning effects are yet another one.

In this field, the best predictor for recall was the amount of time respondents needed on average until they saw the brand logo. Interestingly, for regular ads, this correlated negatively, yet for award-winning ads, it correlated positively. This means the earlier respondents saw the brand logo in a regular ad, the better the recall would be, while for award-winning ads, the recall would be better the later respondents saw the brand logo.

This reflects two key principles in memory psychology: the primacy effect, where we remember things better that we see first, and the recency effect, where we remember things better that we see last, i.e., recall will be U-shaped along time-to-contact on the x-axis of a diagram (see Figure 5).

Creative ads often need more time to communicate because readers need more time to understand them. Yet they can still be effective, if readers' scan paths are directed so that they will see the brand logo, and that they will see it last.

Guiding attention

How, then, does one guide attention? We have already mentioned the importance of a key visual as gateway, the salience of elements and design simplicity.

There are some other interesting means: Faces not only attract attention, they also direct it. A good example is the State Farm "Aquarium" ad from the test (see sidebar on how AttentionTracking works). The prominent brand logo works as an eye-catcher and also supports branding by forcing a short time-to-contact. After that, the mother's face attracts attention - and notice how she is looking at the boy. Where do you think the scan path will go next? Right, to the boy. And see how the boy looks at the fish? Again, that is where respondents will look next. We humans tend to direct our attention at what other people direct their attention at, the direction of their heads and eyes being our cues.

No Z pattern

To wrap things up, let's lay one myth about ad perception to rest. Often, people believe that our reading pattern, from left to right and from top to bottom, will predispose us to look at ads the same way, i.e., that readers will look at the ad in a Z pattern.

We merged the scan paths for all 12 ads into one (Figure 6). Now, of course, this does not suggest a general scan scheme for ads. But it does dispel the notion that there is a Z pattern. That also means that the brand logo should not necessarily go into the bottom right corner (where it is in the majority of ads), not for the sake of the Z pattern, and not for the sake of design tradition. It should go where it is seen.

If there is anything you should take home from this article, it is this: People don't read ads, people look at ads as they would at pictures, guided by visual cues within the ad. Gain their attention with a key visual and guide their gaze towards what is ultimately important. | Q

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advertising research

Play better offense and defense

By Scott Bakken

A prolonged economic downturn can stress out the best Wall Street minds. But for marketers, slowdowns present an especially nerve-wracking Catch-22. When the corporate belt is tightened, advertising and marketing budgets often are among the first to be cut - even as expectations for their performance increase.

That's why it is important to know exactly how effective (and consequently how valuable) your advertising and marketing is at all times. All of these entities use response tracking to defend the value of their marketing: cable TV companies - who want to find out which marketing tactic generates the most calls; mortgage lenders - who need to determine which newspapers and radio stations get the best ROI; energy utilities - which face increasing competition; resorts - who want to get more scientific about which groups to target; and professional sports teams - who can save thousands of dollars with the slightest incremental gain in response rates.

Why do they use response tracking? Because it offers marketers the kind of defense numbers-crunchers can understand: numbers. It works like this:

• You assign a distinct phone number to each of your marketing campaign's tactics - direct mail, TV, radio, newspaper ads, etc.

• When a customer calls to respond to your advertisement, that call is tracked back to the particular tactic that persuaded the customer to act (thereby keeping them separate from your "business as usual" calls).

• The resulting response rates reveal how effectively each of your tactics is at generating new leads.

Measure marketing and advertising effectiveness with response tracking

Quantifying marketing's role in your company's profit growth gives you real leverage. You can use the data to measure cost-per-response, forecast quarterly growth and gauge future campaign requirements - all crucial components to securing and defending your marketing budget. And by relying on actual, reliable call data, you avoid the errors inherent in old-fashioned techniques like campaign codes.

If nothing else, response tracking can help establish the legitimacy of certain marketing tactics. Take ADVO, Inc., the Windsor, Conn.-based direct mail giant. Even though it's the U.S. Post Office's largest customer, ADVO is often asked to substantiate its cost-effectiveness. "Until recently, few of our clients did any tracking of their own, yet

Editor's note: Scott Bakken is president of MainStreet Group, Inc., a St. Paul ad agency. He can be reached at scott@mainstreetgroup.com.


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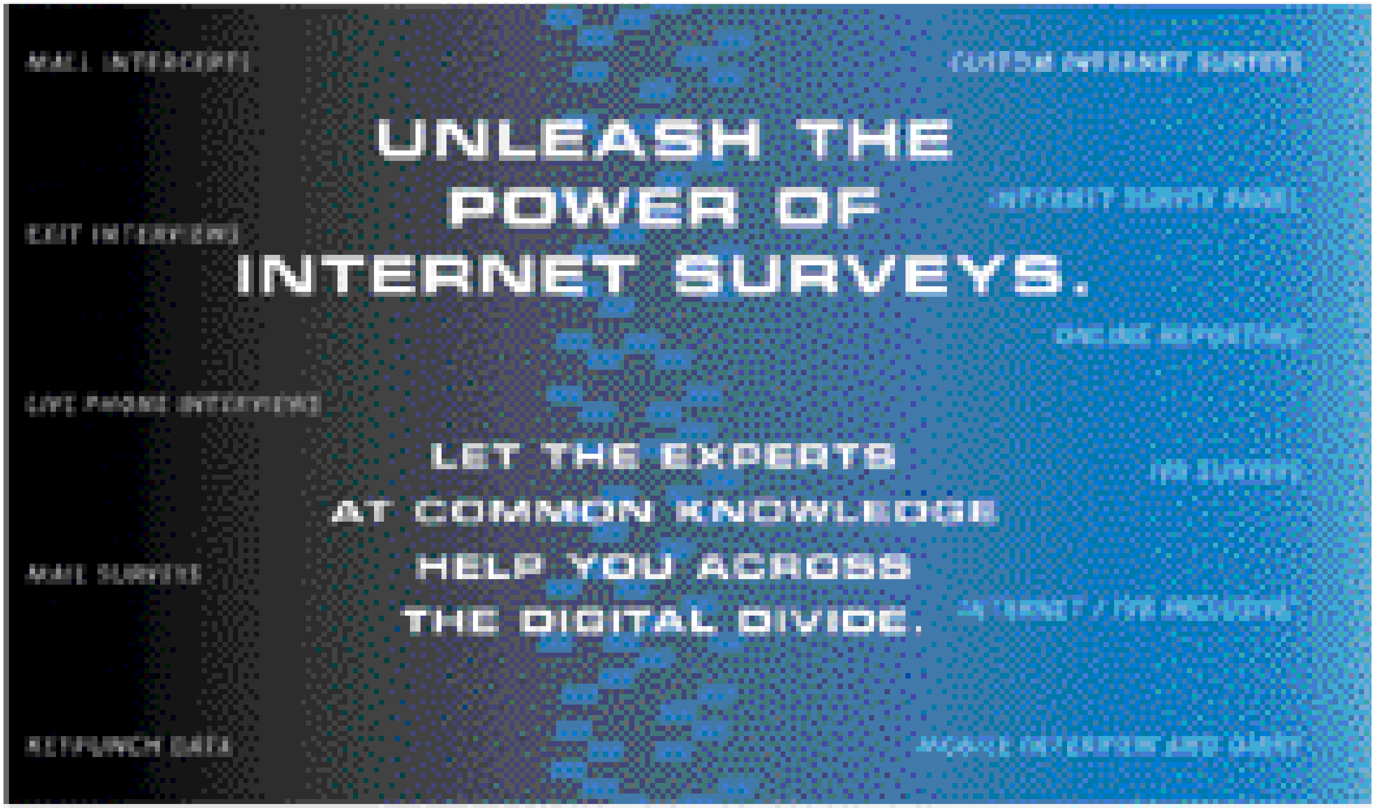


they all asked for historical response data from us," says Bernie Kramberg, ADVO's director of marketing intelligence. "Response tracking has proven to them that their return on investment far outweighed any perceived drawbacks to 'marriage mail.'"

But response tracking offers more than just a good defense. It can help you play offense more effectively too. The following are just a few of the ways you can use response tracking to reduce costs, focus your marketing message and improve your return on investment.

Measure the effectiveness of each marketing tactic

Tracking can be extremely important when your budget is tight and you need to get the most bang for your marketing buck.

Jason LaFrenz, vice president of marketing for the Minnesota Timberwolves and Lynx, began using response tracking to avoid spending unnecessary dollars on unproven marketing ideas. "We've recouped our investment into response tracking five-fold by making better decisions with our advertising dollars," says LaFrenz.

Because tracking allows you to monitor the progress of your campaign, you'll know immediately how well your money's being spent. For instance, if newspaper and radio consistently perform poorly in your campaigns, you'll know to cut there and put your remaining dollars where they will count. In fact, ad agencies regularly use such data to steer their media buys within specific publications.

"A particular newspaper was expensive to advertise in," says a Time Warner Cable marketing executive, "but response tracking proved that it far exceeded the number of responses we got from other publications. This information will help me gauge what level of contract to negotiate those other publications."

A Time Warner Cable colleague discovered that his print ads weren't providing him the return he thought they were and ceased a planned $60,000 contract, instead turning to radio buys, which were surprisingly effective.

Find out who your customers really are

A good response tracking system allows you to cross-reference incoming calls with a comprehensive, external demographics database. This provides a clear picture of who's calling -their age, location, household income, education level, etc. Such information is essential in helping you focus your marketing message and speak more relevantly to your targeted consumers. "We had a year-round contract with one publication, but now we use it only to target college students coming back to town," says a Time Warner Cable media buyer.

A media buyer at cable firm Charter Communications says that a system he employed used geographic data to discover that many calls came from a particular area that Charter had written off because of a competitor's concentrated effort in that area. He came to the conclusion that "market factors such as demographics and geo-

graphics played a bigger role in response rate than our offer did."

Test almost anything

Campaign tracking is an invaluable learning tool. By comparing baseline information from campaign to campaign, you can test any number of variables in order to determine more precisely what drives customers to act. Test aspects as fundamental as offer, price, media placement and timing. Or, compare campaign nuances such as hard sell vs. soft sell, short vs. long copy or even red vs. blue typeface. It's entirely up to you.

One cable TV marketer was forced to accept a cold reality: "[Testing] proved that our creative was rotten."

Monitor your call center's efficiency

Perhaps one of the most important ways response tracking can streamline your budget is by pointing out waste. A good response tracking system not only tracks calls that get through to your call center, but also identifies calls that were attempted but not completed. It also separates the number of "unique" callers from repeated callers. Most marketers would be shocked to learn that their marketing often generates far greater response than their call center can handle. Call data can provide vital statistics such as the percentage of busy signals customers received and the busiest calling times during the day. These numbers will allow you to staff your call center adequately and avoid needless sales losses. You can even capture the phone numbers from uncompleted calls and forward them to your company's sales staff for call-backs.

One company representative (who wished to remain anonymous) confided that, "if it weren't for response tracking, we would never know how poorly our call center was performing." As a result, the representative's company has since hired a third party to handle its in-bound sales calls.

A cable executive put it bluntly: "I'm using this data to slap someone up."

Refine your mail list

Tracking allows you to identify and eliminate underperforming addresses from your mail list. This results in considerable savings on printing and postage costs. In fact, trimming just 5 percent from a mail list of 250,000 files can save you nearly $3,000 in postage alone. Also, by profiling your existing customer list to identify groups with demographic and geographic similarities, you can better target those customers that your response tracking indicates have a higher propensity to buy - and stop wasting money pitching to those who don't.

Increase efficiency

Response tracking can't solve every problem you face as a marketer. It can't force your ad agency to return your phone calls. It can't compel your printer to meet your deadline. But response tracking can arm you with the hard data you need to increase campaign efficiency and justify your marketing's effectiveness - even to those who are used to viewing your department as an expense rather than an investment. | Q customer relationship research

Moving beyond satisfaction

A look at customer relationships

By Jeff Hess
and John Story

The relationship metaphor is no longer merely the property of advertising copywriters. Companies are serious about building relationships with customers and are investing millions of dollars to do so. Marketing textbooks are even getting into the act: Kotler's ubiquitous *Principles of Marketing* text essentially redefines marketing as relationship building (Armstrong and Kotler 2003).

All the customer relationship talk does beg an important question, however: Are customer connections real relationships like the ones we have with other people? Or, do relationship terms like trust and commitment just restate the traditional marketing goals of satisfying customers and providing them with value for the money?

The real reason customer relationships are emerging as a competitive imperative and the dominant paradigm of marketing is that relationships are profitable, and customers who form relationships with brands provide companies some bottom-line benefits not offered by customers who participate in random transactions (Gummesson, 2002).

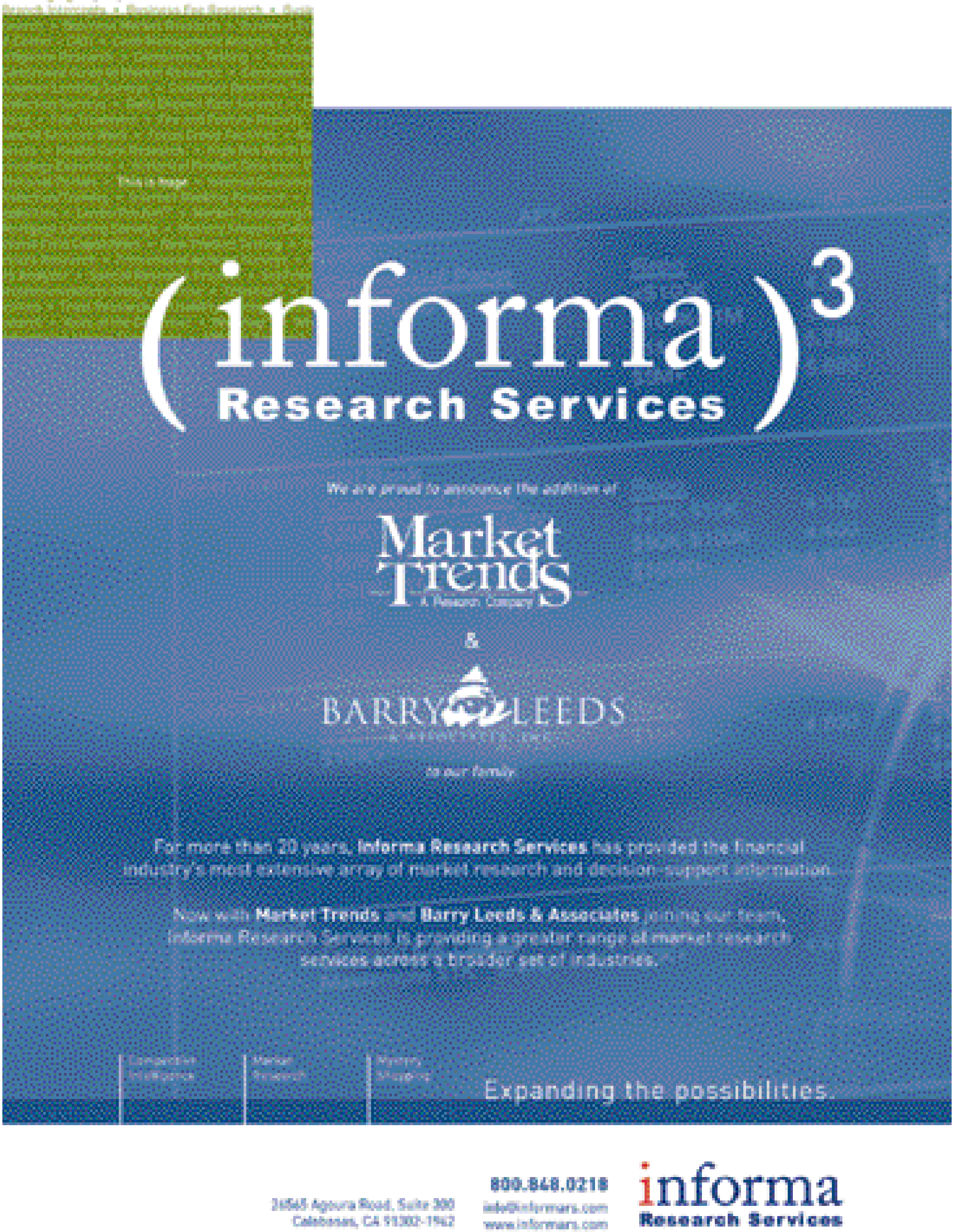
Most companies define customer relationships as habitual repurchase, or intent to stick with the brand. But that definition just scratches the surface of what consumer-brand relationships can be. Customers actually form relationships with brands that are similar to their relationships with people (Fournier 1998; Hess 1995). In many cases, relationships even have a personal character, and that idea has profound implications for how brands treat customers and for the financial benefits firms accrue.

