APRIL 2006

# QUIRK'S

## Marketing Research Review

# Advertising research issue

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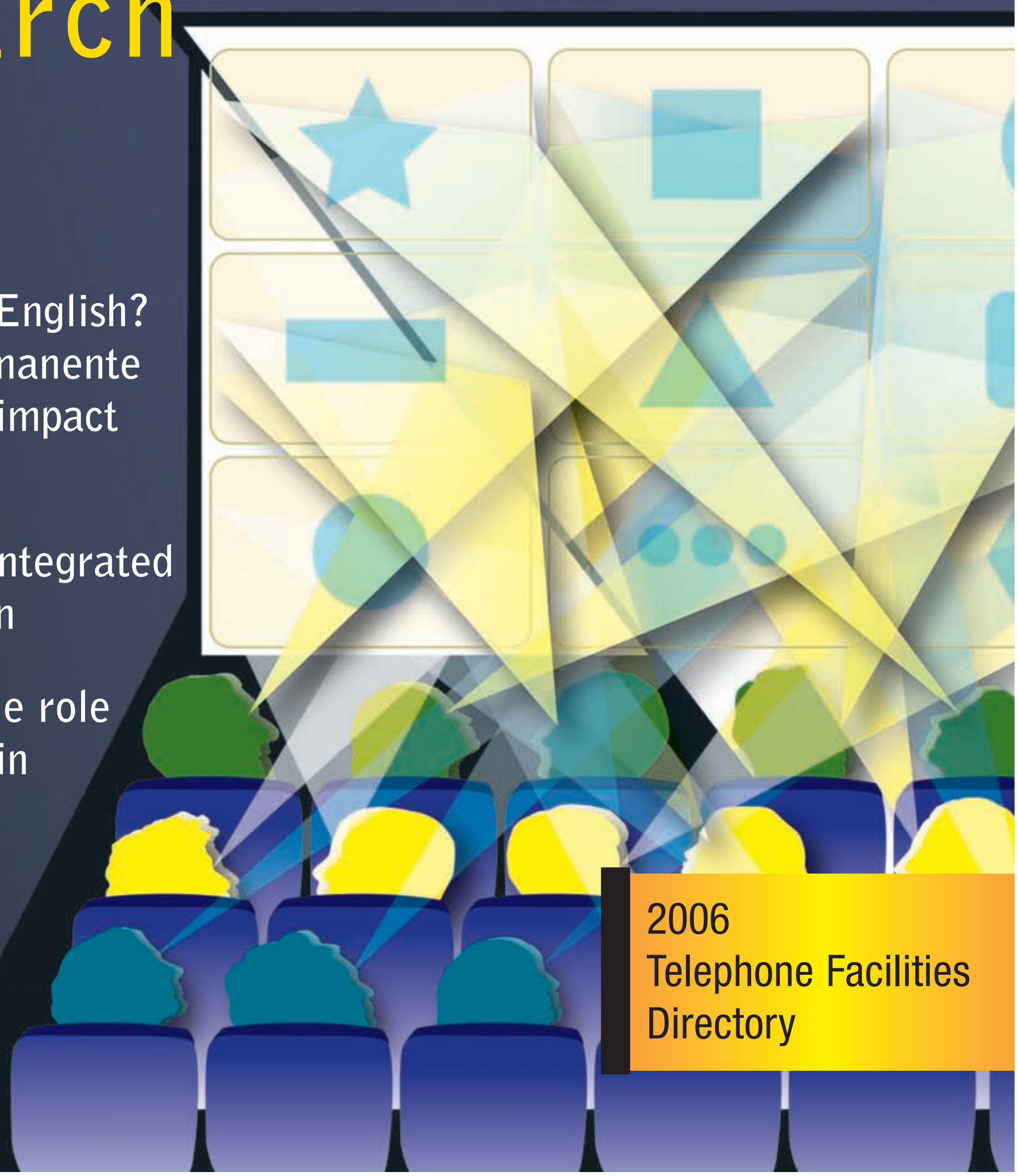

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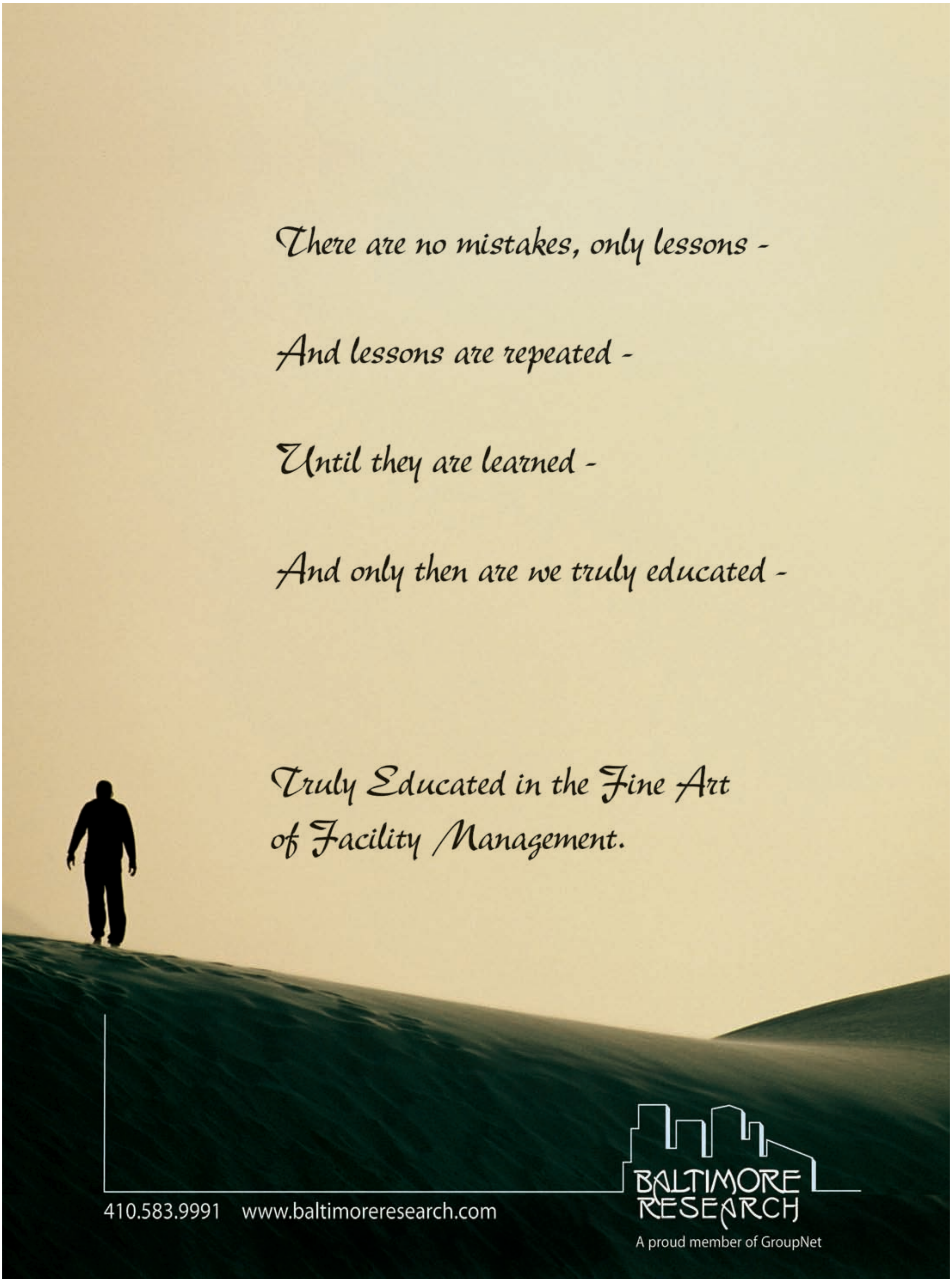
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Volume XX Number 4

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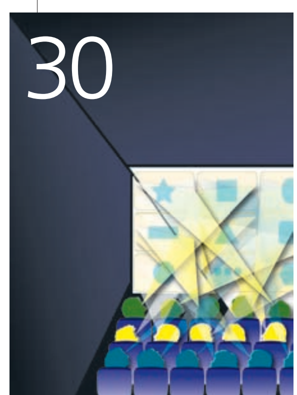


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# In case you missed it...

news and notes on marketing and research

## Are these ads a new window of opportunity?

The January 12 issue of *Ad Age* featured a tidbit about media agency MindShare's use of window-cleaning gondolas as an advertising vehicle. MindShare in Japan appropriated space on the window side of cleaning platforms for Northwest Airlines to promote its new seats in world business class that allow passengers to recline by as much as 176 degrees. The creative, prepared by Ogilvy, asked, "Does your seat recline all the way down to 176 degrees?"

Northwest is the third-largest air carrier in Japan and the largest international airline operating in the country and it needed to boost its business passengers. The MindShare platforms were seen on a number of office buildings in the Otemachi and Akasaka areas of Tokyo, selected on the basis of their occupants. Tenants included Cisco and NTT DoCoMo.

The new medium - a first for Japan - enabled Northwest Airlines to intrude on an executive's working day, an environment that's relatively ad free, and surprise them, thus making the ad more memorable. After all, how many business executives wouldn't want an office chair that could recline to 176 degrees, particularly after a big lunch?

"Window Washers Promote Northwest Airlines," *Advertising Age*, January 12, 2006

## Mums are the word for word-of-mouth

Gary Silverman of the *Financial Times* reported on Procter & Gamble's effort to enlist British mothers to help word-of-mouth marketing campaigns. P&G feels that a mother who is motivated to talk about a product sets off a chain reaction that will eventually involve 1,000 mothers in the discussion. At the start of the decade, it assumed that such a conversation would only involve 200 mothers. "I think it is largely because of the availability of technology. In the past, you had to go to the park and find another mom and tell her. Now they go into a chat room or copy an e-mail to a list of friends," said Gianni Ciserani, P&G managing director for the U.K. and Ireland.

Fearing that TV ads are losing their punch, P&G is becoming more interested in finding ways to compare the impact of different marketing activities. In working with a Cyprus company called Integration, P&G has found that word-of-mouth is gaining influence at a faster rate in Europe than most other marketing tools.

People in the U.K. are five times more likely than consumers in other parts of the Europe to call a company to express their views, Ciserani said. "We can confirm that U.K. consumers, and therefore U.K. mums, are the most vocal in expressing their happiness or disappointment with brands and companies. They talk to plenty of people once they have a positive or negative experience," he said.

P&G is employing targeted marketing efforts in the U.K. that focus on winning the affection of what it calls ambassadors - people to whom other people pay attention. One example of this approach has been on display in cities around the U.K. It's an experiential tour that gives visitors a chance to learn about how babies sleep. The exhibit is sponsored by P&G's Pampers diaper brand, which has been trying to forge connections with mothers by helping them with child-care issues. "We look at things through the eyes of a baby," said Paris Kafantaris, P&G's vice president for baby care in western Europe. "The whole idea is how the baby is developing when it sleeps at night."

Another way P&G targets ambassadors, Ciserani said, involves collaboration with retailers. Before launching a product, the company asks them what kind of consumers might be interested in the product - an approach that works well in the U.K. because of data collected in club-card programs. It then sends a letter and samples of the product to consumers in the hope they will like P&G's wares and talk about them, becoming ambassadors.

"Marketers Talking To Mother, " *Financial Times*, February 18, 2006

## Chase ads hit the wall

*Wall Street Journal* writer Suzanne Vranica profiled another unconventional advertising campaign in a February 21 article. An ad agency hired by a commercial-banking unit of J.P. Morgan Chase installed 90 two-foot-long stickers around outlets in the Indianapolis International Airport's departure lounges and eating areas in February. The decals were emblazoned with Chase's name and logo with messages such as: "This outlet works. Now you can too." Also highlighted were either the e-mail address or a local phone number for Chase's commercial-banking unit, which targets businesses doing between $10 million and $500 million in annual revenue.

Chase hopes the decals will be spotted by businesspeople passing through the Indianapolis airport, many of whom kill time waiting for their plane by working on a laptop computer plugged into a wall outlet. Others use outlets to charge cellphones. Chase is in talks to expand the program to other midsize airports around the country.

Spending on nontraditional venues - plane interiors, ski lifts and food trays at sports stadiums - is expected to outstrip traditional venues this year, according to the Outdoor Advertising Association. It projects spending on nontraditional outdoor ads will rise 10 percent to $346.5 million, while traditional venue spending will rise 8 percent to nearly $6.5 billion.

"You not only have to come up with creative solutions but invent unique places to put them," said Scott Montgomery, principal at Bradley & Montgomery, the Indianapolis ad firm that designed the campaign.

Chase is paying about $65,000 for the ads to appear for a year. For that money, it also gets four months of signage on in-terminal monitors that post flight information.

"Chase Finds a New Outlet for Plugs," *Wall Street Journal*, February 21, 2006

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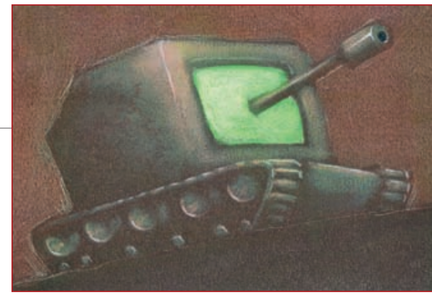
# war stories

## true-life tales in marketing research



*Editor's note: After a three-year absence, War Stories is back! The column is a semi-regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous anecdotes of life in the research trenches.*

*Without your stories, there can be no War Stories! If you want to ensure future installments, send your own (or a colleague's) tales of research-related wackiness to Shulman at artshulman@aol.com. Contributors may remain anonymous in print.*

Recently I was moderating a focus group in a facility located in a high-rise building in a large city. It was the second group of the evening and the time was about 9:15 p.m. One of my clients had, a few minutes earlier, brought me four new packages, which were supposed to replace other packages I was showing. When I was about to show the fourth package I realized I didn't know which of the existing packages it was replacing. So I excused myself and went to the viewing room to ask.

To my surprise, no one was there. My three clients - good-looking young men all - were gone!

I went to the lobby and the hostesses weren't there. I called out for them. No response. I called louder. Silence. I walked around to other areas of the focus group complex, looking for them. No luck!

I returned to the focus room and continued with the discussion. Just then, my cell phone rang. Respondents had been asked ahead of time to shut their phones down, but no one had asked me to do so.

Normally, I wouldn't have answered, but this situation was unusual. The Caller ID indicated it was one of my clients. The three of them had gone outside the building - to make calls, he said, since cell phones didn't work well inside (though mine appeared to be working just fine). They had asked the two lovely young hostesses to join them.

So all five went outside, not realizing that the doors of the building automatically locked at 9 p.m. Moreover, both hostesses had forgotten to take along their keys.

My client asked if I would mind coming downstairs to open the door for them. I pretty well had no choice. I was the only person at the facility, except for my respondents, and it just wouldn't be right to ask one of them to do it. So I excused myself, took the elevator down to the first floor and let my clients back in.

They did not complain later when I ran out of time to cover some of the subjects I was supposed to address.

When my friend Larry Sherman of DIRECTV received a notice that I'd be conducting a statistics workshop for the American Marketing Association he e-mailed me and expressed the hope that I wouldn't be heckled. (I think heckling came to his mind since he sometimes does stand-up at comedy clubs.)

I e-mailed him back, advising him that I'd handle any heckler by pointing out to the rest of the group that this person was a perfect example of a standard deviation, if not a standard error. Further, I'd tell the heckler, "You are regressing to be mean."

Sherman was appreciative of how I'd handle the situation, and wrote back that he could see that I was in a humor "mode." He also asked if, since we were both playing with words, and acting like kids, we could call what we were doing "multiple regression."

He then notified me that the research department at Mack Trucking Company was presenting a new statistical technique to management and calling it "Mack's factor analysis."

Judith Emilie of Judith Emilie Transcription Service had a problem collecting an invoice from a new client. After mailing multiple copies of her invoice over several months, she finally sent an e-mail to remind him of the unpaid invoice. He e-mailed back, saying he would send out payment, even though he hadn't yet been paid by *his* client (a reasoning which, she noted to me, would never work for her at the supermarket).

As an additional excuse, Emilie's client mentioned that his firm was only a small company. However, the automated signature at the bottom of his e-mail indicated that his "small company" just happened to have offices in New York, Chicago, Dallas and San Francisco.

Fay Parker of Market Research and Analysis reports that years ago she was supervising a telephone bank and noticed that over a few hours one particular interviewer, a new hire, hadn't completed any interviews, while other interviewers on the project had all completed several. When she approached the interviewer she found out why: The interviewer had her mouth wired, because of an obesity problem, and was virtually unintelligible.

In future issues, we hope to report on more quirky, loopy and strange happenings in the world of market research. But we can't do it without you! If you'd like your story to be told - anything related to research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires - please e-mail me at artshulman@aol.com. You may remain anonymous in print, if you wish.


What are they thinking?!?

## Advertising insert readership is alive and well

Results from the Customer Focus 2006: Retail study from Baltimore marketing firm Vertis shows that, for the third consecutive survey, advertising insert readership levels are consistently at 85 percent or above. Additionally, the study finds Web-savvy individuals still rely on advertising inserts, as 88 percent of Sunday newspaper readers surveyed via the Web said they read Sunday newspaper inserts, while 79 percent of those surveyed by phone read them.

"In today's Internet age and ever-changing retail landscape, the study's findings show that advertising inserts are still being read at the same level and remain an integral channel for retailers to reach consumers," says Jim Litwin, vice president, market insights, at Vertis. "Heavy Internet users are even more dependent on newspaper inserts than the average consumer. Also, women of all ages are an increasingly important demographic to target through inserts due to their purchasing power and retail decision making."

The study finds consumers use advertising inserts of all forms to help decide where they shop or to learn about available segments. More specifically, 52 percent of those surveyed by phone and 71 percent of those surveyed via the Web use inserts to decide where they buy groceries. Additionally, 29 percent of those surveyed by phone and 41 percent surveyed by Web use inserts to decide where to shop for health and beauty care products, while 28 percent and 39 percent, respectively, use them for office supply decisions.

The Vertis Customer Focus 2006: Retail study, which surveyed respondents for the first time via both the telephone and Web, shows the following additional findings, which provide insight into the purchasing trends and importance of advertising inserts across a variety of retail sectors.

• Grocery ad insert readership is strongest among women: 77 percent of women aged 18-34 do the majority of the household's grocery shopping. Since 1998, the percentage of women ages 18-34 reading grocery inserts has increased 14 percentage points. These women tend to like discount stores and have shown an interest in the grocery stores' ethnic and organic departments.

• Home electronics purchasing trends: Since 2004, the percentage of adults planning to purchase a computer has grown seven percentage points - greater than any other product category surveyed. One of the fastest-growing groups who plan on purchasing a computer is women aged 35-49, rising 10 percentage points since 2004. These women also show a greater interest than the average adult in special financing offers for home electronics, such as delayed credit card payments. Forty percent of women aged 35-49 said advertising inserts influence their overall buying decisions, while television influences 20 percent.

• Women aged 18-34 are an important demographic for furniture retailers: 33 percent of these women said they plan to purchase bedroom furniture, 26 percent plan to purchase bedding and 24 percent plan to purchase living-room furniture. When these women were asked about their last furniture purchase, "lowest price" was the greatest consideration for 39 percent of them, increasing nine percentage points since 2002. Meanwhile, "highest quality" dipped seven percentage points since 2002. Additionally, the percentage of women aged 18-34 turning to the Internet first when ready to make a purchase has increased from 19 percent in 2004 to 27 percent in 2006.

• Home improvement and DIYers turn to inserts for price and selection: The percentage of do-it-yourselfers has grown nine percentage points since 2004, as Americans are increasingly more willing to take on home improvement projects. Specifically, this group has grown most (12 percent in two years) with women aged 35-49. Seventy-three percent of women aged 35-49 who read ad inserts compare similar home improvement inserts before heading to the selected store.

• Key target audience for prescription purchases and drug store visits: Of all the age and gender groups surveyed, women 50 and older had the highest average prescription purchases per month (four) for their households - clearly

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Connect with respondents more efficiently
MSG

# names of note

**Lester Robert Frankel**, 92, who as a young government statistician helped develop an early technique for measuring unemployment and later was a New York-based executive with marketing research firms, died February 11 at his home in Potomac, Md., after a stroke. He had congestive heart failure. In the late 1930s and early 1940s Frankel did statistical work for what became the Works Projects Administration. With another statistician, he conducted one of the first surveys of federal unemployment by developing an effective sampling method. Those findings were released in 1940.

This effort, later under control of the Census Bureau, became known as the Current Population Survey, a monthly government survey of U.S. households focused on employment trends.

After Navy service during World War II, Frankel became chief statistician at Dun & Bradstreet in New York. In 1951, he joined Alfred Politz Research as vice president and technical director. He retired in 1993 as executive vice president of Audits & Surveys Worldwide.

*CBS Corporation* has created CBS Vision, a new research unit designed to explore and offer insight on emerging technologies, media consumption patterns and advertising value in the media marketplace. **David F. Poltrack** will serve as president of CBS Vision and has been promoted to executive vice president and chief research officer for CBS Corporation.

San Diego-based health care firm *Illumina, Inc.* has named **Matthew L. Posard** vice president of marketing.

Carlsbad, Calif., data integration firm *Advanced Warning Systems, Inc.* has named **Caitlin Ramsey** director of marketing and communications. Marketing research will be among her new responsibilities.

Bristol, Tenn.-based *King Pharmaceuticals, Inc.* has promoted **Rick Kelly** to senior product director with responsibility for marketing and life cycle management programs in the company's CV/endocrinology therapeutic area. **Adriann Sax** has been named executive vice president, business development and strategic planning.

**Kelly** **Sax**

*Research International* has announced a number of personnel moves. **Phil Sutcliffe** has been appointed global client director, Research International Innovation Services in the U.K. **Mark Cranmer** has been named worldwide CEO of Research International. He replaces **Roger Banks**, who is in discussions about another role within Kantar. In the Chicago office: **Peter Switzer** has been named senior vice president and leader of the qualitative division in the U.S.; **Larry Fisher** and **David Biernbaum** have been named senior vice president; **Frank Nowicki** has been named senior financial analyst; **Joanna Zero** and **Zach Duenow** have been named manager; **Jaclyn Peek** has joined the qualitative team in Chicago as a research manager. In the Stamford, Conn., office: **Jerry Forristal** has been named senior vice president; **Stefan Stefanov** has been named senior account executive within the global health care practice; **Manish Lulla** has been named senior research manager on the marketing sciences team; and **Roy Persson** has been named manager.

Australia-based *Pulse Group*, a research process outsourcing supplier, has named **N.K. Looi** head of the solutions department at its new operations center in Cyberjaya, Malaysia. **Cannie Tan** has been named head of the new office's client service department.

Cincinnati-based *Sigma: Research Management Group* has named **Dennis Devlin** director of quantitative services and **Gayle Gerhardt** manager, quantitative insights.

**Devlin** **Gerhardt**

Golden, Colo.-based *ingather research* has named **Jessica Schaller** to its senior management team as controller.

*ComScore Networks*, Reston, Va.,

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# product and service update

## ActiveGroup adds ActiveSearch to its research videostreaming

Nexidia, an Atlanta provider of rich-media search and speech analytics solutions, has partnered with ActiveGroup, a Norcross, Ga., provider of videostreaming for marketing research. Using Nexidia Developer Edition, ActiveGroup has expanded its suite of tools and services to include rich-media search capabilities. Dubbed ActiveSearch, the new functionality allows ActiveGroup to immediately index and make video content searchable for its clients.

Using ActiveSearch, authorized users will be able to search for a word, phrase or word combination in the audio track of a specific focus group or interview. Or for larger projects, clients can search across all focus groups or interviews that have been conducted in the same project. When the results are returned, researchers can play the video or create video clips of the content. For more information visit www.activegroup.net.

## Internet-enhanced TURF from Virtual Surveys

U.K.-based Virtual Surveys has launched VirtualTURF to help clients maximize the potential of their product range. An enhancement of the classic total unduplicated reach and frequency (TURF) technique, VirtualTURF can help those managing a range of products to know: how many people their range will reach; which range of products will reach the largest number of customers; and which range will sell the most units. VirtualTURF uses an iterative approach to find the best array of products to launch, based on the research. The Excel-based simulator allows the user to: optimize on definite buys, or definite plus possible buys; optimize on total number of people reached, or reach by frequency; assign frequency to be based on category usage or specific predicted product usage; allow items to be forced (for example if a soup manufacturer knew it wanted four specific flavors and wanted to know the best two to add to these); allow items to be excluded from a particular analysis, to look at different strategies; run the analysis by different sub-groups at the same time. The data for VirtualTURF is collected via online interviews, utilizing the Internet to show stimuli, to rotate concepts and products and to filter responses (e.g., only potential buyers of a product are asked to rate intended frequency of usage). For more information visit www.virtualsurveys.com.

## Updated version of WebSurveyor

Herndon, Va.-based research software firm WebSurveyor Corporation has released WebSurveyor 5.7, an update of its online survey product. New features include: an application programming interface which allows organizations to integrate WebSurveyor with major enterprise data systems; new list manager components, which include the capacity to search and filter mail lists for better targeting of survey invitations; new reporting features, which include a new default report with cover page; a new rich-text editor, which eliminates the need for HTML knowledge when compiling and formatting questions or performing the report analysis; multi-user account management capacity for private-hosted clients; and a new library management feature, which lets privately-hosted customers upload their own question and response libraries, as well as report and display templates. For more information visit www.websurveyor.com.

## New online European B2B panels from Research Now

London online research firm Research Now is offering European business-to-business sub-panels sourced from screening of its 800,000-member online panels. Research Now has profiled more than 20,000 business professionals in the U.K., 16,000 in Germany, 14,000 in France, 14,000 in Spain and 10,000 in Italy. Researchers can profile these people in terms of their management level within their company (profiled on 10 different levels), their job function (e.g.,

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# research industry news

## News notes

Chicago-based **Peryam & Kroll Research Corporation** has changed its name to P&K Research.

San Diego-based **WebSideStory, Inc.**, a provider of digital marketing applications, has filed a patent infringement lawsuit against **NetRatings, Inc.**, in the U.S. District Court for the Southern District of California. WebSideStory alleges that NetRatings infringes WebSideStory's patent rights. "We believe this action is necessary to protect the intellectual capital we have worked hard to develop in-house since 1996," said Jeff Lunsford, chairman and CEO of WebSideStory, in a company statement. "Although we have been focused on innovation and building value for our customers, we cannot ignore companies that we believe are infringing our intellectual property." In its complaint against NetRatings, WebSideStory is seeking unspecified monetary damages and an injunction against further infringement by NetRatings.

In February, Netherlands-based **VNU** announced it had entered into a settlement of the 1996 antitrust litigation brought by **Information Resources, Inc.** (IRI) against **Dun and Bradstreet**, **ACNielsen** and **IMS Health**. The settlement will result in a complete dismissal of all claims in the case. The case was on appeal following the entry of judgment in favor of defendants. Under the settlement agreement, VNU has agreed to a payment of $55 million, which, after tax, will result in a EUR 28 million charge to 2005 earnings. The company noted that the dismissal of IRI's claims will also terminate the Amended Indemnity and Joint Defense Agreement (JDA) among the defendants and thereby give VNU the flexibility to implement certain changes to its group structures that would have otherwise been limited under the JDA. These changes are expected to benefit VNU's earnings in future years.

In a company statement, Rob van den Bergh, chief executive officer of VNU, said, "We are pleased to have finally concluded this decade-old lawsuit. While we believe that the appellate court would have affirmed the dismissal of IRI's meritless case, it was in our company's best interest to resolve this matter and eliminate any further litigation uncertainty and expense. We have always maintained

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## Calendar of Events April-July

IIR will hold its Fuse: Brand Identity and Package Design event on April 24-26 at the Waldorf-Astoria in New York. For more information visit www.iirusa.com/BIPD.

The Society of Competitive Intelligence Professionals will hold its annual conference on April 26-29 at the Disney Coronado Springs Resort in Orlando, Fla. For more information visit www.scip.org.

Research firm Anderson, Niebuhr & Associates will hold a workshop on questionnaire design and use on April 27-28 in Minneapolis. For more information visit www.ana-inc.com.

Research firm Envirosell will hold its first science of shopping conference on May 8-10 at the Fairmont Turnberry Isle Resort and Club in Aventura, Fla. For more information visit www.envirosell.com/conference/scienceShopping1.html.

Research software firm Pulse Train will hold its annual users conference on May 10-12 at the Hilton Diagonal Mar Hotel in Barcelona. For more information visit www.pulsetrain.com/PTC2006.

ESOMAR will hold Innovate 2006, a conference on research innovation, techniques and technology, on May 10-12 at the Eden Roc Renaissance Resort and Spa in Miami. For more information visit www.esomar.org.

Research firm Anderson, Niebuhr & Associates will hold a workshop on questionnaire design and use on May 11-12 in Orlando, Fla. For more information visit www.ana-inc.com.

U.K.-based research association the Business and Industrial Group will hold its annual BIG conference, themed "Business Research Means Business" on May 17-19 at the Marriott St. Pierre Hotel, Chepstow, England. For more information visit www.bigconference.org.

Canada's Marketing Research and Intelligence Association will hold its annual conference on May 31-June 2 at the Westin Hotel, Calgary. For more information visit www.mria-arim.ca.

ESOMAR will hold WM3, a conference on worldwide multimedia measurement, on June 4-7 in Shanghai. For more information visit www.esomar.org.

Salford Systems will hold a conference on data mining on June 7-8 in Sydney, Australia. For more information visit www.salforddatamining.com.

The American Marketing Association will hold its annual Advanced Research Techniques forum on June 11-14 at the Marriott Monterey, Monterey, Calif. For more information visit www.marketingpower.com.

The Marketing Research Association will hold its annual conference on June 14-16 at the JW Marriott Hotel in Washington, D.C. For more information visit www.mranet.org.

The Conference Board will hold its annual marketing research conference on June 22-23 at the Hyatt Regency McCormick Place in Chicago. For more information visit www.conference-board.org.

IIR will hold its annual Shopper Insights in Action conference on July 19-21 at the Chicago Hilton and Towers. For more information visit www.iirusa.com/insights/.

