QUIRK'S

Marketing Research Review

APRIL 2007

Advertising research issue

> Breaking down the barriers to effective advertising

> The four types of brand memories

> Finding the right pharma media mix

2007 Telephone Facilities Directory

Quirk's Marketing Research Review
Volume XXI Number 4

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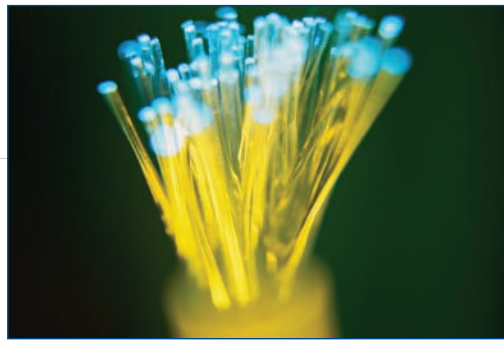

The scans have it: why Coca-Cola's Super Bowl ad won

Los Angeles-based FKF Applied Research LLC and Professor Marco Iacoboni of the UCLA Ahmanson Lovelace Brain Mapping Center released their second annual ranking of the most effective Super Bowl ads using fMRI (functional magnetic resonance imaging) brain scans. Many of the Super Bowl ads stoked regions of the brain associated with anxiety, including the amygdala. The best-testing advertisements, such as the :60 video game ad for Coca-Cola, fired the region of consumers' brains associated with positive emotions.

"This clearly was the year of the amygdala, the brain's 'threat detector.' Compared to last year's ads there was much more anxiety and far less positive emotion in these highly-touted commercials," said Joshua Freedman, UCLA clinical assistant professor of psychiatry and a co-founder of FKF Applied Research. "Much of the anxiety seemed to be caused by violence but was also rooted in economic fears. The Nationwide ad had a spike when Kevin Federline was revealed to be working in fast food, and also when the GM robot turned out to be OK but afraid for its job."

Arguing about which ads are best has been an integral part of the Super Bowl experience. Now, UCLA and FKF are employing technology to look more deeply into the question of which ads are really effective with consumers.

This year's top-ranking ads were: Coca-Cola - Video Game; Doritos - Live the Flavor; Bud Light - Hitchhiker. The bottom-ranking ads: Emerald Nuts - Robert Goulet; Honda - CRV Crave; Sprint - Connectile Dysfunction.

FKF and UCLA's empirical approach measures activity in regions of the brain known to help control whether a consumer will buy or reject a marketer's sales pitch. The fMRI displays activity in parts of the brain responsible for elemental responses, including wanting, reward, surprise, fear, disgust, conflict and attempts to control emotions.

"Asking someone what is going on in their brain is in some ways like asking them what is going on in their heart," said Freedman. "Much of the important activity is outside of their awareness. Coke's ad did well because it engaged a full range of emotions, including the mirror region, which is associated with connection and empathy. Typically, between one-third and one-half of ads are filtered out and are essentially ignored by viewers' brains. Usually the Super Bowl ads do somewhat better, but not this year. The majority elicited very little response."

FKF Applied Research and Iacoboni's group at the UCLA Ahmanson Lovelace Brain Mapping Center recruited men and women ages 18-34 to watch this year's Super Bowl ads. The subjects viewed the ads while in UCLA's high-field fMRI scanner, which monitors the activity in their brains. The group's Super Bowl rankings, along with color images of peoples' brain responses to the ads, are posted on www.fkfrank.com.

More consumers voting via mobile phone

The Mobile Marketing Association reported findings of its annual attitude and usage study on mobile marketing effectiveness. The youth market reported the highest rate of interest and usage, ranging from 30 to 40 percent. Forty-eight percent of the respondents reported their wireless phone usage has increased significantly over the last year. The average consumer uses approximately 4.8 features on their mobile phone. Sixty-nine percent of survey respondents indicated that they use text messaging, and 44 percent use it daily (up from 41 percent in 2005).

The study, conducted with market research firm Synovate, measured both the perceptions and usage for wireless and text messaging, as well as overall receptiveness and participation in mobile marketing initiatives. More than 1,800 consumers between the ages of 13 and 65 were queried, with results indicating that mobile consumers are more educated about the features and functionality of their devices and are engaging more frequently in mobile marketing campaigns.