The secret to understanding marketing relationships is that it is not only good business sense for brands to build relationships with customers, but also that customers enjoy being in relationships with brands. Brands miss a big opportunity when they view customer relationships from a purely functional perspective, or as merely a euphemism for traditional concepts like satisfaction or loyalty that are intended to measure an intent to repurchase. In other words, real relationships do not just promote sales volume, they also stimulate behaviors that are profitable to brands, especially if connections have a personal character.

For instance, a customer in a personal relationship with a brand is more likely to:

• be willing to pay more for the brand's products;

Editor's note: Jeff Hess is vice president, senior consultant, at Harris Interactive, a Rochester, N.Y., research firm. He can be reached at jhess@harrisinteractive.com. John Story is assistant professor of marketing at The University of Texas at San Antonio. He can be reached at storjohn@cob.isu.edu.



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Consider a fast-food customer who will drive 45 minutes only to wait in line for another 45 minutes for a cheeseburger. Or a car buyer who is completely devoted to a relatively unreliable, moderately performing, premium-priced auto brand. Certain retail stores rely on the fact that customers will drive past their more convenient competitors to pay a premium at their own less convenient locations. These are all phenomena indicative of relational bonds not described by standard satisfaction and loyalty measures.

The missing link between transactions and relationships, and the key to understanding customer relationships that have a personal character, is trust (Garbarino and Johnson, 1999; Hess 1995). Customers who trust a brand believe the brand has their best interest in mind; that they are motivated to make customers happy. And if you think a brand is motivated to make you happy, and is also competent enough to do so, you no longer have to worry about getting taken advantage of when your guard is down. Consequently, as in human relationships, trust is the gateway to deeper relationship commitment.

Gained momentum

Unlike customer satisfaction, which dominated the marketing research landscape for over 25 years, the ideas behind customer relationships gained momentum among marketers before marketing academics took a serious interest. But both marketing scholars and marketing practitioners have been slow to describe rigorously tested customer relationship constructs. As a result, a formal framework to quantify, diagnose and describe the nature of such relationships has thus far eluded the marketers. So, they continue to rely on transactional satisfaction and loyalty-based concepts for planning and assessment.

The first significant investments in relationships surfaced as emerging customer database technology promised a rich and quantifiable understanding of individual customers and the ability to customize marketing activity to targeted customer segments. In reality, customer relationship management (CRM) has nearly become a surrogate for the technology applied to data management techniques (Parvatiyar and Sheth, 2001).

It is important to know that a relationship view of the world does not look to replace classic marketing ideas like satisfaction, value and loyalty with relationship nomenclature to merely freshen up traditional marketing models. Harris Interactive's Trust-Based Commitment model situates satisfaction, and related concepts, within a process that results in real relationships and relationship-specific benefits for customers and brands. The Trust-Based Commitment model is a constellation of traditional and newer marketing concepts revolving around the idea that customers and brands are in real relationships that significant financial implications.

Redefining customer loyalty

Strong brands have deep repositories of loyal customers (Aaker, 1992). But, from a customer's perspective, loyalty is more than just a propensity to repurchase a brand's products. It is also a way for customers to improve their ability to win the utility/cost game (reducing risk, increasing information processing effectiveness, gaining tangible "frequent user" benefits). Even more revolutionary, however, is the idea that relationships allow customers to enjoy relationship benefits not normally associated with rational behavior (e.g., affiliation, association, value matching).

Therein is the fundamental discrepancy between the kinds of outcomes typically associated with traditional loyalty measures and those

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resulting from customer-brand relationships. As market researchers we are often asked to justify our existence by the impact our work has on the bottom line. In lieu of a relationship understanding, it is efficient to simply assess repurchase intent or overall satisfaction and forecast performance as an extension of these basic attitudes. This effort often proves to be an exercise in futility as the promise of satisfied customers rarely yields accurate financial predictions. As a result, decision makers are left to ponder the value of marketing research data.

At the core of the dilemma is the simple fact that standard marketing research measures are often well removed from ultimate market behavior or are ill-suited to describe a customer's disposition and resilience in the marketplace. More importantly, such assessments can mislead strategic planning, particularly if market share, volume superiority, or both mask underlying relational weaknesses.

We can use an industry like fast food to illustrate the advantage of understanding relationships. Brand A has nearly twice as many locations as Brand B, with associated superiority in revenue. On a transaction basis, B's customers are slightly more satisfied; however its customers are much more committed. Consequently, they are more willing to spend more and try the restaurants' new products. In this case, an assessment of relationship versus transactional constructs will be much more revealing regarding the potential emergence of Brand B in the marketplace. Brand B can use this information to capitalize on a potential competitive opportunity, while Brand A is alerted to an emerging competitive threat.

Understand the nature

Commitment is customers' ultimate relationship disposition. It carries beliefs and attitudes resulting in customer actions toward the brand – a fundamental and powerful concept that can only be understood when decomposed into its primary components or "dimensions" which separate commitment from standard loyalty/intention. Customer relationship commitment, just like its human counterpart, is derived from a combination of personal and functional characteristics which are central to the trust-based commitment relationship framework.

The bottom line is that, while it is important for marketers to know the strength of the bonds they have with customers, it is also essential to understand the nature of these relationships. Just like a one-dimensional view of human relationships ignores the differences among friendships, acquaintances and romantic attachments, marketers ignore the multiple dimensions of customer-brand relationships to their peril.

The idea that customers form personally- and functionally-based bonds helps explain one of marketing's most notorious episodes: The Coca-Cola Company's decision to

introduce a new-and-improved version of the classic beverage. While blind taste tests convinced Coke executives a new formula would strengthen customer loyalty, the fall-out of their decision to launch New Coke revealed they had overlooked important relationship benefits and responses not captured in traditional performance-attitude frameworks. Customers felt betrayed by Coke's alteration of their trusted brand, a negative customer response to a demonstrably superior product that can only be fully understood under a relationship light.

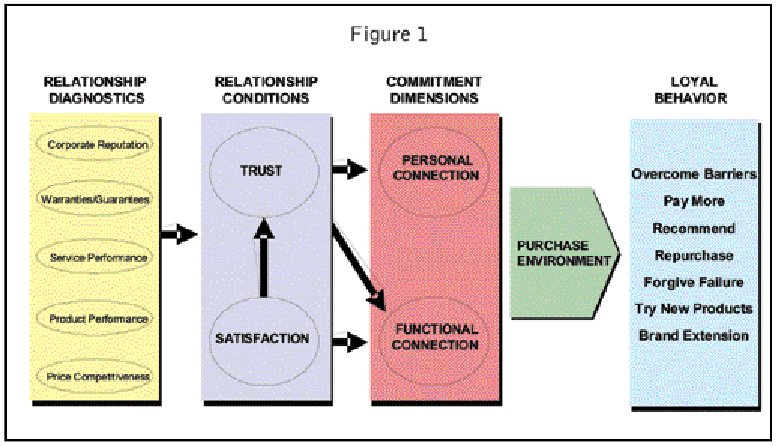


Figure 1

Trust and satisfaction redefined

Transactions begin to transform into relationships in response to trust. In fact, any personal relationship, whether real or metaphorical, is built on trust (Delgado-Ballester and Munuera-Alemán, 2001).

Without trust, relationship building is stifled as relationships are suspended in a precarious state of vulnerability to competitive action or performance failure. Trust tells customers that the brand is looking out for them when they are not looking, that it will do whatever it takes to make them happy and it is going to be responsive to their needs. It is the perceived motivation of the brand that is at trust's core and the catalyst behind the transformation of transactions to relationships.

Brands express these altruistic motivations by doing such things as resolving problems quickly, providing consistently good food, and greeting customers with friendly, efficient employees. Trust resides in the dissatisfied customer who happily marches into a favorite retail store fully expecting a quick and conflict-free resolution to a problem. Under similar circumstances, distrust leads to raised blood pressure, grumpy customers and inevitable conflict.

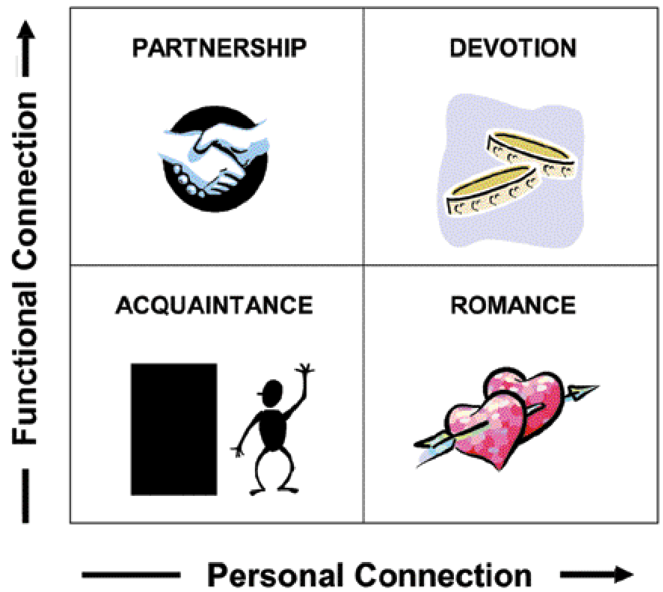
In the Trust-Based Commitment model (Figure 1), satisfaction and trust develop from a series of individual encounters with a brand's products and services. The key to understanding how activities provide relationship return on your investments is in differentiating between the activities that build trust and those that promote satisfaction. In the retail category, for instance, store environment, high-quality products and easy-to-find merchandise all lead to satisfaction, while resolving problems with attentive, pleasant employees and standing behind products lead to trust.

Together trust and satisfaction combine to provide the conditions necessary for enduring customer-brand relationships characterized by relationship commitment.

Relationship dimensions: personal and functional connections

We can tap into the interpersonal relationship metaphor to illuminate the nature of customer-brand relationships. Figure 2 suggests at least four relationship types based on the relative strength of functional and

Figure 2



personal connections. And, as in human relationships, differences between personal and functional connections result in different relationships with different outcomes.

Customers with strong functionally-specific relationships may view their brand relationships like "partnerships" formed to achieve discrete functional outcomes, free of personal investment.

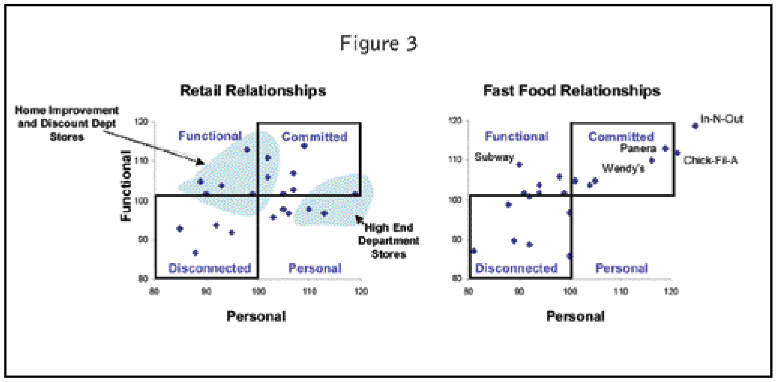
Highly personally-connected customers invest in more emotive bonds seeking to reap relational benefit. Such bonds are likely more elaborately formed and regretfully severed, like interpersonal "romance."

Disconnected customers are in relationships akin to "acquaintances" where interaction and benefit are incidental and fluid.

Finally, customers who describe strong personal and functional connections might be described as "devoted," offering a company many of the attending benefits associated with interpersonal devotion, such as immunity against failure and partner generosity.

Just as relationship commitment is comprised of functional and personal connections, satisfaction and trust contribute uniquely to each relationship dimension. For instance, personal connections are primarily a function of high levels of trust. Customers who trust that a brand has their best interests in mind, is responsive, and will quickly resolve issues will form relationship bonds with a personal character and begin to enjoy ensuing benefits. Similarly, customers who are habitually satisfied with the brand's products will often form functional connections.

This all may sound very irrational from a customer's perspective, but benefits of brand attachments do provide rational benefits and enhance visceral direct consumption. They also provide personal benefits not usually considered by marketers, like affiliation, meaning and cognitive consistency (Fournier 1998).



There are broad implications to taking a relationship view of your interaction with customers, one of the most important of which is as a guide for competitive positioning. As demonstrated in the case studies reported below, competitive advantage can be gained by companies that understand how relationships are formed and sustained. The Trust-Based Commitment relationship model formalizes the processes by which transactions are transformed into profitable customer connections.

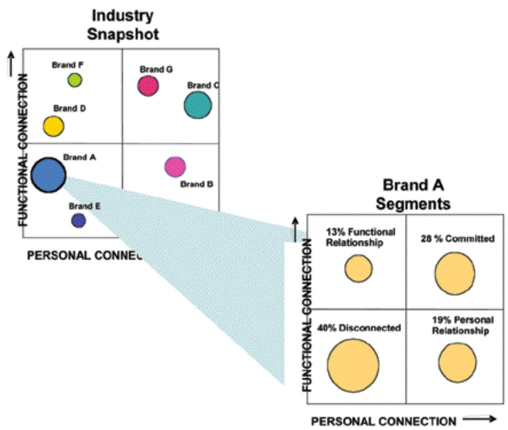
Fast-food and retail case studies

In order to test the Trust-Based Commitment framework, we collected and analyzed survey data from retail and fast-food customers. These product categories were selected to for their broad range of combined service and product performance characteristics and relationship benefits.