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GO BACK TO SQUARE ONE
Emails to other sample sources produce a variety of responses and leave a lot of questions unanswered.
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QUIKQUOTE
ERROR!
Programming vendor asks, "What's QC?"
Bid requests sent to online sample vendors
Respondents report error in programming; you discover the data is not collecting properly.
LOSE ANOTHER DAY
Y2C Quik Quote helps you to focus on sample and data collection requirements. Bid returned promptly with all the info you need and a realistic response.
SQUARE ONE
Your day begins with the ridiculous request for an impossible online sample. (All in an average day's work.)
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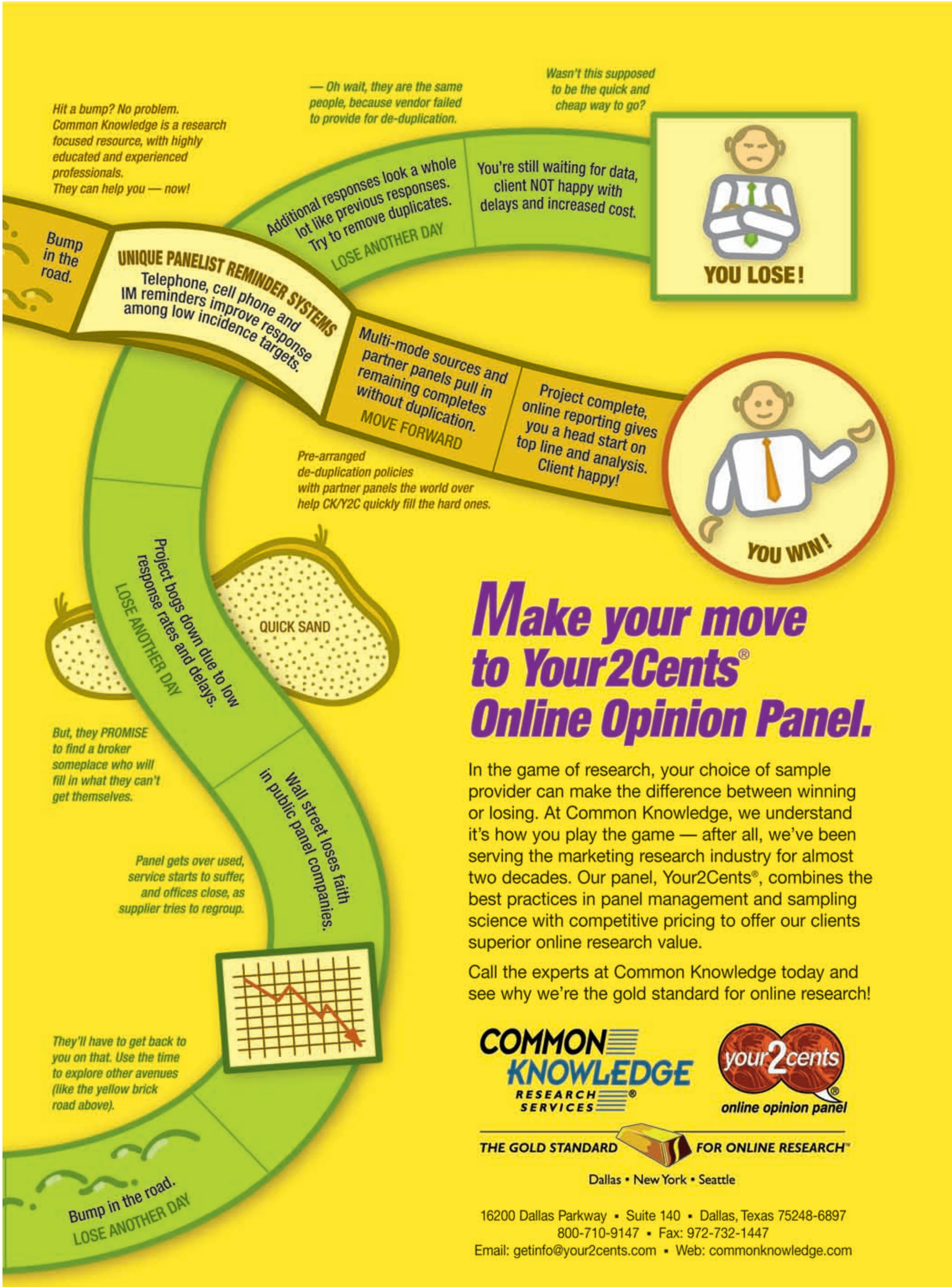
Hit a bump? No problem. Common Knowledge is a research focused resource, with highly educated and experienced professionals. They can help you — now!
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Wasn't this supposed to be the quick and cheap way to go?
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UNIQUE PANELIST REMINDER SYSTEMS
Telephone, cell phone and IM reminders improve response among low incidence targets.
Additional responses look a whole lot like previous responses. Try to remove duplicates.
LOSE ANOTHER DAY
You're still waiting for data, client NOT happy with delays and increased cost.
YOU LOSE!
Multi-mode sources and partner panels pull in remaining completes without duplication.
MOVE FORWARD
Project complete, online reporting gives you a head start on top line and analysis. Client happy!
YOU WIN!
Pre-arranged de-duplication policies with partner panels the world over help CK/Y2C quickly fill the hard ones.
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LOSE ANOTHER DAY
QUICK SAND
But, they PROMISE to find a broker someplace who will fill in what they can't get themselves.
Wall street loses faith in public panel companies.
Panel gets over used, service starts to suffer, and offices close, as supplier tries to regroup.
They'll have to get back to you on that. Use the time to explore other avenues (like the yellow brick road above).
Bump in the road.
LOSE ANOTHER DAY
Make your move to Your2Cents® Online Opinion Panel.
In the game of research, your choice of sample provider can make the difference between winning or losing. At Common Knowledge, we understand it's how you play the game — after all, we've been serving the marketing research industry for almost two decades. Our panel, Your2Cents®, combines the best practices in panel management and sampling science with competitive pricing to offer our clients superior online research value.
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By Trudy Ann Brandenburg

# Appearances can be deceiving

Being a moderator may look easy - the good ones make it look that way. But moderating is challenging. From the minute participants begin filing into the receptionist center until they leave the room for the evening, a moderator must be constantly on her toes.

If you're a moderator, you know how it is - the participants trod into the room with their pop and cookies. "Hi." "Hello." "Hi." You greet them with a hearty welcome and a smile, even though you may be so exhausted from the first group or the travel that you wish you could curl up in the back room, before the observers arrive, and take a power nap.

Based on your overall performance with the last group, or presumptions, or the way the participants introduced themselves, or the look on their faces, or what they're wearing, or a tiny premonition in your left elbow, you have that flicker of fear that the people, despite the incentive they'll receive, are going to hate what you have to talk about and be, basically, difficult.

All moderators know that fear. But thankfully, they are often happily surprised when the group ends up going quite well.

## Valuable lesson

Having moderated consumer focus groups and telephone conferences, I'm ecstatic to know that in fact, one cannot judge a book by its cover. This is a valuable lesson that being a moderator has really taught me and has helped me in other areas of my life as well as my career.

The man walking in with dirty hair and a ripped t-shirt may make you want to run from the room screaming, but about 10 minutes into the group you realize, "This is one smart guy."

Then there's the woman who says, "I'm just a stay-at-home mom who lives in a trailer until we can find a better place," and you instantly wonder where the recruiters went wrong. But as she begins to explain her situation, the investments she's made, and the research she's done on insurance companies, your heart lifts and you thrill to her insightfulness.

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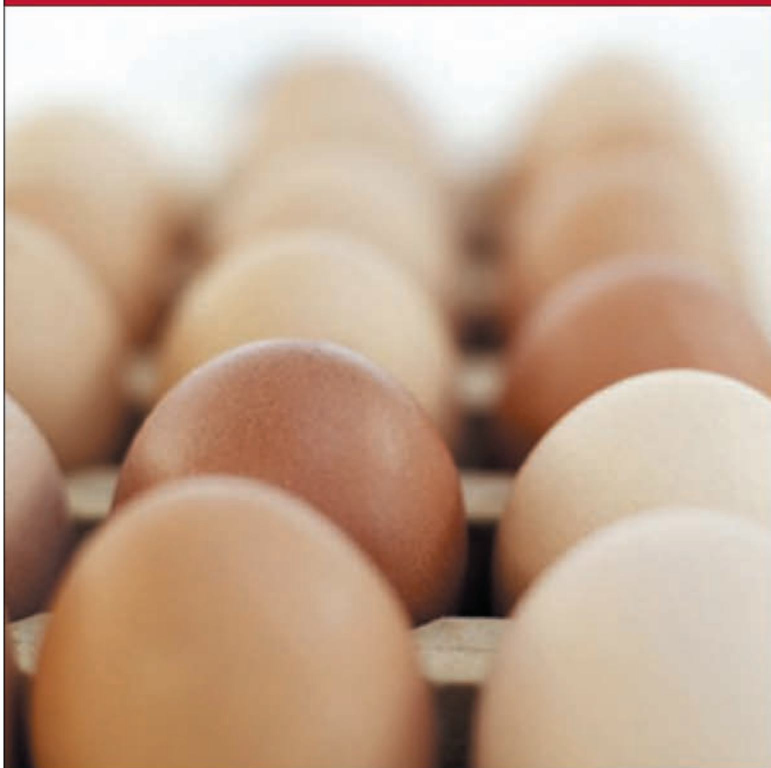
Some recent groups I moderated were no different. After the first group, spotting a severe negative tension in the air for whatever reason, I was expecting the bad vibe to breed. I had my work cut out for me.

The group ended up being rather quiet and somewhat uninvolved, but successful. Afterwards, I felt like I imagine people must feel on a deep sea fishing boat: fighting with that fish for hours and finally hauling it into the boat - exhausted yet pleased.

(I sometimes wonder what the people around the table may be thinking of me, but I never really want to know. "Her lipstick clashes with her shirt." "Her hair has a cowlick in the back." "What is she babbling about?" Do I sound hokey, fake, goofy? Am I acting too excited



about designing a brochure for an insurance plan? Often while reviewing the tapes, I find it was not as bad as I had imagined.)

Based on the experience with the first group, I begin the next by saying something that I think will ignite comments from everyone. Immediately, I wish I could hit a rewind button. They all look like deer caught in headlights. One man shifts in his chair, another taps his pencil on his notepad.

The room grows too quiet but I don't feel I should add to my comment. Then, like a cricket under a rock, the quiet lady to my left softly chirps out the most fantastic idea anyone has ever heard in their lives and the group becomes instantly engaged. I want to lean over and give her a thank-you hug.

**Exhausting**

Doing a series of groups can be exhausting due to the travel, the ever-present happy face you have to wear, and the energy it takes to act as if "that's the most fantastic idea I've ever heard" when, in fact, you've heard the same idea dozens of times within the past week. Sincerity is key, separating the good moderators from the bad.

It's not just the participants that amaze me. The different perspectives of a focus group's viewing clients can come at you like whitewater rapids in a raging river when you walk into the back room, especially if there is a large audience. Take a deep breath and have an open and calm mind before opening that door.

**Gain respect**

Moderating focus groups has not only helped me become a better listener, it has also helped me gain more respect for all kinds of people. I've learned that just because someone may look or talk or live a certain way, that doesn't mean they do not have opinions and valuable insights that should be respected and considered. Never judge a book by its cover. | Q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By Stephen J. Hellebusch

# Total unaided awareness?

The intent of this article is to help those who evaluate advertising via tracking studies to think about the practice and how it might best be done. Advertising tracking studies are a common phenomenon in the research world, and there are many ways to conduct them and many ways to look at the results. They are sometimes referred to as usage and awareness (U&A) studies, awareness and usage studies (A&Us), or awareness, trial, and usage studies (ATUs). Sometimes they are continuous, and sometimes they are conducted at points in time around the advertising events, or just at selected times for monitoring.

One thing all of these types of studies have in common is an attempt to measure the effects of advertising activity. They always measure changes in brand awareness. Sometimes they also measure changes in claimed brand usage, advertising awareness for brands, and brand imagery. Some marketing researchers and marketers are comfortable looking at changes in the total awareness measures and some have a preference for unaided measures. Those preferences can drive the method chosen to conduct the research and the way the data are tabulated.

A few definitions are necessary. If awareness information is obtained from respondents prior to the mention of any brand names, it is unaided awareness. An example would be "What brands of ready-to-eat cereal can you think of? What others? What others?" If the method is telephone or in-person interviewing, the question is asked until the respondent indicates he or she cannot think of any other brands. In online interviewing, it is an open-ended question. The questioning elicits brand names the consumer can recall. They were in the consumer's head, and, if not top-of-mind (first brand recalled, technically), at least not too far from it.

If awareness is obtained by asking questions that include the brand name, it is aided awareness. An example would be "Have you ever heard of Grape Nuts?" This demonstrates whether or not the consumer can recognize the brand name, a far easier task than recalling it. It was in the consumer's mind but may not have been anywhere near the top. Since people make mistakes, it may not even have really been in the mind. I can answer "yes" to "Have you ever heard of Johnson's Corn Flakes?" when, in truth, I have never heard of the product.

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In telephone interviewing, all unaided questions are asked first, before any brand names are mentioned: What brands are you aware of? What brands have you seen advertising for? What brands have you used?

The interviewer will have a list of brands in front of them and check the ones mentioned. If a respondent mentions a brand "unaidedly," the respondent is not asked the aided question for that brand. Consequently, to get total brand awareness, unaided and aided are

added together. Normally only two of these three related measures are reported - e.g., total brand awareness and unaided brand awareness, since total = unaided + aided.

In online interviewing, it is more difficult to handle the unaided questions. As with mail interviewing (the other main self-administered method), it is nearly impossible to skip asking the aided question when the respondent has mentioned the brand "unaidedly," because the unaided question is an open-ended question, and there is no way to know ahead of time what each respondent will say. When unaided and aided are asked in online interviewing, the aided is asked with an "irritation reducer" - "You may have typed in some of these brands before, but have you ever heard of __________?" The brands are then listed. Basically, this procedure makes "aided" equal to total brand awareness, and no adding is needed to obtain the percent aware of a brand; total = aided.

Thus, while you can have both types of awareness with any method of data collection, telephone or in-person make unaided easier and cleaner to gather and online and mail are more suited to aided awareness.

Which is the best type of awareness to examine in looking for the effects of advertising and promotional activity? The practical problem one faces when focusing on total brand awareness is that people are very good at recognition. If a brand is well-known (Kellogg's Corn Flakes) it may have near 100 percent total awareness (unaided + aided) all the time. It is impossible to detect changes if that is the case, and unaided awareness may be a much more useful measure. Additionally, if consumers are "unaidedly" aware of a brand, one can be certain that they have the brand in mind, while recognizing an established, well-known brand may be meaningless in terms of assessing the brand's current marketing activities.

On the other hand, if a brand is relatively unknown, the unaided measure may take years to change, while the total awareness increases markedly over time. Since recognition is easier than recall, it grows faster. In this case, the only way to note success in the promotional efforts is via the total awareness measures, and, while few recall the brand name, the fact that higher and higher percentages recognize it means that the efforts are having a positive effect.

When trying to select the proper measure, one other helpful tip is to make certain that the way the data are processed accurately reflect total unaided brand awareness. Often programmers who have no marketing research knowledge are creating data tables that show the results for each question, and nothing else. To get at total unaided brand awareness, some additional programming must occur.

Suppose, via telephone, a respondent is asked, "What brands of ready-to-eat cereal can you think of? What others?" The respondent mentions many brands, but not Frosted Mini-Wheats. The next question is "What brands have you seen advertised recently? What others?" When asked that question, the respondent says, "Frosted Mini-Wheats." At this point in the interviewing, no brands have been mentioned, so this person is aware of Frosted Mini-Wheats on an unaided basis. If the data tables show just the responses to each question, the unaided awareness of Frosted Mini-Wheats will be underestimated, since this person was not aware at the unaided brand awareness question.

It is necessary to either work with knowledgeable programmers or specify in advance that a total unaided brand awareness table be created, showing the number of respondents who mentioned a brand anywhere in the unaided questioning. This number will often be higher than the number seen on the unaided brand awareness table that is generated by just reporting the responses to one question.

**Think and discuss**

In attempting to measure the impact of promotional spending, it is always wise to think and discuss. It is hoped that this small effort contributes to that greater one. | Q

advertising research

By Karl Rosenberg

# Making a connection

## Analysis of beer ads shows the role of emotion in effective advertising

Ever notice how most successful salespeople are the kind of people you just feel good about? I don't think it's a coincidence. Let's face it: Most of us don't really like being sold to. Unless we have a pressing need, it's not an experience we seek out in our lives. Yet every now and then we find ourselves engaged by a salesperson and for some reason we become willing to set aside our usual habits and consider a change even though we have no apparent need to change. When this happens to me it's almost always because of something I've felt rather than something the person said.

Great salespeople have that uncanny ability to quickly make a relevant connection with us, to make us comfortable with being sold to. We feel like we're going to get something valuable out of the encounter. And this is almost always based on an emotional judgement we make early on or a feeling we have about the person. "He seems like a nice enough guy. I'll give him a listen." Or, "She seems enthusiastic. I wonder what her story is."

Making an emotional connection is as important in effective television advertising as it is in personal selling. After all, as Fairfax Cone said, "Advertising is what you do when you can't go see somebody. That's all it is." Much of what works in personal selling can be applied in principle to creating sales-effective advertising.

*Editor's note: Karl Rosenberg is senior vice president at MSW Research. He is based in the firm's Lake Success, N.Y., office. He can be reached at 516-394-6063 or at krosenberg@mswresearch.com.*

But in practice, advertising faces a huge disadvantage that one-on-one selling does not face. In a one-on-one situation the salesperson knows whether they've made that connection or not and can adjust their behavior and messaging on-the-fly based on feedback (verbal or nonverbal) from the target audience. An ad on the other hand is a one-way communication. How can an ad "know" when it has made that critical emotional connection? This is where advertising research comes in.

Our firm has developed a system to give advertisers feedback about consumers' response to an ad. It was designed to give the full picture, including the emotional response to the ad as well as more traditional communications measures. Hence we call it Whole Brain Diagnostics. In this article we'll take a look at the role of emotion in effective advertising and look at techniques we employ to measure the emotional response to advertising.

**Emotion's many roles**

We can think of many different roles that emotion plays in making advertising effective:

• *Attracts and holds the attention.*

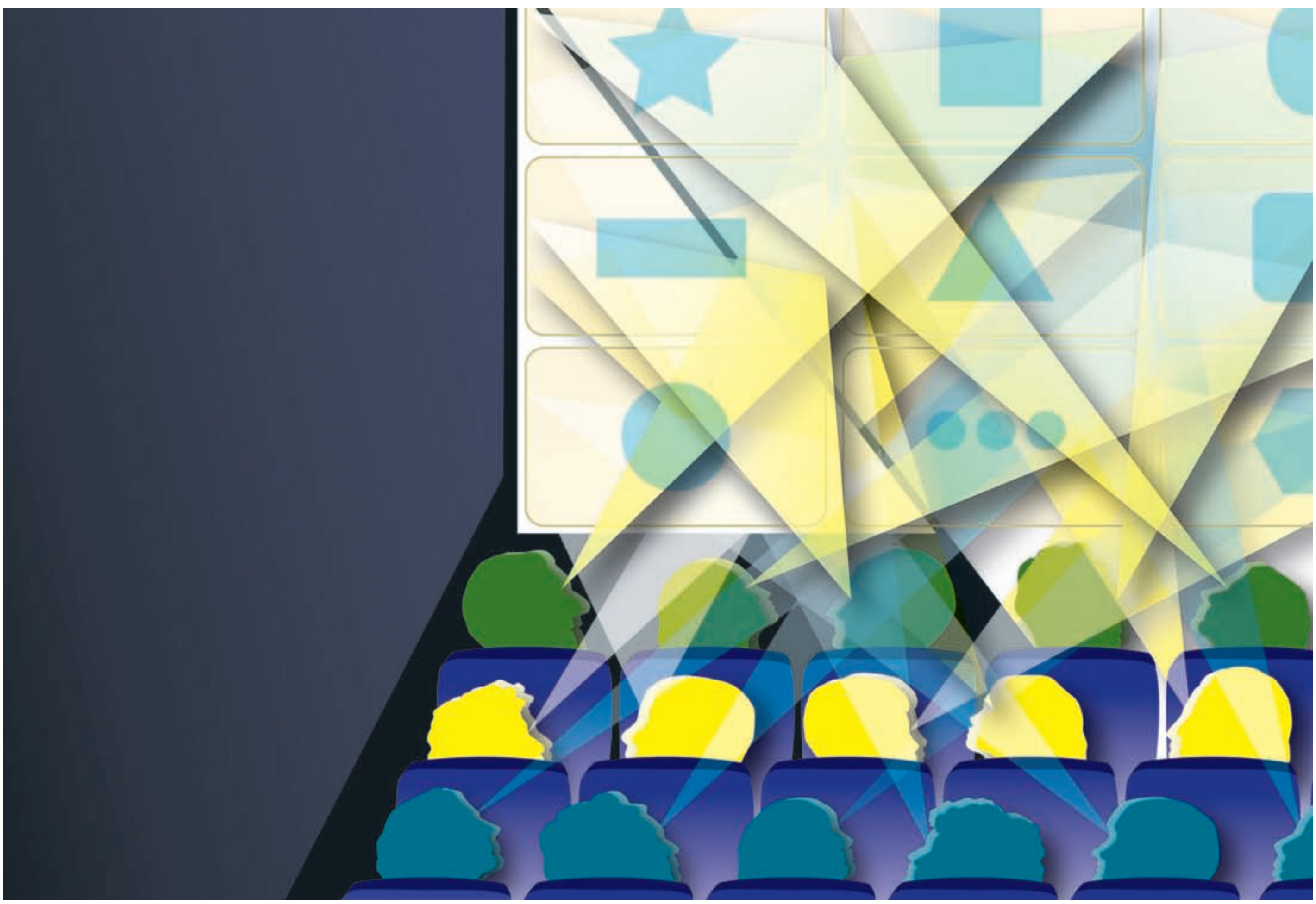
There are more ways to reach consumers today and it seems that it is actually harder than it used to be to attract and hold their attention. With the advance of the Internet consumers have become more media savvy and exercise more control over the media they are exposed to. This has placed greater demands on advertisers to make their messages more engaging to consumers. Emotion clearly plays a key role here. Our brains are hard-wired to attend to certain emotional cues on a primitive level so those cues can often get through to an otherwise disinterested viewer.

• *Makes a personal connection.*

Beyond attracting viewer attention, emotion can actually make a message more valuable to consumers. When an ad strikes a chord with us or when we can relate to a situation or character, we feel that our attention to the ad has been rewarded. That's a good thing for the brand serving up the message. On the other hand, when an ad fails to reward our attention with something relevant and meaningful we can feel in a sense deceived by the ad.

It's obviously not enough to just use emotional triggers to reach out and grab viewers; advertisers have got to then deliver something of value to the viewer, or risk disappointing the customer. At one time or another we've all been sucked in by a gimmick and then said to ourselves, "Why am I watching this?" Not the response we're looking for in today's on-demand world.

Just by making that personal emotional connection, advertising delivers



something of value to the viewer. It acknowledges, as Morris Hite did, that all advertising is in the end personal communication: "There is no such thing as national advertising. All advertising is local and personal. It's one man or woman reading one newspaper in the kitchen or watching TV in the den."

Emotional cues can help us relate to the ad's characters or situation, making us feel that, like a good salesperson, the ad is talking directly to us personally.

• *Builds brand equity*.

Building brand equity is all about building positive connections between your brand and the consumer. Emotion clearly plays a role here as well.

• *Creates a buzz*.

When people really connect with advertising that delivers an exceptionally rewarding experience, some will want to share the experience with others, creating a word-of-mouth buzz. As the number of interpersonal communication channels available expands (picture phones, instant messaging, blogs, etc.) opportunities abound. But what motivates buzz? Most likely, it's something emotional rather than rational.

As neurologist Donald Calne has said, the difference between reason and emotion is that reason leads to conclusions while emotion leads to actions. In the final analysis this is the most important role of emotion in advertising: it gets people to act.

This simple truth is borne out by the experience of another great ad man: "You can say the right thing about a product and nobody will listen. You've got to say it in such a way that people will feel it in their gut. Because if they don't feel it, nothing will happen." (William Bernbach, quoted in the book *Bill Bernbach said*.)

**Figure 1: Measuring Emotional Response**
**MSW Investments**

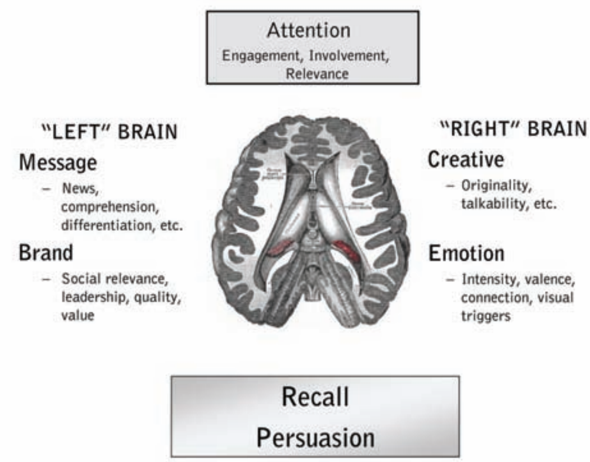
- Physiological measures:
  - Brain waves (eight different measures) with Weinstein
  - Facial EMG with SUNY
  - Eye dilation with Stanford University
  - Salivation response to visual elements
  - Galvanic skin response
  - Voice tension (U.S. Navy method) with Stanford University
- Non-verbal scales:
  - Smile scales with PEAC Canada
  - Emotional faces with Heidelberg University and GfK

**Measuring the emotional response**

While nearly everyone agrees that getting an emotional response to one's advertising is a good thing, there is far less agreement on how to detect if such a response occurred. Indeed many have even argued that it is not possible to accurately measure an emotional response or believe that the very act of questioning itself distorts the true response.

Over the years, our firm has investigated measuring the emotional response to advertisements (Figure 1). Early on, our efforts focused on finding a direct, physiological measure of emotional response. Working with partners in the academic community we connected respondents to every device imaginable. In the end however, these systems just did not yield reliable and reproducible results. Often, testing the same ad twice would yield widely different results. Non-verbal

Figure 2: Whole Brain Diagnostics




response scales, on the other hand, have consistently yielded more practical results and this is the approach we take today in both our adult- and child-testing systems.

**A study of emotion in advertising**

Recently, the American Association of Advertising Agencies (AAAA) and the Advertising Research Foundation (ARF) came together to showcase the work of research companies using methods to detect the emotional response to advertising. MSW was asked to contribute.

Four television ads from four different brands of beer – each known to have produced positive business results and each employing different means of making an emotional connection – were selected for testing by the AAAA. MSW put the four beer ads through our AD/insight Whole Brain copy test system.

Our Whole Brain Diagnostic Suite was designed to render a clear picture of how viewers respond to a test ad on emotional as well as rational levels. The system provides feedback both about how deeply the ad is processed and about how key mental modalities are engaged by the ad (Figure 2).

Television ads are linear events. One scene follows the next. However, the way we process ads is definitely non-linear. As we watch an ad we process it on several levels simultaneously and all levels interact with one another continuously. Attention activates our faculties. Our "left brain" semantically processes the messages while our "right brain" gets a feel for what's going on in a more holistic way. The two come together to synthesize some

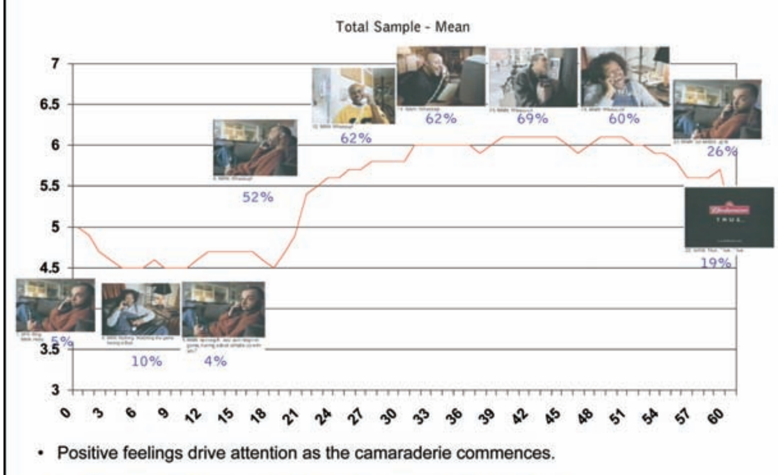


Figure 3: Budweiser - "Whassup?" Attention Track

• Positive feelings drive attention as the camaraderie commences.

Blue numbers = % of respondents who associate positive feelings with the scene.

sort of meaning. If it's relevant meaning, then attention may be turned up a notch to process more deeply, perhaps relating our stored personal experiences to what we're seeing and processing the stimulus more deeply. Then of course, any or all of this may or may not be connected and integrated with our existing image of the brand depending on how the ad plays out in time and how deeply we process all this information.

This is undoubtedly a gross oversimplification. But it reminds us just how much is going on before we come along and measure recall and persuasion and explains why creative teams can be disappointed with copy tests that only report persuasion and recall scores.

Four ads were tested for the AAAA/ARF project:

- Budweiser "Whassup" (:60)
- Bud Light "Ice" (:30)
- Miller Lite "Each Hand/Tastes Great" (:30)
- Heineken "The Weasel" (:30)

All the ads had aired and were known to have been effective. Therefore, assessing the sales potential of the ads was not at issue. The study's objectives were more about understanding how the emotional response to these ads drove sales.

Our Whole Brain Diagnostics reveal the impact of emotion on two levels. First, we examine how emotional cues contained in the ads govern the amount and depth of processing that respondents allocate to the ads. And secondly, we examine the processing modalities that were engaged by each ad, revealing the extent to which an emotional connection is made.

Attention is the mechanism by which we control how much mental energy is given to process each of the dozens of information channels that both impinge upon and arise from within our brain. It is that essential mental capacity that puts us firmly in control of our environment and not the other way around. Philosophically, it is at the heart of individuality and free will. And from a marketing perspective, it's why the consumer is boss. And in the end it is the consumer who chooses which brands to attend to and which brands to buy.

While most philosophers and psychologists agree that if we are in control of anything in this world it is our attention, those same thinkers would also admit that over the millennia our attention has been "educated." Emotion has played a key role in this education process. Studying how the attention tracks over the course of an ad gives us a window on the emotional response that is taking place in the mind of our target.

Take for example the "Whassup" ad from Budweiser (Figure 3). Things start rather slowly until – you guessed

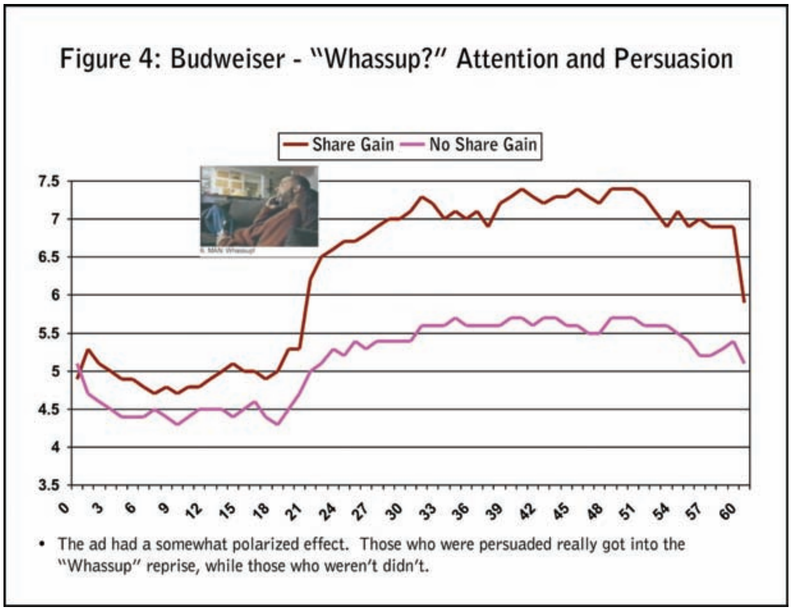



**Figure 4: Budweiser - "Whassup?" Attention and Persuasion**

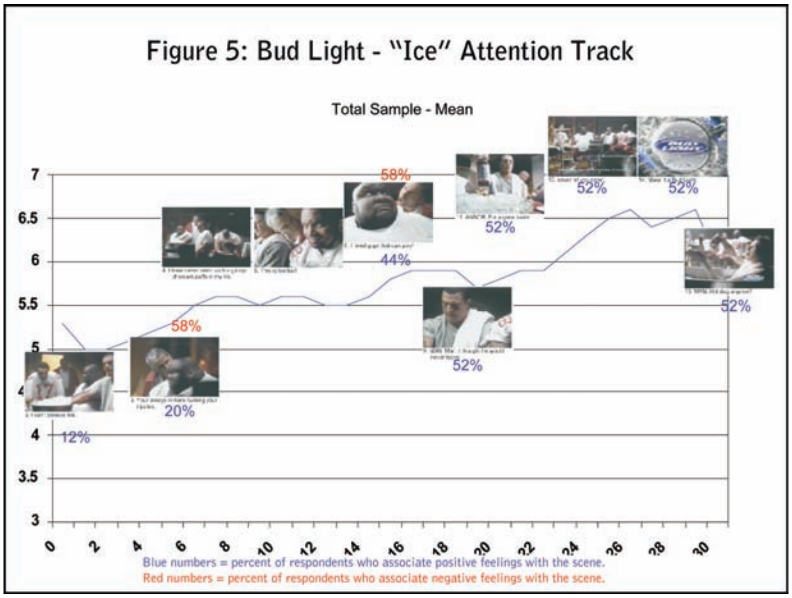
- The ad had a somewhat polarized effect. Those who were persuaded really got into the "Whassup" reprise, while those who weren't didn't.

it – that first "Whassup!" comes. Then things take off and stay up throughout the remainder of the ad. Our 21-35-year-old beer drinkers got into it. Bear in mind these ads had been seen before and there is likely some "delighted recognition" going on here. Some may be thinking, "Oh wow, this is that ad!" It was an enjoyable experience when they last saw it so they tune in for the reprise. Nevertheless, the lift is there and it carries the attention all the way through to the branding scene at the end, "True."