Of those respondents who have participated in mobile marketing campaigns, their participation in voting campaigns has significantly increased, from 8 percent in 2005 to 29 percent in 2006. The highest-regarded mobile marketing services include downloads, coupons and alert-based services. For more information visit http://mmaglobal.com.

Broadband broadens its penetration

Residential subscriptions to broadband Internet services surged 20 percent in 2006 to exceed 50 million U.S. households, according to Digital Lifestyles: 2007 Outlook, a study from Dallas research firm Parks Associates. The report estimates U.S. residential broadband subscriptions will surpass 60 million households by year-end 2007, accounting for 55 percent of all U.S. households.

"The foundations of digital lifestyle applications and products are built on access services, including broadband Internet and television," said Kurt Scherf, vice president and principal analyst with Parks Associates. "With the penetration of high-speed Internet exceeding 50 percent in 2007, we're also witnessing shifts in the way companies are positioning their communications, entertainment and information services as home technology solutions."

The report reveals that providers are delivering both broadband and television services with greater emphasis on the value-added services they enable, rather than just the services themselves. The report also finds that, in recent years, service providers have been partnering more closely with equipment vendors to strengthen the linkages between digital lifestyle services and the end-user products that enable them, including set-top boxes, home computers, home networks, gaming consoles and other fixed and portable consumer electronics devices.

"With the demarcation points in access services migrating closer to the customers, service providers can provide much more in the way of personalized and enhanced communications, entertainment and information services," Scherf said. "A key trend is the tightening of the value chains that enable end-to-end and seamless services. These stronger linkages will lead to greater choice and convenience in the ways customers interact with digital lifestyle amenities."

Healthy beverages selling well around the globe

Beverages that support healthy diets are among the world's fastest-growing food and beverage categories, according to a study released by Schaumburg, Ill.-based ACNielsen Global Services. The report, titled What's Hot Around the Globe - Insights on Growth in Food & Beverage Products, noted that drinkable yogurts in particular was the fastest-growing food and beverage category purchased by consumers worldwide. "Around the world, consumers are balancing health and nutrition concerns with a desire for convenience and value," says Jane Perrin, senior vice president, managing director for ACNielsen Global Services. "Drinkable yogurt is not only healthy and good-tasting, but in many cases the packaging offers the convenience and portability that consumers crave."

In total, nine product categories grew by double digits compared to 2005, with drinkable yogurts topping the list. In six of the nine categories, sales totaled more than $1 billion globally (Table 1).

Three categories between $100 million to $1 billion also showed double-digit growth (Table 2). Overall, the global growth across all of the food and beverage categories included in the study was 4 percent.

Other dairy-based drinks (which includes items such as fruit-flavored milk and kefir-based drinks) also had strong growth across the board, with 32 markets (of the 42 measured) exhibiting growth. In most of these 32 markets, the growth was in double digits.

Table 1: Top Category Growth
(categories over $1 billion globally)

Top Categories	Mid-2005 to Mid-2006 Growth Rate
Drinkable Yogurt (40/45)	18%
Fresh Fish and Seafood (10/10)	12%
Alcoholic Cider (9/18)	11%
Fresh Ready-to-Eat Salad (14/14)	10%
Baby Formula (48/55)	10%
Dairy-Based Drinks (32/42)	10%

(Markets growing/markets measured in parentheses)

Table 2: Top Category Growth
(categories between $100 million and $1 billion globally)

Top Categories	Mid-2005 to Mid-2006 Growth Rate
Fresh/Refrigerated Soup/Bouillon/Stock (11/13)	18%
Fresh Herbs/Spices/Seasoning (6/7)	17%
Frozen Meal Starters (3/4)	10%

(Markets growing/markets measured in parentheses)

Drinkable yogurt, topping the list, exhibited year-over-year growth in 40 of the 45 markets measured, with 29 of these markets scattered around the world growing at more than 10 percent. China topped the list with a year-over-year growth rate of 49 percent. In markets as diverse as Greece, Romania, Finland and Italy, drinkable yogurt grew by more than 40 percent. Interestingly, in the United States, drinkable yogurt showed growth of only 5 percent.