During Wave I, close to 4,000 customers of 20 fast-food restaurant brands and 21 retail brands completed online surveys approximately 30 to 40 minutes long, answering questions on a wide range of topics including behavior, attitudes and demographics.

Wave II followed up with the same respondents approximately four months after the initial survey. The primary goal of Wave II was to test the behavioral legitimacy of the initial relationship disposition in an environment relatively free of instrument bias. Key survey topics in Wave II focused on such things as share of

Figure 4



spending and frequency of visits, and total spending at store locations.

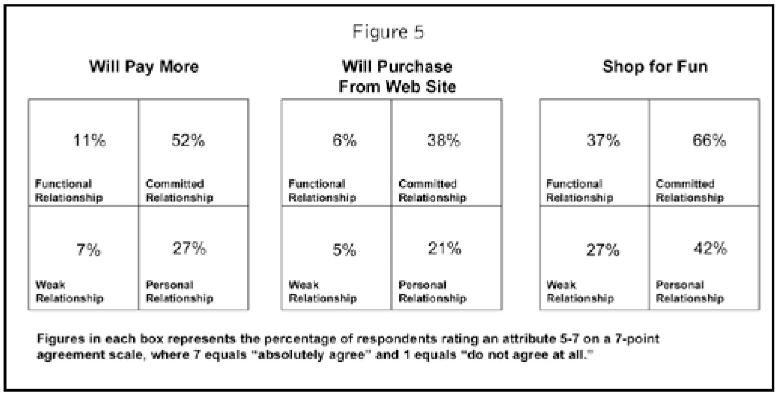
Understanding the maps

The first step in the analysis was to turn theoretical ideas into concrete and reliable measures of key relationship constructs using factor analysis methodology. Brands were then scored on each multi-item relationship "factor." In order to simplify brand comparisons, factor scores were translated into indices where a score of 100 represents the study average on each factor. So, for instance, a score of 125 is 25 percent higher than industry average.

On the maps in Figure 3, the dimensions plotted on the vertical and horizontal axes are personal connection and functional connection. The quadrants are divided at the industry average. A brand in the upper-left quadrant for instance, is above average on functional connection, but below average on personal connection. We call these functional relationships. Conversely, personal relationships fall in the lower-right quadrant. Committed relationships, exhibited by high personal and functional connection, are in the upper-right quadrant, balanced against disconnected relationships in the lower-left quadrant.

Mapping relationships in competitive space

If a picture tells a thousand words, then the relationship map reveals volumes about the nature of customer relationships and their competitive implications. Customer relationships take many forms based on the primary dimensions of personal and functional connection. When these connections are used to map brands against one another, the unseen structure of competitive customer-brand relationships is



revealed. And this is more than just an interesting twist on brand mapping; one's position on the relationship map has direct implications for marketing activity.

On the retail map, for instance, brand clusters emerge that suggest brand strengths and weaknesses as well as differences in strategic options. For instance, the most successful department store brands cluster into the lower-right or "personal relationship" quadrant. This suggests that to be competitive in this space a brand must provide professional service and generous return policies that support trust-building and personal connections. The reward for these investments is customers who say they will pay a premium for products and will shop in your store as a leisure activity - both profitable customer attitudes. In the same way, home improvement stores and discount department stores are strong on the functional dimension, suggestive of functional requirements like product selection and value for the money. Their reward is high volume.

The first thing one might notice about the fast-food map is that there are no brands in the lower-right quadrant, which is high on personal connection and low on functional connection. This appears to reveal that, while a legitimate retail store position may focus primarily on personal relationship characteristics, fast-food relationships must be built on a solid functional foundation.

Functional relationships in this context are essentially built on food taste, food choices and value for money. Subway, through its focus on healthful options, appears to have separated itself from the fast-food pack through primarily functional relationships. Wendy's, on the other hand, has utilized personal connections to carve out its own space among national hamburger chains. The most relationship-formidable fast-food brands are regionally-focused brands such as In-N-Out Burger, Chick-Fil-A and Panera Bread.

Not only do customers of different brands aggregate in comparative map positions, but a company's own customers can be segmented based on relationship type and strength. Figure 4 illustrates the emergence of relatively distinct customer groups for an individual firm. In this case, a ubiquitous fast-food brand may look competitively weak when its average customer is compared to that of specialized or regional fast-food brands, but when it maps its own customers it may discern a critical mass that have strong relationships with the brand. While 40 percent of the hypothetical brand's customers are disconnected, almost half are committed or, at least, have personal relationships with the brand. These customers are candidates for profitability segmentation or targets of innovation

Relationship outcomes

Relationship disposition has a direct impact on attitudes toward behavior. And whether customers have a personal or functional relationship indicates a bias toward certain positive,

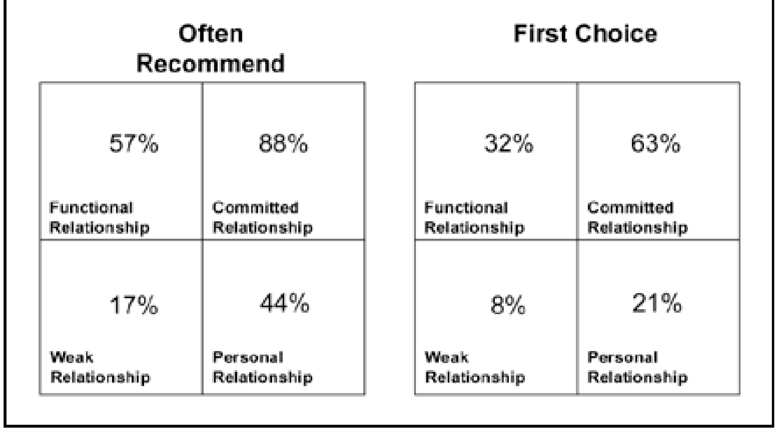


Figure 6

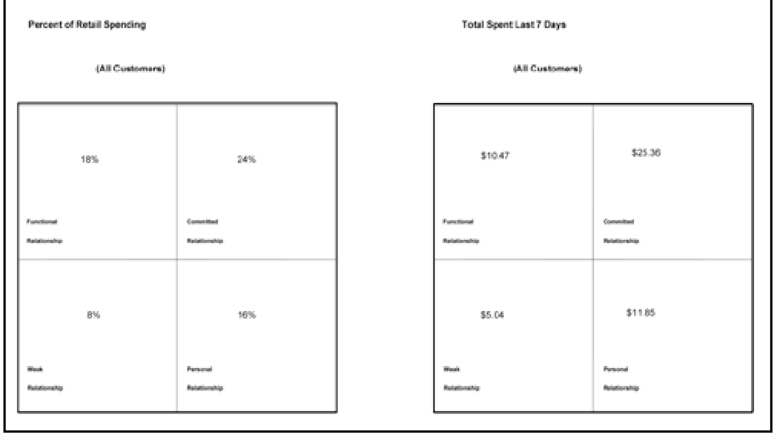


Figure 7

Figure 8

one might even say, profitable behavioral attitudes. For instance, retail customers in the personal relationship quadrant are more likely to be willing to pay more for a store's products, use its Web site to purchase products and shop there as a leisure activity.

The functional dimension is more likely to suggest recommendations and selection of the brand as the customer's first choice when visiting retail stores in general.

What is clear from Figures 5 and 6, however, is that relationships steeped in both functional and personal connections (or "committed" relationships) represent customers with the strongest attitudes toward a range of profitable behaviors. The committed customer objective becomes even more compelling when spending behavior is measured directly. In fact, committed retail customers reported spending over three times as much as other customers and claim a greater percentage of their retail spending at stores to which they are committed (see Figure 7).

The bottom line is that both personal and functional connections are required for a fully committed relationship, but niche competitive positions can take advantage of - or be legitimized by - the type of relationships customer have with brands.

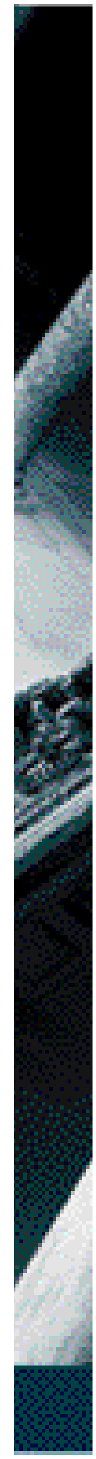
Do relationships really matter?

The Trust-Based Commitment relationship framework opens the door to understanding previously unexplained behavior as a function of relationship motivations rather than just needs satisfaction. For instance, it explains how trust-based relationships may differentiate relatively small regional brands from more established national chains in their local markets, and why customers are willing to go out of their way to visit some retail stores but will only shop at others if convenient. It also guides companies toward targeting relationship motivations when building a basket of brand benefits.

It is important, therefore, for companies to 1) understand what it will take to deepen commitment among current customers, 2) establish strong relationships with new customers and 3) assess on whom to focus their relationship efforts and resulting benefits. Questions such as "Is a brand transformation required?" or "Will performance adjustments enhance an already strong position?" are answered only in light of a solid relationship framework that clearly articulates relationship strength and its antecedents: trust and satisfaction.

Once relationship measures are established and measured, companies can map their positions in competitive space, and marketing prescriptions and opportunities are then implied. For instance, companies whose customers have strong functional but weak personal connections will be required to focus on performance diagnostics and innovation, while those with strong personal connections to the exclusion of functional connections must be most careful with their image (Figure 8). Also, customers with strong personal connections respond more favorably to brand extensions and premium pricing, while disconnected customers rely heavily on competitive pricing and sales promotion.

Ultimately, brands which have established functional connections in the market and have earned personal connections with their customers can have confidence that steps taken to fortify and build their market positions will be more positively received by their committed base. In this way, Trust-Based Commitment not only models a more direct connection between customer attitudes and behavior, but also reveals customer motivations previously hidden underneath a veil of anemic customer measures. |Q



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Survey Monitor

continued from page 10

information received from a home improvement store.

The study also examined the types of messages adults respond to. Eighty-two percent of Generation X women who read retail direct mail said they have replied to buy-one-get-one-free messages, compared to 63 percent of men in the same category. Of the male Generation Y adults surveyed who read retail direct mail, 79 percent said they respond to direct mail messages that include discounts off a single item, compared to 67 percent of women in the same category. Seventy-six percent of adults with a household income of $50,000-$75,000 who read retail direct mail have responded to messages with coupons. Similarly, 72 percent of adults with a household income of less than $30,000 who read retail direct mail said they have responded to messages with buy-one-get-one-free offers.

Who are the retail direct mail readers? Of clothing store direct mail readers, 71 percent are women and 29 percent are men. Of home electronics store direct mail readers, 51 percent are men and 49 percent are women. Twenty-seven percent of home electronics direct mail readers are Generation X adults. Of clothing store direct mail readers, 23 percent are younger Baby Boomer adults. For more information visit www.vertisinc.com.

Out vs. outrageous: gay TV viewers weigh in

Gay men are from Mars and lesbians are from Venus when it comes to picking their favorite TV. Men gravitate toward shows featuring guys: *Queer as Folk* and *Will & Grace*; women go for "chick" shows: *The L Word* and *The Ellen Show*.

While 32 percent of women say *The L Word* is their favorite show, 0.5 percent of men do. And *Queer as Folk* was the favorite of 26 percent of the men, but 10.2 percent of the women. Overall, 69.9 percent of women watch *The L Word*, compared to 22.4 percent of men, according to an online study conducted December 10-15, 2004 by GLCensus Partners, a research partnership between OpusComm Group and the S.I. Newhouse School of Public Communications at Syracuse University.

No matter what show they did pick, many of the 2,149 GLBT respondents are ambivalent about their image in the medium. Case in point: Jack McFarland. The flamboyant, over-the-top character from *Will & Grace* was the No. 1 pick for both "most favorite" and "negative portrayal." The show was a top five favorite for both men and women, but with reservations. "I enjoy *Will & Grace* despite the fact that it is one long series of gay jokes," said one respondent. "If Jack were a monogamous homebody like me, there would be no ratings and no show," said another. One respondent summed it up: "Although Jack on *Will & Grace* portrays the worst of the stereotype of gay men, he is still the funniest of all the gay TV characters. Though I despise the stereotype, I love his comedic talents. Go figure."

Those mixed emotions also are manifested in the fact that 47 percent of respondents couldn't pick their least favorite show that featured either a GLBT character or GLBT participant in a leading role. "The GLBT respondents are partial to GLBT shows in general, but they also are concerned with how they are being portrayed," says Jeff Garber, president of OpusComm Group. "Early on, they were just happy to be included. Now they want what they believe to be a fair representation."

The survey did show that there was one thing all the respondents could agree on. When asked "Who is your favorite GLBT participant who has a recurring role on a reality TV show or talk show?" the overwhelming favorite was Ellen DeGeneres of *The Ellen Show*. Overall, 49.9 percent picked Ellen, 70 percent among women and 38.7 percent of men.