Interestingly, "Whassup" produced a bimodal response (Figure 4). There were those who got into it – the ad made that personal connection – and those who did not. We saw clear differences in the depth of processing among those who were "persuaded" by the ad to allocate a greater share of drinking occasions to Budweiser versus those who were not "persuaded."

When we layer our measure of emotional valence onto the Attention Trak data we see that this step-change in attention is associated with positive emotional feelings – camaraderie perhaps? Ads that succeed at making that emotional connection rarely connect with everyone. When an ad produces a polarized response it's important to know who the ad connected with so that subsequent efforts can focus on other important segments that may have been left out.

We've also seen how negative as well as positive emotional triggers can attract the attention. The track for Bud Light "Ice" is much different however (Figure 5). It has more of stair-step pattern. The strength of this




brand story is that it just keeps building from beginning to end.

Clearly, there are key emotional drivers along the way at each step. These are the scenes our guys found particularly "relevant" and they drew them deeper and deeper into the story. First at second 6, when the coach is giving that enormous guy with the great face an earful. Then again around second 15, he's back again and the tension builds until finally, when you thought he'd never leave, relief at last, and it's party time!

What 21-35-year-old male can't relate to this situation? Whether it's the coach or the boss or even dad, each has gotten an earful at one time or another and lived to deal with the emotional response. Interestingly, these early scenes evoked overwhelmingly negative emotions yet they drew respondents into the ad instead of driving them away.

Ah, but endurance has its rewards. At second 20, the tables turn and attention climbs even higher. This scene was associated with the most positive emotional response.

In case you were wondering if all ads show this generally upward pattern of increasing attention, there's the Miller Lite case. This ad was selected because its approach was primarily rational and not emotional. Not surprisingly, the Attention Trak for the Miller Lite ad is essentially flat (Figure 6).

Once again however, it pays to look beneath the surface (Figure 7). This "low carbs/great taste"-focused ad produced a polarized response, finding its mark only among those guys looking to lose their love handles yet keep their world-class beer. The rest of your

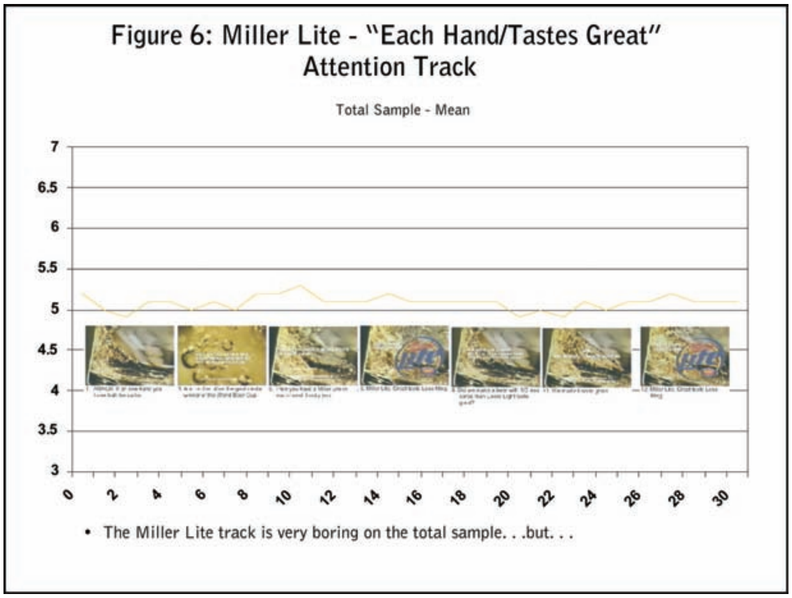



Figure 6: Miller Lite - "Each Hand/Tastes Great" Attention Track

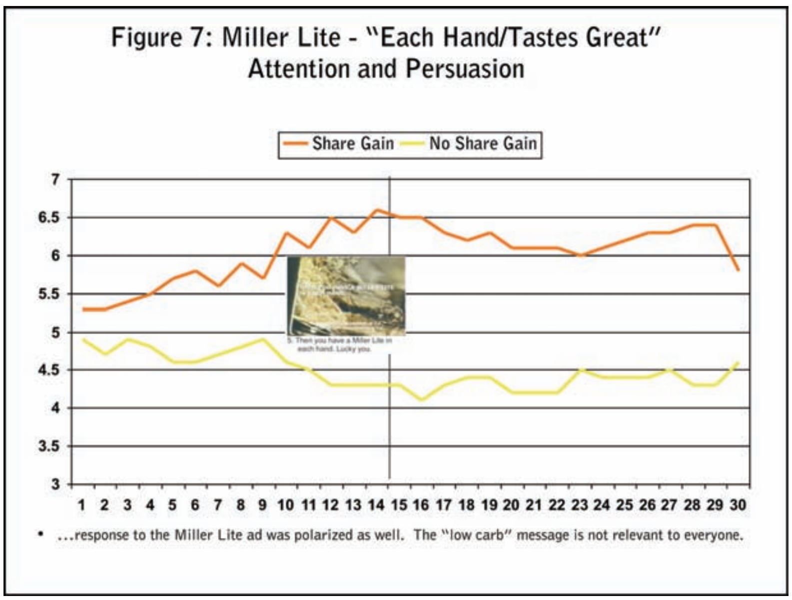



Figure 7: Miller Lite - "Each Hand/Tastes Great" Attention and Persuasion

typical 21-35-year-old beer drinkers couldn't have cared less. You can be sure that Miller has something else in mind to capture the other guys...as did Heineken with its classic, guy-beer-girl, formula (Figure 8). Notice how the scenes associated with a positive emotional response are also associated with increased attention and engagement with the ad.

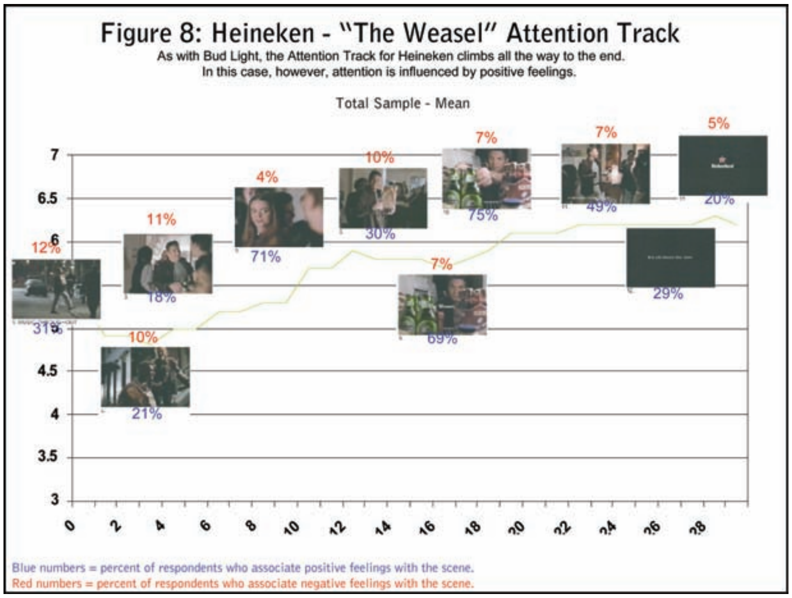
**Emotional connection to the brand**

The beer ads demonstrate emotion's central role in engaging consumers. They also show that both positive and negative emotional responses can engage the attention.

Beyond engaging consumers in the ad, an emotional response to an ad can enrich the brand's meaning to consumers and build brand equity. Our Whole Brain Diagnostics measure the extent to which an ad is being processed emotionally as well as rationally. Each ad leaves its own unique neural signature, as revealed by our depth-of-processing spider maps.

The maps summarize commercial and brand perceptions among those who were persuaded by the ad versus those who were not. They give us a picture of both how the ad was connecting with the viewer and which of the connections were driving persuasion.

The processing map for "Whassup" shows that there was very little verbal message processing going on among viewers of this ad. But that doesn't mean there was nothing happening. Quite to the contrary, viewers were highly engaged, as we saw in the Attention Trak for this ad. What's happening is that "Whassup" is being processed more holistically in both the Creative and Emotional quadrants. Viewers are being entertained and



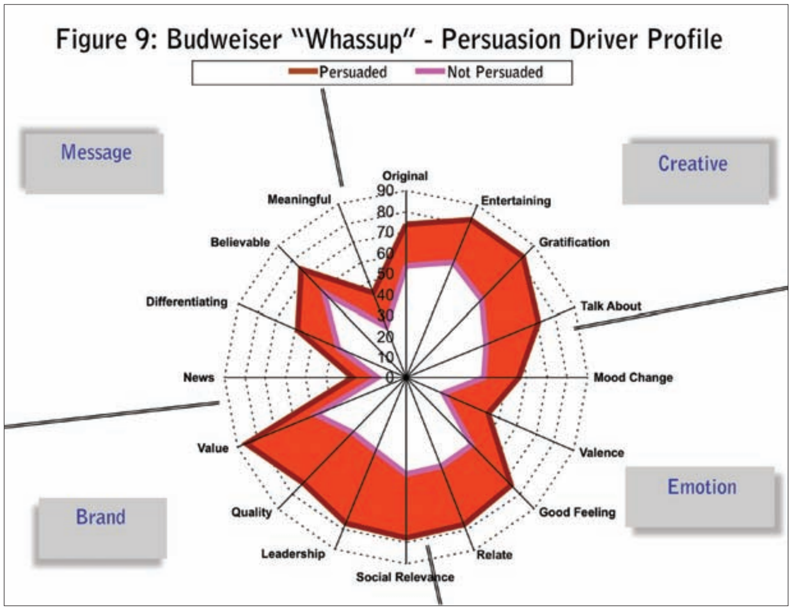

most are making an emotional connection either because they can relate to the characters or they're able to participate in the good feelings of the moment. The ad delivers something of real value to the viewers - camaraderie.

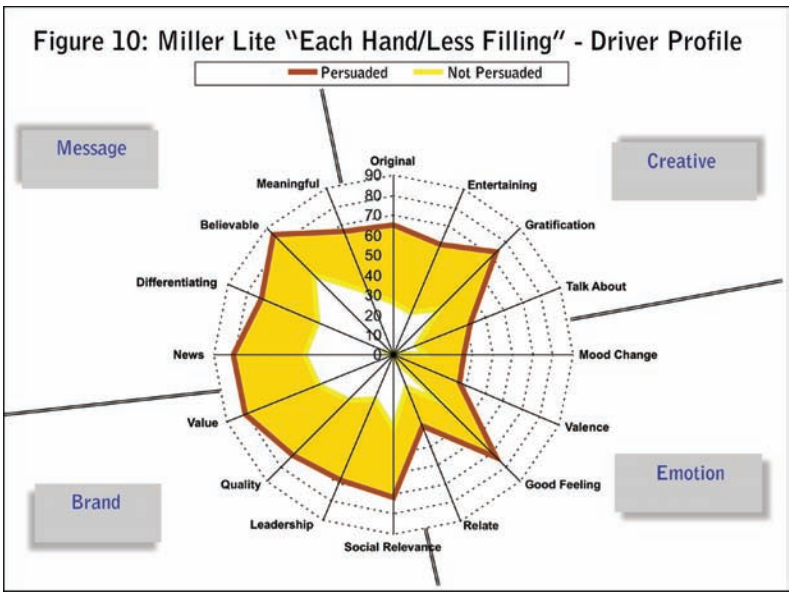
The payoff comes in the Brand quadrant - the thickest band and source of the ad's selling power (Figure 9). The viewing experience is not only positive and rewarding it is connected to the brand. The brand plays a central role in this wonderfully engaging "life is good" story: havin' a Bud; life is good; true, true.

The processing map for the Miller Lite ad is very different, as seen in Figure 10. The verbal Message quadrant is where the action is for Miller Lite. This is a classic message-oriented ad that delivers believable and differentiating new news about the brand. Can this more cognitive approach make that important emotional connection as well? Yes it can but obviously in a different way. Good thoughts can evoke an emotional response just as compelling visual and situational cues can. There's more than one way to make that emotional connection. On the Miller map we can see that those who were persuaded by the ad were left with an overall "good feeling" from watching the ad. Why? Perhaps because they learned something valuable about the brand that is relevant to their personal lives - lower carbs in a great-tasting beer.

**Difficult to make a connection**

The television medium is not as




compelling to consumers as it was 20 or 30 years ago. It is more difficult for advertisers to make the personal connection that truly builds brand meaning through television, given the increased clutter, changing viewing habits and alternative entertainment channels available.

To maximize the economic value of television today, managers must change the way they think about how to use the medium. A new model is evolving among advertising thought leaders that is replacing the old AIDA (attention, interest, desire, action) flowchart. Our new view is that television is a channel through which we can deliver value to consumers rather than a channel through which we simply deliver one-way communication. The new model focuses more on constructs of engagement, enjoyment and enrichment of brand meaning rather than old ideas of recall and communication. In the end the objective remains to persuade, sell more of our brand and build stronger brand relationships. But how we consistently achieve this payout must be rethought if we are to maximize our return from today's television investment. | Q

advertising research

# One size almost fits all

By Chuck Young

## Integrated testing for integrated ad campaigns

In today's confusing world of proliferating media choices, a primary role of advertising pre-testing research is to bring clarity to the problem of how to divide up your precious advertising dollar. TV, print, radio, outdoor, direct response, the Internet - how do you decide in advance which of these media will work hardest for you? In theory, conducting research on the creative elements of your integrated campaign idea should be able to help. But does it?

The problem is that, over time, many ad professionals have developed very different mental models of how to think about different media. Tactically, one might think of television as an awareness-generating medium while print is an educational medium; outdoor or radio are media that keep your brand top-of-mind; while direct mail is highly targeted and new media such as the Internet are interactive.

As a result, researchers who specialize in testing the different forms of advertising operate in silos of research, with measurement constructs that rarely intersect those used by other researchers. For instance, how would you compare a banner ad's click-through rate to a print ad's eye-tracking data to a TV commercial's branded attention score?

With all the different research that is used by different media to prove the advantages of using their channel to reach the consumer, it is easy to lose sight of the basic fact that all advertising is, in the end, supposed to be a sales medium. In the end, all ads have to be consumed by one and the same mind - your target customer's.

By looking at the problem of advertising effectiveness in all its forms with a coherent, overlapping set of mental models, we can improve the way we organize and communicate our research data. This is useful because it makes it easy for ad managers to do comparisons of performance metrics across media platforms. It is a way to fit together all the different pieces of research onto a decision-maker's spreadsheet.

With that in mind, I would like to show you how you can start with one pre-testing model of how advertising works for a particular medium and, by systematically changing only one or two variables at a time, use it to create corresponding models for other

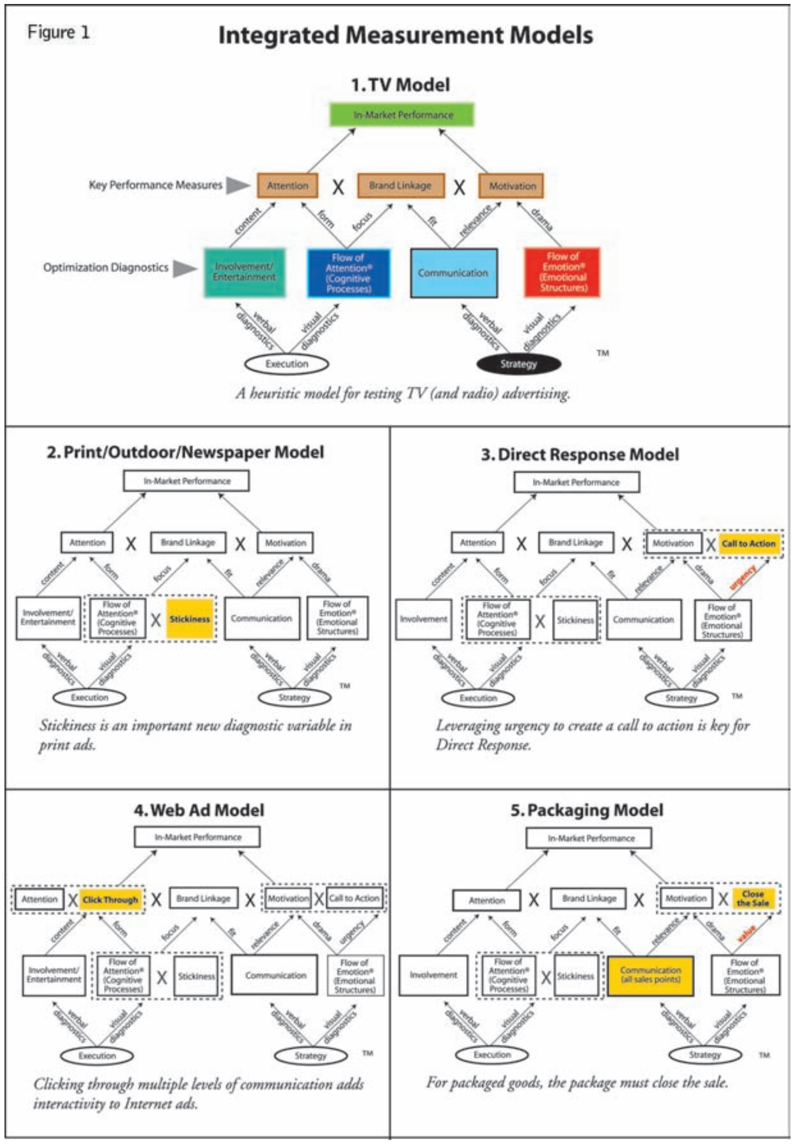
*Editor's note: Chuck Young is CEO of Ameritest, an Albuquerque, N.M., research firm. He can be reached at 505-856-0763.*

media (see Figure 1).

*1. The TV model*

Since it is still the major line-item in the advertising budget, we start with television advertising. The Ameritest model of TV advertising is a heuristic or teaching framework for testing television creative. Without going into the details of particular testing procedures, which vary in practice from one research supplier to another, we can still use the model in a general way to identify a set of theoretical constructs that almost all research suppliers can agree are important to measure.

Our conceptual model says that for a TV commercial to be effective it must accomplish three things: 1) it must win the fight for the attention of the consumer in a medium filled with the clutter of competing advertising; 2) it must be well-branded, so that the consumer properly attributes the advertising message or experience to the sponsor's product or service and not to someone else or to the category in general; and 3) it must motivate the consumer - that is, it must move the mind of the consumer somehow closer to the sale, either by persuading the consumer of the value of the sponsor's offering or by creating either a preference, consideration or simply an emotional bond with the brand.




*A heuristic model for testing TV (and radio) advertising.*

*Stickiness is an important new diagnostic variable in print ads.*

*Leveraging urgency to create a call to action is key for Direct Response.*

*Clicking through multiple levels of communication adds interactivity to Internet ads.*

*For packaged goods, the package must close the sale.*

At the report-card level, these are the three things that most researchers can agree are important predictors of advertising performance. As a result, virtually all the major pre-testing suppliers provide some kind of score for each of these three dimensions of performance as a way of evaluating TV commercials.

The second level of the model describes categories of diagnostic information that can provide useful insights to help advertisers understand the performance scores their commercial is getting. This is important for the purpose of optimizing commercial executions; for example, figuring out ways to re-edit average performers so that they will work harder before you start spending large sums of money on very expensive media time.

Looking at Figure 1 from left to right, we see that attention-getting power is primarily a function of the advertising execution. In particular, executions can be conceptualized in terms of their form and content. By content we are asking whether or not the creative idea is fresh and different, funny, enjoyable or involving in such a way that it provides a reward to the consumer for the time spent attending to your advertising. By form we mean that the commercial is a well-edited, or well-formed, piece of film, one that grabs the viewer's attention early on and leads it from moment-to-moment, focusing attention on the important ideas and images that you are trying to get across. The Flow of Attention, therefore, is a construct that reminds us that television is a dynamic experience. To fully understand television commercials we must understand how the consumer cognitively processes moving pictures.

Branding is linked both to the creative execution and to the brand's strategy, something we call "focus and fit." A well-branded piece of film tightly focuses the attention of the consumer on the identity of the brand somewhere in the ad. Although depending on the creative concept, it might be at the beginning, somewhere in the middle, or not until the end of the ad. A well-branded commercial also fits the brand like a custom-tailored suit, so that ideally no competing brand could be substituted without seeming out of place in terms of emotional character, positioning or values.

The right side of the model explains motivation. To be motivating, the execution must be grounded in a good strategy, with a compelling promise being made to the consumer. Motivation always has a rational and an emotional component, although the balance of the two may vary from ad to ad. The key to motivation is to communicate a relevant idea in a dramatic way. The Flow of Emotion construct reminds us that, like attention, emotion is dynamic. It flows and changes from the beginning to the end of the film. Motivating creative is designed to organize the emotions of the consumer along the way for particular dramatic effects that express something relevant about the brand experience.

It should be noted that this same model can be used for designing research for a radio commercial. Attention, branding and motivation are still the primary measures of performance and can be measured with identical research questions. The only differences are in the diagnostics. Being an auditory rather than a visual medium, the dynamic measures of cognitive processing and emotional response - the Flow of Attention measures - would be handled differently with radio and TV commercials (see Figure 2).

*2. Print*

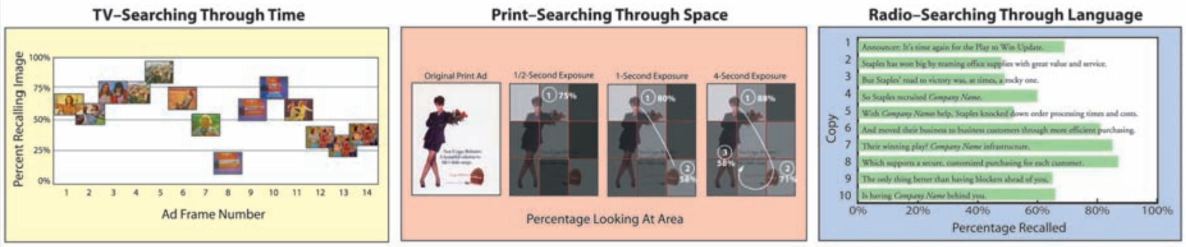
From a pre-testing standpoint, print and television advertising are a lot more alike than most marketers realize. Both have to compete for attention against competing ads in highly cluttered media environments. To be successful at this, both have to provide the reader (or viewer) with a reward for the time they are asked to spend with them, by providing creative content which is fresh and different, involving, or entertaining in some way. Both kinds of ads have to be well-branded in order to be effective. And both are expected to motivate a sale by communicating relevant ideas in an emotionally engaging context.

In terms of performance, therefore, both print and television have the same criteria of success. It is only in terms of diagnostics - that is, getting inside the ads to understand how they work - that researchers must modify their measurement toolkit.

There is a common misconception that print is a static medium while television is a dynamic medium because it uses moving pictures. This represents a media-centric rather than a consumer-centric point of view. To be sure, the printed page does not physically move, but the mind of the reader moves through

Figure 2
The consumer's mind is...

**Ameritest® Flows of Attention**




the page. Indeed, the flow of the consumer's attention through all forms of media is dynamic, because whatever the channel of communication, the mind of the consumer is actively "shopping the information in the ad," looking for ideas and images and emotions that are relevant and meaningful.

So, how is print really different from television? First of all, with television, the linear sequence in which ideas and images are exposed to the viewer is predetermined by the advertiser: image B always follows image A, and image C always follows image B, and so on. This is not the case with print. Like a manager of a retail store, a creative director can use the layout of the print ad to try to shape the path the consumer's mind travels as she looks over the ad. But the consumer has a way of looking at things differently than we might expect.

As a diagnostic construct, the Flow of Attention deals with the sorting and scanning functions of the right-brain, the perceptual basis of how we perceive the world visually. With a TV commercial, it measures how selective attention varies over time, as the viewer sorts through the series of the images from the beginning to the end of the film; with a print ad, it measures how attention varies over space, as a reader scans the layout of the ad. (See Figure 2 for an example of the difference.)

The other difference is that television comes in fixed units of time: 30 seconds, 15 seconds, or perhaps some other quantum unit, which is obviously not the case with print.

To transform the TV ad model into a model for testing print advertising, we must add one new variable that needs to be measured: stickiness, or the amount of time the reader is willing to spend with the ad. Importantly, the model makes no *a priori* assumptions about the amount of reading time it takes for a print ad to work; stickiness is only a diagnostic variable, not an end in itself.

Finally, the testing of outdoor and newspaper ads does not require a different ad model. While the visual clutter of a street scene or of a pile of newspaper inserts may be different from that of a magazine, the attention-getting power of the advertising is still a primary performance variable. Communication is a driver of motivation for both types of ads – though, of course, the communication objectives of outdoor must be more telegraphic in comparison to newspaper. In fact, all of the theoretical constructs of the print model are still relevant for these other forms of print. It is only the logistical details of research testing procedures that need to be adjusted.

*3. Direct response*

By reputation, direct response is the most accountable of the advertising forms because you can accurately measure the response rate after an ad has run. By comparing the response rates for different executions it is relatively straightforward to create a closed feedback loop for continuously improving direct response campaigns over time. For that reason, unlike TV or print advertisers, direct response marketers have historically made little use of pre-testing research.

However, this has begun to change. More sophisticated advertisers have realized the value of obtaining diagnostic research in advance, for the purpose of optimizing executions before the budget is spent. Research has shown it is important to not only know which of two mailings has the greater selling power, but to know the reasons why.

In addition, pre-testing research can provide value by helping the advertising manager synchronize the creative elements of direct response with the other elements of an integrated ad campaign.

Direct response, whether it be television or print based, is different from the more general type of advertising in one important respect. It is expected to trigger a behavioral response from the consumer right away (or at least within a very short period of time) rather than be stored in the consumer's memory in order to enhance sales of the brand at some point in the future.

Indeed, the consumer's behavioral "response" may be engaged from the very beginning of the interaction with one type of direct response: direct mail. When you sort through your mail, what is it that causes you to open one unsolicited piece of mail, while you toss others unopened into the trash? Is it the gold lettering, the high quality of the paper? Is it the personalized address? Are you more, or less, likely to open an envelope addressed to "resident"? Or is it the brand logo on the envelope? Are you more likely to open a piece you receive from American Express than one you receive from the Acme Loan Company? In any event, attention-getting power and branding are still relevant constructs of interest to the direct response researcher.

But from a pre-testing standpoint the essential difference that describes direct response advertising can be captured by our basic ad model by adding a qualifying variable to motivation: the call to action. This variable defines the specific response that the advertising is designed to evoke; for example, calling a toll-free number, which is usually a higher level of commitment on the part of the consumer than is elicited by most advertising in general.

To achieve this commitment direct response is usually very promotional in its communications, e.g., "We are making a special offer!" In addition, direct response ads are frequently designed to define a time period for action, e.g. "The special offer ends Sunday!" The purpose of these messaging strategies is to impact consumer emotions in a particular way by creating a sense of urgency which drives the call to action. Of course, more sophisticated users of direct response can deploy emotion in negative as well as positive ways to create the sense of urgency. One way is to raise the level of concern about some problem - e.g., "Do you have these symptoms?" - which creates stressful emotional anxiety that is resolved when the consumer responds by taking the prescribed action.

*4. Web advertising*

Web advertising, with all the degrees of creative freedom the Internet provides, is chameleon-like in that it is able to emulate any of the others. Like TV, Web ads use moving images and visual novelty to attract attention. Like print, Web ads try to engage consumer interest while consumers are reading. Like direct response, Web ads call for an immediate action - just click on the image!

A Web ad is a barker who stands by the entrance to the carnival tent and solicits customers with loud, colorful sales talk. The first click-through is actually part of the attention-getting function of advertising. It is the first hesitant decision the consumer makes to engage with the advertiser, which is really no different than the decision to open unsolicited mail.

Once the consumer clicks through the door of the ad to the advertiser's video or Web site, the consumer finds they are in another ad or a virtual store. Here, the friendly, sticky salesman must keep communicating to keep the consumer engaged, inviting the consumer to browse through information until they find something they like and motivating them to go to the virtual checkout counter to click again, on "purchase now."

With the Internet, the boundary between advertising and in-store or point-of-purchase communication has dissolved. As a result, pre-testing research can be defined narrowly.

And it can focus on the attention-getting function of the first click, which is analogous to the outdated practice of only using recall scores to evaluate TV commercials. Or it can be defined broadly. The ad model we show here provides a road map of all the things the researcher needs to take into account in order to plot the path of the consumer's mind all the way through to the second click.

To describe that path from a diagnostic standpoint, the Internet ad researcher may need to use all the tools in the toolkits developed for other media. Figure 2 shows you some parallel techniques we have developed to measure how the attention of the consumer flows: first, through moving images; second, through graphic layouts; and third, through lines of copy. What these three techniques have in common is an appreciation for the cognitive processes of the mind. In particular, the consumer is not - and never has been - a passive receiver of brand communications, but is always actively engaged in Googling the ideas and information in advertising.

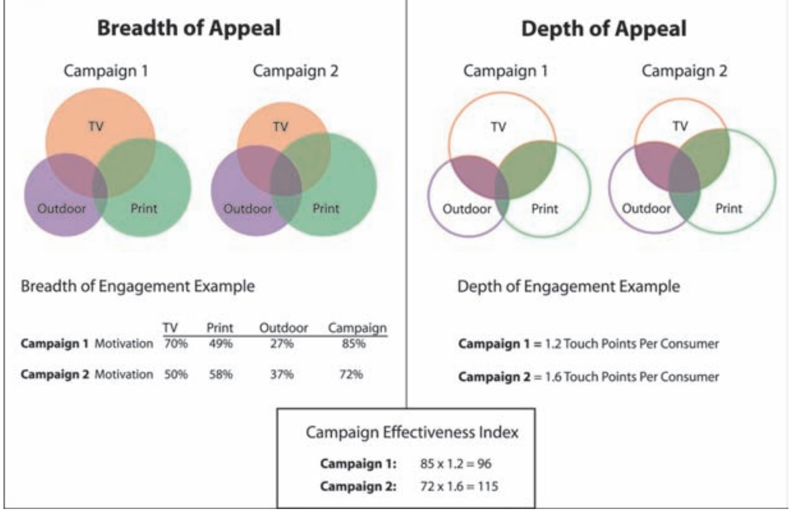
*5. Packaging*

There is an old saying in the packaged goods business: "The package is the last ad the consumer sees before buying the product." Indeed, most ad researchers seem to consider packaging research to be almost a separate, highly specialized discipline. Yet all of the constructs we have been talking about apply equally well to effective package design as they do other forms of advertising.