Marketing has helped the growth of these beverage categories. In some cases, drinkable yogurt and dairy-based drinks have used licensed characters to appeal to children, while the health benefits (and in the case of yogurt, the active cultures) appeal to parents. In markets such as Spain, Israel and Great Britain, for example, drinkable yogurt and probiotic yogurt were positioned in the marketplace as "heart-healthy" with the

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names of note

Research industry commentator **Philip Kleinman** died February 9 following heart surgery. Kleinman was the editor of the U.K.-based online news source Market Research News and was also a regular contributor to *Admap*. "Philip was a high-profile and respected journalist in the research industry. He was a fierce and uncompromising inquisitor who wasn't afraid to ruffle feathers. He was an old-school journalist, in the very best sense of the phrase," said Marc Brenner, editor of U.K.-based *Research* magazine.

Scarborough Research, New York, has named **Kathy Beitler** to lead client services for its newspaper custom research division as account director, custom research.

Van Nuys, Calif.-based *Interviewing Service of America* (ISA) has promoted **Tony Soares** to vice president, account services. He has managed ISA's Dallas office since 2002.

Rob Monster has stepped down as chief executive of Seattle-based *Global Market Insite* (GMI) to pursue other interests. **Enrique Godreau III**, a current GMI board member and managing director at Voyager Capital, one of GMI's major venture capital investors, has been appointed chairman of GMI's board. Monster, the company's largest individual shareholder, will participate in the selection of a new CEO.
The firm separately announced a number of new hires: **Lisa Ricci** as vice president, panel operations; **Joelle Nole** as managing director; **Shelly Anton** as purchasing agent; **Betsy Yalcin** as human resources director; **Joseph Quinto** as associate director, business analysis. In other GMI offices: **Christine McComb** has been named director of accounting - USA; in Sydney, **Jun Clarke** has been named project fulfillment manager and **Samson Tam** has been named human resources director, Asia-Pacific; in Los Angeles, **Jon Currie** has been named director, sales, and **Courtney Mills** has been named sales assistant; in Munich, **Julie Hübschmann** has been named marketing assistant; in Denver, **Steven Kennedy** has been named sales director; in Moscow, **Elena Mitina** has been named marketing manager; in the Netherlands, **Maaike Oerlemans** has been named marketing assistant; in San Francisco, **Sandy Saco** has been named sales director.

Synovate has promoted **Ignacio Galceran** to CEO of Latin America. In addition, Synovate Healthcare Germany has named **Manfred Eberlein** country manager and

Eberlein Brockmeyer

Torsten Brockmeyer senior research executive. Separately, London-based Synovate Healthcare announced the following promotions: **Virginia Mount** to the Synovate Healthcare global executive committee; **Marianne Purdie** to managing director, Europe custom; **Bob Douglas** to managing director, global custom; **Rebecca Webster** to senior vice president, syndicated services; **Rhoda Schmuecking** to senior vice president, global therapy monitors.

G & S Research Inc., Carmel, Ind., announced a number of staff additions and promotions. New hires: **Wyndy Smelser** as moderator/analyst; **Leah Schwebach** as data specialist; **Lisa Wilson** as executive assistant. Promotions: **Cara Bockler** to analytics manager; **Chad Moore** to senior project manager; **Bonnie Renner** to director of human resources; **Melinda Spaulding** to senior vice president, research division; **Ann Sullivan** to senior qualitative analyst; **Mary Ellen Wheeler** to associate project manager; **Elizabeth Woerly** to associate analyst.

New Hope, Pa.-based research firm *Roger Green and Associates Inc.* has named **Laurie Lockwood Harris**

Ford Menon

executive vice president and CEO. In addition, the firm has named **Joseph**

Deshpande

R. Ford director, research. **Ajit Menon** and **Aparna Deshpande** have been named associate director, research.

Research International, Chicago, announced two additions to its Qualitative Space qualitative division: **Peter Bürgi** has been named senior account executive and **Rebecca Severson** has been named account executive.