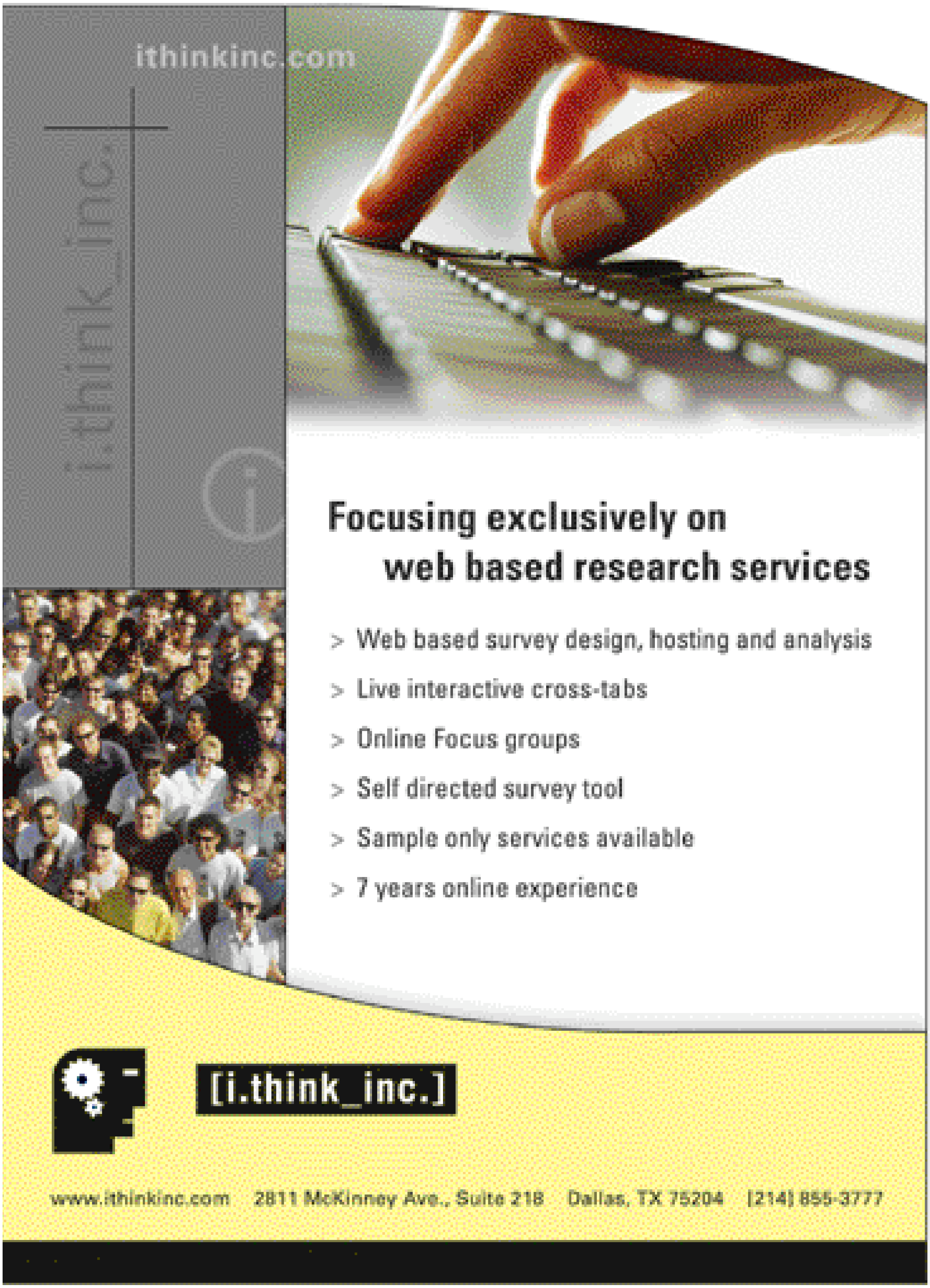
"There's Ellen and then there is everyone else, mostly the *Queer Eye* guys," says professor Amy Falkner of Syracuse University and a lead researcher in the study. "Perhaps it's the history here with Ellen, her coming out on national television. GLBT people feel a connection with her and her struggles."

Both the characters of Ben Brucker and Michael Novotny from *Queer as Folk* take the No. 2 and 3 spots on the most positive male portrayal, but don't make the top five in the most favorite category. Ben and Michael portray a couple. "Perhaps relationships earn respect from the male GLBT audience," says Garber, "but they might not be as interesting to watch as 'wild singles.' "

Queer As Folk (26 percent), *Will & Grace* (24.1 percent) and *Six Feet Under* (19.9 percent) were the men's favorite TV show featuring either a GLBT character or a GLBT participant, while *The L Word* (32 percent), *The Ellen Show* (18.7 percent) and *Queer as Folk* and *ER* (10.2 percent each) were the women's choices.

The most-watched show among the GLBT respondents was *Will & Grace*; *Degrassi* was the least-watched show; *Six Feet Under* was the most accurate show; and *Reno 911!* was the least accurate show.

"This is not that surprising given that *Will & Grace* is on broadcast TV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and *Degrassi* targets a very niche, younger audience," says Falkner. "But the accuracy ratings are interesting, as only 11 percent said they thought *Will & Grace* was very accurate, which comparatively is a very low percentage. *Six Feet Under*'s showing is impressive – 95.2 percent said they thought it was at least somewhat accurate. *ER* and *The L Word* are the next closest in the high 80 percentiles."

GLBT viewing habits are different than the general TV audience. The top five shows for GLBT viewers: *Will & Grace, Queer as Folk*, *Queer Eye for the Straight Guy*, *Six Feet Under* and *CSI*. The five top shows for general TV viewers (Nielsen top shows, December 13-19, 2004): *Desperate Housewives*, *CSI-Miami*, *CSI, 60 Minutes* and *The Apprentice 2*. For more information visit www.glcensus.org.

DIY sales building nicely

Despite the slowing economy after 2000, sales for home improvement products have flourished, increasing from $327 billion in 1999 to $411 billion in 2004, a growth of 26 percent. Historically-low interest rates have spurred home sales and mortgage refinancing, which in turn create additional revenue to be spent on home improvement.

Research from Chicago-based Mintel shows that income and home ownership are key drivers for growth in this industry. In addition, dedicated do-it-yourself (DIY) enthusiasts tend to spend large amounts and have repeat purchases, rather than just one single purchase. According to Mintel's consumer research, nearly half of those who completed a home improvement project in the past year spent more than $1,000 over the year. Also, two-thirds tend to purchase at least once every three months, supporting the potential of the home improvement market.

Females are renovating the stereotype of the traditional DIY shopper, as DIY activity and purchasing are no longer just all-male markets. Women control half or more of total DIY sales, plan about one-third of home improvement projects, and have attitudes towards home improvement that are as positive as men's attitudes. Home improvement retailers have been reaching out to women with a range of marketing strategies and such efforts appear fruitful and could be expanded. While men still show a slightly higher level of purchasing and interest in DIY activity, women show a strong interest as 65 percent of females take on home improvement tasks relative to 75 percent of men.

Stores such as Lowe's and Home Depot are the dominant home improvement retail channel, frequented by about nine in 10 respondents who purchased home improvement products in the past year. However, about seven in 10 made purchases at hardware stores, suggesting that many consumers turn to smaller, neighborhood stores for some products.

Total U.S. retail home improvement sales are predicted to increase 35 percent in the next five years. This growth will be driven by expanded retailing of DIY products throughout many retail channels, not only home improvement stores.

Mass merchandisers are expected to increase activities intended to target DIYers by providing a wider assortment of DIY products and services. Within the big-box retail channel, retailers such as Lowe's and Home Depot are expected to continue the pursuit of aggressive store additions, including expanded placement in urban areas throughout the U.S. For more information visit www.mintel.com.

Music subscriptions not a big hit

Portable music services will not have a big impact this year, according to Digital Music: Analysis and Forecasts, a report from Dallas-based research firm Parks Associates. Respondents in the recent Parks Associates survey Global Digital Living strongly favored the single-track purchase model over a subscription when presented with both options. Roughly 40 percent said they were likely to buy songs one at a time, but only 8 percent were likely to use a subscription service.

"The market has a long way to go in promoting subscription models," says John Barrett, director of research at Parks Associates. "There is hope Microsoft's Janus technology will boost the digital music market by enabling portability and greater integration of hardware and content. However, our data show the industry needs to translate these solutions into something more tangible and desirable to consumers. At present, consumers either do not fully grasp the value of a subscription 'all-you-can-eat' service, or they simply don't want it."

According to the report, the industry is beginning to promote "buffet" music plans, which allow users unlimited downloads for a flat monthly fee, to compete with a la carte models such as iTunes. Technologies such as Microsoft's Janus promote this paradigm of use, although few MP3 players, save for some very expensive models, currently support these solutions. The report, citing both limited availability and limited enthusiasm from consumers, predicts sluggish growth for these solutions this year, but it is more bullish on the long-term prospects because hardware could be subsidized under a subscription model. For more information visit www.parksassociates.com.


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Review the sessions on your PC. No VHS cassettes. No VCRs. No TVs.
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Imagine saving time, money and headaches while creating powerful, persuasive presentations. Make it a reality. Ask your favorite focus facility for it instead of videotape—VideoMarker™ CD Recording. More than you imagined.
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Product and Service Update

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Take a survey on marketing intelligence

The Photizo Group, a Lexington, Ky., consulting firm, is conducting a survey regarding executive expectations for marketing intelligence. The survey was developed by the Photizo Group in consultation with Peter Trim, Birkbeck College, University of London. Its purpose is to understand the importance of marketing intelligence in small and large businesses today. The survey is intended for executives, marketing intelligence managers and marketing intelligence vendors. It asks pointed questions on where, how and what types of information are expected from companies' marketing intelligence functions. Individuals answering the survey can elect to receive a free copy of the results. The survey can be accessed at www.photizogroup.com/surveys/surveys.html.

Feedback software built on .Net platform

NetReflector, Inc., Seattle, has introduced VantagePoint, an online feedback software solution built on Microsoft's .Net platform. Specifically designed to address the research needs of business owners at medium- to large-sized companies, VantagePoint offers Analyzer, an online analytical module that provides actionable customer intelligence at the click of a mouse. Analyzer capabilities include crosstab tables, line/trend charts, key driver charts, multiple data export formats, text search, interactive analysis and reporting, and calculated fields.

Whether used as self-service or integrated with CRM, contact center, business intelligence, and campaign management applications for ongoing automated programs, VantagePoint features an interface designed for enhanced ease of use. For more information visit www.netreflector.com.

Research pinpoints emotions behind buying nutrition bars

Amid an increasingly healthy food-conscious society, and within a $2 billion per year nutrition bar market, a consumer research report entitled "The experiEmotive Drivers of Purchasing Nutrition Bars" explores the emotions and feelings that drive consumers to buy nutrition bars.

A March 2004 Frost & Sullivan report, The U.S. Sports and Fitness Nutrition Markets, claimed that "most participants in the sports/nutrition industry find themselves struggling to retain customer loyalty. Developing strong brands with distinct identities and clear-cut positioning holds the key to overcome this challenge."

The study behind the experiEmotive report was conducted by St. Louis-based experiEmotive analytics. Its researchers observed nutrition bar shoppers in a variety of stores and conducted two-hour in-depth interviews with people who had recently purchased a nutrition bar.

The report summarizes five emotional themes (called Key Chains) that nutrition bar manufacturers and marketers can use as foundations for their brands' positionings. Two of the five emotional themes are control and security, and self-image connectedness.

Related to control and security, when buying nutrition bars some people strive to feel relaxed, trusting, and secure, but often feel helpless, uncertain and insecure. Related to self-image connectedness, when buying nutrition bars some people strive to feel unique, connected and free, but often feel alienated, lost and insecure.

The report also summarizes eight functional goals that people have when they shop for nutrition bars. Two of the eight functional goals are illness management and appetite management. For more information visit www.experiemotive.com.

Tool helps TV networks hit their marks

New York research firm Simmons has developed BehaviorGraphics, a proprietary segmentation system that looks beyond standard viewer demographics and concentrates on the actual consumer behaviors networks and advertisers wish to target. In recent months, FX Networks has signed a multi-year agreement for Simmons' TV BehaviorGraphics.

Simmons conducted an analysis of *Rescue Me*, a critically-acclaimed FX drama, by identifying the BehaviorGraphics groups that were most likely to have tuned into the show. Individuals identified as Pop Culturers, one of 32 adult BehaviorGraphics clusters, dominated by young twenty- and thirty-somethings who watch an inordinate amount of MTV, are more than twice as likely as the average adult to tune into a typical episode of *Rescue Me*. Film Fans, another group defined by their enthusiasm for watching cable networks like HBO and Showtime, are also nearly twice as likely to watch *Rescue Me*. Other groups that are likely to tune in to *Rescue Me* include: Sarcastics, Media Heads and News Junkies among others.

Combining the top indexing BehaviorGraphics groups allows users to create a target, which can then be employed to identify distinct consumer and psychographic behaviors of viewers.

TV BehaviorGraphics was developed through an integration process that merges the Nielsen National Television Index (NTI) and the Nielsen Hispanic Television Index (NHTI) with the Simmons National Consumer Survey (NCS). It consists of a multi-segment cluster system which classifies consumers into distinct groups based on their television viewing behavior. The system classifies Americans into 32 consumer segments that capture both the U.S. general market and the Hispanic population. For more information visit www.smrb.com.

Protect images in online surveys

Dallas-based Mobile Memoir is now offering ViewProtect, a service that safeguards images published in Web surveys so that they cannot easily be captured or published on Web sites. A secure key and dynamically generated watermark image are placed atop new product concepts and ad tests. The watermark contains each respondent's unique e-mail address, panel identification code, or other personal identifier and is displayed over an image. The identifier cannot be erased from the image. A survey respondent therefore cannot publish the image from the Web survey without revealing their identity.

In addition to watermarking, ViewProtect includes other methods of protecting an image. An encryption key limits the time period in which the image can download, after which it expires automatically. Secured images fail to display on other computers if the active survey session is not detected or the download period has elapsed. ViewProtect images can be displayed with an optional copyright or other notice. For more information visit www.mobile-memoir.com.

Syndicated studies target influencers

Markitecture Syndicated Studies, Cave Creek, Ariz., has launched two separate multi-sponsored studies targeted at bartenders and liquor store managers who recommend beer and spirits. Launched March 1, the studies are designed to enable spirits, beer and wine marketers to develop trade marketing programs aimed at bartenders and liquor store attendants. Optimal programs will encourage the "influencer" to purchase more of the marketer's brand for his establishment, and make sure the influencer recommends the marketer's brand to his customers when given the opportunity to do so.

Further studies planned by Markitecture Syndicated Studies include a study for the beauty and specialized hair products industry directed at salon professionals, and a study of veterinarians and pet store owners/managers geared to manufacturers of pet foods and pet supplies. For more information contact Kevin Moran at 480-595-4754 or kmoran@markitecturesyndicated-studies.com.

Quality Manager adds a new dimension to MM4XL software

With the release of Marketing Manager for Excel 6.6 (MM4XL), Switzerland-based MarketingStat has added Quality Manager, a quality analysis tool that lets users perform quality analysis of many different kinds of business processes, such as traffic at call centers, the quality of ongoing marketing surveys, tendencies in sales or profits, hits at Web sites, contacts made by sales reps, results of direct marketing campaigns, etc. It can generate all of the most common quality control charts, run acceptance sampling, and perform process capability analysis. And Quality Manager analyses can be previewed online before printing a hardcopy chart.

Statistical quality control can involve two types of analytical methods. The first is statistical process control, a decision-making tool useful to ensure that processes perform within limits. When a process goes beyond limits, statistical process control helps to identify when the change occurs, and whether the change is good or bad. If the change is bad, action should be taken to remove the cause. If the change is good, the occurrence of the cause should be made common practice. The second is acceptance sampling, which helps to ensure that the material a company receives and the product it delivers are acceptable in terms of quality. Functional trial copies of MM4XL can be downloaded and used for up to 21 days. For more information visit www.marketingstat.com.

New reports in AutoVIBES series

Rochester, N.Y.-based Harris Interactive and Kelley Blue Book, Irvine, Calif., have teamed to produce the Generations series of reports from their monthly AutoVIBES study. Four new reports provide a look at the purchasing dynamics and decision-making factors of U.S. vehicle buyers based on their generation. Each Generation report summarizes the attitudes, opinions and behaviors of in-market vehicle buyers who are within 12 months of purchasing or leasing a new vehicle. Reports within the series include a Generation Y Report, Generation X Report, Baby Boomers Report and Pre-Boomers Report, and are based on more than 16,000 interviews conducted over nearly a full year.