In terms of risk, getting the package wrong can be extremely costly. The reason for this speaks to the essence of what is special about the package-as-advertising. Unlike other forms of advertising which may simply create an enhanced intention to purchase the brand, the package must actually close the sale!

From a communication standpoint, a package needs to systematically remove all the barriers to purchase that make the consumer hesitate. It must provide a point-by-point argument about why it's better than the competitor's product that is sitting beside it on the shelf. And it must do this in the most emotionally appealing way in order to drive home the impulse to purchase.

Figure 3




Because of the media constraints of other forms of advertising such as TV - i.e., what you can reasonably hope to accomplish in 30 seconds - a tight focus on one clear idea may be the best practice. But when the consumer is holding the package in her hands, trying to decide between your brand and a competitor, it's best to cover your bets. The package needs to communicate all the advantages of the product.

The need for multiple points of communication does not mean package designs should be cluttered or confusing. Quite the opposite. The information on a package should be easy to find. That means the order in which the consumer "sees" the information on the package should match the order of importance in order to help make the sale, with the most important information standing out first in the consumer's perceptions.

**Breadth and depth of campaign engagement**

The traditional way of making media allocation decisions is to trade off reach versus frequency in the media buy. This is still a useful approach to thinking about programming advertising exposures. It also provides us with a useful conceptual framework for thinking about how consumers are engaged by different creative executions across an integrated advertising campaign.

Even though the different elements in a campaign are designed to work together, that does not mean that all the creative executions will work equally well. Consider the scenario shown in Figure 3 where the motivation scores (using standard top-box purchase intent scores) for creative elements from two alternate campaigns are being compared. In this hypothetical example, the TV commercial from Campaign 1 is significantly more motivating than the TV from Campaign 2; on the other hand, the print and outdoor from Campaign 2 is more motivating than the creative from Campaign 1. Which campaign would you choose?

A key question to ask when testing creative elements across media platforms is whether the different pieces of creative are motivating to the same consumer segments. In this example, if we were to ask the question, "How many consumers were motivated by at least one execution in the campaign?", this is the intersection of the sets of consumers motivated by different elements in the campaign. We see that Campaign 1 has more "breadth" of appeal, 85 percent to 72 percent. What if, on the other hand, we were to ask the question, "On average, how many different executions impact a given target consumer in a motivating way?" This is the intersection of the sets of consumers motivated by different elements of the campaign. Now we see that Campaign 2 wins, with an average of 1.6 versus 1.2, of what we call "motivational touch-points" or motivating ads per consumer. So we can say that Campaign 2 has greater "depth" of appeal.

Just as media buyers multiply reach times frequency to get a measure of the net effectiveness of a media buy, we can do the same thing here. By multiplying breadth of appeal times the depth of appeal we can say that Campaign 2, winning 115 to 96, is the more impact-full campaign when viewed as a whole.

This example makes several important points about campaign testing. First, it points out the importance of using standard measures of key performance across different media, so that the relative impact of the creative can be compared. This is one reason why the adoption of an integrated set of media models is so useful. Second, it underscores the importance of diagnostics. In this case, either campaign choice is like a wobbly stool - one of the media legs supporting each of the campaign ideas was sub-optimal. From a diagnostic standpoint, the question for Campaign 1 is, "Can I fix the print and outdoor to make it work harder in support of the TV?" The question for Campaign 2 is, "Can I re-edit the TV film to make it work harder with the print and outdoor idea?" Hence, we see the importance of diagnostic measures for different media creative elements.

Finally, it reminds us that in this new age of exploding media choices there is the fundamental need to view advertising holistically. And if this is to happen, advertising research needs an integrated testing approach. | Q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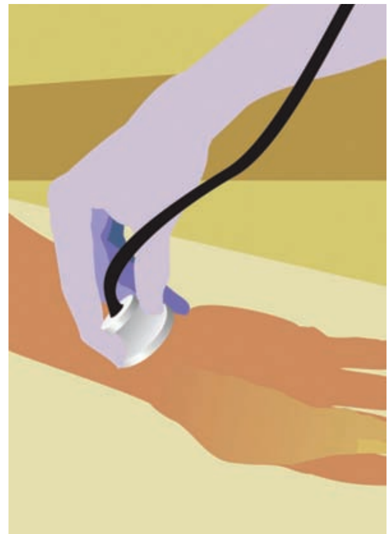
advertising research

# Taking the pulse of their market



By Felipe Korzenny
and Maria Gracia Inglessis

## Survey finds Hispanic ad agencies adapting, changing

Who knows the Hispanic market better than those who communicate with it continuously? Hispanic ad agencies perceive their world according to their successes and failures. Their lifeline is the accuracy with which they predict the behavior of the consumer. In the fall of 2004, the authors, along with Nadia Saavedra, conducted a study of U.S. Hispanic advertising agencies to find out their perceptions of:

- how the Hispanic market is changing;
- how clients that work with the Hispanic market are evolving; and
- how these agencies are adapting to these changes, if any.

Almost all of the approximately 70 members of the Association of Hispanic Advertising Agencies (AHAA) were contacted to request an interview to answer the above main questions. Eighteen agencies cooperated with this research effort. The collaborating agencies are located in major U.S. Hispanic markets and were about equally distributed between larger and smaller agencies according to net revenues based on the classification in the Hispanic Fact Pack of *Advertising Age*, 2004.

Fifteen in-depth interviews that lasted from 30 to 90 minutes were conducted by phone, and three interviews were done by e-mail. All the interviews were done with high-level managers or agency owners. The interviews were recorded, transcribed and analyzed between September and December 2004. The results are summarized below.

**Perceptions of a changing market**

Agencies perceive that the sophistication of the market is increasing according to indicators of acculturation, e.g., length of time in the U.S., information about life in the U.S., understanding or products and services in the U.S.

It is no longer universally true that Hispanic immigrants to the U.S. come here totally unaware of how to adapt to U.S. society. Because of NAFTA, increasing business internationalization, and access to U.S. cable programming, even humble immigrants from Latin America have an idea of the products they will find in the U.S. Those who come to the U.S. without prior information now

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are more likely to benefit from family members or friends who have been longer in the U.S. "Hispanics are no longer isolated, they have somebody to ask and have a better sense of what to do in this country in terms of institutions, housing, transportation and so forth," said one respondent.

In a similar vein, Hispanic consumers have learned about how to achieve a better status in the United States via education and political participation. Hispanics are evolving into a more demanding group that is aware of opportunities and obstacles in this their new society. The political passivity that characterized Hispanics in the past appears to be dissipating in favor of a proactive stance.

Increasing Hispanic economic power contributes now to a more demanding attitude towards products and brands. Hispanics' aspirations for products and services are climbing at a fast pace. It used to be the case that Hispanics would cling on to a few well-known brands. Now they seem to be more analytic in their approach as they have more access to information and consumer literacy.



The market is also changing in its geographic distribution. Hispanics have dispersed in the United States. Agencies pointed out, for example, how Mexicans are moving from the West Coast to the East Coast and Miami is becoming a more "Argentinean" city. New emergent markets include Chapel Hill, N.C., Minneapolis and other areas where Hispanics were not abundant in the recent past. Moreover, Hispanics are migrating from urban to rural settings. This dispersion is creating a marketing dynamic that requires more widespread efforts to reach Hispanics. Marketers and Hispanic media need to anticipate this trend towards dispersion to reach Hispanics in ways that were not contemplated just a few years ago.

The English language is becoming more accessible to U.S. Hispanics and that is changing the way in which marketers need to reach them. At the same time, continuous immigration contributes to the maintenance of the Spanish language. Spanish and English are becoming equally important and used in everyday life. Now the messages directed to Hispanics need to be in both English and Spanish media and need to be consistent across the two languages.

Because of the influence of marketers and politicians, the self-esteem of Hispanics has been elevated so that now it is truly "cool" to be Hispanic in the U.S. This means that marketing to non-Hispanics can be more effective with a "Hispanic touch." One can think of a hybridization of the Hispanic culture and the rest of the non-Hispanic population. That also has important implications for marketing in both Spanish and English and with cultural sensitivity to diverse constituencies.

**Perceptions of changing clients**

Based on the interviews with ad agencies, their clients fall into four main categories:

- learners;
- ROI seekers;
- old foxes; and
- stereotypers.

Learners are those first entering the Hispanic market and heavily relying on consultants and ad agencies to understand their opportunities. Learners read reports and articles about the complexity of the market. They are open to suggestions and education. More importantly, these clients are willing to dedicate resources and develop specific products for Hispanics. These are a very important segment of the client landscape.

ROI seekers are pragmatists that address the Hispanic market as long as they can anticipate an important return, typically in the short term. They expect an ad agency to be a strategic partner that is able to offer a plan to demonstrate the impact of advertising.

Old foxes tend to be the large and successful companies that have learned to work with the Hispanic market and have dedicated major efforts to it. Since these clients are leaders and have been in the market for a long time, usually they understand its dynamics. However, these clients can also represent a challenge to ad agencies when it comes to innovation because they are perceived to have fixed ways of doing things.

Stereotypers are those who still use the family and other traditional images of Hispanic culture to reach Hispanics. Even if they recognize the financial opportunity the market offers, they do not seem to understand its cultural nuances. They insist on using *la abuelita* (the grandma), *la cocina* (the kitchen), and *los labios rojos* (the red lips) as the only way to appeal to the market.

Ad agencies indicate that with the exception of the old foxes the other types of clients request education about the market. The tendency is for many agencies to still rely heavily on ad agencies in order to obtain cultural insights to position and communicate their products and services.

**Increasing sophistication**

Agencies report they are adapting to the increasing sophistication of the market, and also to the requirements of their clients. Some of the interviewees pointed out that allocation of resources to the Hispanic market continues to lag in comparison to the spending power of Hispanics and their population size. This discontinuity continues to make education efforts by agencies important.

Some interviewees indicated that audiovisual documentation efforts are important to persuade clients to abandon strictly demographic thinking and move more towards cultural thinking. With audiovisual materials, in the style of ethnographic documentaries, some agencies help clients to understand the cultural differences, purchasing patterns and other variables relevant to successful marketing efforts. Flexible clients allow agencies to recommend relevant and different communication approaches, and also strategies that involve new product development.

Many ad agencies, particularly smaller ones, are forming their own media divisions in order to complement their offerings. Agencies that outsource media buying accentuated their active participation with ideas and opinions in the media planning. In some cases media planning is influenced by the fact that larger clients many times have a well-established relationship with media outlets. This tendency limits the autonomy of agencies in the process of media selection.

Agencies are capitalizing on the growth and diversification of Hispanic media. This diversification includes a new array of print outlets, radio stations, TV channels, and Internet offerings. There is an increasing presence of product placements in media directed to Hispanics in order to sidestep advertising fatigue. One example is the use of embedded scripts in telenovelas in which products become part of the story.

In addition, there is an increasing reliance on non-broadcast media and a proliferation of personal marketing efforts. Examples of one-on-one communication efforts include examples of interpersonal outreach to Hispanic sorority and fraternity students. Also, these efforts include marketing campaigns at the community level that include concerts and demonstrations.

In recognition of increasing sophistication on the part of Hispanics, Internet advertising and Web sites are proliferating. It is estimated that about 65 percent of U.S. Hispanics access the Internet. That is a figure that is bound to grow very fast because Hispanics see the Internet as a means of leapfrogging stages of economic and social well-being.

When addressing the issue of media and language, agencies admitted their preference for Spanish-language media. Spanish-language media are more affordable and many clients have strong budget limitations. Moreover, some conservative clients perceive Spanish-language marketing as the only efficient means. However, and perhaps more importantly, agencies perceive that the Spanish language will continue to be relevant to the Hispanic population for the foreseeable future. Agencies indicate that the first reason for the endurance of the Spanish language is continuous immigration to the U.S. from Latin America. Second, even later-generation Hispanics have an emotional connection to the Spanish language. Third, these later generations use Spanish media as a language-learning tool. And fourth, the Spanish language is the ultimate unifier: no matter country of origin, years in the U.S. or generation, language is believed to keep Hispanics together.

Nevertheless, an increasing number of ad agencies are incorporating the English language in their repertories. This used to be taboo in the industry just a few years ago. Now there is an increasing recognition of the fact that bilingualism is a trend of the future. Placing Spanish-language ads in English media was not possible in the past. Nowadays, there are many examples of cross-media advertising. Some agencies indicated in their interviews that if Spanish broadcasting companies would allow it, they would place English ads in Spanish broadcast media. Furthermore, the use of Spanglish and code-switching are gaining acceptance and have become relevant alternatives to appeal to younger, urban segments.

Sophisticated segmentation schemes are in the process of development by many ad agencies and the industry in general. As the market has turned more complex, it is increasingly important to understand the nuances of diverse subgroups within this population. Agencies are approaching segmentation beyond the traditional formulation based on country of origin, acculturation, language preference and region in the U.S. They are adding factors like cultural identity, product usage, brand preferences, buying habits, social networks and so on. Agencies recognize the importance of lifestyle segmentation and a more holistic approach. More agencies are conducting in-house research, particularly qualitative research in the form of focus groups, ethnographies, youth panels and participant observation. In many cases this tendency to conduct in-house research contributes to proprietary research schemes and strategic platforms.

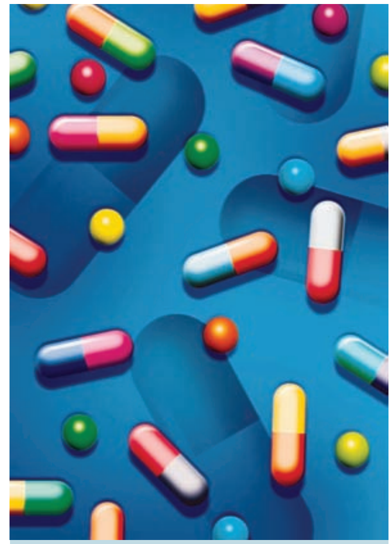
Account planning based on consumer insights is a growing trend in Hispanic ad agencies. The account planner is the bridge between the consumer and the different ad agency functions. It is the key to strategy. Account planners are still very scarce in Hispanic marketing and in the industry in general.

**Agencies are taking note**

There is an active effervescence taking place in U.S. Hispanic marketing and ad agencies are taking note of that. Many see that they need to adapt to these changes rapidly and some also fear that the niche they have occupied is being threatened by large competitors that have created or purchased Hispanic divisions.

The key changes in the market have to do with consumer savvy and language evolution. The Spanish language, however, will continue being the language of the heart for a long time to come. Still, ignoring the fact that Hispanics are exposed to English-language content is no longer tenable. Marketing in-culture is now more important than marketing exclusively in-language. | Q

# Harness the medium's power



By Ramon Portilla

Despite rising costs for TV media and advertising production – recent estimates indicate rates are up almost 19 percent in two years – TV is still the most powerful medium available to sell and build brands. But with its high cost, the pressure to manage the investment has never been greater. The stakes are even higher for direct-to-consumer (DTC) pharmaceutical brands as DTC advertising is at a turning point for most marketers. Existing government regulation and the prospect of more to come means that effective advertising – reflected as gains in brand preference, market share and market value – may be more crucial for DTC than for other industries. Therefore, the future of DTC advertising as a viable marketing communications vehicle lies in the ability to harness the power, given the costs. Fortunately, there is a wide body of empirically-based knowledge about how DTC advertising works that, when applied to the ad development and management processes, can lead to improved business performance for DTC brands.

This article will discuss how one DTC advertiser (aka Brand A) applied measurement and knowledge to more consistently contribute to the business enterprise, thus enabling it to maximize its investment in TV advertising.

## Measuring the effectiveness of its DTC TV ads helps pharma firm gauge ROMI

**Validated measure**

Early in its foray into DTC TV advertising, Brand A understood the importance of using measurements that reliably predict the selling, or business-building, power of its advertising. It sought a way to base ad development and management decisions on a validated and calibrated measure of an ad's ability to drive scripts/call to action. It chose the ARS Persuasion metric as a measurement standard. As Figure 1 indicates, the higher the ARS Persuasion measure, the greater the in-market increase.

The predictive validity of the metric is also evident in a number of case studies. For example, one DTC brand team employed the measure when evaluating alternative advertising executions for use

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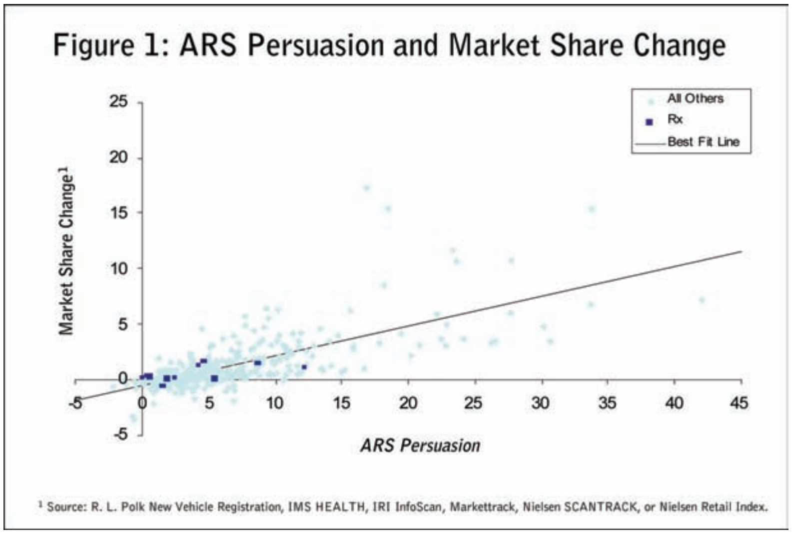



in controlled advertising spend test markets. The brand team assessed the business value of its advertising and found that, based on strong ARS Persuasion results, the advertising would be expected to drive higher prescriptions when incremental media spending was applied.

The ads were aired in three cells: no-spend control, low-spend, and heavy-spend markets (Figure 2). Two "elastic" ads (7+) were aired in both the low-spend and heavy-spend cells, resulting in 30-40 percent increases in both total and new prescriptions (note the decline in prescriptions in the "no advertising" cell). As Figure 2 shows, the incremental spending behind the persuasive advertising (no-spend vs. low-spend and low-spend vs. heavy-spend) drove large increases in total number of prescriptions - up to 42 percent more.

With the high correlation between the ARS Persuasion metric of ads aired and subsequent market responses, Brand A adopted this financially-based measurement for identifying business opportunities (and/or threats from competitors) related to its TV advertising and for optimizing its advertising investments.

**Not meeting expectations**

While early ad development work identified some strong ads for Brand A, the overall strength of the advertising was not meeting expectations. For insight on how to improve the strength of its advertising, the brand team turned to a study of the factors associated with sales-effective advertising by David Stewart and David Furse, Marketing Science Institute, and ARS/rsc. In a continuation of this work and application to DTC advertising, the importance of these factors or drivers has been verified for DTC advertising. In general, the most successful DTC ads tend to be strong strategically - with many using some type of competitive comparison - and product-focused. The weakest executions tend not to have any of the strategic drivers, to be less product focused and to have relatively late identification of the product category. Thus, brands can increase the likelihood of producing successful advertising by:

• Focusing on a strong strategy, especially competitive comparisons and superiority claims, when possible.

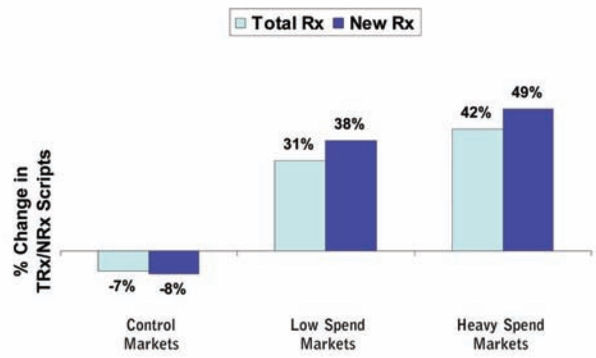
• Maintaining an uncluttered, product-focused approach.

• Identifying the product category early in the ad.

Using a strategic review of its advertising in the context of these drivers, Brand A concluded that stronger advertising would likely result from clearly communicating its differences relative to the competition. Advertising research by ARS/rsc supported this conclusion as a brand-differentiating key message has consistently shown to be the one element most highly associated with advertising that impacts consumer brand preference (choice), sales, market share and market value.

Working with ARS/rsc, Brand A adapted traditional brand-differen-

Figure 2: Increased Spending Behind Sales-Effective Advertising Drove Increases in Total and New Scripts (Brand D — Results From Two Month Test Market)




Source: The ARS Group (rsc).

tiating techniques to the DTC industry and began developing ads focused on the brand's competitive advantages. As Figure 3 indicates, the brand-differentiating advertising more than doubled the strength of the advertising among total sufferers and nearly tripled the strength among target sufferers. In addition, the ad agency was able to produce sales-effective ads more often, as nearly half of the ads developed (44 percent) performed above the brand's benchmark, as compared to 7 percent prior to including a brand-differentiating selling proposition.

**Understand its strength**

Secure in the strength of its advertising, the brand worked to better understand its strength relative to the competition. The brand operates in a highly competitive category with well-established brands, both OTC and DTC. The company also knew, based on studies provided by ARS/rsc, that best-in-class advertising could help drive stronger business results over the short and long term.

Thus, Brand A evaluated the strength of its competitors' advertising to ensure that it was maintaining a best-in-class status. The advertising based on the aforementioned brand-differentiating selling proposition turned a competitive disadvantage (approximately 25 percent the strength of its competition) to a competitive advantage (approximately 200 percent the strength of its competition).

**Optimize media**

With a fine-tuned ad development process consistently producing best-in-class advertising capable of

**Figure 3: Utilizing a Brand-Differentiating Selling Proposition Can Dramatically Improve the Business Value of Advertising (Brand A)**

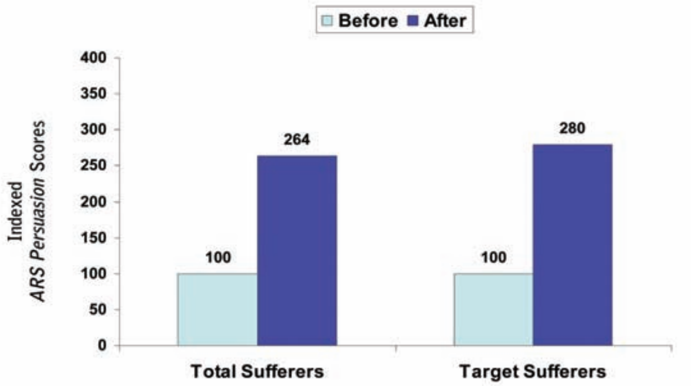
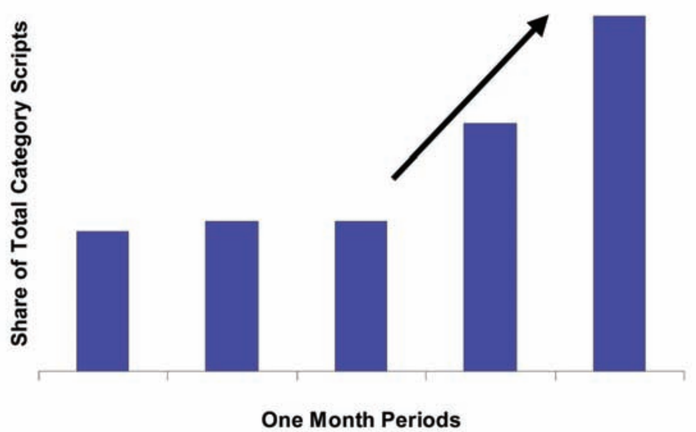



**Figure 4: New Approaches to Ad Development and Ad Management Lead to a Dramatic Increase in Share (Brand A)**




driving the business, the brand turned to the ad management side of the equation to optimize media investments. Already knowing that each individual TV ad has a unique business-building value, the brand team relied on research published by ARS/rsc on how selling power is delivered to market (wearout) to manage its ads on hand and optimize TV media investments.

ARS/rsc discovered that as GRPs are spent behind an execution, its selling power decreases predictably, indicating the speed at which the advertising power is being delivered to market. The research also demonstrated that executions wear out independently, highlighting the importance of managing each discrete execution to air based on its unique business value. This knowledge regarding the delivery of selling power is rendered in an Internet-based ad management planner along with advertising models of validation and wearout. This what-if application helps optimize media allocation by determining the appropriate weight for each ad given its strength. The tool can also be used early in the ad development process to estimate the number of ads needed given planned media weight and probable strength of the advertising.

Thus, using ARS Persuasion "facts" of the business value of every ad going to air and media optimization capabilities of the Outlook planner, Brand A was able to adopt an ad management solution of putting the weight ("traffic GRPs") behind the strongest ads for only as long as they are working. This solution helped Brand A and its agents answer some common advertising questions, including:

- Should we shift more media weight to our :15 ads?
- Should we air this new ad instead of the copy currently on air?
- When will we need to refresh our advertising?
- How could we optimize media spending to deliver the most selling power over the next business quarter?

In doing so, it filled a critical gap in further optimizing the TV component of its media plan.

**Maintain an advantage**

By following a few empirically-based better practices, Brand A was able to consistently deliver advertising that maintained a competitive advantage for the brand. Even in a highly competitive (and cluttered) category, Brand A's share has grown nearly 3 points in just the first three months of airing its new, brand-differentiating advertising – to its highest TRx share level to date (Figure 4). A short-term return of over $10 million over the total TV marketing investment has also been realized – and this doesn't yet count the residual returns which will come from new and repeat users.

While never perfect, the practices reviewed in this article can help deliver DTC advertising success more consistently and provide new solutions for ad development and ad management to meet business objectives and generate a higher return on marketing investment. | Q

advertising research

# Do they work together?

By William J. Havlena

## Understanding the effectiveness of television, online and magazine advertising in cross-media campaigns

Advertisers are beginning to think holistically in planning and measuring advertising campaigns, since the media that are included in the mix can also impact the success or failure of the campaign. Media differ on a number of important characteristics – intrusiveness, engagement, sensory modality, motion, interactivity – that may affect not only the overall effectiveness of each medium but how they complement each other across the stages of the consumer decision process.

Our firm's CrossMedia Research studies measure the effectiveness of campaigns using online surveys of consumers naturally exposed to advertising. Respondents are recruited using Web intercepts from sites typical of the online advertising or from panels. They complete an online survey containing questions about the brand or product, media usage, brand usage and demographic and psychographic characteristics. Sampling typically begins about two weeks prior to the launch of an advertising campaign and continues for at least 8 to 12 weeks or for the entire length of the campaign. Analysis is based on comparing respondents exposed to advertising in different media combinations to understand the impact of each medium and synergy across media.

Exposure to offline advertising in a particular medium is established using survey questions about the consumption of media vehicles on the plan. For example, opportunity to see (OTS) for magazines is based on the recognition of specific issue covers in which advertising was placed or on reported readership of titles on the media plan. In the case of online advertising, exposure to the campaign is counted directly through the use of cookies. Respondents are then grouped according to the OTS for different combinations of media. The impact of each medium or combination is determined by comparing group metrics for awareness and persuasion against a control group, typically collected immediately prior to the launch of the offline campaign.

Having conducted over 130 of these studies to examine the branding impact of integrated ad campaigns, we have found that different media vehicles demonstrate unique strengths. This body of research includes studies of television, magazine, newspaper, flyer/insert, online,

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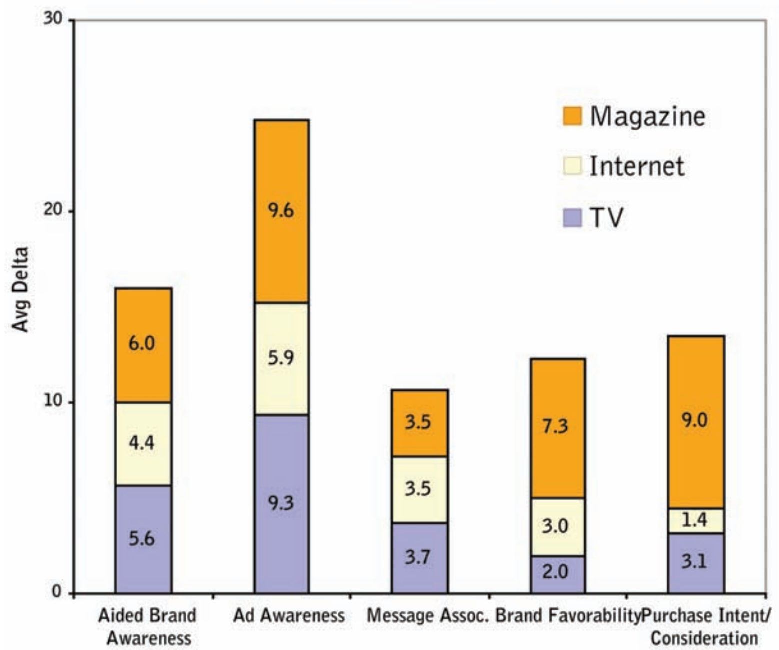
radio, outdoor and cinema advertising. Previous CrossMedia Research has analyzed the complementary effects of TV and Internet advertising (Dynamic Logic, January 2004). Aggregated results from 10 studies indicated that online advertising was particularly effective in associating brands with sponsorships. Internet advertising also produced relatively large increments in brand favorability but had a less dramatic impact on brand awareness or intention to purchase the brand.

This article presents results based on 17 studies in which the individual impact of television and the incremental impacts of online and magazine advertising could be isolated. The inclusion of magazine advertising in the mix offers a new perspective on how media work together.

Figure 1: Incremental Effect of Medium on Brand Metrics
(Delta Point Increase)




## Compare effects

Five metrics were used to compare media effects. Aided brand awareness is based on respondent recognition of the advertised brand among a set of brands in the product category and is scored dichotomously. Ad awareness is also a dichotomous variable measuring whether the respondent is aware of seeing any advertising (in any medium) for the brand during the prior 30 days. Message association measures whether the respondent is able to correctly associate the advertising message or tagline with the brand (rather than with a competitive brand). Brand favorability and purchase intent/consideration are scored as top-two-box scores on standard five-point scales ranging from "very favorable" to "very unfavorable" (for brand favorability) and "very likely" to "very unlikely" (for purchase intent/consideration).

As seen in Figure 1, all three media - television, magazines and Internet - were effective in increasing consumer awareness, preference and purchase intent. The bars in the figure illustrate the incremental contribution of each medium to five brand metrics over the pre-control baseline level. The TV segment presents the average metric differences between respondents unexposed to the campaign and those who had an opportunity to see only the television advertising. The Internet increase represents the additional increase in the brand metrics among respondents who had OTS for both online and TV advertising. The magazine increase denotes the change in each metric from those with OTS for TV and online to those with the opportunity to see advertising in all three media.

While based on results from only 17 campaigns, a closer analysis of the data reveals the following:

• TV, Internet and magazines produced similar increments in aided brand awareness. If this holds up over a larger data set, it would be an important finding for the online publishers. This result suggests that Internet advertising can build brand awareness similar to TV and magazine within the context of an integrated cross-media campaign.

• Television and magazine advertising produced greater increments than online advertising in advertising awareness. The impact of magazine advertising may be due, in part, to the size of magazine ads and the higher involvement typical of the print environment. On the other hand, banner-based online advertising may be less obtrusive than television or magazine advertising. The small sample size of campaigns prevented separate analysis of rich-media creative units, which might be more comparable to offline media in terms of creating advertising awareness. However, taken together with the results on aided brand awareness, these findings suggest that although Internet creative may be less memorable, it is still able to generate awareness of the brand.