Paragon Research and Consulting, West Chester, Pa., has named **Shelli Field** chief operating officer.

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product and service update

Gallup, Invoke offer qual-quant service

The Gallup Organization, Washington, D.C., has partnered with Invoke Solutions, Waltham, Mass., to launch a new Gallup research service that blends qualitative and quantitative research capabilities in live Internet sessions with large, targeted groups of consumers or employees. Using technology from Invoke Solutions, these research sessions combine the adaptive questioning of a focus group with the large sample and metrics of a survey, all in a real-time event in which client stakeholders can participate. For more information visit www.gallup.com.

New mobile-phone survey product

U.K. research firms Pulse Train and Embrace Mobile have teamed to create Bellview Mobile, a new service that brings together Pulse Train's Bellview data collection suite and Embrace Mobile's MSurvey product, which enables market research over mobile phones. Bellview Mobile includes survey creation, survey invitations via SMS and other mechanisms, data collection via mobile phone (SMS, WAP browser and Java are supported), and final data delivery in a variety of industry-standard formats. For more information visit www.pulsetrain.com or www.embracemobile.com.

PreTesting measures emotional connections to ads

Tenafly, N.J.-based research firm PreTesting is now offering e-Motion, technology that measures the intensity of emotional connectedness one feels with television commercials or Web sites. E-Motion can record both visual fixations and saccadic response to these media, measuring respondents' emotional interest as they watch commercials. With a target audience's e-Motions superimposed over a commercial, a second-by-second analysis of a brand's ability to bond with consumers is produced. For more information visit www.pretesting.com.

Two new online-based services from Gongos

Gongos Research, Auburn Hills, Mich., is now offering Gongos i°Communities, a custom platform that encourages consumers to interact with one another in an online environment, and Active Intercept, which offers real-time qualitative interaction with respondents during quantitative online surveys.

Gongos i°Communities are designed to engage customers in a Web-based environment where natural dialogue allows them to take an interest in the direction of brands. During a typical a six-month period of engagement, Gongos Research analysts facilitate communities while guiding interactions such as live chats, flash polls and online surveys designed to enrich the dialogue.

Active Intercept lets moderators interact with select respondents as they participate in an online survey. The program facilitates real-time exchanges between researcher and respondent - a feature that allows qualitative analysis to be injected into traditional quantitative online surveys. For more information visit www.gongos.com.

NMI updates its reports on LOHAS

The Natural Marketing Institute (NMI) has released its 2006 Understanding the LOHAS Market report series. There are three new components to the fifth edition of the LOHAS (lifestyles of health and sustainability) report series, including a new segmentation model, the LOHAS Index and market size quantification.

The new segmentation has more dimensionality, with each consumer segment having unique qualities that provide insight on the entire

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research industry news

News notes

New York-based **Arbitron Inc.** announced in late January that the Media Rating Council has accredited the Portable People Meter radio ratings data in Houston.

Sydney-based research process outsourcing firm **Pulse Group** announced that it has received an undisclosed amount of venture capital funding from Japan Asia Investment Company Ltd.

Acquisitions/transactions

Synovate has acquired **Interview-NSS**, an Amsterdam-based full-service research company. Interview-NSS employs a staff of 110 and has experience in contact and channel management, media and branding research. The acquisition also includes the European Data Collection Centre, a multilingual CATI contact center located in the Dutch capital.

U.K.-based **Research Now** has acquired **Samplenet e-Research Solutions**. Samplenet, which trades as OpenVenue, is a Canada-based online fieldwork company. The initial consideration for the acquisition is CAN$22.5 million, split equally between cash and shares. Additional payments totaling up to CAN$25 million of cash or shares may be payable subject to the achievement of performance targets, giving a potential maximum total consideration of CAN$47.5 million.

The Nielsen Company announced in February that it has completed the sale of its **VNU Business Media Europe** unit to 3i, a private equity and venture capital firm. Terms were not disclosed.