Findings within each Generation report include: the respondents' financial outlook for upcoming year; key factors influencing vehicle purchase decisions; the effect of incentives on purchase decisions; the effect of gas prices on purchase decisions; safety considerations; make and model ownership, consideration and loyalty; vehicle country of origin attitudes; and reaction to new model launches.

Also available is the AutoVIBES Lifestyle Series, which includes an Affluent Buyer Report as well as a Gender Report, which focuses on the different purchase dynamics of men and women. Also included in the Lifestyle series will be a group of reports focusing on shoppers who are married, single and those with and without children. In addition, the AutoVIBES Ethnicity Series will soon be released, focusing on how different ethnicities approach and react to the vehicle buying process. Reports planned for the Ethnicity Series include an African-American Report, Hispanic American Report and an Asian-American Report. For more information contact Kelley Blue Book Marketing Research at 949-268-3074 or Harris Interactive at 877-919-4765 or visit www.harrisinteractive.com.

ESRI enhances support for OGC WMS

ESRI, Redlands, Calif., has released the Open Geospatial Consortium, Inc. (OGC) Web Mapping Service (WMS) client and server support with the Service Pack 2 release of ArcGIS 9. In addition, an enhanced WMS connector is now included with ArcIMS.

The OGC WMS is an Open GIS standard specification for interactive mapping based on requesting map images from a server over the Internet. OGC WMS client support in ArcGIS Desktop allows users to access these services over the Internet and add them to their maps as layers. ESRI offers both a WMS provider/server and a WMS client/consumer solution.

With Service Pack 2, users can access OGC WMS with the ArcGIS Desktop products (ArcView, ArcEditor, and ArcInfo). No other software is required.

Services complying with versions 1.0.0, 1.1.0, and 1.1.1 of the OGC WMS specification are supported. OGC WMS services work in a similar way to ArcIMS image services. Also, developers working with ArcObjects can build solutions based on the WMS specification using the ArcObjects application program interface.

ArcIMS 9 Service Pack 2 includes an enhanced WMS connector. The connector now includes a Web-based administration tool to easily create a WMS service from an ArcIMS service. The WMS server-side solution has also been tested for compliance against the OGC test suite for WMS 1.1.1. For more information visit www.esri.com/standards.

Briefly

All Global Viewing, a London focus group facility, now offers FocusVision videostreaming in three of its five studios. For more information visit www.allglobalviewing.com.

Saskatoon, Saskatchewan-based research firm Itracks is now making its software development team available to other research firms, who can commission customized software solutions to meet their research challenges and business needs. For more information visit www.itracks.com.

Businesslink, a Des Moines-based call center firm specializing in outbound phone contact solutions for business-to-business and research companies, is growing its calling capacity 50 percent in response to current and projected business growth. For more information visit www.marketlinkinc.com.

Research Industry News

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pany's inclusive research methods. The print ad copy is translated in Chinese, Spanish and English for respective audiences and will run in ethnic weeklies in and national publications that reach ethnic opinion leaders. The radio ads will run on top-rated African-American and Hispanic (Spanish- and English-language) stations. The campaign also includes on-screen advertising in multicultural movie theaters.

Acquisitions/transactions

Reston, Va.-based **comScore Networks** has acquired **SurveySite, Inc.**, a Toronto research firm. The SurveySite organization will operate as a division of comScore Networks under the name comScore SurveySite. Jeff Hohner, president of SurveySite, has assumed the position of president, comScore SurveySite.

New York information firm **Factiva** has acquired the business and assets of **2B Reputation Intelligence Limited** and **Benchmarking Solutions Limited**, a London-based technology and consulting business specializing in media monitoring and reputation management.

Paris-based research firm **Ipsos** has acquired two marketing research companies in North America: Montreal-based **Descarie & Complices**, a firm specializing in advertising and market research in Quebec's Francophone sector, and **Shifrin Research Inc.**, a New York research company. Descarie & Complices, which will operate as Ipsos Descarie, has 25 full-time employees and generated revenues of CAN $3.6 million in 2004. Shifrin Research Inc., which will operate as Ipsos Shifrin, has 21 full-time employees and had revenues of $8.6 million in 2004.

Research firm **Greenfield Online, Inc.**, Wilton, Conn., has completed the acquisition of **Zing Wireless, Inc.** (goZing), a privately held Encino, Calif, corporation, for approximately $30 million in cash, subject to certain post-closing adjustments. Simultaneous with the closing, goZing's three executive officers as a group purchased 195,650 shares of Greenfield Online common stock for $18.40 per share in a private placement.

The acquisition of goZing, a provider of survey sample solutions, expands the Greenfield Online panel to 4.7 million double opt-in survey takers, representing households containing approximately 12.2 million people, plus an additional 3.6 million single opt-in registrants the firm intends to convert to double opt-in panelists. The goZing acquisition increases Greenfield Online's international panel by approximately 50 percent.

GoZing was founded in 1999. The company has 41 employees, substantially all of which are based in Encino. For the year 2004, the company recorded revenue of approximately $13 million, 80 percent of which was attributable to survey sample solutions. Approximately 10 percent of its 2004 revenue was associated with panel recruitment services for marketing research firms. The remaining 10 percent of revenue was achieved through the goZing cellular reseller business. This portion of the business is not complementary to Greenfield Online's current business model and was discontinued. GoZing recorded 2004 operating income of approximately $2.5 million. The goZing client base more than doubled in 2004 to 97 clients. GoZing's three senior executives will join Greenfield Online in senior management roles. Matthew Dusig, goZing's president, has been named senior vice president corporate strategy for Greenfield Online. Gregg Lavin, goZing's CEO, has been named Greenfield Online's senior vice president online marketing. GoZing COO Lance Suder has been named Greenfield Online's senior vice president West Coast operations.

Separately, Greenfield Online, Inc. has completed the acquisition of **Rapidata.net, Inc.**, a privately-held North Carolina corporation, for $5.5 million in cash, subject to certain post-closing adjustments. Simultaneous with the closing, Rapidata's two executive officers (who together owned a majority of Rapidata stock) each purchased 16,225 shares of Greenfield Online common stock for $18.49 per share in a private placement. Rapidata's panel includes practicing physicians across all major specialties, hospital, retail and managed care pharmacists and formulary decision makers, nurses and nurse practitioners, as well as dentists.

Germany-based **GfK Group** has increased its shareholding in U.S.-based e-commerce and database marketing specialists **Caribou Lake Software**, to 69.8 percent. This makes GfK the majority shareholder in the company in which it had already acquired a 19.9 percent holding in 2001. Caribou Lake Software supplies technical advisory services for e-commerce solutions in the business-to-business and business-to-consumer markets. It has 20 employees. In 2004, the company recorded total sales of around $4 million.

Alliances/strategic partnerships

Seattle research firm **NetReflector** and **Quaero**, a Charlotte, N.C., marketing consulting firm, have formed a strategic partnership involving the integration of NetReflector's customer satisfaction and loyalty measurement capabilities into Quaero SpringBoard's hosted relationship marketing service. Quaero and NetReflector have joined forces to optimize marketing through customer satisfaction measurement capabilities for their mutual clients.

Association/organization news

The appointment of Debrah Harding to the new dual role of director, policy and communication, and deputy director general at Britain's **Market Research Society** (MRS) is part of a wider move to establish clearly differentiated identities and branding for MRS as a professional membership association led by Harding, and for the separate business division led by its managing director, Peter Greenwood.

In late 2004, the commercial publishing and events operations of MRS were brought together under the Research brand, serving a much wider customer base beyond the MRS membership. The Research brand encompasses the industry magazine, directory, conferences and awards dinner.

In April 2005, MRS will launch a re-branding of the membership association (including a new logo), and will also launch the new MRS company partner service.

Harding will have direct responsibility for industry and professional standards, professional development, external representation of market research, legislation and regulatory matters, public affairs and media relations, as well as overseeing policy on membership services and communications.

Véronique Jeannin has been appointed as the new director general of **ESOMAR**. Jeannin started her professional career as an international law consultant in 1981. Since 1985, she has been engaged in a number of international marketing and multicultural management functions in companies in Paris, London and Geneva, focusing on various markets. In 2000, she became the international marketing director for Eden Springs Europe, based in Lausanne, Switzerland, which, since 2003 has been known as Danone Springs of Eden.

Separately, ESOMAR has launched the Excellence Award for Standards of Performance, to be known as the John Downham Award. The award aims to recognize outstanding achievements in market, opinion and social research and to stimulate excellence in research standards at an international level. In making the award, ESOMAR wants to signal the importance of rigorous standards of research and to encourage the wider application of standards for the enhancement of the profession's reputation worldwide.

The award is named in honor of John Downham, who has been a key figure over many years in helping ESOMAR develop international codes and guidelines for the industry worldwide. Initiatives can include but are not limited to innovative or rigorous approaches that encourage or broaden the application of standards and add credibility to the profession. The award can be won by an individual or organization, whether or not they are a member of ESOMAR. Nominations must be made by an ESOMAR member and members are free to nominate themselves or their colleagues. Current ESOMAR council members are not eligible for the award.

The award will be given on the basis of a written submission of up to 750 words, describing why the person or organization deserves the award. The submission must clearly articulate how the initiative or achievements created a successful outcome and a positive impact on the profession.

The award carries a prize of EUR 10,000 and is sponsored by ESOMAR. The winner of the 2005 award will be announced at ESOMAR's annual congress in Cannes in September, where the award will also be presented.

Awards/rankings

Walker Information, Indianapolis, and one of its clients, Microsoft Business Solutions, have been selected as recipients of the first annual CRM WizKids Award, which was issued by Beagle Research Group. Beagle Research awarded WizKids Awards to 11 vendors and their customers for their advancement of customer relationship management. Walker Information enabled Microsoft Business Solutions to gather, analyze and distribute critical customer feedback.

New accounts/projects

The National Center for Missing Adults (NCMA) is using Braintree, Mass.-based **Perseus Development Corporation's** SurveySolutions Enterprise to collect feedback from families of missing persons to gauge the Center's performance associated with the handling of their missing persons case. The NCMA has an average of 1,200 active missing person cases ongoing each year. The use of Perseus SurveySolutions Enterprise is helping to fulfill a mandate: since receiving its designation from the U.S. Department of Justice to serve as a national clearinghouse for missing adults, the NCMA is required to conduct feedback surveys and report the results.

The **California Tree Fruit Agreement** of Reedley, Calif., has renewed its contract with Hoffman Estates, Ill.-based **FreshLook Marketing Group**, a supplier of marketing research information to the perishables industry, and will continue to rely on FreshLook to provide distribution, sales and pricing information on fresh peaches, plums and nectarines.

Food retailer **Safeway** has selected the DemandTec Price and DemandTec Promotion applications of San Carlos, Calif.-based **DemandTec** for its consumer demand management program.

New companies/new divisions/relocations/expansions

Cincinnati-based **Directions Research Inc.** has opened an office in Alexandria, Minn., which will be staffed by Dennis Murphy, the newly named vice president of the technology practice. Murphy recently retired from IBM.

Melbourne, Australia-based research firm **Insight Marketing Systems** has opened a new office in London and named Jonathan Rabson European director to head up the London office.

Scottsdale, Ariz., research firm **In-Stat** has established a branch of its research practice in mainland China. In-Stat's presence in China is an extension of a joint venture announced by Reed Business Information, In-Stat's parent company and International Data

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2005 Seminar Dates and Locations

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- New York .... Jan 11-13
- Los Angeles .... Feb 7-9
- Boston .... Mar 21-23
- Chicago .... May 2-4
- San Francisco .... June 14-16
- New York .... Aug 1-3
- Cincinnati .... Sept 13-15
- Baltimore .... Oct 24-26
- Chicago .... Dec 6-8

104. Designing Effective Questionnaires: A Step-by-Step Workshop
- New York .... Jan 19-21
- San Francisco .... Mar 8-10
- Chicago .... May 10-12
- Las Vegas .... June 28-30
- New York .... Aug 23-25
- Cincinnati .... Oct 11-13
- Los Angeles .... Nov 29-Dec 1

106. Tools & Techniques for Conducting Online Research
- New York .... Mar 8-9
- Los Angeles .... June 15-16
- Chicago .... Oct 18-19

202. Focus Group Moderator Training
- Cincinnati .... Jan 25-28
- Cincinnati .... Mar 8-11
- Cincinnati .... Apr 26-29
- Cincinnati .... June 7-10
- Cincinnati .... July 19-22
- Cincinnati .... Sept 20-23
- Cincinnati .... Nov 1-4
- Cincinnati .... Dec 6-9

203. Specialized Moderator Skills For Qualitative Research Applications
- Cincinnati .... Mar 14-17
- Cincinnati .... July 25-28
- Cincinnati .... Nov 7-10

301. Writing and Presenting Actionable Marketing Research Reports
- New York .... Feb 2-4
- Los Angeles .... Apr 20-22
- Chicago .... July 13-15
- Cincinnati .... Sept 28-30
- San Francisco .... Dec 7-9

501. Applications of Marketing Research
- Los Angeles .... Feb 10-11
- Chicago .... May 5-6
- New York .... Aug 4-5
- Baltimore .... Oct 27-28

502. Product and Service Research
- New York .... Mar 1-2
- Chicago .... June 7-8
- Los Angeles .... Sept 20-21

504. Advertising Research
- New York .... Mar 3-4
- Chicago .... June 9-10
- Los Angeles .... Sept 22-23

505. Market Segmentation Research
- New York .... Mar 15-16
- San Francisco .... July 12-13
- Chicago .... Nov 2-3

506. Customer Satisfaction Research
- New York .... Apr 5-6
- Los Angeles .... July 26-27
- Chicago .... Oct 18-19

507. Analysis & Interpretation of Customer Satisfaction Data
- New York .... Apr 7-8
- Los Angeles .... July 28-29
- Chicago .... Oct 20-21

508. Positioning Research
- New York .... Mar 17
- San Francisco .... July 14
- Chicago .... Nov 4

509. Pricing Research
- New York .... Feb 18
- Chicago .... June 30
- Las Vegas .... Nov 10

601. Data Analysis for Marketing Research: The Fundamentals
- New York .... Jan 31-Feb 1
- Los Angeles .... Apr 18-19
- Chicago .... July 11-12
- Cincinnati .... Sept 26-27
- San Francisco .... Dec 5-6

602. Tools & Techniques of Data Analysis
- New York .... Jan 25-28
- Los Angeles .... Mar 21-24
- Boston .... May 23-26
- Chicago .... July 19-22
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Group (IDG), early in 2004. Through its affiliation with the alliance, which is overseen by Hugo Shong, president and CEO of IDG Asia/China, In-Stat will have access to a network of information and people.