• As in the case of aided brand awareness, all three media provided similar incremental increases in message association. It appears that campaigns are communicating creative taglines or messages with approximately equal effectiveness across all these media. The differences in viewing time or involvement do not seem to interfere with the ability to communicate a short, focused message in any medium.

• Magazine advertising performed strongly in producing persuasion, as measured by both increments in brand favorability and purchase intent/consideration. In many of the campaigns tested, the print advertising contained more product information than a short TV spot or an

Internet display unit. It will be interesting to see if the relative incremental impact on purchase intent for magazine advertising holds over a larger sample of campaigns - if so, it would prove to be a powerful media combination on a metric that is difficult to move.

These findings (from various product categories including CPG-household, CPG-consumables, CPG-health and beauty, and automotive) are based on a small sample of studies. However, the results do provide some insight into the effect of each medium and are generally consistent with other information in the advertising literature. An earlier analysis based on a sample of only eight campaigns produced a similar pattern of findings (Dynamic Logic, September 2004), suggesting that the overall results may not change dramatically as more studies are included. As more data become available, it will be possible to analyze the impact of media at a greater level of detail, such as by product category or by creative category. In the new age of accountability in marketing, this information could provide much-needed insight leading to more effective and efficient cross-media advertising.

It is also important to note that the results for each medium represent the combined effect of media (including frequency) and creative quality. Since each study is based on a single campaign, the quality of creative executions within each medium will affect the contribution of that medium to the overall campaign impact. However, over a range of campaigns, it is likely that average differences in creative quality across media will become less extreme and that consistent patterns of media impact will emerge.

**New perspective**

In this early aggregate analysis of CrossMedia Research studies, the inclusion of magazine advertising along with television and online offers a new perspective on how media work together. While magazine advertising showed similar impact on awareness as TV and Internet, it excelled at increasing persuasion scores. On the other hand, online advertising provided substantial increases in awareness of the brand and the campaign message, comparable to those produced by more traditional media. Understanding the branding impact of advertising in each medium and placing it in the context of media cost and reach could provide advertisers with valuable information for planning new cross-media advertising campaigns. | Q

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advertising research

# There are Hispanics... and then there are Hispanics

By Jack Bookbinder and Don Bruzzone

The media habits of Hispanics differ widely. Measure their viewing and language preferences with one online research panel and you can get a very different picture than if you used other panels that recruit Hispanics or Latinos differently. This can have drastic effects on the outcome of your study.

This came to light as part of a massive two-year, 22,000-interview study conducted online to track the effectiveness of a $100+ million "Thrive" brand campaign by Kaiser Permanente, the nation's largest HMO. It was the first national campaign with new agency Campbell-Ewald and its partner in Hispanic advertising, Accent Marketing. It started in the fall of 2004, and at this point has used seven different commercials, two of which are in Spanish, created specifically for the Latino market. Over 2,500 of those 22,000 interviews were with Latinos in California to study the impact of the Spanish-language advertising. It is that section of the ad tracking study that produced the findings that are the subject of this article.

Incidentally, we view the word Latino as meaning the same thing as Hispanic, with Latino being preferred in California.

**The early waves**

The study started with a baseline wave to show what the conditions were before the campaign started. Every six months since then about 5,000 interviews have been conducted to monitor the main campaign's effects. In addition to that, 600-900 Latinos in California were also interviewed.

In the Latino survey we intended to get at least 300 replies from Latinos replying in Spanish.

Research on Kaiser Permanente ads explores influence of language preference

Figure 1 shows that goal was not achieved until the second wave. In the first wave we were surprised by a much lower response rate from those replying in Spanish. By Wave 2 we were able to locate more sources of Hispanic panelists who would reply in Spanish.

The importance of that difference was obvious from the start. We found those who replied in Spanish were more likely to recognize the Spanish-language commercials which Kaiser Permanente had been running on Spanish-language TV. Figure 2 shows that holds true for all three that had been tested by the end of Wave 2. (The first two were Kaiser Permanente Spanish-language commercials that had been running prior to the new Thrive campaign.)

Figure 3 shows how the percent that gave Kaiser Permanente a top rating in various attributes had changed by the second wave. For those reply-

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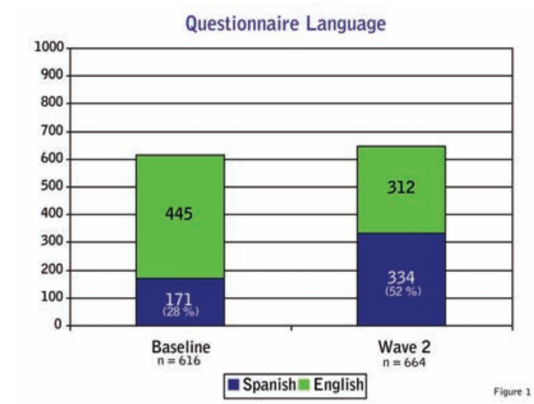


Figure 1

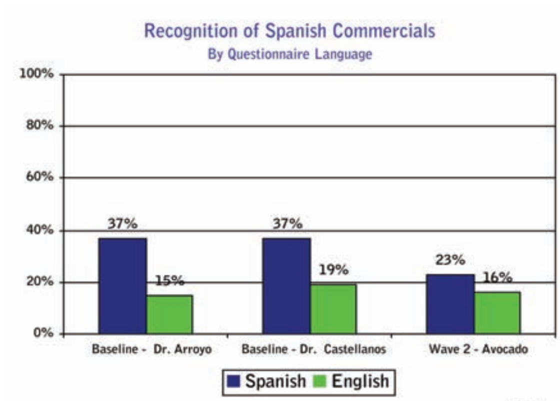


Figure 2

ing in Spanish, these impressions had not improved. But for the group replying in English, the ones we assumed were more likely to have been reached by Kaiser Permanente's regular advertising in English, there was some evidence of slight movement.

**Wave 3**

Since we had balanced the sample in Wave 2 in terms of language, our goal for Wave 3 was to see if we could increase the overall size of the sample and get more respondents replying in Spanish. The best opportunity for doing that appeared to be sending bilingual invitations to the types of panelists who had previously replied in English. Most indicated they were bilingual, so we wanted to see if we could get a significant portion to reply in Spanish. Figure 4 shows that the effort succeeded in getting a larger sample, but the bilingual invitations did not get more to reply in Spanish. In addition, the panel that had been our best source of Spanish-language replies in the first two waves, goZing, was bought out by Greenfield and was no longer available to us. In the end, the number replying in Spanish stayed about the same as in Wave 2.

There was a substantial increase in the percent who recognized "Avocado," a Spanish-language commercial tested in both Wave 2 and Wave 3, among those replying in Spanish (see Figure 5). But there was no similar increase among those replying in English.

There was a much larger increase in the percent of Latinos responding in Spanish who gave top ratings to Kaiser Permanente (KP) attributes (see Figure 6). These increases were so large that based on increases seen in other tracking, there was reason to question the validity of the data.

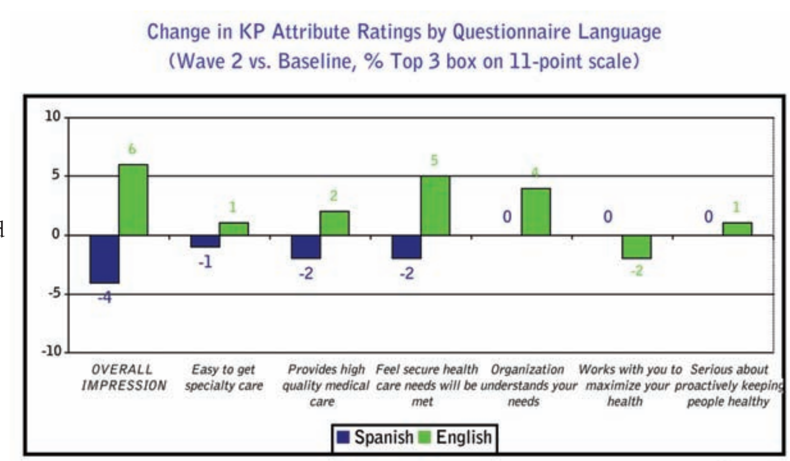


Figure 3

**The online panels**

The nine online research panels listed in Figure 7 were used to obtain the Hispanic replies in Wave 2 and 3. The chart shows Luth was the only panel to be used in both waves, and roughly a third of the replies in both Spanish and English came from a new panel that had not been used before: Lightspeed.

Almost all of the increase in recognition of the "Avocado" commercial in Wave 3 was accounted for by the Spanish-language replies from that same panel: Lightspeed (Figure 8). Similarly, almost all of the improvement in overall impression and other attributes was accounted for by the very favorable replies that came in from that same panel that had not been included in previous waves (Figure 9).

Figure 10 shows viewing habits were significantly different between the panels, and this helped explain the differences in campaign performance.

Among respondents replying in Spanish from the Luth panel, a majority watch mostly English language TV. Among those from Lightspeed a majority watches Spanish-language TV at least half of the time, and the percent that watch mostly Spanish TV was more than double what it was for Luth.

But among those replying in English both panels were quite similar. A strong majority watched TV mostly in English.

**Recruiting**

What caused those key differences between the panelists who responded in Spanish? Figure 11 shows it was related to how the panelists had been recruited by their panels. All had Latino panelists who were recruited in English. They ended up in the firm's Hispanic panel only because that is what they checked when filling out their demographic background. However, the goZing panel (later taken over by Greenfield) and the Lightspeed panel, which had produced higher recognition of Spanish-language commercials, had

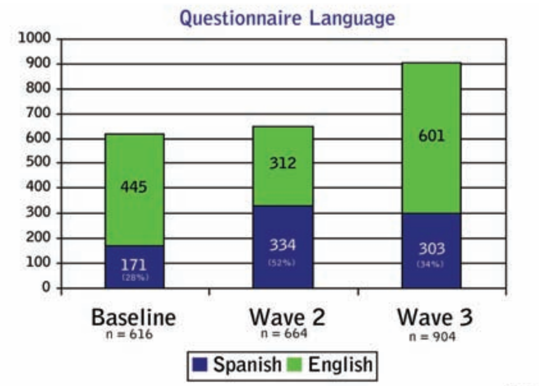



Figure 4

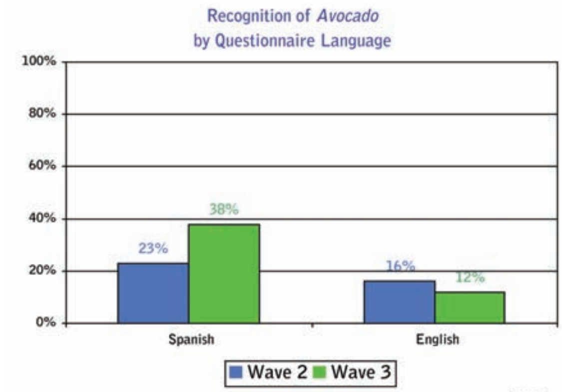



Figure 5

been recruited differently. Respondents had been recruited into the panels entirely in Spanish, from Spanish-language sites that in each case included the Web site of a major Spanish-language TV network. Both feel they know the language preferences of their panelists, always ask them to take a survey in their preferred language, and resist using bilingual requests. Further, both were the only panels that maintained Spanish-language Web sites that were used in their recruiting.

**Wave 4**

That gets us to the latest wave, Wave 4, conducted the end of last year. Given what had happened up to this point we had several goals:

Based on the earlier results we wanted to reduce the percentage of English-dominant respondents in the sample. We found they spoke mostly English at home, watched little Spanish TV, were less likely to be aware of health plan commercials in Spanish, and had awareness of other advertising that closely matched the rest of the population. They were less important in this tracking of Spanish-language advertising because Spanish-language media appeared to be reaching fewer of them.

To do this we set out to find more online panels that communicate only in Spanish with their panel members, and thus offer the survey in Spanish only, rather than a choice of language. This effort was quite successful: 79 percent of the 765 respondents in Wave 4 replied in Spanish.

But it was not as successful as we hoped in targeting viewers of Spanish TV. Many of these Spanish-dominant respondents watch a significant amount of English TV.

Wave 4 revealed that among those who usually speak Spanish at home, only a bare majority, 52 percent watch mostly Spanish TV. A surprising 33 percent spend most of their time watching TV in English. A relatively small number watch both about equally. That is shown by the bars on the left of Figure 12. It is as if a substantial number of Spanish-speaking Latinos are becoming acculturated to the English-speaking environment they are in, or are making a conscious effort to do so. Still, the largest number is comfortable spending most of their time watching TV in the language they use most. It is interesting that most fall in one group or the other. The number that watch both equally is quite small.

The pattern is noticeably different when you look at the results for the group in the center who speak both languages

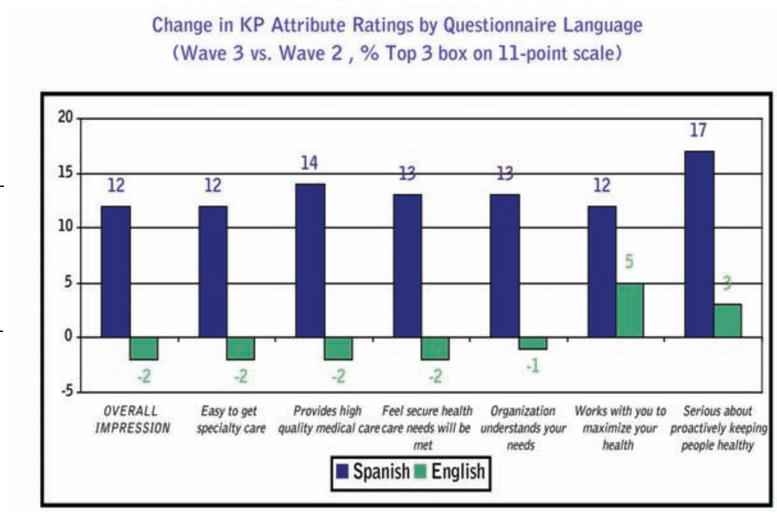



Figure 6

Different Online Panels Used In Each Wave

| Panel | Wave 2 Spanish | Wave 3 Spanish | | Wave 2 English | Wave 3 English |
|---|---|---|---|---|---|
| Luth | 62 (18%) | 95 (31%) | | 37 (12%) | 96 (15%) |
| goZing | 138 (41%) | | | 243 (79%) | |
| Market Tools | 90 (27%) | | | 25 (8%) | |
| Survey Direct | 7 (2%) | | | 4 (1%) | |
| Test Spin | 40 (12%) | | | 0 | |
| SSI | | 20 (7%) | | | 119 (19%) |
| Greenfield | | 45 (15%) | | | 94 (15%) |
| E-Rewards | | 30 (10%) | | | 99 (16%) |
| Lightspeed | | 114 (38%) | | | 212 (34%) |

Figure 7

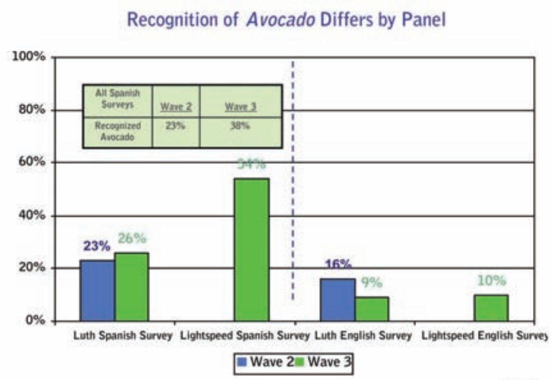



Figure 8

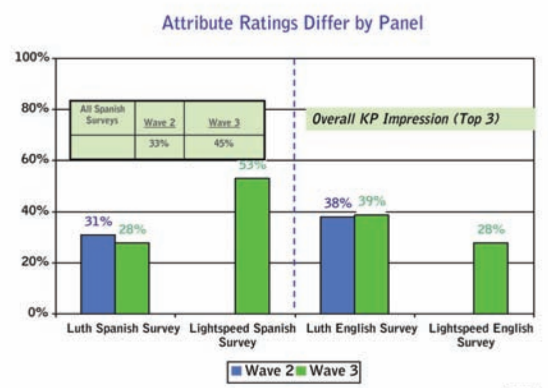



Figure 9

about equally. The percent who watch mostly Spanish TV is much lower. The percent watching TV in English is higher, and the percent that watch both types has increased dramatically to almost three times what it was for those who speak mostly Spanish.

Results for the third group of Latinos who speak mostly English show why we have been deemphasizing them in our Spanish-language ad tracking. When asked about their ethnic background this English-dominant group says they are Hispanic. But in terms of their viewing habits, almost all spend most of their time watching TV in English. The grey boxes across the bottom show that even though we had substantially increased the number of Spanish-dominant Latinos in the sample, 55 percent of all Wave 4 respondents still spent most of their time watching TV in English.

How do these viewing habits affect the number reached by commercials in Spanish? Figure 13 shows the results from this fourth wave for two of Kaiser Permanente's commercials in Spanish that are called "Avocado" and "Hands." It uses commercial recognition as the measure of whether they were reached. The number that remembered seeing them was higher among those who watch Spanish TV most of the time compared to those who watch mostly English TV. Recognition among those who watch both equally is in the middle.

We think the most notable finding on this chart is the 18 percent recognition of these

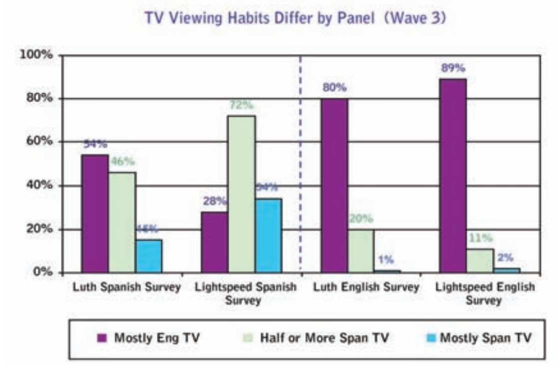



Figure 10

commercials among those who spend most of their time watching TV in English. They have not said they spend all of their time watching TV in English. This suggests they do spend some time watching Spanish TV, and that time is enough for 18 percent of these English-dominant Latinos to have noticed the commercials. The difference in recognition – 18 percent vs. 30 percent – is far less than the difference in time spent watching the two types of television indicated by the previous chart (Figure 12). A substantial number noticed them even when the opportunities to see them were only a fraction of what they were for the heavy viewers of Spanish TV.

Here we think we have evidence of the type of "engagement" that is the subject of serious study by the Advertising Research Foundation. It suggests a substantial number of anglicized, English-dominant Latinos become engaged with commercials in Spanish, and remember them, even when they have had very little exposure.

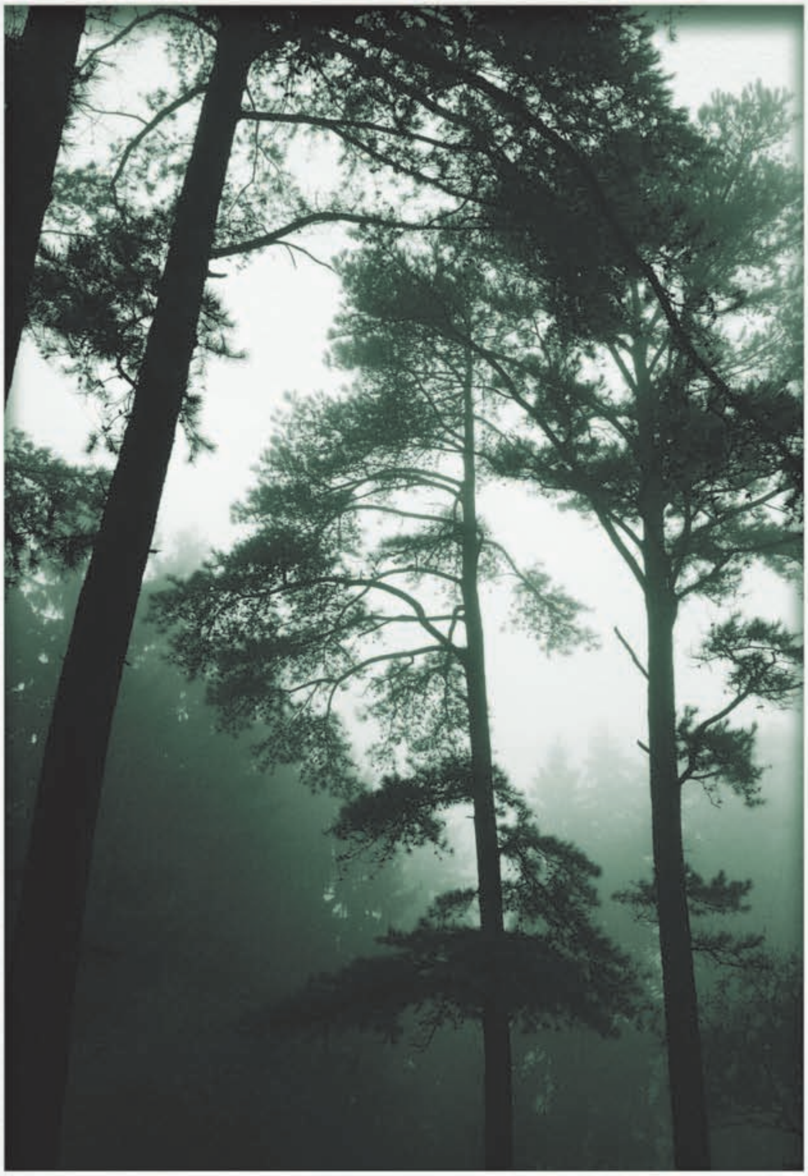
Even stronger evidence of that is seen in Figure 14. It shows one way of determining if a commercial has actually had an effect on people who noticed it. Here we are looking at the percent who said they were very likely to consider joining Kaiser Permanente. It shows that figure for those who later indicated they recognized each commercial as one they had seen before, and compares it with the figure for those who didn't recognize that commercial. It shows if there was a difference or "lift" in this indication of interest in

**Recruitment Differs by Panel**

| Panel | Spanish-language Web sites/Spanish TV networks | English recruiting, select Hispanic respondents from demos, asks about secondary language | Survey Invitation |
|---|---|---|---|
| Luth | | X | Bilingual |
| SSI | | X | Bilingual |
| Greenfield | X | X | Bilingual |
| E-Rewards | | X | Bilingual |
| Lightspeed | X | X | Separate Spanish and English invitations |

Figure 11

In the fine art of research,
the shades of gray complete the masterpiece.



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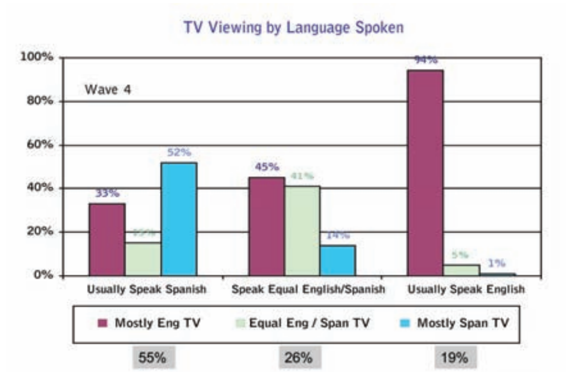



Figure 12

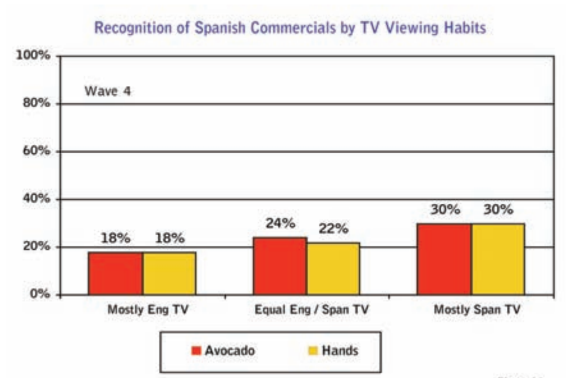



Figure 13

joining Kaiser Permanente that was related to having seen each of four commercials. It shows this for the large group of Latinos who watch English-language TV most of the time. And, it shows this for four Kaiser Permanente commercials, two in Spanish and two in English.

What we found was a great deal of lift among those who had seen the Spanish commercials, but no consistent pattern of lift among those who had seen the English commercials.

Here we have even stronger evidence to back up the premise we alluded to previously. And it provides consistent evidence backing up a key premise other students of multicultural marketing have offered. Even the English-dominant, well-anglicized Latinos will react more favorably to an advertiser who shows some recognition of their culture.

Unaided awareness of the organization and its advertising is another measure of campaign impact. Figure 15 shows both are as high or higher among those who watch mostly Spanish TV.

Why those who watch both types equally were lower was not obvious. In fact it was very suspicious, so we looked into that further.

### Suspicious findings

One of the first places we noticed some unusual differences between Wave 3 and Wave 4 was in the answers to a question asking if the respondent had ever been a member of Kaiser Permanente (Figure 16). It has an effect on answers, so it is something that is asked in almost all the organization's surveys - and it is a figure that is known to stay fairly constant. But it didn't stay constant here. Between the last two waves it dropped significantly among those who watch both English and Spanish TV equally, and it increased among those who watch Spanish TV most of the time. It suggested there had been a significant change in the make up of the sample between the waves.

More evidence of the same type was found in the number who said they didn't know if they had ever been a member of Kaiser Permanente (see Figure 17). In Wave 4 it became very high among those who watched both equally - and the same pattern was seen for Kaiser's competitors.

Similar evidence was found in the income question. Figure 18 shows how the percent that declined to answer also rose to unusually high levels among those who watched both.

### Added a new panel

We again found most of these wave-to-wave differences came from the addition of a new panel, in this case it was Focus Forward. As shown in Figure 19, among the Focus Forward respondents 54 percent were in the "watch equal" category, the category that showed substantial differences since the earlier wave. Compared to other panels, the chart shows they were also more likely to watch both equally, speak both languages equally, and much more likely to say

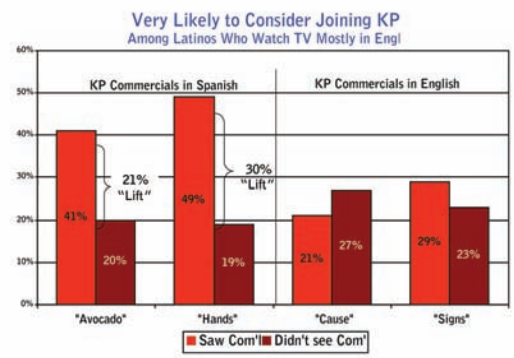



Figure 14

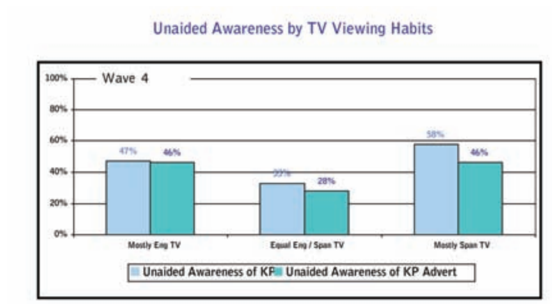



Figure 15

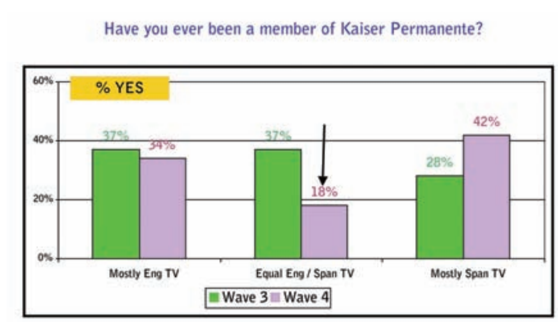
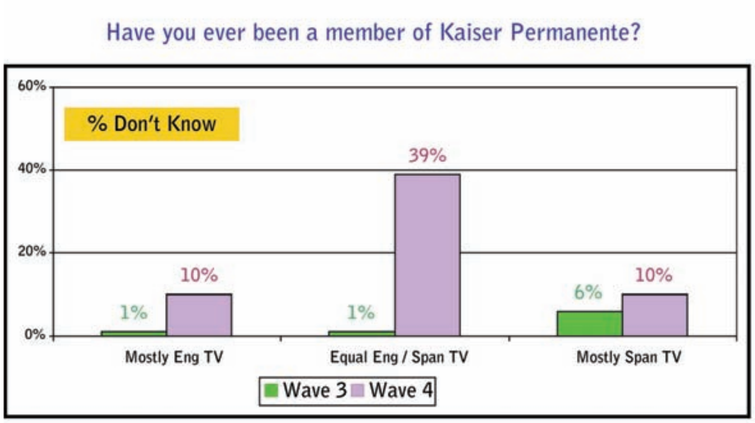



Figure 16




| Watch Equal Eng/Span TV | KP | Blue Cross | Health Net | Pacificare |
|---|---|---|---|---|
| % Don't Know (Wave 4) | 39% | 36% | 41% | 42% |

Figure 17

they didn't know if they had been a member of Kaiser Permanente, and to decline to indicate their income level.

We added panelists drawn from this Focus Forward panel when we found they were one more panel that recruited in Spanish from Spanish Web sites, and we were impressed to find that was not the only way they recruited Latinos. They also post flyers in neighborhoods heavily populated by Latinos, use direct mail and advertise in Latino newspapers and church bulletins. This unusual recruiting produced other differences. Few reported above-average income. The percent from California's central valley, where low-paying agricultural jobs are common, was greater than for the other panels.

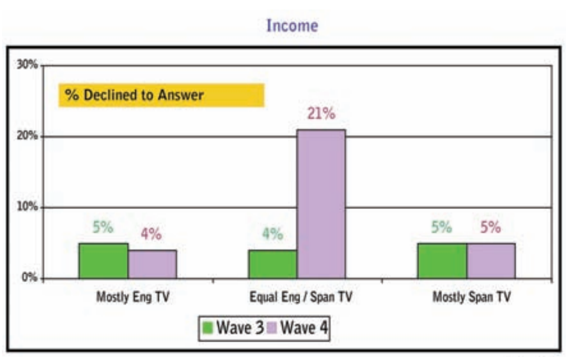



Figure 18

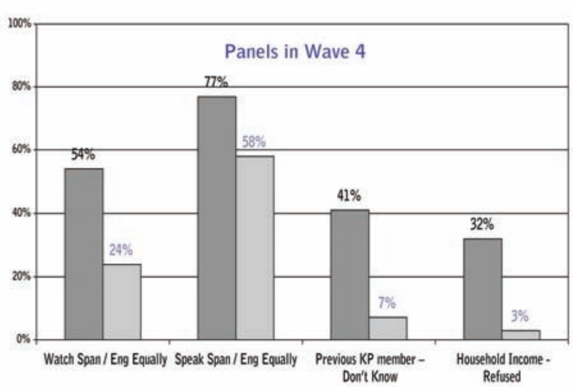



Figure 19

There was a more equal balance between men and women, and they were much less likely to have taken any other online survey during the past week. If nothing else, it broadened our coverage of a segment of the Latino population that was not as well represented previously.

**How do you explain?**

But how do you explain the unusual results from this panel? After talking to experts, it is still pure speculation, but these are the best possibilities we have come up with.

• These respondents are more likely to speak both languages and watch both types of TV at home because they are still at the stage where they are struggling to find a place. They are not at the stage yet where they can afford to keep parents or others in the household who only speak Spanish.

• They don't know if they were covered by Kaiser Permanente or any other health plan in the past because their coverage was likely to be handled entirely by their employer without their being aware of, or even being interested in, whose plan they were covered by.

• We can see several reasons for a large number at this level of the socioeconomic ladder declining to indicate their income. Many may have been embarrassed at how low it was. Others may have worked at many short-lived jobs during the year and honestly have no idea what their total income was for the year.