A new data processing and analysis firm, **Stadisticus**, has opened at Calle 34an # 3cn - 22, Cali - Valle, Colombia. Ilan Lechter is president. Jon Geiler Ordoñez is manager. Phone 057-680-1120. Fax 057-680-2011. Web www.stadisticus.com.

A new research and consulting firm, **Observant LLC**, has opened at 277 Linden St., Suite 207, Wellesley, Mass., 02482. Phone 781-239-1102. E-mail info@observant.biz. Web www.observant.biz. Rich Durante and Mike Feehan are co-presidents.

L&E Research Incorporated has moved to new and expanded facilities at 5505 Creedmoor Road, Suite 200, Raleigh, N.C., 27612. Phone 919-782-3860. Fax 919-787-3428.

Company earnings reports

Paris-based **Ipsos** generated consolidated revenues of EUR 605.6 million in full-year 2004, up 6.3 percent relative to 2003. Exchange rate effects dragged growth down by 3.8 percent, while changes in the scope of consolidation boosted growth by 2.6 percent. At constant scope and exchange rates, Ipsos' revenues came in up 7.5 percent relative to 2003.

At **Greenfield Online, Inc.**, Wilton, Conn., net revenue for the fourth quarter ended December 31, 2004 was $13.6 million, a 64 percent increase compared to $8.3 million for the fourth quarter ended December 31, 2003. Revenue for the 12 months ended December 31, 2004 was $44.4 million, a 72 percent increase compared to $25.9 million for the 12 months ended December 31, 2003.

Gross profit for the fourth quarter ended December 31, 2004 was $10.0 million, or 74 percent of revenue, and increased 83 percent compared to $5.5 million, or 66 percent of revenue, in the same period a year ago. Gross profit for the 12 months ended December 31, 2004 was $33.3 million, or 75 percent of revenue, and increased 96 percent compared to $17.0 million, or 66 percent of revenue in the same period a year ago.

Operating income for the fourth quarter ended December 31, 2004 increased to $2.5 million from $0.6 million in the same period a year ago. Operating income for the 12 months ended December 31, 2004 increased to $7.2 million from $1.7 million for the same period a year ago.

Net income for the fourth quarter of 2004 increased to $2.4 million compared to $0.4 million for the fourth quarter of 2003. Net income for the 12 months ended December 31, 2004 increased to $5.7 million compared to $1.6 million in the same period a year ago.

Adjusted EBITDA, a non-GAAP financial measure, for the fourth quarter ended December 31, 2004 increased 134 percent to $3.4 million compared to $1.4 million in the same period a year ago. Adjusted EBITDA for the 12 months ended December 31, 2004 increased 135 percent to $10.3 million compared to $4.4 million for the same period a year ago.

Harris Interactive, Rochester, N.Y., released its financial results for the second quarter of fiscal 2005. Revenue, which includes $13.9 million from Wirthlin and $1.1 million from Novatris, was $54.4 million for the quarter, up 51 percent compared with $36.1 million of revenue for the same period a year ago. Organic revenue, not including revenue from Novatris (acquired in March 2004) and Wirthlin (acquired in September 2004), was $39.4 million, up 9 percent from last year. Global Internet revenue, including $1.1 million from Wirthlin and $1.0 million from Novatris, was $25.9 million, up 29 percent from the $20.0 million of Internet revenue reported for the same period a year ago. U.S. Internet revenue, including $1.1 million from Wirthlin, increased 22 percent to $23.1 million. For the quarter, Internet revenue comprised 48 percent of global revenue, and 59 percent of the U.S. revenue. The impact of foreign currency fluctuations added $0.7 million to revenue this quarter.

Operating income for the quarter was $2.3 million, which includes $1.2 million from Wirthlin and zero income from Novatris, compared with operating income of $3.1 million reported last year. The company recorded a one-time cost of $0.8 million to reflect payment obligations to Gordon S. Black, former chairman of Harris Interactive, under the terms of his employment agreement which expired December 31, 2004. Net income for the quarter was $1.4 million, including one-time after-tax costs of $0.5 million for Black's severance. Earnings per share for the quarter were $0.02 per fully diluted share, including $0.01 of one-time costs for Black, compared with $2.2 million, or $0.04 per share, reported in the second quarter of fiscal 2004.

Sales bookings, which do not include Wirthlin, set a new record of $46.3 million, up 16 percent from last year's pace.

In fiscal year-to-date results, revenue for the six-month period ended December 31, 2004, was $95.2 million, up 37 percent from $69.4 million reported last year. Six-month organic revenue, which excludes $16.4 million from Wirthlin and $2.2 million from Novatris, was $76.6 million, an increase of 10 percent from a year ago.

For the six months ended December 31, 2004, global Internet revenue, including $1.1 million for Wirthlin and $1.9 million from Novatris, was $50.1 million, up 32 percent from $37.9 million for the same period a year ago.

Operating income for the six-month period ended December 31, 2004 decreased 2 percent to $4.9 million, which includes $0.8 million of one-time costs discussed above as well as income of $1.4 million from Wirthlin and $0.2 million from Novatris, compared with operating income of $5.0 million for the same period a year ago. Net income for the six months ended December 31, 2004 was $3.1 million, or $0.05 per fully diluted share, which includes one-time after-tax costs of $0.5 million, or $0.01 per share, for Black, compared to net income of $3.5 million, or $0.06 per fully diluted share, for the same period a year ago.

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Galloway Research Service

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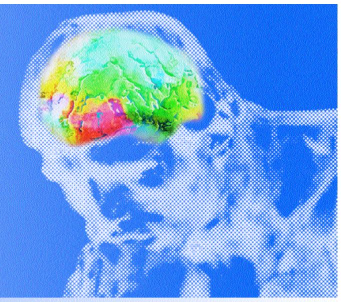

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- Bob Garfield, *Advertising Age* ad critic, author and *On the Media* expert

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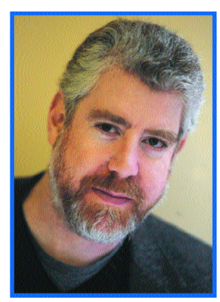

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Names of Note

continued from page 12

group.

Paul Mazzoni has been named to the newly created position of manager, marketing analytics at *Catalina Health Resource*, St. Petersburg, Fla., office.

Appointments at the new London office of research firm *Ciao* include **Rob Staunton** as U.K. head of e-commerce; **Ally Miller** as e-commerce team sales manager. At Ciao Online Surveys, **Nicola Robertson** has been named strategic account manager, **Rob Perry** has joined the online surveys team as sales manager, and **Jo Knight** has been added to the office's finance and administration department.

Arbitron Inc., New York, has named **Vaughan Scott Henry** executive vice president and chief information officer. He will be based at Arbitron's Research and Technology Center in Columbia, Md.

Debrah Harding has been promoted to the new dual role of director, policy and communication, and deputy director general Britain's *Market Research Society*.

Jonathan Rabson has been named European director to head up the new London office of Melbourne, Australia-based research firm *Insight Marketing Systems*.

Joan E. Gerberding has been promoted to vice president, Arbitron Outdoor, New York. In addition, *Arbitron Inc.* has appointed **Scott Musgrave** to senior vice president, marketing, U.S. media client software, and named **Carol Hanley** senior vice president, sales, U.S. media services. And **Michael Panebianco** has been named to the newly-created position of senior account manager and digital media specialist, Arbitron Outdoor Solutions.

Minneapolis research firm *Iconoculture* has named **Gene Raphaelian** vice president, products and services.

DSS Research, Fort Worth, Texas, has promoted **Michelle Dodd** to director of client services.

New York-based *Ipsos* has named **Douglas Cottings** senior vice president and head of the financial services practice in the U.S. He will be based in Charlotte, N.C.

The Collaborative Group, a Baltimore research and consulting firm, has named **Brad E. Fackler** vice president.

New York research firm *Ziment* has announced several promotions in its full-service research division within its client service and multivariate services/analytics groups: **Tim O'Rourke** to senior methodologist; **Cheryl Grosso** and **Chris Casazza** to director of client service; **Brett DiNatale** to manager of client service. In addition, **Steven Baruch** has been promoted to controller of the Ziment Group, the holding entity that includes Ziment, WebSurveyResearch and imap Research. And **Christopher Barreto** has been named Ziment's director of client service, based in Los Angeles.

LandAmerica Financial Group, Inc., Richmond, Va., has named **Elizabeth D. Sharp** vice president - product and services development. Market research and new product development are among her new responsibilities.

Karey Stiefer has joined *Chicago Focus* as managing director.

New York research firm *Advanced Focus* has named **Andrea Michaels** project director. **Colleen Branigan** has joined the firm as junior project director.

Indianapolis-based *Walker Information* has promoted the following associates in the marketing sciences and client services departments: **Scott Lambert** to statistical analyst II, **Meg Sanders** to program manager, **Laura Hreno** to senior program manager, and **Melissa Walker** to consultant.

Target Research Group Inc., Nanuet, N.Y., has named **George E. Brown II** vice president of client development.

2005

Telephone Facilities Directory

>>>

The 2005 Directory of Telephone Interviewing Facilities was compiled by sending listing forms to firms we identified as having permanent telephone interviewing facilities. This year's directory lists nearly 700 firms, arranged geographically. In addition to the company's vital information, we've included a line of codes showing the number of interviewing stations, the number of stations that use computer-aided interviewing (CATI), and the number of stations that can be monitored on-site and off-site. A searchable version of this directory is available on our Web site at www.quirks.com.

Codes - (e.g. 25-10-25-10)

1. **STATIONS** - No. of interviewing stations at this location
2. **CATI** - No. of stations using computer-aided interviewing
3. **ON-SITE** - No. of stations which can be monitored on-site
4. **OFF-PREMISES**- No. of stations which can be monitored off-premises

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Birmingham

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Fax 205-868-4173
bvwconnect@mindspring.com
www.connectionsresearch.net
Rebecca V. Watson, President
32-14-32-0

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Birmingham, AL 35244
Ph. 205-443-5399
Fax 205-443-5389
ceanes@grahammktres.com
www.grahammktres.com
Cindy Eanes, Vice President
40-30-40-20

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Birmingham, AL 35244
Ph. 205-443-5350 or 800-289-7335
Fax 205-443-5340
jjager@newsouthresearch.com
www.newsouthresearch.com
Jim Jager, President
40-30-40-20

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Tony Parker
150-150-150-150

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Mobile, AL 36619-0666
Ph. 251-660-2910 or 504-522-2115
Fax 251-660-2918
rsincorp@bellsouth.net
Patricia Rhinehart, Vice President
50-50-50-0

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Ph. 907-279-3982
Fax 907-279-0321
craciun@craciun.com
www.craciun.com
Amy Wiita
5-5-5-0

Arizona

Flagstaff

Social Research Laboratory
Northern Arizona University
Box 15301
Flagstaff, AZ 86011-5301
Ph. 928-523-1515
Fax 928-523-1754
srl@nau.edu
www.nau.edu/srl
Fred Solop, Director & Professor
20-20-20-0

Phoenix

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Scottsdale, AZ 85258
Ph. 480-483-2700
Fax 480-905-1416
jack.pollack@analyticalgroup.com
www.analyticalgroup.com
Scott Smith
60-60-60-60
(See advertisement on p. 15)

Arizona Market Research Services
Div. of Ruth Nelson Research Services
10220 N. 31st. Ave., Suite 122
Phoenix, AZ 85051-9562
Ph. 602-944-8001 or 303-758-6424
Fax 602-944-0130
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20-0-20-1
(See advertisement on p. 32)

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Ph. 602-258-4554
Fax 602-252-2729
info@brc-field.com
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Earl de Berge, Research Director
49-49-49-49

Consumer Opinion Trends
(A Division of Time N Talent, Inc.)
2400 E. Arizona Biltmore Cir., Suite 1100
Phoenix, AZ 85016
Ph. 800-633-7996 or 602-956-1001
Fax 602-224-7988
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Yvette Cave, Branch Manager
30-25-30-0

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shelley@data-call.com
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Shelley Thompson, Sr. Vice President
40-40-40-40

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Ph. 480-874-2714
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phoenix@focusmarketresearch.com
www.focusmarketresearch.com
Ray Opstad, General Manager
12-0-12-0

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10-0-10-0

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Tempe, AZ 85282
Ph. 888-967-4441 or 480-967-4441
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www.oneilresearch.com
Michael J. O'Neil, Ph.D., President
14-14-14-0

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Tempe, AZ 85282-1517
Ph. 801-434-9546
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Rebecca Walters, Client Development Manager
50-50-50-50

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jmuller@precisionresearchinc.com
John Muller, President
140-140-140-140

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300-300-300-300

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Fax 602-631-4477
michael@responseresearch.com
150-75-150-25

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Beth Fischer, President
10-10-10-0

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32-32-32-32

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Don Weston, President
30-30-30-30

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Gary Lorenzen, Exec. Vice President
60-60-60-60

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70-70-45-70

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(See advertisement on p. 73)

Southern New Jersey

(See Philadelphia, PA)

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(See advertisement on p. 61)

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(See advertisement on p. 122)

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Codes - (e.g. 25-10-25-10)

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150-150-150-150

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www.kpcresearch.com
Jack Clark, Research Director
36-36-36-36

Leibowitz Market Research Associates, Inc.
3120 Whitehall Park Dr.
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info@leibowitz-research.com
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15-10-0-0

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38-38-38-8

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150-150-150-150

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132-132-132-132

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85-85-85-85

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100-100-100-100

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27-27-27-27

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20-20-20-0

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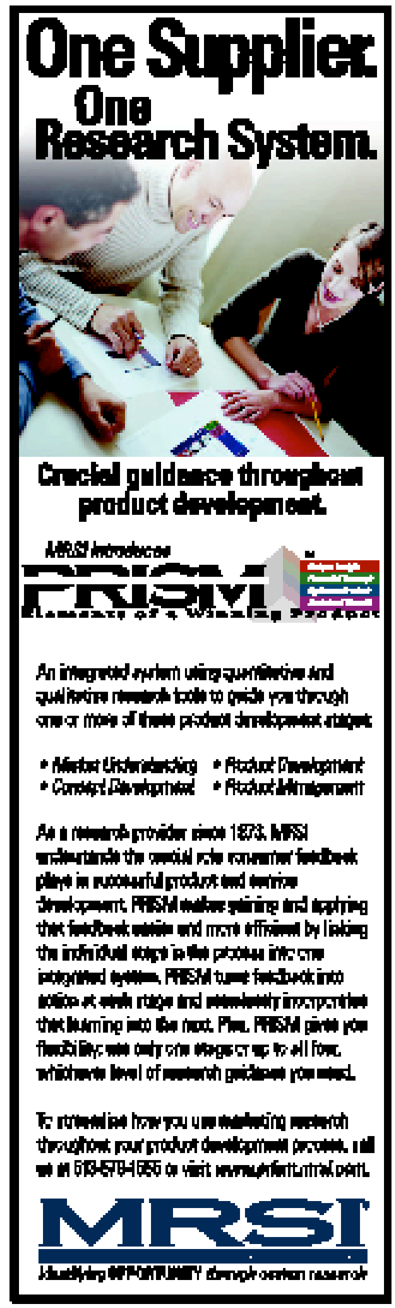