So, for the moment, we are treating these changes in our Latino sample as improvements in reaching a more complete cross-section of those who watch Spanish TV. But we are not sure about that. We are still working on it, and we would be greatly interested in comparing notes with others working in this field.

**Final thoughts**

Finally, what do we now know about the differences between panels and how they affect measurements of the effectiveness of advertising to Latinos? We'd summarize it this way:

• Advertising in Spanish-language media reaches a much larger share of those from Latino panels recruited in Spanish from Spanish-language Web sites, particularly the Web sites maintained by the major Spanish-language TV networks.

• In addition, Latinos are also reached by a substantial amount of the English-language advertising, but it doesn't have as much of an effect on them as being reached by advertising in Spanish. That is particularly true for those who watch mostly English TV.

• Conclusions about the effectiveness of advertising in Spanish can be glaringly different depending on how Latinos are sampled.

• Inadvertently changing from one source of Latino samples to another can lead to jarring and seemingly impossible changes in the findings. | Q



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## Survey Monitor

continued from page 12

making them an important target for pharmacy retailers. Thirty-three percent of these women said advertising inserts were the number one medium that influences their general purchase decisions, followed by 20 percent who said newspaper advertisements influenced purchase decisions. For more information visit www.vertisinc.com.

### Oprah still rules as fave TV personality

For the fourth consecutive year, Oprah Winfrey in 2005 captured the No. 1 position in a Harris Poll seeking respondents' nominations of favorite TV personalities. In the 12 years that Rochester, N.Y.-based Harris Interactive has conducted this survey, Oprah has always been one of the top three favorites. In fact, this is the sixth time she has been number one; in addition to the 2005 poll, she topped the list in 1998, 2000, 2002, 2003 and 2004.

Jon Stewart continued his rise to the top as he and David Letterman swapped places in 2005; Stewart came in at No. 2, while Letterman dropped one spot to No. 3. Leno may consistently beat Letterman in the ratings game, but here the opposite is true. Leno tied for No. 4 with Fox News talk show host Bill O'Reilly, who was No. 8 in 2004. Ellen DeGeneres moved up one spot from No. 7 in 2004 to No. 6 in 2005. These are the results of a nationwide Harris Poll of 960 U.S. adults (aged 18 and over) surveyed online between December 8 and 14, 2005 by Harris Interactive.

There were four new TV personalities who made it into the top 10 list in 2005, two for the first time and two from years past: Conan O'Brian jumped onto the list for the first time at No. 7, while George Lopez debuted at No. 9. Jerry Seinfeld made a return to the list at No. 8. His last appearance on the list was in 2000, but the release of his show on DVD may have spurred his return. Another sitcom star, Tim Allen, returned to the list. He last appeared in 1999 at No. 7; for 2005 he returned at No. 10.

The four people who dropped off the list in 2005 were Ray Romano (was No. 4 in 2004), Bill Cosby (was No. 6), Dr. Phil McGraw (was tied for No. 9) and Regis Philbin (was tied for No. 9).

While Oprah was tops with women and adults aged 65 and over, David Letterman was No. 1 for men. Among adults aged 18 to 24, who are an important demographic to advertisers, Conan O'Brien was the most popular. Not surprisingly, Bill O'Reilly was tops among conservatives, while liberals chose Jon Stewart as their favorite. For more information visit www.harrisinteractive.com.

### Sports radio format listeners are active investors

A study from Scarborough Research, New York, shows that all-sports radio format listeners are 27 percent more likely than the average adult to live in a household that has a financial investment. Other radio formats that stand out to the investment set include classical (investors are 26 percent more likely than all consumers to tune into this format), all-news (26 percent more likely), news/talk/information (25 percent more likely) and educational radio (24 percent more likely). (For the study, investors are consumers who indicated that they or someone in their household has a financial investment.)

In examining different types of investments, Scarborough finds that all-sports radio format listeners have a diversified range of investment types. All-sports listeners are 44 percent more likely than the average adult to live in a household that has stocks or stock options. Additionally, these listeners are 43 percent more likely than all consumers to have a 401-k plan.

All-news radio formats are also popular among active investors. Listeners of all-news formats are 48 percent more likely than all consumers nationally to have stocks or stock options. "Banking marketers seeking to reach active investors have a prime target in sports radio listeners," says Howard Goldberg, senior vice president, radio services, Scarborough Research. "Marketers can combine this with other insights - such as investor retail habits - to create local marketing plans that achieve measurable success." For more information

visit www.scarborough.com.

## Bread makes a slow comeback in American diets

The U.S. bread market, flattened by negative health claims and fad diets, is rising, according to a report from Chicago researcher Mintel. The bread market's reinvention in the wake of the low-carb craze, coupled with new positive food-pyramid claims, have given the category a new lease on life. The market, estimated at $16.1 billion in 2005, has seen a gain of close to $2 billion since 2000.

Whole-grain bread products have triggered a new marketing opportunity for manufacturers. With the new and reinforced health claims surrounding the category, these products are becoming increasingly more important to manufacturers. According to the report, more than 70 percent of respondents use whole-wheat bread - it is the most widely used segment of bread.

"Atkins and some of the other diets dealt quite a blow to the bread category," says Chris Haack, analyst for Mintel Reports. "Now that the government says bread is an essential part of a healthy diet, manufacturers are trying to take advantage of the new findings by providing healthier bread alternatives. Whole grain is the future of the bread market."

Companies are taking full advantage of reformulation and reinvention opportunities. Sara Lee has introduced a Heart Healthy Bakery line. Lender's New York Style Bagels are now available in a variety of whole-grain varieties. And Interstate Bakeries Corporation (IBC), maker of the American staple Wonder Bread, has even launched Wonder Kids, a brand that claims the fiber of 100 percent whole wheat, and Wonder Whole Grain White Bread. IBC, along with other major companies, suffered a major hit due to the low-carb revolution - in fall of 2004, the company filed for Chapter 11 bankruptcy.

With positive movement toward innovative offerings, there might be yet another struggle on the bread horizon. According to the Mintel Global New Products Database, more than 1,000 new bread products have been launched since 2004. More than a third of report respondents stated that they are overwhelmed by current bread choices in their stores.

"Consumers are being flooded with choices, and companies are going to need to be very strategic about having their bread marketing stand out from the pack," says Haack. "In addition to competing with other retail bread producers, they also have to compete with specialty restaurants that are also featuring bread products, such as Panera and Corner Bakery. Manufacturers need to make sure that they don't get lost in the shuffle." For more information visit www.mintel.com.

## Consumers still wary of goods from China, Korea

Only one in eight respondents from the U.S. and key markets in Europe think highly of the quality of products made in China and Korea, a Synovate survey showed. A little over half (52 percent) of European respondents, however, think Japanese-made products are of high quality, an opinion shared by 41 percent of their American counterparts. Findings also revealed that one-third of the respondents polled consciously seek out goods made in their countries when they go shopping.

The survey was conducted in December 2005 among 6,011 respondents in the U.S., France, Germany, the Netherlands, Spain and the United Kingdom. The study focused on perceptions of value and quality of products made in these markets, as well as those made in China, Japan and Korea.

"Both China and Korea want to get into the mid- to luxury/high-quality markets because there are richer margins, especially Korea, which has been undercut on cost by the Chinese," says Mike Sherman, Synovate's executive director of consumer insights in Asia Pacific. "[Their] products may be seen as low quality, but they are also low cost, so the perceived value is significantly higher than quality."

Japan fared better but its products have successfully made the evolution from perceived low quality to perceived high quality, he says. "In the '60s, perceptions of Japan were the same as they are for China now. They were making cheap transistor radios and flooding the market. They made the evolution through hard work and innovation - step one was to design and build better products. For example, Sony was making these cheap transistors but then produced the Walkman and now Playstation - products they are known for around the world, products that have been copied by others."

The quality of made-in-USA products is rated highly by 78 percent of American respondents, while only roughly two out of five Europeans subscribe to the same viewpoint (43 percent). Three-quarters (74 percent) of European respondents considered products made in their countries to be of high quality.

"Patriotism often drives American consumer sentiment," says Tom Mularz, a senior vice president at Synovate. "Regardless of actual quality and value of goods made in other countries, Americans are fiercely loyal to their own domestic goods, especially older and less affluent consumers. From a cultural perspective, it is considered one's patriotic duty to 'buy American' in America.

"China is also perceived as having taken many jobs from U.S. manufacturing, especially in industries such as apparel and electronics," he says. "This leads to an overall relatively negative perception on both value and quality, as a reaction to the loss of these jobs." For more information visit www.synovate.com.

## Product and Service Update

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finance, HR, IT, manufacturing, marketing, operations, purchasing, sales, etc.) and the size of the company they work for. This allows quota sampling for many specialist business-to-business research projects.

In addition, Research Now has also examined levels of decision-making ability within specific business sectors. As a result, Research Now can target IT decision makers, business mobile phone handset and contract decision makers, buyers of office furniture, photocopiers, fax machines and printers and those responsible for deciding which couriers and parcel services to use. For more information visit www.researchnow.co.uk.

### Pulse Train offers data processing tool

U.K.-based Pulse Train has launched Data Central, a PC-based tool for data processing professionals. The tool aims to improve the reliability and repeatability of DP operations by incorporating a self-documenting workflow process. Data Central is designed to fill the gap between data collection and data analysis, centralizing all of the activities that typically take place after data has been collected but before it has been reported. These include data and metadata definition and manipulation, cleaning and recoding, reformatting, weighting and exporting.

Data Central is a new product built on the latest Microsoft .NET platform. It has an open architecture and is fully scriptable, using the VB .Net language alongside pre-defined objects and methods. This allows users to add their own functions and procedures to cope with any special or unique features of the tasks they need to perform. For more information visit www.pulsetrain.com/solutions/application/data_central.htm.

### PRIZM product profiles restaurant visitors

San Diego marketing information firm Claritas has released PRIZM NE Restaurant Audit Profiles, a new information product that combines Claritas' segmentation system with its industry-specific survey to better identify which PRIZM segments have a high propensity to eat at certain restaurant categories and frequent specific brands.

The profiles answer questions such as: Who are my best customers? Which areas contain the highest concentration of my customers? What other types of restaurants do my customers frequently visit? And, what are my customer's attitudes towards eating out?

Among its features, the profiles offer a range of information on consumer behavior, such as: locations frequented in the past 30 days by type and name; how many times visited in the past 30 days; drive-thru/carry-out/dine-in frequency; number of dining out instances in the past week; stored value gift card use and interest. Further, the product has approximately 50 attitudinal profiles that address consumer preferences and attitudes when dining out. Topics include: dieting and nutrition; pricing; impact of children on restaurant choice; organically grown food; smoke-free restaurants.

PRIZM NE categorizes the population into 66 segments and ranks them on a socioeconomic level, with each segment described by a name that captures the makeup of that segment population, such as Blue Blood Estates, Young Digerati and Bohemian Mix. PRIZM NE combines household-level coding and geographic-level coding to provide the same segment schema at both levels.

The Restaurant Audit, which is administered by Integras, Claritas' analytical services division, is based on more than 30,000 respondents and provides a range of information regarding behavior and attitudes toward eating away from home.

Both the raw data from the Restaurant Audit and the PRIZM NE profiles are available for licensing. For more information visit www.claritas.com.

### New GIS products from ESRI

Redlands, Calif.-based ESRI is now offering a new version of the GIS Portal Toolkit. Version 2.0.1 includes improved handling and validation of metadata; more detailed documentation; support for harvesting and publishing to and from ArcIMS 9.1 metadata repositories; and support for additional database management systems, servers and operating systems. The GIS Portal Toolkit is a technology and services solution for implementing local, regional, national and global spatial data infrastructure portals. GIS portals organize content and services such as directories, search tools, community information, support resources, data and applications. They provide capabilities to query metadata records for relevant data and services and link directly to the online sites that host content services. The content can be visualized as maps and used in geographic queries and analyses. GIS Portal Toolkit 2.0.1 offers: support for Windows 2000/XP/Server 2003, Red Hat Enterprise Linux 3 and Sun Solaris 8; database management system support for SQL Server 2000/2003, Oracle9i and DB2 8.2; the ability to download metadata documents in XML files to local drives; improved handling and validation of Metadata Content Type in published metadata documents; and support for harvesting and publishing to and from ArcIMS 9.1 metadata repositories.

ESRI has also produced new versions of its software for mobile GIS and field-mapping applications, ArcPad 7 and ArcPad Application Builder 7. These releases expand the capabilities of mobile GIS applications with features that are designed to improve the productivity of working with spatial data in the field. ArcPad provides field-based personnel with the ability to capture, store, update, manipulate, analyze and display geographic information. This enables users to perform validated field data collection including the use of data input from GPS receivers, rangefinders and digital cameras. ArcPad 7 features enhancements in the areas of performance, ease of use, productivity, enterprise GIS integration and customization.

Release 9.1 of ArcGIS Business Analyst desktop analysis software includes 2005/2010 demographic data. In addition, it features: complete integration with the ArcGIS 9 framework; routing and drive-time tools based on ArcGIS Network Analyst; enhanced reporting capabilities with a batch framework and a custom report wizard; updated datasets, such as 2005/2010 demographic data and forecasts, and segmentation data from Community Tapestry down to the census tract level; infoUSA business data and street data from the flagship Dynamap/Transportation data product from Tele Atlas North America, Inc.; new techniques to create, manage and compare trade areas; new Huff Sales Forecasting Models; automated report booklet creation wizard. For more information visit www.esri.com.

## Briefly

House Market Research, Rockville, Md., has redecorated its Baltimore and Rockville conference centers and added wireless Internet, DVD recording, translation equipment and new computers with printers in all of its conference suites. For more information visit www.housemarketresearch.com.

The TestAmerica division of Cunningham Research Group, Inc., Ormond Beach, Fla., has opened a new restaurant, bar and kitchen facility at Desert Passage at the Aladdin, Las Vegas, for consumer research and sensory testing. For more information visit www.cunninghamresearch.com.

Chicago-based researcher Synovate reports that Hispanic membership on its research panels has expanded to over 150,000 Hispanic individuals nationwide. For more information visit www.synovate.com.

Greenfield Online Inc., Wilton, Conn., and its European subsidiary, Ciao, have established native-language market research panels in three Asian markets: Japan, South Korea and China. The Japanese and South Korean panelist recruitment sites were established in December 2005. The Chinese panel site was established and launched for panelists' registration in late January. For more information visit www.greenfield.com.

## Research Industry News

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that the competition between ACNielsen and IRI belongs in the marketplace and not in the courtroom."

Separately, VNU announced in February that it continues to be in active talks with a private-equity consortium over a proposed buyout of the company, and that its supervisory and executive boards expected to provide their view on the non-binding offer by the end of February. In connection with the discussions, the private-equity group has been conducting due diligence of the company. VNU announced on January 16, 2006 that it had received a non-binding proposal to purchase the company for EUR 28.00 to 28.50 per common share from the private-equity consortium consisting of AlpInvest Partners, the Blackstone Group, the Carlyle Group, Hellman & Friedman, Kohlberg Kravis Roberts & Co., Permira Advisers Ltd., and Thomas H. Lee Partners.

**Simmons Research**, Fort Lauderdale, Fla., announced that its flagship survey, the National Consumer Study (NCS), has been awarded accreditation by the **Media Rating Council** (MRC), an association that audits and accredits measurement services meeting the MRC's minimum standards. Having been accredited by the MRC board of directors, the Simmons NCS is now authorized to show the MRC Double-Check logo on its National Consumer Study.

Formed in 1964, at the urging of the United States Congress, the MRC strives to secure, for the industry and related users, measurement services that are valid, reliable and effective. The MRC pursues this goal through setting the minimum standards for media rating research, auditing measurement services who voluntarily submit to the MRC process, and accrediting those services that meet the MRC's minimum standards and that fully disclose their methodology to the MRC and service subscribers.

New York-based **Arbitron Inc.** announced that another phase of the independent audit of the Portable People Meter (PPM) radio and television ratings system has been delivered to the Media Rating Council. The audit was designed by the MRC to authenticate and illuminate the procedures used in the PPM ratings system. Ernst and Young conducted the audit on behalf of the MRC.

Norway-based research company **FIRM** announced its placement towards institutional and private investors of 1,770,000 shares at the price of NOK 17.00. The placement represents 9.99 percent of shares outstanding before the placement. Gross proceeds from the share issue amount to NOK 30,090,000. The new share issue was subscribed 2.7 times. The purpose of the placement is to estab-


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We see your products from a unique point of view – your consumers. That's the point of view that drives products in the marketplace. It's why consumer research is what we do. It's who we are. We know it's all about the product.
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lish increased strategic and operational flexibility. The board exercised the authority granted to it under the company's annual general meeting held on November 1, 2005. Total outstanding shares after the issue are 19,484,445 shares, nominal value NOK 0.175.

## Acquisitions/transactions

Research company **Schlesinger Associates** has acquired the **Research House Ltd.**, a U.K. research firm with facilities in London's West End and in the suburbs of Wimbledon Village.

**Cunningham Research Group, Inc.**, Ormond Beach, Fla., has acquired **MRCGroup's** Preview Studio Venetian Canale Shoppes in Las Vegas and has placed it under the TestAmerica Division.

Germany-based **GfK Group** increased its shareholding in the Swiss pharmaceutical market research company **Research Matter**s from 33 percent to 66 percent. Separately, as part of the integration of **NOP World's** U.S. subsidiaries, **Audits & Surveys** has been incorporated into the Retail and Technology division.

Paris-based research firm **Ipsos** has acquired **Camelford Graham**, a Toronto-based company founded in 1988 by Jennifer Camelford and Brenda Graham which now has 28 full-time employees. Both Camelford and Graham will continue to lead the newly formed company, Ipsos Camelford Graham.

Milwaukee-based **Market Probe, Inc.** has acquired St. Louis research firm **Marketing Horizons, Inc.** Earl Wims, co-founder of Marketing Horizons, retired from the company in December. Robert Jasper, co-founder of Marketing Horizons, has assumed the title of senior vice president of Market Probe and will continue to oversee the day-to-day management of operations of Marketing Horizons. Marketing Horizons, Inc. will retain its name, adding "a division of Market Probe, Inc."

**Service Intelligence, Inc.**, a Suwanee, Ga., provider of employee performance assessments through mystery shops and site evaluations, has been acquired by Charlotte, N.C.-based **Global Compliance Services.**

## Alliances/strategic partnerships

**The GfK Group**, Cypriot company **MEMRB** and **Avinoam Brog**, owner of the Israeli market research company **Market Watch** founded a joint venture in Israel. GfK has a 63.8 percent stake in the company, which will operate under the name GfK Retail and Technology Israel in future. As part of the retail and technology division, the company provides sales information on technical consumer goods in Israel.

**Fifty-Plus.net International Inc.**, which owns a portfolio of Internet media operating as The 50Plus Group, and **Decima Research**, a Canadian research firm, have partnered to develop market research insights and services for marketers interested in consumers aged 50 and over. Under the terms of the multi-year agreement: the 50Plus Group's entire audience will be invited to join Decima's EVOX online research panel; Decima is establishing a 50-plus specialty practice to direct the development of these syndicated products and offer custom research studies to current and future Decima clients; Decima and the 50Plus Group will collaborate on the design of a series of syndicated studies of consumer behavior and attitudes in this segment.

## Association/organization news

**The British Market Research Association** (BMRA) on February 21 announced a vote in favor of proposals to integrate BMRA services into the **Market Research Society** (MRS), with effect from April 2006 (at which point the BMRA will cease to exist). The vote follows an extensive consultation process involving both the BMRA and MRS councils. Following initial approval by both councils in December 2005, the decision was put to a BMRA membership vote, with the motion being carried by a majority of 29 votes (62 out of 95 voting members in favor).

Ivor Stocker, chairman of the BMRA, said: "We have been in discussions with the MRS over possible integration of services for several years - with the aim of providing one unified body to coordinate the U.K. market research sector and better serve the needs of our industry. The BMRA and MRS has long shared the remit of providing professional development opportunities to their members, and through this integration, our members will continue to benefit from the BMRA's gold standard services as well as accessing those offered by the MRS.

"The proposal agreed by our members fully retains the culture and enthusiasm of the BMRA while conferring additional benefits which

MRS, with its established brand and infrastructure and larger scale of operation, is well-placed to deliver. This move provides an opportunity to bring together individuals and companies from across the market research industry to share best practice and help drive the industry forward into a new era."

## Awards/rankings

Winston-Salem, N.C.-based **AllPoints Research, Inc.** has been awarded certification as a Women's Business Enterprise by the Women's Business Enterprise Council. AllPoints Research, owned by Tara Olson and Sherrie Aycock, meets the requirements for certification under the criteria and guidelines established by the Women's Business Enterprise National Council: 51 percent ownership by a woman or women (AllPoints is 100-percent woman-owned); proof of effective management of the business (operating position, bylaws, hire-fire and other decision-making role); control of the business as evidenced by signature role on loans, leases and contracts; U.S. citizenship or resident alien status.

## New accounts/projects

**Simmons Research**, Fort Lauderdale, Fla., has signed a deal to provide NBC Universal with Television BehaviorGraphics, Simmons' behavior targeting technology.

**Arbitron Inc.**, New York, announced that Philadelphia ad agencies Harmelin Media, Mayo Seitz Media and the Star Group have signed an agreement for Arbitron's Portable People Meter (PPM) ratings service when it is deployed in that market. In addition, Beasley Broadcast Group, Inc. has entered into a multi-year agreement for Arbitron's radio ratings services that includes Portable People Meter audience measurement services when deployed in Philadelphia. MPG, the media buying and planning unit of marketing communications company Havas, has signed a contract to use the Portable People Meter radio audience estimates. The agreement covers the U.S.-based radio planning and buying activities of Havas companies including MPG and MPG Diversity. Zenith Optimedia, Starcom MediaVest Group and MediaCom have also signed on to use the PPM service.

New York-based **TNS Media Intelligence** announced that the Interpublic Group of Companies has renewed its partnership with TNS MI as its primary provider for competitive advertising intelligence.

The **BI Norwegian School of Management** has renewed its licensing of the Confirmit research software from Norway-based **FIRM**.

U.K. research firm **ESA** has been retained by retailer **Marks & Spencer** to assess head-office telephone customer service for 2006. The study will focus on the M&S switchboard and take the form of mystery telephone calls.

San Francisco-based **MarketTools, Inc.,** announced that its self-service survey solution, Zoomerang, has been selected as the official survey partner of online publisher **MarketingProfs.com**.

**Techneos Systems Inc.,** a Vancouver-based survey software firm, and the **Canadian Sport Tourism Alliance** have extended their agreement to use Techneos's Entryware software to collect primary data on-site at selected sporting events across Canada.

Seattle research firm **QuestionPro** has been selected by the online unit of grocer **Safeway** to power its customer satisfaction surveys.

## New companies/new divisions/ relocations/expansions

Vancouver, B.C.-based **NRG Research Group** has opened offices in Calgary and Edmonton.

Research firm **Advitek** has moved to new, larger offices and expanded its call center. The new address is 235 Yorkland Boulevard, Suite 301, Toronto, ON, M2J 4Y8. The main phone number remains 416-756-2867.

Seattle-based **Global Market Insite, Inc.** has opened a new office in the Netherlands at Zuiderkruis 13, 5215 MV 's Hertogenbosch. Leon de Koning, managing director for Northern Europe, will head the new location.

Australia-based **Pulse Group**, a research process outsourcing supplier, has opened a new international operations center in Cyberjaya, Malaysia to cover the Asia-Pacific market.

Germany-based **GfK Group** has established a new GfK HealthCare branch in Thailand.

## Company earnings reports

In full-year 2005 results, Paris-based **Ipsos** generated consolidated revenues of EUR 717.8 million, up 18.7 percent relative to 2004. This performance can be attributed to three factors. Organic growth was 8.6 percent for the full year, and 9.3 percent for the fourth quarter alone. For the first time since 2001, the currency effect was positive due to the appreciation of the U.S. and Canadian dollars and the currencies of Latin America against the euro. The positive effect was 1.8 percent. Changes in the scope of consolidation also had a positive effect of 8.4 percent, reflecting the consolidation of Descarie & Complices (Montreal) and Shifrin Research (New York) in January 2005, GDMR (Canton) on April 1, Napoleon Franco (Colombia) on July 1, MORI (UK) in October and Understanding UnLtd. (Cincinnati) in November.

For its fiscal second quarter 2006, ended December 31, 2005, **Harris Interactive**, Rochester, N.Y., reported revenue of $54.8 million, up 4 percent when compared with $52.6 million of revenue reported for the same period a year ago. U.S. revenue was $43.7

million, up 12 percent from the $39.0 million of revenue reported a year ago. European revenue was $11.2 million, down 15 percent from the $13.1 million of revenue reported for the second fiscal quarter of 2005. European revenue was negatively impacted by the continued erosion of the traditional research business, lower than expected Internet revenue growth and $0.8 million of unfavorable foreign exchange rate differences. Global Internet revenue for the second fiscal quarter of 2006 was $32.4 million, up 26 percent from Internet revenue of $25.7 million reported for the same period a year ago. U.S. second fiscal quarter 2006 Internet revenue was $29.2 million, up 26 percent when compared to $23.1 million in the second fiscal quarter of 2005. European Internet revenue for the second fiscal quarter of 2006 was $3.2 million, up 21 percent from the $2.6 million of Internet revenue reported for the same quarter last year. Internet revenue comprised 59 percent of total revenue, 67 percent of the U.S. revenue and 28 percent of the European revenue for the second fiscal quarter of 2006.

Operating income for the second fiscal quarter of 2006, which included $0.7 million of non-cash stock-based compensation expense, was $4.0 million, or 7.2 percent of revenue, up 68 percent when compared to operating income of $2.4 million, or 4.5 percent of revenue, for the same period a year ago. Second fiscal quarter 2005 did not include any stock-based compensation expense, but did include one-time pre-tax severance costs of $0.8 million.

Net income for the second fiscal quarter of 2006 was $2.4 million, or $0.04 per diluted share, up 66 percent when compared with net income of $1.4 million, or $0.02 per diluted share for the same period a year ago.

Norway-based **FIRM** reported revenue increased in the fourth quarter 2005 by 39 percent compared to the corresponding quarter in 2004. FIRM achieved revenue of $6.263 million in Q4 2005 compared to $4.513 million in the corresponding quarter of 2004. Operating result (EBIT) for Q4 2005 was $917,000 compared to $774,000 for the corresponding quarter in 2004. A one-off charge of $250,000 in listing costs has been charged in the fourth quarter. Profit before tax for Q4 2005 was $923,0000 compared to $623,000 in Q4 2004. Accumulated revenue for 2005 amounted to $17.297 million compared to $13.024 million in 2004, a growth of 33 percent. Operating result (EBIT) for 2005 was $915,000 compared to $696,000 in 2004.

**Greenfield Online, Inc.**, Wilton, Conn., reported financial results for the fourth quarter and full year ended December 31, 2005. Net revenue totaled $24.5 million for the fourth quarter of 2005 as compared with $13.6 million for the same period a year ago and $23.1 million in the third quarter of 2005. Net revenue from Ciao, the company's European subsidiary, totaled $9.1 million, including $3.6 million in revenue from the Ciao comparison shopping business.

Gross profit totaled $18.5 million or 75.4 percent of revenues for the fourth quarter of 2005, as compared with $10.0 million or 73.7 percent of revenues in the prior year period, and $16.4 million or 71.0 percent of revenue in the third quarter of 2005.

Operating losses were $88.6 million for the fourth quarter of 2005, including the impairment and restructuring charges described above. Excluding these charges, fourth-quarter 2005 operating income was $2.7 million or 11.1 percent of revenue, as compared to $2.5 million or 18.1 percent of revenue for the prior year period and $1.9 million or 8.0 percent of revenue in the third quarter, excluding the $1.0 million charge related to our management change, which we announced on September 29, 2005.

Net losses for the fourth quarter of 2005 were $88.7 million, as compared with net income of $2.4 million for the prior year period and net income of $1.6 million for the third quarter of 2005.

Cash flow from operations was $7.6 million for the fourth quarter of 2005 as compared to $3.3 million for the prior year period and $7.2 million in the third quarter of 2005.

For the fourth quarter of 2005, adjusted EBITDA, a non-GAAP financial measure, excluding the impairment and restructuring charges, was $5.7 million or 23.3 percent of revenues, as compared to $3.4 million or 25.0 percent of revenue for the prior year period and $4.6 million or 19.8 percent of revenue for the third quarter of 2005, excluding the $1.0 million charge related to the September 29th management change.

Operating free cash flow, a non-GAAP financial measure, was $5.4 million for the fourth quarter of 2005 as compared to $1.7 million for the prior year period and $4.8 million in the third quarter of 2005.

**IMS Health**, Fairfield, Conn., announced fourth-quarter diluted earnings per share on an SEC-reported basis of $0.38, up 19 percent, compared with $0.32 in the prior year. Fourth-quarter adjusted diluted earnings per share were $0.40, compared with $0.34 per share in the same period of 2004, an increase of 18 percent. Fourth-quarter 2005 revenues were $477.7 million, up 8 percent (12 percent constant dollar), compared with revenues of $443.7 million for the fourth quarter of 2004. Net income on an SEC-reported basis was $89.4 million, up 22 percent compared with net income of $73.6 million in the year-earlier quarter. On an adjusted basis, net income for the fourth quarter of 2005 was $94.1 million, up 19 percent, compared with net income of $79.2 million in the prior year.

For its fourth quarter and fiscal year ended December 31, 2005, Chicago-based **SPSS Inc.** reported record revenues of $62.2 million and diluted earnings per diluted share (EPS) of $0.30 for the fourth quarter of 2005, representing the highest single revenue quarter in its history. These results compare to revenues of $60.5 million and EPS of $0.20 in the fourth quarter of 2004. Operating income for the fourth quarter of 2005 increased to $8.6 million, or 14 percent of total revenues, from $3.7 million, or 6 percent of total revenues, in the same quarter last year.

Revenues for the 2005 fiscal year totaled $236.1 million with EPS of $0.85, compared to $224.1 million and $0.31, respectively, in 2004. New license revenues increased 12 percent to $107.6 million from $95.8 million in 2004. Operating income for the 2005 fiscal year reached $28.0 million, or 12 percent of total revenues, through the combination of record revenues and a 4 percent decrease in operating expenses resulting from widespread gains in productivity, cost management and more efficient revenue generation.

Cash totaled $84.4 million as of December 31, 2005, compared to $37.1 million at the end of the 2004 fiscal year. Net cash flow from operating activities in 2005 increased to $51.5 million from $12.3 million in 2004.

**Forrester Research, Inc.**, Cambridge, Mass., reported fourth-quarter total revenues increased 9 percent to $41.2 million, compared with $38.0 million for the fourth quarter of 2004. On a GAAP-reported basis, which reflects an effective tax rate of 37 percent, Forrester reported net income of $3.6 million or $0.16 per diluted share, compared with net income of $3.5 million, or $0.16 per diluted share, for the same period in 2004.

On a pro forma basis, net income was $4.8 million or $0.22 per diluted share for the fourth quarter of 2005, which excludes amortization of $782,000 of acquisition-related intangible assets, non-cash stock-based compensation expense of $537,000, and net realized losses and impairments of non-marketable investments of $326,000, and reflects a pro forma effective tax rate of 35 percent. This compares with pro forma net income of $3.9 million, or $0.18 per diluted share, for the same period in 2004, which excludes amortization of $1.3 million of acquisition-related intangible assets, a reversal of reorganization costs of $355,000, and net marketable and non-marketable investment gains of $305,000, and reflects a pro forma effective tax rate of 35 percent.