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55-55-55-55

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(See advertisement on p. 32)

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40-40-40-40

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djarrett@consumer-logic.com
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Dan Jarrett, President
38-28-28-28

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30-30-30-30

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75-75-75-75

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62-62-62-62

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60-60-60-60

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216-216-216-216

Sorensen Associates Inc
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Linda Zinck, Dir., Consumer Research
25-0-25-0

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Colleen Moore Mezler, President
15-15-3-3

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35-35-35-35

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300-300-300-300
(See advertisement on p. 28)

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2. CATI - No. of stations using computer-aided interviewing
3. ON-SITE - No. of stations which can be monitored on-site
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22-20-22-0

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50-50-50-50

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65-65-65-65

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44-44-44-44

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www.synovate.com
May Tse
52-52-52-52

TNS Canadian Facts
1250, rue Guy, bureau 1030
Montreal, PQ H3H 2T4
Canada
Ph. 514-935-7666
Fax 514-935-6770
infocanada@tns-global.com
www.tns-global.com
64-64-64-64

Saskatchewan

Saskatoon

Itracks
150 - 820 51st Street E.
Saskatoon, SK S7K 0X8
Canada
Ph. 306-665-5026 or 888-525-5026
Fax 306-665-2045
info@itracks.com
www.itracks.com
Harley Rivet, V.P. Sales
70-70-70-70

Itracks has 70 Web-enabled CATI stations, which allow our clients to monitor progress, view real-time and download their data 24/7. Integrate phone and Web-based surveys in one database to maximize response rates and increase efficiency. Founded in 1996, Itracks has a proven track record of delivering quality results quickly.
(See advertisement on pp. 42-43)

Codes - (e.g. 25-10-25-10)

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3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES - No. of stations which can be monitored off-premises

China

(See also Hong Kong)

Marcom-China.com
Rm. 13C, Xin Mei Building
No. 585 Tian Mu Zhong Road
Shanghai, 20007
China
Ph. 86-21-5100-3580
Fax 86-21-5100-3582
info@marcom-china.com
www.marcom-china.com
60-60-60-60

Marcom-Hong Kong.com Marketing Research Co. Ltd.
28/F Soundwill Plaza
38 Russell St., Causeway Bay
Hong Kong,
China
Ph. 852-2106-1915 or 86-1300-1165-144
Fax 852-2106-1333
30-30-30-30

Colombia

Centro Nacional de Consultoria
Diagonal 34 N 5-27
Bogota,
Colombia
Ph. 57-1-339-4888
Fax 57-1-287-2670
cnc@cable.net.co
www.centronacionaldeconsultoria.com
Carlos Lemoine, Manager
180-40-180-0

YanHaas
Avenida 39 #14-92
Bogota,
Colombia
Ph. 57-1-232-8666 or 57-1-288-7027
Fax 57-1-288-7575
contacto@yanhaas.com
www.yanhaas.com
40-0-40-0

Denmark

ACNielsen AIM A/S
Strandboulevarden 89
2100 Copenhagen O,
Denmark
Ph. 45-35-43-35-43
Fax 45-35-43-26-34
office@acnielsen.aim.dk
www.acnielsen.aim.dk
80-80-80-80

Berent Aps
Njalsgade 21G, 5
2300 Copenhagen S,
Denmark
Ph. 45-32-64-12-00
Fax 45-32-64-12-09
info@berent.dk
www.berent.dk
40-40-40-40

France

CSA-TMO Group
22 rue du Quatre Septembre
BP 6571
75065 Parris Cedex 2,
France
Ph. 33-1-44-49-44-00
Fax 33-1-44-94-29-67
claude.suquet@csa-tmo.fr
www.csa-tmo.fr
Jean Oddou, Managing Director
120-120-120-0

Efficience 3
26, rue Buirette - BP 202
51057 Reims,
France
Ph. 33-3-26-79-75-89
Fax 33-3-26-88-41-76
contact@efficience3.com
www.efficience3.com
Chloe Vignon, Int'l Research Manager
50-50-50-0

Field Facts France
25 rue de Ponthieu
75008 Paris,
France
Ph. 33-1-53-96-02-10
Fax 33-1-53-96-02-50
info@fieldfactsfrance.fr
www.fieldfacts.com
Ben Maury, Manager
12-12-12-12
(See advertisement on opposite page)

Focus World Europe
Rue Du Theatre
75015 Paris,
France
Ph. 732-946-0100 (U.S.)
Fax 732-946-0107 (U.S.)
paulette@focusworldint.com
www.focusworldinternational.com
Paulette Eichenholtz, President
50-18-50-50

GMV Conseil
25 rue Titon
75011 Paris,
France
Ph. 33-1-55-25-50-00
Fax 33-1-44-90-29-30
gmv-conseil@gmv-conseil.fr
www.gmv-conseil.fr
Eric Fournier, Managing Director
15-15-15-15

I.E.S. Information Europe Services
14 rue d'Uzes
75002 Paris,
France
Ph. 33-1-40-13-16-16
Fax 33-1-40-13-16-19
info@ieseurope.com
www.ieseurope.com
35-35-35-35

La Maison Du Test
100 Boulevard Sebastopol
75003, Paris,
France
Ph. 33-1-73-02-69-69
Fax 33-1-73-02-69-60
info@lamaisondutest.com
www.lamaisondutest.com
Malmanche Christophe, General Manager
24-24-24-0

MV2 Conseil
89/100 avenue Aristide Briand
92120 Montrouge, Paris,
France
Ph. 33-1-46-73-31-31 or 33-1-46-73-31-86
Fax 33-1-46-73-31-60
info@mv2group.com
www.mv2group.com
Christian de Balincourt, Director
510-510-510-510

Germany

abs Marktforschung
Abele und Strohle OHG
Dreifaltigkeitsweg 13
89079 Ulm,
Germany
Ph. 49-731-4001-0
Fax 49-731-4001-234
hallo@abs-marktforschung.de
www.abs-marktforschung.de
Stefan Stroehle, Managing Director
80-80-80-80

ASKi International Market Research
Moenckebergstr. 10
20095 Hamburg,
Germany
Ph. 435-654-3639 (U.S.) or 49-40-3256710
Fax 49-40-32567198
info@aski.de
www.askius.com
Kirsten Dietrich-Hommel
50-50-50-0

Confield Research
Freiheit 4
45127 Essen,
Germany
Ph. 49-201-82737-0
Fax 49-201-82737-37
info@confield.com
www.confield.com
50-50-50-50

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ENIGMA GmbH
Medien-und Marketingforschung GmbH
Burgstrasse 3
65183 Wiesbaden,
Germany
Ph. 49-611-999-600
Fax 49-611-999-6060
info@enigma-institut.de
www.enigma-institut.de
Thomas Pauschert, Managing Director
130-130-130-130

Field Facts Deutschland GmbH
Schillerstrasse 5
60313 Frankfurt-Am-Main,
Germany
Ph. 49-69-299-8730
Fax 49-69-299-873-10
info@fieldfacts.de
www.fieldfacts.com
Swantje Warns, Manager
12-5-5-0
(See advertisement on p. 143)

forsa GmbH
Max-Beer-Strasse 2/4
10119 Berlin,
Germany
Ph. 49-30-62882-0
Fax 49-30-62882-400
info@forsa.de
www.forsa.de
Mr. Florian Wenzel
180-180-180-180

gdp Markt und Meinungsumfragen GmbH
Richardstrasse 18
22081 Hamburg,
Germany
Ph. 49-40-2987-60
Fax 49-40-298761-27
info@gdp-group.com
www.gdp-group.com
260-260-260-260

infas TTR GmbH
Dreieichstrasse 59
60594 Frankfurt,
Germany
Ph. 49-69-96246-0
Fax 49-69-96246.46
info@infas-ttr.com
www.infas-ttr.de
30-30-30-30

Kramer Marktforschung GmbH
Hansestrasse 69
48165 Muenster,
Germany
Ph. 49-2501-802-0 or 49-251-609-2727
Fax 49-2501-802-100
contact@kraemer-germany.com
www.kraemer-germany.com
Henning Eichholz, Dir. International Projects
235-195-195-0

Link Insitut fur Markt- und Sozialforschung
Burgstrasse 106
60389 Frankfurt/Main,
Germany
Ph. 49-69-94540-110 or 49-69-94540-728
Fax 49-69-94540-105
klass.johannes@link-institut.de
www.link-institut.de
Thomas Gleissner
150-150-0-0

MR&S Market Research & Services GmbH
Mainluststrasse 2
60329 Frankfurt/Main,
Germany
Ph. 49-69-2426650
Fax 49-69-250016
mr-s@mr-s.com
www.mr-s.com
Thomas Aragones, Managing Director
30-30-5-5

Phone Research KG
Bramfelderstrasse 121
22305 Hamburg,
Germany
Ph. 49-40-611655-0
Fax 49-40-611655-55
mail@phoneresearch.de
www.phoneresearch.de
160-160-160-0

Valid Research
Am Bahnhof 6
33602 Bielefeld,
Germany
Ph. 49-521-96591-0
Fax 49-521-96591-50
info@validresearch.com
www.validresearch.com
Harald Blacha, Managing Director
60-60-60-60

Greece

GfK Market Analysis Ltd.
190, Hymettus Street
116 36 Athens,
Greece
Ph. 30-2-10-757-2600
Fax 30-2-10-701-9355
markanalysis@marketanalysis.gr
www.marketanalysis.gr
Anthony May, CEO
50-40-40-0

Prisma Options Ltd.
25 Alexandroupoleos, Ambelokipi
115 27 Athens,
Greece
Ph. 30-210-748-2001
Fax 30-210-775-6227
prismaop@hol.gr
Marita Sormunen or Anthi Kitsineli
30-20-30-0

Guatemala

IPSOS-ASK
5 Av 5-55. Torre 4, Nivel 18
Edificio Europlaza, Zona 14,
Cuidad de Guatemala, 01014
Guatemala
Ph. 502-365-1669
Fax 502-365-1615
flordavidzon@askdeguatemala.com
www.askdeguatemala.com
10-10-0-1

Hong Kong

Marcom-HongKong.com
28/F Soundwill Plaza
38 Russell Street
Causeway Bay,
Hong Kong
Ph. 852-2106-1915
Fax 852-2106-1333
kcw@marcom-hongkong.com
www.marcom-hongkong.com
40-40-40-40

Synovate - Asia Pacific Headquarters
9/F, Leighton Centre
77 Leighton Road
Causeway Bay,
Hong Kong
Ph. 852-2881-5388
Fax 852-2881-5918
brendon.shair@synovate.com
www.synovate.com
83-83-0-0

India

Colwell & Salmon Communications, Inc.
C-39 Sector 58
Noida, Uttar Pradesh, 201 301
India
Ph. 011-1-866-438-1302
Fax 011-1-866-438-1283
jholland@colwell-salmon.com
www.colwell-salmon.com
Colleen Egnaczyk
200-200-200-200

Majestic MRSS Ltd.
Raghuvanshi Mills Compound, 11-13 Senapati Bapat Marg
Lower Parel,
Bombay, Maharashtra, 400 013
India
Ph. 91-22-56604151 or 91-22-56604152
Fax 91-22-56604155
raj@mslindia.com
www.mslindia.com
Raj Sharma, President
250-250-250-250

Ireland

DataDirection
Carrick House
Finglas Business Center, Jamestown Road
Dublin, 11
Ireland
Ph. 353-1-864-3333
Fax 353-1-864-0588
info@datadirection.com
www.datadirection.com
Christina Fox
20-10-20-10

Millward Brown IMS
19, 20 & 21 Upper Pembroke Street
Dublin, 2
Ireland
Ph. 353-1-676-1196
Fax 353-1-676-0877
info@imsl.ie
www.imsl.ie
Margaret Hoctor
100-100-100-0

MORI Ireland
24 Windsor Place
Lower Pembroke Street
Dublin, 2
Ireland
Ph. 353-1-632-6000
Fax 353-1-632-6001
info@morimrc.ie
www.morimrc.ie
Eamonn Tracey
25-25-25-0

Italy

Experian Research
Cinecitta 2 - Palazzo Experian
Via Umberto Quintavalle 68
00173 Rome,
Italy
Ph. 39-06-72-42-21
Fax 39-06-72-42-24-80
marco.vecchiotti@experian.it
www.experian.it
450-450-450-450

Inter@ctive Market Research srl
Via Scarlatti 150
80127 Naples,
Italy
Ph. 39-081-22-92-473
Fax 39-081-22-92-463
info@imrgroup.com
www.imrgroup.com
Maurizio Pucci
15-15-15-8

Medi-Pragma S.r.l.
Via Nizza, 152
00198 Rome,
Italy
Ph. 39-06-84-55-51
Fax 39-06-84-11-850
medipragma@medipragma.com
www.medipragma.com
Dr. Michelle Corsaro, General Manager
60-60-60-60

Mesomark Group Srl
Via Fabio Massimo, 95
00192 Rome,
Italy
Ph. 39-06-326-90-31
Fax 39-06-36-00-40-13
info@mesomark.it
www.mesomark.it
Valeria Carlodalatri
24-24-24-0

Quadra Srl
Viale Vittorio Veneto 6
20124 Milan,
Italy
Ph. 39-02-45-43-231
Fax 39-02-45-43-233-00
quadra@quadra-res.com
www.quadra-res.com
Greg Pulcher
100-100-100-100

Japan

INTAGE Inc.
Global Services
2-14-11 Yatocho
Nishitokyo-shi
Tokyo, 188-8701
Japan
Ph. 81-424-76-5164
Fax 81-424-76-5178
global-service@intage.co.jp
www.intage.co.jp
Toshihiko Hino and Kiyomi Miyauchi
100-100-100-100

Latvia

TNS Baltic Data House
3 Kronvalda Boulevard
Riga, 1010
Latvia
Ph. 371-7-096-300
Fax 371-7-096-314
tns@tns.lv
www.tns.lv
19-19-0-0

Lithuania

WorldOne Research
Vilnius,
Lithuania
Ph. 44-20-7252-1118 (UK)
Fax 44-20-7252-1316 (UK)
info@w1-research.com
www.w1-research.com
56-56-56-56

Luxembourg

TeleContact
46, rue du Cimetiere
1338 Luxembourg,
Luxembourg
Ph. 352-49-76-11
Fax 352-49-76-13-333
linfo@telecontact.lu
www.telecontact.lu
105-105-105-105