For the full year 2005, total revenues increased 11 percent to $153.2 million, compared with $138.5 million for 2004. On a GAAP-reported basis, which reflects an effective tax rate of 41 percent, Forrester reported net income of $11.3 million, or $0.52 per diluted share for 2005, compared with net income of $4.1 million or $0.18 per diluted share for 2004.

On a pro forma basis, net income was $14.8 million or $0.68 per diluted share for 2005, which excludes amortization of $3.5 million of acquisition-related intangible assets, non-cash stock-based compensation expense of $1.6 million, net marketable and non-marketable investment gains and impairments of $1.7 million, and reflects a pro forma effective tax rate of 35 percent. This compares with pro forma net income of $12.8 million, or $0.57 per diluted share for the same period last year, which excludes amortization of $6.5 million of acquisition-related intangible assets, reorganization costs of $8.4 million primarily due to office space consolidations, and net marketable and non-marketable investment gains of $1.4 million, and reflects a pro forma effective tax rate of 35 percent.

## Names of Note

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has named **Samantha Voisin** vice president of media/entertainment solutions. She will be based in Los Angeles.

*House Market Research*, Rockville, Md., has announced the return of **Elaine House Custead** as president. In addition, the firm promoted **Thomas Towles** to executive director of its Baltimore conference center and **Lisa Marshall** to executive director of its Rockville conference center.

**Allan Bowditch** has joined New York research firm the *Ziment Group* in a strategic advisor role.

**Derek Blair** has been named senior vice president and will head the new Calgary office of Vancouver, B.C.-based *NRG Research Group*. The firm has named **Greg Turner** vice president and installed him as head of its new Edmonton office. In addition, **Rod Love**, president of *Rod Love Consulting* in Calgary, has joined NRG as senior advisor.

*Millward Brown* has announced a number of hires and promotions at its associated companies. **Gordon Pincott**, previously working jointly for Millward Brown UK and the global development team, has been named global development director. **Surekha Poddar** has been named head of Millward Brown's customer loyalty management business in Asia-Pacific. **Robert Vinet** has been appointed managing director, Millward Brown France. **Tim Wragg** has joined Millward Brown UK as head of client service. **Trevor Acreman** has been named head of business development, Millward Brown UK. Promotions: **James Conrad** to managing director, Millward Brown Canada; **Nick Findlay** to executive vice president, Millward Brown North America; **Angela Federici** to senior vice president, pharmaceutical practice, Fairfield, Conn.; **Jake Kolb** to vice president, Fairfield, Conn. **Graceann Bennett** has joined Greenfield Consulting Group as a managing director based in Chicago. At Greenfield Consulting Group, Westport, Conn., **David Hirschler** has been named managing director; **Brett Zinober** has been promoted to managing director; and **Anne Lantz** has been promoted to senior vice president.

*Survey Sampling International,* Fairfield, Conn., has announced several personnel moves in conjunction with the opening of new offices in Europe. **Andrew Moffatt** has been named sales director for Europe. He is based in London and joins **Pete Cape**, **Martin Cawley**, **Kim Fredrik Schneider** and **Gaelle Normand**, who handle U.K. operations. To run European operations, **Michel Guidi** has been named COO. He is based in a new office in Paris together with **Nicolas Nore**, **Geraldine Donat**, **Celine Chardon** and **Renaud Farrugia**. In addition, **Mauricio Torres Leclerc** and **Marko Zednik** are leading the development of a new Madrid office. At the Rotterdam office, **Helene Chauvin** and **Julien Dauvilliers** consolidate central operations.

**Brian Zaff** has joined *CSS/Datatelligence*, a division of Cunningham Research Group, Inc., Ormond Beach, Fla., as chief research officer. **Ana Escudero** has joined Datatelligence Online as manager of client service.

Indianapolis-based *Walker Information* has named new project directors in its client serve team: **Lisa O'Keefe**, **Emily Eberhardt**, **Marena Gammons**, **Mi Sook Kang**, **Shannon Collins**, **Lindsay Smarker** and **Deric Roberts.** In addition, the firm has promoted **Shellie Miller** and **Joe Horvath** to program manager, and **Marina Molenda** to senior program manager. Separately, **Julie Easton**, vice president of data and report processing at Walker Information, was selected as winner of the 2006 Women & Hi Tech Leading Light Award in the category for distinguished use of technology in a service industry. Selected for her demonstrated excellence in creating and delivering business value through the use of technology, Easton was one of nine overall category winners recognized at the annual awards dinner. The Leading Light Awards recognize women of achievement in science, education and technology who have set an example to others by demonstrating expertise, professionalism, leadership, service, courage and tenacity in pursuing their chosen career.

*Arbitron Inc.*, New York, has promoted **Joan FitzGerald** to vice president, sales and new product development for the Portable People Meter new product development group to lead sales and development efforts for the Arbitron side of Project Apollo. The firm also promoted **Sheena Lewis** to manager, customer relations for cable and out-of-home sales.

Stamford, Conn., research firm *InsightExpress* has named **Niki Tyson** senior account executive in the technology sector and **Adam Brucker** senior account executive in the media sector. **Harmen Westra** has been appointed director of AdInsights, East Coast, and **Annette Mullin** has been named director of marketing and account management for the AdInsights group.

*G & S Research*, Carmel, Ind., has named **Mike Bandick** business unit leader and promoted **Susie Hunnicut** to research director and **Jon Ditmer** to data analyst.

**Ian Pierpoint,** head of *Synovate YC*, the Vancouver, B.C.-based youth research division of Synovate, has been chosen as one of British Columbia's "Top 40 under 40" businesspeople by the publication *Business in Vancouver*.

New York researcher *Synovate* has named **Joel Rubinson** senior vice president and general manager of solutions.

Fairfield, Conn.-based research firm *IMS Health* has named **David R. Carlucci** chairman, CEO and president.

**Gill Redfern**, **Kathryn Boxall** and **Ann Thompson** have joined U.K. research agency *Nunwood* as account director.

*M/A/R/C Research*, Irving, Texas, has named **Kevin Robertson** senior vice president. He will lead M/A/R/C's Greensboro, N.C. office. **Donna Lowell** has been named research manager in Greensboro.

*Harris Interactive*, Rochester, N.Y., has named **Ronald E. Salluzzo** executive vice president and chief financial officer. In addition, **Michael Lowenstein** has been named vice president and senior consultant in the firm's customer loyalty management research practice.

**Michael Warner** and **Tony Ceccoli** have joined *Freedonia Custom Research, Inc.*, Cleveland, as business development manager and senior analyst.

Boston-based *Yankee Group* announced management changes, as the firm launches its first year under new ownership. **Brad Hecht** has reassumed the role of chief research officer. The firm's three global research groups – telecommunications/wireless/mobile, consumers/media/entertainment and IT – will unite under Hecht. **Berge Ayvazian** has been named chief strategy officer. Executive Vice President **Rob Rich** has left to pursue other interests. Rich's responsibilities will be shared by **Eileen Eastman**, **Zeus Kerravala**, **Keith Mallinson** and **Boyd Peterson**.

Seattle-based *Global Market Insite, Inc.* has named **Leon de Koning** managing director for Northern Europe and tapped him to head its new Netherlands office.

# 2006

# Telephone

## Facilities Directory

>>>

The 2006 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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bvwconnect@mindspring.com
www.connectionsbirmingham.com
Rebecca V. Watson, President
32-14-32-0

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Ph. 205-443-5399
ceanes@grahammktres.com
www.grahammktres.com
Cindy Eanes, Vice President
40-30-40-20

**New South Research**
3000 Riverchase Galleria, Suite 630
Birmingham, AL 35244
Ph. 205-443-5350 or 800-289-7335
jjager@newsouthresearch.com
www.newsouthresearch.com
Jim Jager, President
40-30-40-20

**The Parker Group, Inc.**
468 Palisades Blvd.
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www.the-parker-group.com
Tony Parker
150-150-150-150

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Mobile, AL 36619-0666
Ph. 251-660-2910 or 504-522-2115
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Patricia Rhinehart, Vice President
50-50-50-0

# Alaska

## Anchorage

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Anchorage, AK 99501
Ph. 907-279-3982
craciun@craciun.com
www.craciun.com
Jenny Bell
5-5-5-0

# Arizona

## Flagstaff

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

## Phoenix

**The Analytical Group, Inc.**
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Scottsdale, AZ 85260
Ph. 480-483-2700
jack.pollack@analyticalgroup.com
www.analyticalgroup.com
Scott Smith
72-72-72-72
(See advertisement on p. 75)

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Div. of Ruth Nelson Research Services
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Phoenix, AZ 85051-9562
Ph. 602-944-8001 or 303-758-6424
azmktres@att.net
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Lincoln Anderson, Manager
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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
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ycave@ccrsurveys.com
www.ccrsurveys.com
Yvette Cave, Branch Manager
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**Datacall, Inc.**
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Phoenix, AZ 85021
Ph. 602-687-2500 or 602-864-0017
shelley@data-call.com
www.data-call.com
Shelley Thompson, Sr. Vice President
40-40-40-40

**Focus Market Research, Inc.**
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Phoenix, AZ 85251
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phoenix@focusmarketresearch.com
www.focusmarketresearch.com
Ray Opstad, General Manager
12-0-12-0

**Friedman Marketing Services**
Consumer Opinion Center
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Ph. 623-849-8080 or 914-698-9591
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www.oneilresearch.com
Michael J. O'Neil, Ph.D., President
14-14-14-0

**Precision Research Inc.**
5681 W. Beverly Lane
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Ph. 602-997-9711
jmuller@precisionresearchinc.com
John Muller, President
140-140-140-140

**Research International - Phoenix Office**
8800 N. 22nd Ave.
Phoenix, AZ 85021
Ph. 800-635-9190
marketingusa@research-int.com
www.research-int.com
Harriet O'Connor, V.P. Tele-Services
300-300-300-300

**Strictly Medical Market Research**
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Phoenix, AZ 85016
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www.westgroupresearch.com
Peter Apostol, Vice President
60-60-60-60

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jpetrillo@cpisurveys.com
www.cpisurveys.com
Jim Petrillo, President
70-70-70-70

**FMR Associates, Inc.**
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Ph. 520-886-5548
ashton@fmrassociates.com
www.fmrassociates.com
Ashton McMillan, Field Director
55-40-55-55

**Pueblo Research Associates, Inc.**
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Tucson, AZ 85713
Ph. 520-623-9442
pueblorsch@aol.com
www.puebloresearch.com
20-20-20-20

## Arkansas

### Fort Smith

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Fort Smith, AR 72903
Ph. 479-785-5637
craig@ccmarketresearch.com
www.ccmarketresearch.com
Craig Cunningham, President
19-8-19-19

### Little Rock

**Flake-Wilkerson Market Insights, LLC**
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Jennifer Dawson, V.P. Operations
50-50-50-50

**Bartels Research Corp.**
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Clovis, CA 93612
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www.bartelsresearch.com
Patrick Bartels, Vice President
50-15-50-7

**Nichols Research - GroupNet Central California**
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fresno@nicholsresearch.com
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Amy Shields
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Andrew Sorensen
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### Los Angeles
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Evonne Guinn, Manager
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Dr. Anita Kantak, Principal
17-17-17-17

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Ken Gross, President
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Amy Siadak
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www.isacorp.com
Michael Halberstam, President
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(See advertisement on p. 97)

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Alhambra, CA 91801
Ph. 818-989-1044
mhalberstam@isacorp.com
www.isacorp.com
Michael Halberstam, President
60-60-60-60
(See advertisement on p. 97)

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639 West Ave., L-14
Lancaster, CA 93534
Ph. 661-726-9480
mhalberstam@isacorp.com
www.isacorp.com
Michael Halberstam, President
75-75-75-75
(See advertisement on p. 97)

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juarezla@gte.net
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Nicandro Juarez, President
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Joey Harmon, Vice President
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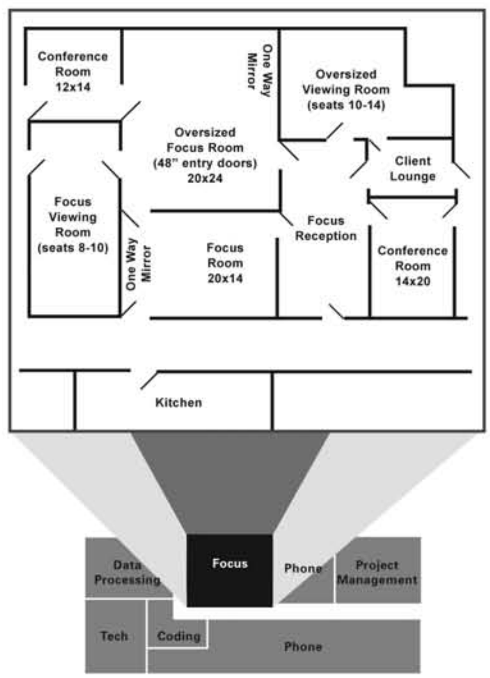


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Don Minchow, President
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24-0-24-0
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24-0-24-0
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Ryan Reasor, President
20-0-20-0

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(See advertisement on p. 98)

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Jennifer Franz
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## San Bernardino/Riverside

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lynn@athenamarketresearch.com
www.athenamarketresearch.com
Lynn Dianantopolous, President/CEO
24-0-24-6
(See advertisement on this page)

## San Diego

**CIC Research, Inc.**
8361 Vickers St.
San Diego, CA 92111-2112
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jrevlett@cicresearch.com
www.cicresearch.com
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www.clearwater-research.com
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137-137-137-137

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andi@awres.com
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Andrea Weiner, Managing Director
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**The Analytical Group, Inc.**
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Chicago, IL 60610
Ph. 312-751-2915
jerry.madansky@analyticalgroup.com
www.analyticalgroup.com
Tony Pacenti
50-50-50-50
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Angel Flight MARKETING SERVICES

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www.crmarketsurveys.com
Cherlyn Robinson, Project Coordinator
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## Codes - (e.g. 25-10-25-10)

1. STATIONS - No. of interviewing stations at this location
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3. ON-SITE - No. of stations which can be monitored on-site
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**Consumer and Professional Research, Inc. (CPR)**
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P.O. Box 10884
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Ph. 312-832-7744
pmorich@cprchicago.com
www.cprchicago.com
Peter Morich
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**Consumer Opinion Trends**
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Richard Day, President
32-26-32-32

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3615 Park Dr., Suite 101
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Mt. Prospect, IL 60056
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Debbie Ottenfeld
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Lisle, IL 60532
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www.mindseyeresearch.com
Kathie Cowles, Exec. Vice President
12-12-12-12

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(See advertisement on p. 83)

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(See advertisement on p. 83)

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www.qandm.com
Don Tucker
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chicago@schlesingerassociates.com
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Jason Horine, Facility Director
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(See advertisement on Inside Front Cover)

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6-0-6-0
(See advertisement on p. 99)

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mail@affina.com
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Amy Hernandez
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Ava Powell, General Manager
64-64-64-8

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Michael Lloyd, Director Mktg. Rsch.
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www.epleymarketing.com
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Lena Webre, Project Director
21-8-21-0

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Linda DeCuir, Research Coordinator
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# Maine

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Ph. 207-772-4011
insights@criticalinsights.com
www.criticalinsights.com
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**Market Decisions, LLC**
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www.marketdecisions.com
Curtis Mildner, President
25-25-25-25

**Seaport Surveys, Maine**
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mstrobl@maine.rr.com
www.panatlantic.net
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Carl Iseman or Kathy Skopinski
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Barbara Bridge, Managing Partner
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**Hollander Cohen & McBride**
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lbliss@hcmresearch.com
www.hcmresearch.com
Linda Bliss, Focus Group Director
20-15-20-20

**Maryland Marketing Source, Inc.**
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Randallstown, MD 21133
Ph. 410-922-6600
cspara@mdmarketingsource.com
www.mdmarketingsource.com
Christopher Spara, Partner
40-40-40-18

## Hagerstown/Frederick

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john_bekier@m-rr.com
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John Bekier, COO
64-64-64-64

# Massachusetts

## Boston

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kbasile@atlantic-research.net
www.atlantic-research.net
Kelly Basile, President
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**Bernett Research Services, Inc.**
World Trade Center East
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Ph. 617-746-2705
arhayes@bernett.com
www.bernett.com
Andrew Hayes, Brother & Partner
220-220-220-220

**Dorr & Sheff, Inc.**
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Margi Priddy, Vice President
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Owen Jenkins, CEO
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www.performanceplusboston.com
Shirley Shames, President
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31 Saint James Ave., Suite 930
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Terri Lyn Hawley, Facility Director
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(See advertisement on Inside Front Cover)

# Michigan

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www.socialmarketing.org
Bill Schroer, Principal
8-8-8-0

## Detroit

**Advantage Research Services, Inc.**
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Ph. 734-261-8377
davids@advantageresearch.net
www.advantageresearch.net
David Sokolowski, President
70-20-70-0

**Amrigon**
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Bloomfield Hills, MI 48304
Ph. 248-332-2300
192-192-192-192

**Consumer Pulse of Detroit**
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Ph. 800-645-9850
etrimarchi@mktginc.com
www.mktginc.com
250-250-250-250
(See advertisement on p. 114)

**Opinion Access Corp.**
31-00 47th Ave.
Long Island City, NY 11101
Ph. 718-729-2622 or 888-489-DATA
info@opinionaccess.com
www.opinionaccess.com
Joe Rafael, Chairman
200-200-200-200

**Research Management, Inc.**
40-3 Burt Drive
Deer Park, NY 11729
Ph. 631-586-9337
doctorg@resmanage.com
www.resmanage.com
Stewart Goldberg, Owner
40-40-40-40

State-of-the-art computer-assisted telephone research center. Operates 40 computerized interviewing stations, as well as traditional paper-and-pencil surveys. Responsible data collection for a full spectrum of marketing, business and consumer research needs - direct marketing - Web-based surveys - lead generation - business-to-business.

**Barbara Ruderman**
211 W. Chester St.
Long Beach, NY 11561
Ph. 516-889-3559
rudyj211@optonline.net
Barbara Ruderman
20-0-20-20

**S I S International Research, Inc.**
Worldwide Headquarters
7 East 20th St., 4th Floor
New York, NY 10003
Ph. 212-505-6805
research@sisinternational.com
www.sisinternational.com
Ruth Stanat, President
20-20-10-10

SIS International Research has a global call center located in New York. We employ highly skilled interviewers in the European, Latin American and Asian languages for U.S. global recruitment studies, medical/pharmaceutical, consumer and B2B interviews. Visit our global and industry capabilities at www.sisinternational.com.
(See advertisement on opposite page)

**S I S International Research, Inc.**
Global Observation Center
11 E. 22nd St., 2nd Floor
New York, NY 10010
Ph. 212-505-6805
research@sisinternational.com
www.sisinternational.com
Ruth Stanat, President
20-20-10-10

SIS International Research has a Global Call Center located in New York. We employ highly skilled interviewers in the European, Latin American and Asian languages for U.S. and global recruitment studies, medical/pharmaceutical, consumer and B2B interviews. Visit our global and industry capabilities at www.sisinternational.com.
(See advertisement on opposite page)

**Schulman, Ronca & Bucuvalas, Inc.**
275 Seventh Ave., Suite 2700
New York, NY 10001
Ph. 212-779-7700
m.schulman@srbi.com
www.srbi.com
Chintan Turakhia, Sr. Vice President
380-380-380-380

SRBI is a full-service global marketing and opinion research firm specializing in consumer market insights, financial services, insurance, media, transportation, telecommunications, utilities, public/social policy, public opinion. Provides extensive CATI telephone and Internet interviewing services, both consumer and business-to-business, to the market research industry. Four large, networked interviewing centers, multi-lingual capabilities. Member, Global Market Research.

**Seaport Surveys**
Financial Focus, Inc.
135 William St., 5th Floor
New York, NY 10038
Ph. 212-608-3100 or 800-347-2662
Seaportand@aol.com
www.seaportsurveys.com
Andrea Waller, President
25-0-25-25

**Universal Survey Center**
29 W. 38th St.
New York, NY 10018
Ph. 212-391-5243
kstrassberg@universalsurvey.com
www.universalsurvey.com
Keith Strassberg, Exec. Vice President
225-225-225-225

## Rochester

**The Sutherland Group, Ltd.**
1160 Pittsford-Victor Rd.
Pittsford, NY 14534
Ph. 800-388-4557 or 585-586-5757
webmaster@suth.com
www.suth.com
380-380-380-380

## Syracuse

**Knowledge Systems & Research, Inc. (KS&R)**
500 S. Salina St.
Syracuse, NY 13202
Ph. 888-8KSRINC or 315-470-1350
HQ@ksrinc.com
www.ksrinc.com
100-100-100-100

**KS&R's INSITE**
5792 Widewaters Pkwy.
Dewitt, NY 13214
Ph. 800-645-5469 or 315-446-3403
insite@ksrinc.com
www.ksrinc.com
Joe Snyder, Dir. of Ops/Sr. Cnsultant
100-100-100-100

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

1. STATIONS - No. of interviewing stations at this location
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4. OFF-PREMISES- No. of stations which can be monitored off-premises

# North Carolina

## Charlotte

**KPC Research**
600 S. Tryon St.
Charlotte, NC 28202
Ph. 704-358-5757 or 800-852-2794
kpcresearch@kpcresearch.com
www.kpcresearch.com
Jack Clark, Research Director
36-36-36-36

**Leibowitz Market Research Associates, Inc.**
GroupNet Charlotte
3120 Whitehall Park Dr.
Charlotte, NC 28273-3335
Ph. 704-357-1961
info@leibowitz-research.com
www.leibowitz-research.com
Teri Leibowitz, President
15-10-0-0

**MarketWise, Inc.**
831 E. Morehead St., Suite 150
Charlotte, NC 28202
Ph. 704-332-8433 or 800-849-5924
mrambo@marketwise-usa.com
www.marketwise-usa.com
Mimi Parker Rambo
22-22-22-22

## Greensboro/Winston-Salem

**AllPoints Research**
8025 N. Point Blvd., Suite 215-E
Winston-Salem, NC 27106
Ph. 336-896-2200 ext. 1009
your_team@allpoints.biz
www.allpoints.biz
Sherrie Aycock, Co-Owner
38-38-38-8

**Bellomy Research, Inc.**
2150 Country Club Rd., Suite 300
Winston-Salem, NC 27104
Ph. 800-443-7344
slayne@bellomyresearch.com
www.bellomyresearch.com
Scott Layne
270-270-270-270

**Survey Partners of America**
2400 Reynolds Rd., Suite 203
Winston-Salem, NC 27106
Ph. 800-348-8002
johnsessions@surveypartners.com
www.surveypartners.com
Pat Rierson
275-275-275-275

**The Telephone Centre, Inc.**
1204 Oakland Ave.
Greensboro, NC 27403
Ph. 336-574-3000
mfoust@telectr.com
www.telectr.com
Liz Winter, Owner
130-130-130-130

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## Raleigh/Durham

**FGI Research**
400 Meadowmont Village Circle, Suite 431
Chapel Hill, NC 27517
Ph. 919-929-7759
info@fgiresearch.com
www.fgiresearch.com
Dino E. Fire, General Manager
100-100-100-100

**Harker Research**
1616 E. Millbrook Rd., Suite 230
Raleigh, NC 27609
Ph. 919-954-8300
info@harkerresearch.com
www.harkerresearch.com
120-0-120-120

**Medical Marketing Research, Inc.**
1201 Melton Court
Raleigh, NC 27615
Ph. 919-870-6550 or 800-866-6550
info@mmrx.com
www.mmrx.com
George Matijow, President
10-10-10-0

# North Dakota

## Fargo

**Burton, Gordon & Associates**
322 Broadway
Fargo, ND 58102
Ph. 701-297-6111
gchristensen@bgai.net
Gordon Christensen
14-0-14-0

**Dynamics Marketing, Inc.**
805 Sunflower Ave.
Cooperstown, ND 58425
Ph. 701-797-2600
terik@dynamicsmarketinginc.com
www.dynamicsmarketinginc.com
Teri Knutson, Research Director
85-85-85-85

**Teleforce, Inc.**
601 28th St. S.W.
Fargo, ND 58103
Ph. 800-323-0810
linda@teleforcerg.com
www.teleforcerg.com
Linda Finch
192-24-192-192

# Ohio

## Akron

**DTS Research**
5847 Darrow Rd. Suite 3
Hudson, OH 44236
Ph. 800-843-9614
info@dts01.com
www.dts01.com
William Braden, President
50-36-50-36

## Cincinnati

**Assistance In Marketing, Inc.**
11890 Montgomery Rd.
Cincinnati, OH 45249
Ph. 513-683-6600 or 888-4AIMFIRE
marian@AIM-Cincinnati.com
www.aimresearchnetwork.com
Irwin Weinberg
20-0-20-0

**B & B Research Services, Inc.**
8833 Chapel Square Lane
Cincinnati, OH 45249
Ph. 513-583-4660
focusmark@fuse.net
Kim Sharp
12-6-12-12
(See advertisement on opposite page)

**Burke, Incorporated**
805 Central Ave.
Cincinnati, OH 45202
Ph. 800-688-2674
info@burke.com
www.burke.com
Steve Clark, V.P. Data Collection
105-105-105-105
(See advertisement on p. 71)

**Calo Research Services, Inc.**
10250 Alliance Rd.
Cincinnati, OH 45242
Ph. 513-984-9708
ncalo@caloresearch.com
www.caloresearch.com
Patricia A. Calo, Vice President
14-0-14-0

**Convergys Customer Intelligence Services**
201 East Fourth Street
Cincinnati, OH 45202
Ph. 800-344-3000
marketing@convergys.com
www.convergys.com/research.html
Kathy Renaker, Dir. Mktg. Rsch. Outsourcing
100-100-100-100

**Fields Research, Inc.**
3814 West St., Suite 110
Cincinnati, OH 45227
Ph. 513-821-6266
ken@fieldsresearch.com
www.fieldsresearch.com
Ken Fields, President
27-27-27-27

**Friedman-Swift Associates**
110 Boggs Lane, Suite 200
Cincinnati, OH 45246
Ph. 513-772-9200
info@friedmanswift.com
www.friedmanswift.com
Judy George, Sr. Vice President
50-0-50-50

**Market Inquiry LLC**
5825 Creek Rd.
Cincinnati, OH 45242
Ph. 513-794-1088
cathy@marketinquiry.com
www.marketinquiry.com
Lee Ann Adams, Facility Director
24-15-24-24

**MarketVision Research®**
10300 Alliance Rd.
Cincinnati, OH 45242
Ph. 513-791-3100
info@mv-research.com
www.mv-research.com
Tyler McMullen, Senior Vice President
56-56-56-56

**MRSI (Marketing Research Services, Inc.)**
720 East Pete Rose Way, Suite 200
Cincinnati, OH 45202
Ph. 513-579-1555 or 800-SAY-MRSI
info@mrsi.com
www.mrsi.com
Randall Thaman
96-96-88-88
(See advertisement on p. 37)

**QFACT Marketing Research, LLC.**
9908 Carver Rd.
Cincinnati, OH 45242
Ph. 513-891-2271
info@qfact.com
www.qfact.com
Carol Mihal, Research Director
34-0-24-0

**Service Industry Research Systems, Inc. (SIRS)**
Field & Focus Group Facilities
201 Martha Layne Collins Blvd.
Highland Heights, KY 41076-1750
Ph. 859-781-9700
knowledge@sirsinc.com
www.sirsinc.com
Bill Welch
95-95-95-95

**StrataMark Dynamic Solutions**
4350 Glendale Milford Rd.
Cincinnati, OH 45242
Ph. 513-618-7150
lmock@stratamark-r.com
www.stratamark-r.com
Josh Hiley, Account Services
60-60-60-60

## Cleveland

**Business Research Services, Inc.**
26600 Renaissance Parkway, Suite 150
Cleveland, OH 44128
Ph. 216-831-5200 or 888-831-5200
info@MarketingResearch.com
www.MarketingResearch.com
Ron Mayher, General Manager
25-25-25-25

**Focus Groups of Cleveland**
2 Summit Park Dr., Suite 225
Cleveland, OH 44131
Ph. 216-901-8075 or 800-950-9010
research@idirectdata.com
www.focusgroupsofcleveland.com
Amy Morris, Executive Director
12-3-10-0
(See advertisement on this page)

**National Market Measures, Inc.**
25109 Detroit Rd., Suite 330
Cleveland, OH 44145
Ph. 440-892-8555
www.nmminc.com
Jessica Petrovek, Field Director
15-15-15-15

**National Survey Research Center**
5350 Transportation Blvd., Suite 19
Cleveland, OH 44125
Ph. 800-837-7894 or 216-518-2805
nsrc@nsrc.com
Lauren Wagner, Mgr. Customer Relations
20-20-20-20

**Opinion Centers America**
Suite 100, Great Northern Corporate Ctr. III
25050 Country Club Blvd.
Cleveland, OH 44070
Ph. 800-779-3003 or 440-779-3000
oca@opinioncenters.com
www.opinioncenters.com
Karen Cunningham, Field Director
20-12-20-20

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

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**OPINIONation**
4301 Ridge Rd.
Cleveland, OH 44144
Ph. 216-351-4644
ron@opinionation.com
www.opinionation.com
Ron Kornokovich, President
35-35-35-35

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**Pat Henry Market Research, Inc.**
P.O. Box 17182
Cleveland, OH 44117
Ph. 800-229-5260 or 216-531-9562
jhominy@pathenry.com
www.thepathenrygroup.com
Judy Hominy
20-20-20-20

**Synergy International Limited, Inc.**
1761 E. 30th St., Suite 115
Cleveland, OH 44114
Ph. 216-431-0008
tholloway@synergylimited.net
www.synergylimited.net
7-7-7-0

### Columbus

**Advantage Research of Columbus Ohio**
(Contact via Headquarters)
29671 Six Mile Rd, Suite 100C
Livonia, MI 48187
Ph. 734-261-8377 (Hq.)
davids@advantageresearch.net
www.advantageresearch.net
Thomas Harvey, Vice President
70-20-70-0

**Assistance In Marketing/Columbus**
One Easton Oval, Suite 100
Columbus, OH 43219
Ph. 614-583-2100
lorne@aim-columbus.com
www.aimresearchnetwork.com
Lorne Dillabaugh, V.P., Field Operations
20-0-20-0

**B & B Research Services, Inc.**
550 Frantz Rd., Suite 111
Dublin, OH 43017
Ph. 614-760-8566
bbresearchcolumbus@fuse.net
Judy Frederick, Project Director
8-0-8-0
(See advertisement on p. 118)

**Saperstein Associates, Inc.**
4555 N. High St.
Columbus, OH 43214
Ph. 614-261-0065
dwolfe@sapersteinassociates.com
www.sapersteinassociates.com
Deborah K. Wolfe, V.P. Corp. & Field Ops.
27-25-27-27

### Dayton

**Business Research Group**
University of Dayton
300 College Park
Dayton, OH 45469-2110
Ph. 937-229-2453 or 888-483-2237
richard.stock@notes.udayton.edu
www.udayton.edu/~brg
Richard Stock, Director
20-20-20-0

**Center for Urban and Public Affairs**
Wright State University
3640 Colonel Glenn Hwy.
225 Millett Hall
Dayton, OH 45435
Ph. 937-775-2941
david.jones@wright.edu
www.wright.edu/cupa
T. David Jones, Dir. Survey Research
14-14-14-0

**L2 Marketing Research, Ltd.**
381 Miamisburg - Centerville Rd.
Dayton, OH 45459
Ph. 937-435-5067
info@l2mr.com
www.l2mr.com
Libby Webster or Lou Es Greene
12-0-12-0

**Paragon Research LLC**
1950 Composite Dr.
Mail Stop W6
Dayton, OH 45420-1475
Ph. 937-294-9004
wlewis@paragonresearchllc.com
20-0-20-0

### Toledo

**A Z G Research**
325 E. Wooster St.
Bowling Green, OH 43402
Ph. 800-837-4300
sgries@azgresearch.com
www.azgresearch.com
25-25-25-25

**Creative Marketing Ent., Inc.**
6711 Monroe St.
Bldg. IV, Suite C
Sylvania, OH 43560
Ph. 419-867-4444 or 800-533-8480
lpbrown@cmeinet.com
Joyce Clevenger, Exec. V.P.
55-55-55-55

**Great Lakes Marketing Associates**
3103 Executive Pkwy., Suite 106
Toledo, OH 43606
Ph. 419-534-4700 or 419-534-4710
info@greatlakesmarketing.com
www.greatlakesmarketing.com
Lori M. Dixon, Owner
20-20-20-20

## Oklahoma

### Oklahoma City

**Johnson Marketing Research, Inc.**
2916 Hemingford Lane
Oklahoma City, OK 73120
Ph. 405-840-9243
johnsonresearch@webtv.net
Patty Casteel, President
8-0-8-0

**Oklahoma Market Research**
Data Net
4900 N. Portland Ave., Suite 150
Oklahoma City, OK 73112
Ph. 405-525-3412
mail@datanet-research.com
Judy Nitta, Vice President
40-40-40-40

### Tulsa

ConsumerLogic
Marketing Research

**Consumer Logic, Inc.**
4928 S. 79th E. Ave.
Fontana Center
Tulsa, OK 74145
Ph. 918-665-3311 or 800-544-1494
djarrett@consumerlogicresearch.com
www.consumerlogicresearch.com
Dan Jarrett, President
30-24-20-0

With over 30 years marketing research experience in the Tulsa MSA we know research and we know Tulsa. We will partner with you to deliver quality and meaningful research results. Consumer Logic is a full-service market research company. We offer a state-of-the-art facility; quality recruiting and data collection; including CATI interviewing; moderating; data tabulation and analysis. Our vast experience includes mail, telephone, online; and on-site surveys; focus groups; IDI's; store audits; store intercepts; and more.

**On-Line Communications, Inc.**
401 S.E. Dewey
Bartlesville, OK 74003
Ph. 800-765-3200 or 918-338-2000
askus@on-linecom.com
www.on-linecom.com
Peggy O'Connor
180-180-180-180
(See advertisement on opposite page)

## Oregon

### Portland

**BN Research**
1220 S.W. Morrison, Suite 425
Portland, OR 97205
Ph. 503-248-9058
info@bnresearch.com
www.bnresearch.com
Jaci Root, Communication Specialists
29-29-29-29

**Consumer Opinion Services, Inc.**
Lloyd Focus & Videoconference Center
2225 Lloyd Center
Portland, OR 97232
Ph. 503-493-2870 or 206-241-6050 for bids
jim@portlandopinion.com
www.cosvc.com
Jim Weaver, Vice President
18-14-18-0
(See advertisement on p. 130)

**HN Research, Inc.**
18277 S.W. 133rd Terrace
Tualatin, OR 97062
Ph. 877-330-6726
tony@hnresearch.com
www.hnresearch.com
60-0-60-60

**InfoTek Research Group, Inc.**
4915 S.W. Griffith Dr., Suite 210
Beaverton, OR 97005
Ph. 503-644-0644
steve@infotekresearch.com
www.infotekresearch.com
Steve Boespflug, V.P./Principal
62-62-62-62

**Market Decisions Corporation**
8959 S.W. Barbur Blvd., Suite 204
Portland, OR 97219
Ph. 503-245-4479
info@mdcresearch.com
www.mdcresearch.com
Lester Harman, Field Svcs Acct. Exec.
60-60-60-60

**Research Data Design, Inc.**
5100 S.W. Macadam, Suite 500
Portland, OR 97239
Ph. 503-223-7166
info@rdd.info
www.rdd.info
John Stepleton, President
216-216-216-216

**Sorensen Associates Inc**
999 N.W. Frontage Rd., Suite 190
Troutdale, OR 97060
Ph. 503-665-0123
james.sorensen@saiemail.com
www.sorensen-associates.com
Linda Zinck, Dir., Consumer Research
25-0-25-0

## Pennsylvania

### Allentown/Bethlehem

**Marketing Solutions Corporation**
175 W. Butternut Rd.
Hellertown, PA 18055
Ph. 800-326-3565
MarketingSolutions@attglobal.net
www.marketingsolutionscorp.com
Greg Surovcik, Vice President
25-25-25-25

**PAREXEL (IMC)**
3724 Crescent Court W.
Whitehall, PA 18052
Ph. 610-437-4000
joanne.kuchera@parexel.com
www.parexelimc.com
104-104-104-104

### Erie

**Moore Research Services, Inc.**
2675 West 12th St.
Erie, PA 16505
Ph. 814-835-4100
colleen@moore-research.com
www.moore-research.com
Colleen Moore Mezler, President
15-15-3-3

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

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4. **OFF-PREMISES**- No. of stations which can be monitored off-premises

## Lancaster

**Visions Marketing Services**
528 W. Orange St.
Lancaster, PA 17603
Ph. 800-222-1577
allan@vmsmkt.com
www.vmsmkt.com
Allan Geller, President
35-35-35-35

## Philadelphia

**M Davis & Co., Inc.**
1520 Locust St., 3rd Floor
Philadelphia, PA 19102-4403
Ph. 215-790-8900 or 800-842-4836
info@mdavisco.com
www.mdavisco.com
Morris Davis, President
40-40-40-40

**Delta Market Research, Inc.**
333 N. York Rd.
Hatboro, PA 19040
Ph. 215-674-1180
DMRSUPPORT@aol.com
32-32-32-32

**GfK-NOP**
Customer Management Center of Excellence
One Belmont Ave.
Bala Cynwyd, PA 19004
Ph. 610-667-1649
mlowenstein@nopworld.com
www.gfkamerica.com
Bob Magee, AVP Telephone Centers
400-400-400-400

**ICR/International Communications Research**
53 W. Baltimore Pike
Media, PA 19063-5698
Ph. 484-840-4300
info@icrsurvey.com
www.icrsurvey.com
Gilbert Barrish, President/CEO
300-300-300-300

ICR is a top-ranked, nationally recognized market research organization serving business-to-business and consumer markets. Providing custom research and information analysis to clients on issues including customer and employee satisfaction, loyalty, multicultural and ethnic marketing, social science, public policy, advertising, public relations and others. ICR's family of EXCEL omnibus services includes TeenExcel, SmallBizEXCEL, HispanicEXCEL and CENTRIS. ICR's research is often cited in the New York Times, USA Today, the Wall Street Journal, ABCNews.com and others.
(See advertisement on p. 51)

**ICT Research Services**
100 Brandywine Blvd
Newtown, PA 18940
Ph. 267-685-5660
asuperfine@ictgroup.com
www.ictgroup.com
Alan Superfine, V.P./G.M.
120-120-120-120

**JRA, J. Reckner Associates, Inc.**
JRA: Data Collection
587 Bethlehem Pike, Suite 800
Montgomeryville, PA 18936-9742
Ph. 215-822-6220
bogrizek03@reckner.com
www.reckner.com
Barbara Ogrizek, Director
100-100-100-75

**MAXimum Research, Inc.**
1860 Greentree Rd.
Cherry Hill, NJ 08003
Ph. 856-874-9000 or 888-212-7200
sales@maximumresearch.com
www.maximumresearch.com
Robert A. Malmud
100-100-100-100

Maximum Research is a certified small business yet is the largest interviewing facility in South Jersey. We pride ourselves on offering high-quality interviewing and customer service. We offer 100 CATI stations; multiple inbound 800-lines; mail, focus group and Web recruiting; in-person interviews; on-site programming, questionnaire development, coding, statistical tabulations; CfMC, WebQuery and SPSS; quick turnaround of large studies.
(See advertisement on this page)

**MSI International East, Inc.**
650 Park Ave
King of Prussia, PA 19406
Ph. 610-265-2000
paul_strasser@msimsi.com
www.msimsi.com
Sharon Santangelo, Field Director
40-40-40-40

**NJ Inst. for Successful Aging Research Call Center**
University of Medicine & Dentistry of New Jersey
42 E. Laurel Rd.
Stratford, NJ 08084
Ph. 877-NJ-AGING or 877-652-4464
BrillJe@umdnj.edu
www.oranjbowlresearch.info
Jonathan E. Brill, Ph.D.
11-11-11-11

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**The Olson Research Group, Inc.**
North American Technology Center
48 Swan Way, Suite 102
Warminster, PA 18974
Ph. 267-487-5500
info@olsonresearchgroup.com
www.olsonreseachgroup.com
Paul Neal, Vice President
25-25-25-25
(See advertisement on p. 55)

**Ricci Telephone Research, Inc.**
2835 West Chester Pike
Broomall, PA 19008
Ph. 610-356-7575
info@ricciresearch.com
www.ricciresearch.com
Chris Ricci, President
50-50-50-50

**Schlesinger Associates Philadelphia, Inc.**
1650 Arch St., 27th Floor
Philadelphia, PA 19103
Ph. 215-564-7300
pa@schlesingerassociates.com
www.schlesingerassociates.com
Amber Leila Jones, Vice President
26-0-26-26
(See advertisement on Inside Front Cover)

**Teleresearch**
1300 Virginia Drive, Suite 200
Fort Washington, PA 19034
Ph. 610-220-7593
rolesky@trsurvey.com
Robin Olesky
200-200-200-200

**ThoughtMetrics, LLC**
34 Cameo Dr.
Cherry Hill, NJ 08003
Ph. 800-369-6303
info@thoughtmetrics.com
www.thoughtmetrics.com
Michael Feldman, Co-CEO
60-60-60-60

**TMR, Inc.**
1924 Parker Ave.
Holmes, PA 19043
Ph. 610-586-5051
jvc@tmrinfo.com
www.tmrinfo.com
Youssett Zerkani, V.P./G.M.
50-50-50-50

**TMR, Inc.**
450 Parkway
Broomall, PA 19008
Ph. 610-359-1190
jvc@tmrinfo.com
www.tmrinfo.com
Michelle Adore, V.P./G.M.
50-50-50-50

## Pittsburgh

**All Facilities, Inc.**
1500 Ardmore Blvd.
Pittsburgh, PA 15221
Ph. 412-242-6200
info@allfacilities.com
www.allfacilities.com
Michael Vertullo, Bus. Dev. Coord.
70-70-70-70

**Campos Market Research, Inc.**
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Pittsburgh, PA 15222-1619
Ph. 412-471-8484 ext. 309
marketing@campos.com
www.campos.com
Kathy Leeper, Project Manager
40-20-40-40

**Clark Market Research**
5933 Baum Blvd.
Pittsburgh, PA 15206
Ph. 800-426-8248
jjca5933@aol.com
www.clarkservices.net
John J. Clark, President
40-20-40-40

**Customer Contact, Inc. (CCI)**
2325 E. Carson St.
Pittsburgh, PA 15203
Ph. 412-431-7020
tim@pghmail.com
Tim Marshall, President
36-36-36-36

**Customer Contact, Inc. (CCI)**
38 N. Main St.
Washington, PA 15301
Ph. 724-222-5040
tim@pghmail.com
Tim Marshall, President
24-24-24-24

**Direct Feedback, Inc.**
Four Station Square, Suite 545
Pittsburgh, PA 15219
Ph. 412-394-3676 or 800-519-2739
mignella@dfresearch.com
www.dfresearch.com
Margaret Powers, Project Manager
15-15-15-15

**Focus Center of Pittsburgh**
2101 Greentree Rd., # A-106
Pittsburgh, PA 15220
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**Guide Post Research**
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GDEPST@aol.com
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**PERT Survey Research**
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Ph. 412-939-1500
cathy.frank@pertsurvey.com
www.pertsurvey.com
Cathy Frank, Operations Manager
56-56-56-56

## State College

**Diagnostics Plus, Inc.**
1333 S. Allen St.
State College, PA 16801
Ph. 814-238-7936
jimf@diagnosticsplus.com
www.diagnosticsplus.com
Jim Fong, VP of Sales & Marketing
23-23-23-23

**Market Insight, Inc.**
112 W. Foster Ave., Suite 202-C
State College, PA 16801
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www.advantagemarketinginfo.com
Rick Nagele, President
15-0-15-0

## Providence

**Alpha Research Associates, Inc.**
395 Smith St.
Providence, RI 02908
Ph. 401-861-3400
alphapoll@sprynet.com
22-0-22-0

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

1. STATIONS - No. of interviewing stations at this location
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**Capture Information Services Group**
601 Jefferson Blvd.
Warwick, RI 02886
Ph. 401-732-3269 or 866-463-8638
partners@captureinc.com
www.captureisg.com
Stuart H. Marion, Managing Partner
20-20-20-20

## South Carolina

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**ProGen Research, Inc.**
2724-A Wade Hampton Blvd.
Greenville, SC 29615
Ph. 864-244-3435
22-7-22-22

**Research Inc.**
211 Century Dr., Suite 102-D
Greenville, SC 29607
Ph. 864-232-2314 or 770-619-9837 (Hq.)
info@researchincorporated.com
www.researchincorporated.com
Cathy Sonfield (Hq.)
18-10-18-18

**David Sparks & Associates**
107 Clemson St.
Clemson, SC 29631
Ph. 864-654-7571
more@sparksresearch.com
www.sparksresearch.com
48-48-48-10

## South Dakota

### Sioux Falls

**American Public Opinion Survey & Market**
Market Research Corp.
1320 S. Minnesota Ave.
Sioux Falls, SD 57105-0625
Ph. 605-338-3918
ron@mtcnet.net
www.mtcnet.net/~ron
Ron Van Beek, President
27-27-27-27

**L & S TeleServices, Inc.**
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Sioux Falls, SD 57104
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john.sievert@l-s.com
www.mostresponsive.com
John Sievert
24-24-24-24

**RMA, Inc.**
Robinson & Muenster Associates, Inc.
1208 Elkhorn St.
Sioux Falls, SD 57104-0218
Ph. 605-332-3386
jimr@rma-inc.com
www.rma-inc.com
128-128-128-128

## Tennessee

### Chattanooga

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Chattanooga, TN 37421
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info@wilkinsresearch.net
www.wilkinsresearch.net
Lisa Wilkins, Co-Owner
60-60-60-60

### Memphis

**AccuData Market Research, Inc.**
1036 Oakhaven Rd.
Memphis, TN 38119
Ph. 800-625-0405 or 901-763-0405
val@accudata.net
www.accudata.net
Valerie Jolly, Manager
12-0-12-12

**PWI Research**
5100 Poplar Ave., Suite 3125
Memphis, TN 38137
Ph. 901-682-2444
ebeech@pwiresearch.com
www.pwiresearch.com
Ellie Beech, President
35-35-35-35

### Nashville

**Perdue Research Group**
21 White Bridge Rd., Suite 200
Nashville, TN 37205
Ph. 615-298-5117
gfuson@perdueresearchgroup.com
www.perdueresearchgroup.com
Greg Fuson, Acct. Mgr.
20-16-0-0

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Kelly Castleberry, President
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**Tammadge Market Research**
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Melissa Pepper, CSO
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Daniel Lee
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Dallas, TX 75247-3715
Ph. 800-315-TEXX
tveliz@mmrx.com
Tony Veliz, Facility Director
10-3-10-0

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**DSS Research**
6750 Locke Ave.
Fort Worth, TX 76116-4157
Ph. 800-989-5150 or 817-665-7000
jtodd@dssresearch.com
www.dssresearch.com
Jennifer Todd, Marketing Coordinator
80-80-80-80

**Fenton Swanger Consumer Research, Inc.**
14140 Midway Rd., #105
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focus@fentonswanger.com
www.fentonswanger.com
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**Focus On Dallas, Inc.**
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Dallas, TX 75244-4632
Ph. 972-960-5850
bids@focusondallas.com
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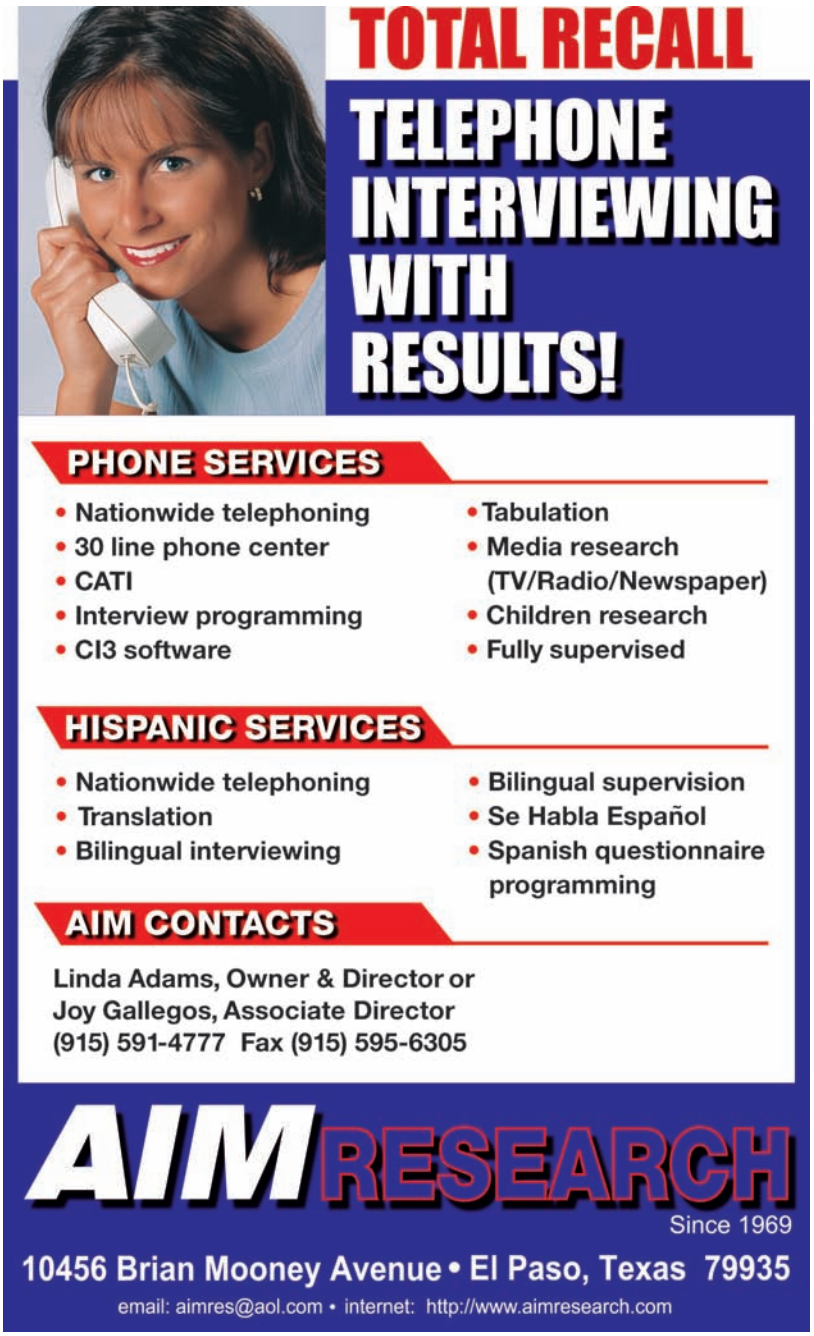
Mary Ulrich, President
36-0-36-0

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**Information Unlimited, Inc.**
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ckuepker@informationunlimited.com
www.informationunlimited.com
Chad Kuepker, Dir. Of Operations
100-100-100-100
(See advertisement on p. 125)

**Rincon & Associates**
6500 Greenville Ave., Suite 510
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Ph. 214-750-0102
info@rinconassoc.com
www.rinconassoc.com
Edward T. Rincon, Ph.D., President
30-30-30-30

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Ph. 972-386-4050
information@savitzfieldandfocus.com
www.savitzfieldandfocus.com
Harriet E. Silverman, Exec. Vice President
150-150-150-150
(See advertisement on p. 125)

**Schlesinger Associates Dallas, Inc.**
JP Morgan International Plaza III
14241 Dallas Pkwy., Suite 500
Dallas, TX 75254
Ph. 972-503-3100
dallas@schlesingerassociates.com
www.schlesingerassociates.com
Nancy Ashmore, Facility Director
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## El Paso

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El Paso, TX 79935
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info@aimresearch.com
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Linda Adams, Owner/Director
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www.easternresearch.com
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Suzanne Lopez
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Ph. 713-783-9111 or 800-460-9111
cqs@cqsinc.com
www.cqsinc.com
Jan Homer
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Ph. 281-240-9646
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Miguel Pantoja, Branch Manager
60-50-60-0

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Fay Parker, President
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Jan Homer
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www.vcrhouston.com
Dan Kessler, Vice President
90-90-90-90

**Voter Consumer Research**
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The Woodlands, TX 77380
Ph. 800-VCR-POLL or 281-364-0911
dan@vcrhouston.com
www.vcrhouston.com
Dan Kessler, Vice President
96-96-96-96

## Lubbock

**United Marketing Research**
1516 53rd St.
Lubbock, TX 79412
Ph. 806-744-6740
umr220@door.net
www.umspromo.com
David McDonald, Sales/Marketing Dir.
85-85-80-80

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### San Antonio

**Creative Consumer Research**
5300 Wurzbach Rd., Suite 400
San Antonio, TX 78238
Ph. 210-520-7025
ccrsanantonio@ccrsurveys.com
www.ccrsurveys.com
Richard Weinhold, Vice President
50-25-50-0

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Luis Carter, President
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**Discovery Research Group**
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(See advertisement on p. 127)

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David Finch, General Manager
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info@usfieldresearch.com
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David Finch, Director of Business Dev.
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www.valley-research.com
Dennis L. Guiver
100-100-100-100

**Venture Data**
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Salt Lake City, UT 84117
Ph. 800-486-7955
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www.VentureData.com
Jeff Call, General Manager
314-314-314-314

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contact@westernwats.com
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Rebecca Walters, Client Development Manager
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info@actionresearch.com
www.actionresearch.com
Cheryl Eaton
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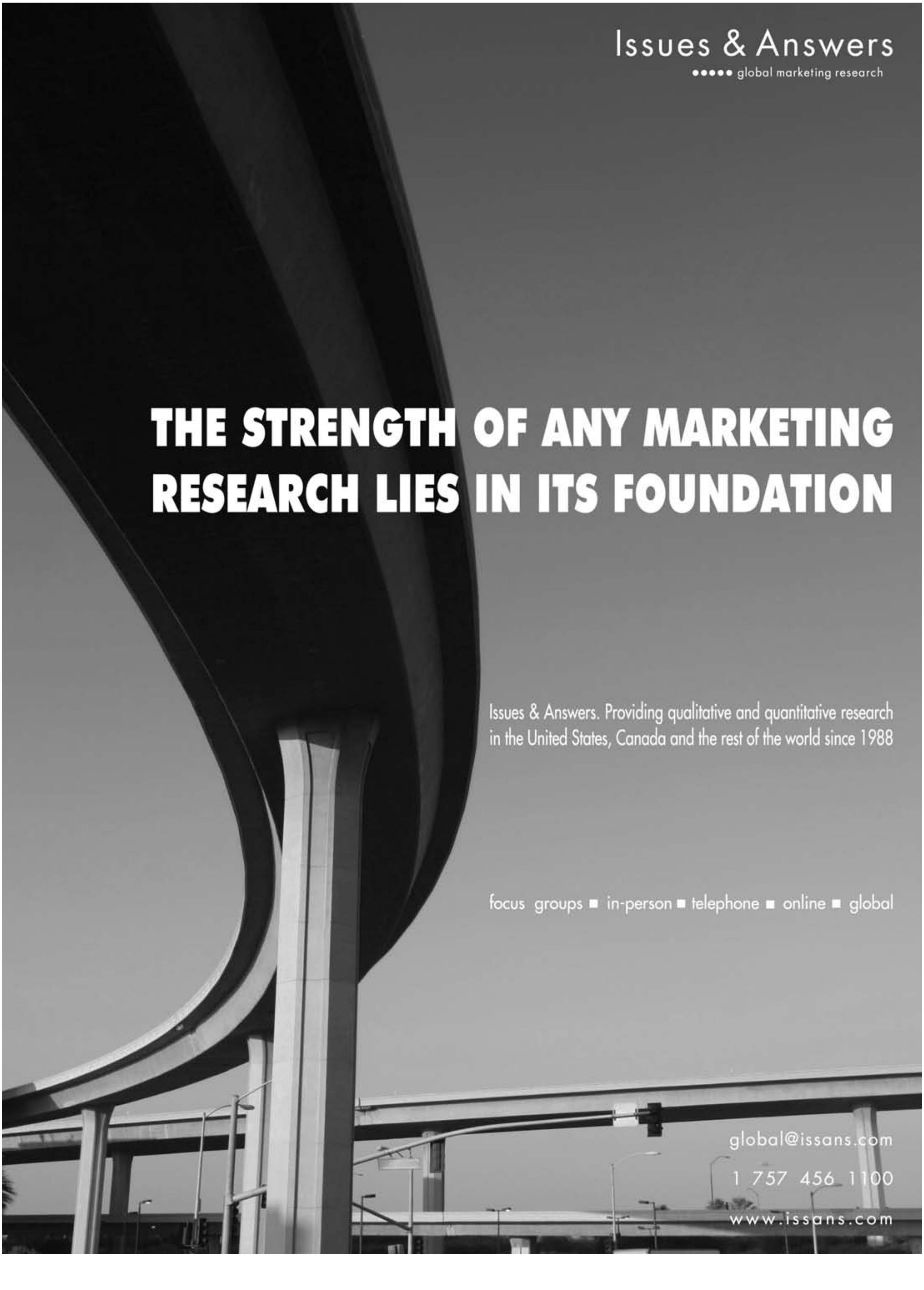

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## Virginia

### Newport News/Norfolk/ Virginia Beach

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4500 Colley Ave.
Norfolk, VA 23508
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www.continentalresearch.biz
Nanci A. Glassman, President
14-7-14-14

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5151 Bonney Rd., Suite 100
Virginia Beach, VA 23462
Ph. 757-456-1100 or 800-23-ISSUE
peterm@issans.com
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Peter McGuinness, President
35-35-35-35
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www.quicktest.com
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peterm@issans.com
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Peter McGuinness, President
85-85-85-85
(See advertisement on p. 129)

## Washington

### Seattle/Tacoma

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12825 First Ave. S.
Seattle, WA 98168
Ph. 206-241-6050
info@cosvc.com
www.cosvc.com
Jerry Carter, President
17-0-17-0
(See advertisement on this page)

**Gilmore Research Group**
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Seattle, WA 98102-3306
Ph. 206-726-5555
info@gilmore-research.com
www.gilmore-research.com
Cathy Peda, Vice President
60-60-60-60

**GMA Research Corp.**
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Jackie Weise, Director Nat'l/Int'l Field
50-50-50-50

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### Spokane

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bids@yourcci.com
www.yourcci.com
Judy Goodrich, Operations Director
120-120-120-120

**Robinson Research**
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Ph. 509-489-4361
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www.robinson-researchinc.com
William D. Robinson, President
30-30-30-30

**Strategic Research Associates**
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Spokane, WA 99201
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www.strategicresearch.net
Dean or Moorehouse
10-10-10-0

## West Virginia

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www.synovate.com
Jonathon Benavidez
110-110-110-110

## Wisconsin

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Manitowoc, WI 54220
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JimD@Leede.com
www.Leede.com
Jim DeZeeuw, Vice President
35-35-35-35

**The Martec Group - Green Bay**
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Green Bay, WI 54313
Ph. 920-494-1812 or 888-811-5755
linda.segersin@martecgroup.com
www.martecgreenbay.com
Linda Segersin, General Manager
32-32-32-32

**Wisconsin Research, Inc.**
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## International

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Dr. Eduardo Luis D'Alessio, President
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**Walker Information Canada**
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Jenny Zhang,
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**YanHaas**
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Colombia
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www.yanhaas.com
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15-15-15-15

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Malmanche Christophe, General Manager
24-24-24-0

**MV2 Conseil**
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48161 Muenster,
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henning.eichholz@ccsi-service.com
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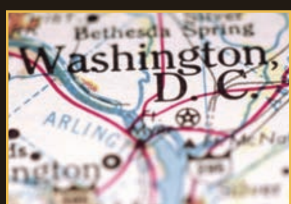


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Other findings:

• The bigger the store, the more likely consumers are to experience problems.

• Category killers are supposed to be experts, but don't always meet customers' expectations about information and product availability.

• Department stores and mass merchandisers have more issues related to time and/or accessibility.

• Men are less loyal than women.

• Men and women are remarkably similar in the problems they experience and their tolerance levels. Men are, however, less likely to return to a store if the product they were looking for is out of stock.

**Take note**

U.S. businesses should take note, Courtney said. "Every instance of customer dissatisfaction has the potential to negatively impact loyalty and ultimately, the bottom line. With this study, we now know that negative word of mouth is so powerful that it can deter potential customers from ever shopping at that store. But there is hope. By taking steps to better understand the problems their customers experience, retailers can begin to immunize themselves against negative word of mouth," she said. For more information visit http://bakerretail.wharton.upenn.edu. | Q

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By Joseph Rydholm
*Quirk's* editor

# Stories about bad service get worse in the retelling

Fifty percent of Americans report that the negative shopping experience of a friend or colleague will prevent them from shopping at a store altogether, according to the Customer Dissatisfaction Study, which was released by Toronto research firm the Verde Group and the Baker Retailing Initiative at Wharton.

As tales of shopping problems get repeated, they often get embellished and actually become even more damaging to customer retention than the initial negative shopping experience itself, the study found.

Nearly one-third of all U.S. retail customers who have a bad shopping experience will recount it to four people, potentially angering many more shoppers than just the person who initially had the problem. "No matter what that store does to entice shoppers - sales, promotions, advertising, marketing - those people will not set foot in their store," said Verde Group President Paula Courtney in a press release on the study.

Just as troublesome, customers who have a problem are happy to tell their friends in a very powerful way but they don't bother to tell the company. In fact, shoppers experiencing problems are five times more likely to tell a friend about it than contact the company. "If businesses want to stop the bleeding from negative word of mouth, it's clear that they need to invest in ensuring that each customer experience is first rate - from adequate parking, to trained frontline staff, to the right product mix, both in stock and on the shelves," said Stephen J. Hoch, the Patty and Jay H. Baker professor and chair of the Marketing Department of the Wharton School of the University of Pennsylvania.

The study was conducted by the Verde Group, together with Toronto research firm Consumer Contact, and analyzed with the help of the Baker Retailing Initiative at Wharton. It represents 1,200 responses from U.S. consumers who made purchases under $2,500 in the four weeks leading up to Christmas 2005. The average purchase price was $163.

**Problems, problems**

Negative word of mouth influences future patronage up to five times more than the person who experienced the problem firsthand as a result of:

• problem embellishment (each time someone tells the story it is exaggerated);

• risk aversion (there are many other choices for consumers; why shop at a store with problems?);

• location, exit barriers or general convenience (potential shoppers have no previous relationship with a store because it is not close to home, they are not a part of a loyalty program, etc.)

Consumers reported experiencing problems in three main areas:

• time - can't find parking and too long to get in or out of store;

• merchandising - difficulty finding product, confusing store layout and product information displays;

• frontline staff - poor product knowledge and lack of courtesy.

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