Mexico

Cheskin México
Ensenada 61
Colonia Hipodromo
Mexico City, DF, CP 06100
Mexico
Ph. 650-802-2100 (U.S.) or
52-5-553-2754 (Mex.)
Fax 650-593-1125 (U.S.)
SuperDatos@cheskin.com
www.cheskin.com
Miriam Korzenny, Manager
5-0-5-0

EPI Marketing, S.A. de C.V.
Alencastre 110
Virreyes
Mexico City, DF 10000
Mexico
Ph. 52-55-2623-0034
Fax 52-55-5540-2980
info@epimarketing.net
www.epimarketing.net
Ricardo Escobedo, President
25-25-25-0

Market Intelligence
San Luis Potosi 43
6 Col. Roma Sur
Mexico City, 16020
Mexico
Ph. 52-55-5564-7566
contacto@marketintelligence.com.mx
www.marketintelligence.com.mx
32-32-32-0

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Pearson, S.A. de C.V.
Homero 223-4to. Piso
Col. Polanco
Mexico, DF 11560
Mexico
Ph. 52-55-5531-5560 or 52-55-5531-5324
Fax 52-55-5203-8230
pearson@pearson-research.com
www.pearson-research.com
Manuel Barberena, CEO
65-65-65-65

Survey Investigacion Y Estudios de Mercago, S.A.
Cascada No. 67
Col. Del Cramen Coyoacan
Mexico City, DF 040100
Mexico
Ph. 52-5-584-2584
Fax 52-5-264-4849
clientes@surveyinvestigacion.com.mx
www.surveyinvestigacion.com.mx
8-8-8-8

The Netherlands

Desan Research Solutions
Raadhuisstraat 46
1016 DG Amsterdam,
Netherlands
Ph. 31-20-620-15-89
Fax 31-20-638-72-99
info@desan.nl
www.desan.nl
100-100-100-100

Intomart Gfk bv
Noordse Bosje 13/15
1211 BD Hilversum Postbus 10004
1201 DA Hilversum,
Netherlands
Ph. 31-35-625-84-11
Fax 31-35-624-65-32
info@intomartgfk.nl
www.intomartgfk.nl
Leendert van Meerem, General Manager
140-140-140-140

M4 Marktonderzoek bv
Stationsstraat 19
5038 EA Tilburg,
Netherlands
Ph. 31-134-64-99-77
Fax 31-134-64-99-70
info@m4marktonderzoek.nl
www.m4marktonderzoek.nl
120-120-120-120

MOTIVACTION INTERNATIONAL
Research and Strategy
Postbus 15262
1001 MG Amsterdam,
Netherlands
Ph. 31-(0)20-589-83-83
Fax 31- 90 020-589-83-00
moti@motivaction.nl
www.motivaction.nl
Dr. Frits Spangenberg, President
60-60-60-0

Team Vier b.v.
Veenplaats 19
1182 JW Amstelveen,
Netherlands
Ph. 31-20-645-53-55
Fax 31-20-645-59-30
info@teamvier.nl
www.teamvier.nl
Jeannetta Berghahn
35-35-35-35

Telder Research Data & Facilities BV
Varkensmarkt 19
3811 LD Amersfoort,
Netherlands
Ph. 31-33-422-00-22
Fax 31-33-422-00-20
sales@telder.nl
www.telder.nl
76-76-76-76

Telder Research Data & Facilities BV
Varkensmarkt 19
Amersfoot, 3811 LD
Netherlands
Ph. 31-33-422-00-22
Fax 31-33-422-00-20
sales@telder.nl
Albert Buitenkamp, Managing Director
40-40-40-40

TNS NIPO
P.O. Box 247
Grote Bickersstraat 74
1013 KS Amsterdam,
Netherlands
Ph. 31-20-522-54-44
Fax 31-20-522-53-33
info@tns-nipo.com
www.tns-nipo.com
270-270-270-270

New Zealand

In Touch Research
P.O. Box 33679
Takapuna,
New Zealand
Ph. 64-9-919-3002
Fax 64-9-919-3001
karen@intouchresearch.co.nz
www.intouchresearch.com
114-88-114-0

Norway

Field Work Scandinavia
Christian Kroghsgate 1B
0186 Oslo,
Norway
Ph. 47-22-954-700
Fax 47-22-954-855
info@fieldwork.no
www.fieldwork.no
132-132-132-132

Research International Feedback AS
Grensen 5-7
0159 Oslo,
Norway
Ph. 47-22-00-47-00
Fax 47-22-00-47-01
info.no@research-int.com
www.feedback.no
36-36-29-0

Philippines

Western Wats Interviewing Center
3rd floor PIPC Building 7
Basak, Lapu-Lapu City Cebu, 6015
Philippines
Ph. 801-373-7735
Fax 801-379-5073
jwelch@westernwats.com
www.westernwats.com
Jeff Welch, V.P. Client Services
200-200-200-200
(See advertisement on p. 133)

Portugal

METRIS GfK
GfK Portugal
Rua Marquesda da Fronteira No. 8-1 And
1070-296 Lisboa,
Portugal
Ph. 351-21-000-02-00
Fax 351-21-000-02-90
info@metris.gfk.pt
www.metris.gfk.pt
50-50-50-50

Puerto Rico

Gaither International, Inc.
G.P.O. Box 70211
San Juan, PR 00936
Puerto Rico
Ph. 787-728-5757
Fax 787-728-5715
gaither@gaitherinternational.com
www.gaitherinternational.com
10-0-0-0

The Marketing Center
Cavalieri 1594, URB. Caribe Rio Piedras
San Juan, PR 00927
Puerto Rico
Ph. 787-751-3532
Fax 787-765-2096
info@tmcgroup.net
www.tmcgroup.net
20-20-5-5

SKA Division of Mediafax, Inc.
1606 Ponce de Leon Ave., Suite 600
San Juan, PR 00909
Puerto Rico
Ph. 787-721-1101
Fax 787-725-1340
sklapper@ska-pr.com
www.ska-pr.com
Stanford Klapper, President & COO
6-6-6-6

Singapore

Joshua Research Consultants
190 Middle Road
Fortune Centre #20-02
Singapore, 188979
Singapore
Ph. 65-6227-2728
Fax 65-6333-5517
joshuarc@singnet.com.sg
www.joshuaresearch.com
Carol Goh or Andrew Chong
20-20-20-0

Kadence Singapore
#11-01 Royal Brothers Building
Raffles Place, 22 Malacca St
Singapore, 084960
Singapore
Ph. 011-65-6513-2400
plee@sg.kadence.com
www.kadence.com
Piers Lee, CEO
20-20-20-20

South Africa

Proactive Insight
(Part of Synovate)
The Campus, Ground floor
Wrigley Field, 57 Sloane Street
Bryanston, 2021
South Africa
Ph. 27-11-709-7800
Fax 27-11-463-2233
info@proactive.co.za
www.proactive.co.za
Karin Bailie
146-146-146-0

Synovate
12th floor, The Korea Economic Daily Bldg.
441 Chunglim-Dong, Chung-Ku
Seoul, 100-791
South Korea
Ph. 82-2-741-3091
Fax 82-2-741-3096
kurt.thompson@synovate.com
www.synovate.com
39-39-0-0

Spain

Synovate
Calle Cartagena 70
28028 Madrid,
Spain
Ph. 34-91-8379-300
Fax 34-91-8379-302
susanne.ball@synovate.com
www.synovate.com
Susanne Ball, International Unit Manager
65-65-65-0

TNS Spain
Cami de Can Calders, 4
Saint Cugat del Valles
Barcelona, 08137
Spain
Ph. 34-93-581-94-10
Fax 34-93-581-94-03
rosa.moreno@tns-global.com
www.tns-global.es
Rosa Moreno
340-340-340-340

Sweden

Furst Scandinavian Research AB
Vastmannagatan 52, Box 183
101 23 Stockholm,
Sweden
Ph. 46-8-21-59-59
fredrik@frs.se
www.fsr.se
40-40-40-0

Intervjubolaget AB
Strengbergsgatan 2
871 33 Harnosand,
Sweden
Ph. 46-611-34-97-20
Fax 46-611-34-97-29
ib@intervjubolaget.se
www.intervjubolaget.se
130-130-130-130

Research RBM
Slagthuset
211 20 Malmo,
Sweden
Ph. 46-40-699-80-70
Fax 46-40-699-80-71
goran.lilja@rbmab.se
www.rbmab.se
Goran Lilja, Director
20-20-20-20

Switzerland

P. Robert and Partners S.A.
International Marketing Research
Avenue de Lonay 19
1110 Morges,
Switzerland
Ph. 41-21-802-84-84
Fax 41-21-802-84-85
carmstrong@probert.com
www.probert.com
Clive Armstrong, Dir. Int'l. Sales Dev.
David Perroud, COO
136-136-128-56

Full-service agency with extensive experience in integrated multi-country research. Leader in international telephone interviewing (136 CATI, 600 interviewers covering 25 national languages, 800,000 CATI and F2F surveys annually in Western and Central Europe, North and South America, Middle East, Japan and South East Asia). Report in English, German, French, Italian and Spanish. Re-certified in 2004 to ISO 9001:2000 Quality Management systems. (See advertisement on p. 9)

Taiwan

Opinion Research Taiwan
Minsheng East Road, Section 3, #57, 2F-3
Taipei,
Taiwan
Ph. 886-2-2509-6438
Fax 886-2-2509-6447
kevinmeyer@ort.com.tw
www.opinionresearchtaiwan.com
Kevin Meyer
20-10-20-0

United Kingdom

all global
5-25 Scrutton St., Unit E
Zetland House
London, EC2A 4HJ
United Kingdom
Ph. 44-20-7749-1434
Fax 44-20-7729-2700
info@allgloballtd.com
www.allgloballtd.com
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Trade Talk

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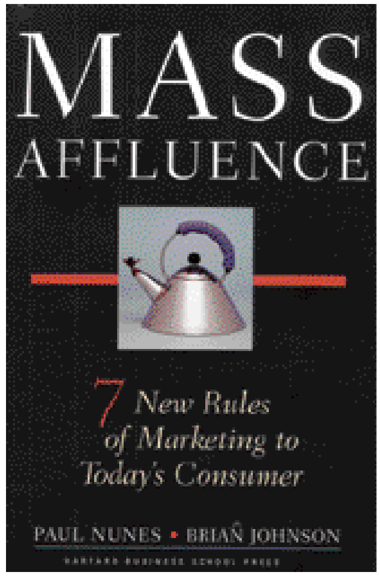
brand extension, try going for the gold, Nunes and Johnson say. "Executives should pick a substantially higher price point than their category's current average (anywhere from two to 10 times higher is a good start) and then imagine what they could possibly offer, given the freedom to spend – on development as well as delivery – that those sorts of price points would give them. What unmet customer needs could be addressed, and what innovative approaches could be considered, if the company were expecting to make that kind of money from each sale?"

This of course is not a move made lightly – brand equity being the precious commodity that it is – but if done with care and foresight, this kind of bold step can bring sales and profits that more than make up for the development costs. They discuss the example of Gillette's Mach 3 razor, which on its introduction retailed for an average price that was 35 percent above any other razor in the Gillette line and went on to capture 28 percent of the men's razor market and persuaded consumers to



increase their spending on a single pack of razors by 60 percent. Key to Gillette's success is that the company didn't abandon its more price-conscious customers but rather seized the chance to redefine the shaving experience and change consumer conceptions of what appropriate price points are for the category.

Money to be made

Clearly, there is money to be made in the marketing of luxury goods and services. But it's not enough to create a product or service, add some cachet to it and hope that it takes off. You must understand what luxury means to your target audience, what messages they will respond to. If you are interested in finding out, these two books offer a wealth of information. |Q

Let Them Eat Cake - Marketing Luxury to the Masses as Well as the Classes *(300 pages; $27), by Pamela Danziger, is published by Dearborn Trade Publishing (www.dearborn - trade.com).*

Mass Affluence - 7 New Rules of Marketing to Today's Consumer *(270 pages; $29.95), by Paul Nunes and Brian Johnson, is published by Harvard Business School Press (www.hbs - press.org).*

By Joseph Rydholm, *Quirk's* editor

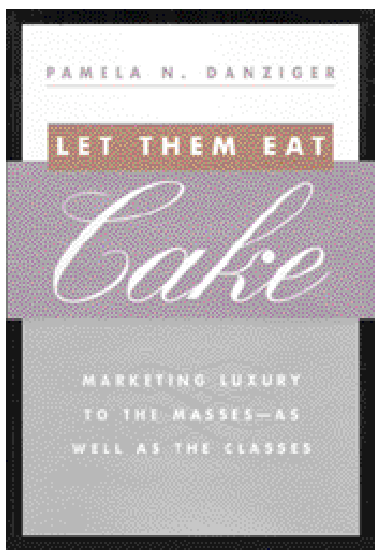
Show me the moneyed

F. Scott Fitzgerald's statement about the rich being "different from you and me" may not be quite so true anymore. With retailers such as Target bringing luxury to the masses via products from designers such as Michael Graves and Isaac Mizrahi, you don't have to be rolling in dough to be able to add chic niceties to your life.

Indeed, as two recent books explore, the very concept of luxury is changing.

In *Let Them Eat Cake - Marketing Luxury to the Masses as Well as the Classes*, author Pamela Danziger argues that luxury today is often more about the experience of luxury rather than the status and prestige that (in theory) comes with luxury. We still love our possessions, but more and more people are viewing a luxurious life as one filled with life-enhancing activities and experiences. *House & Garden*'s Editor-in-Chief Dominique Browning puts it this way in Danziger's book: luxury isn't only about luxurious goods but the luxury of time, of space, of quiet, of simplicity. Those things all come at a price, and consumers in many income levels are more and more willing to pay that price.

Drawing on findings from a two-year quantitative and qualitative study of the luxury market and also from interviews with executives at companies that are succeeding as purveyors of luxury items, Danziger offers very solid insights, presented clearly and with a good research- and/or data-based foundation. She covers it all, from the many facets of the psychology of luxury to specific sections on marketing luxury home products, luxury personal goods and luxury services.



There is much more to the idea of luxury than simply possessing expensive items. There are a whole host of accompanying psychological and emotional factors and Danziger's book does an excellent job of detailing them.

Huge opportunity

Paul Nunes and Brian Johnson explore the luxury market from a different angle in *Mass Affluence - 7 New Rules of Marketing to Today's Consumer*. They argue that there is a huge opportunity for marketers of all kinds to capture an untapped portion of affluent (and near-affluent) consumers' incomes by rethinking and recasting the standard assumptions of what constitutes a luxury product or experience. They make some thought-provoking arguments over the course of three sections on product positioning, designing luxury-market offerings and reaching customers.

In a section on product development, they cite research findings in which affluent consumers say they often feel forced to choose between buying a product that meets their needs but is too expensive and one that costs less than they would be willing to pay but isn't really what they are looking for. This unmet need, which the authors call a "middle ground," provides opportunities for marketers in many product areas to raise the bar and change their positioning.

When considering these growth opportunities, rather than a me-too

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