Separately, The Nielsen Company and **NetRatings Inc.** announced that they have entered into a merger agreement by which Nielsen, which already owns approximately 60 percent of NetRatings, would acquire the NetRatings shares it does not currently own at a price of $21 per share in cash, for a total purchase price of approximately $327 million. The NetRatings board of directors approved the merger agreement following the unanimous recommendation and approval of an independent special committee of the NetRatings board of directors. The transaction price represents a 44.1 percent premium over NetRatings' closing price on October 6, 2006. The merger is expected to be completed in the second quarter of calendar year 2007, subject to customary conditions and approvals.

Paris-based **Ipsos** has acquired a majority stake in the Peruvian market research and public opinion company **Apoyo Opinión y Mercado S.A**. The company, which also operates in Bolivia and Ecuador, has revenues of over $10 million, and approximately 200 employees in the three countries where it operates.

New York communications services

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Calendar of Events April-July

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on April 16-18 at the New York Marriott Marquis. For more information visit www.thearf.org.

IIR will hold its FUSE brand identity and package design conference on April 16-18 at Pier 60, New York. For more information visit www.iirusa.com.

ESOMAR will hold a conference on consumer insight on May 7-9 in Milan. For more information visit www.esomar.org.

ESOMAR will hold a conference on luxury brands on May 9-11 in Milan. For more information visit www.esomar.org.

The Greater New York/Philadelphia Chapters of the Marketing Research Association will hold their annual joint conference on May 10-11 at the Park Hyatt Philadelphia at the Bellvue. For more information visit www.mra-net.org.

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

The Marketing Research Association will hold its annual conference on June 6-8 at the Hyatt Embarcadero Hotel in San Francisco. For more information visit www.mra-net.org.

The American Marketing Association will hold its annual Advanced Research Techniques forum on June 10-13 at the Eldorado Hotel, Santa Fe., N.M. For more information visit www.marketingpower.com.

Canada's Marketing Research and Intelligence Association will hold its annual conference on June 13-15 at the Blue Mountain Resort Village Conference Centre, Collingwood, Ontario. For more information visit www.mria-arim.ca.

ESRI will hold its user conference on June 18–22 at the San Diego Convention Center. For more information visit www.esri.com.

ESOMAR will hold a conference on innovation on June 18-20 in Helsinki. For more information visit www.esomar.org.

ESOMAR will hold its Brand Matters conference on June 20-22 in Helsinki. For more information visit www.esomar.org.

The Advertising Research Foundation will hold its annual audience measurement symposium on June 26–27 at the Millennium Broadway Hotel, New York. For more information visit www.thearf.org.

IIR will hold its Shopper Insights in Action conference on July 11-13 at the Marriott Downtown Chicago Magnificent Mile. For more information visit www.iirusa.com.

To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail us at editorial@quirks.com.

By Linda Piekarski

An update on the state of 'working phone rate'

In survey research, working phone rate (WPR) refers to the proportion of telephone numbers in a sample that are working numbers. Non-working numbers include numbers that are not in service, disconnected or have been changed. However, a working number may not be an eligible number. Working residential rate (WRR) is the proportion of a telephone sample that connects to a residence. For a residential telephone sample, ineligible units would be those numbers that connect to an ineligible unit such as a business, modem or fax machine. Our firm, Survey Sampling International (SSI), like most researchers, uses WPR to mean WRR for residential samples.

The accompanying table shows the correct way to calculate the WPR for a sample. It is important to note that B is the number of sample records dialed not the number of dialings.

Working phone rates can be adversely affected by a number of factors, singly or in combination:

- sample design;
- sample geography;
- listed rates;
- population density;
- mobility rates;
- number of businesses;
- telephone numbering plan changes;
- number demand;
- number assignment policies;
- advances in telephony; and
- length of time between the drawing of the sample and the fielding of the sample. (SSI recommends that a sample not be kept unused for more than three months.)

Linda Piekarski is vice president, database and research at Survey Sampling International, Fairfield, Conn. She can be reached at linda_piekarski@surveysampling.com.

WPR will vary according to sampling methodology. A sample of directory-listed phone numbers will usually have a significantly higher WPR than a random-digit-dial (RDD) sample but be less representative, while an EPSEM or random A RDD sample will have a lower WPR but be more representative.

Disconnected	300		
Business/Government	100		
Fax	50		
Modem	50		
		Sample Records Dialed	1,000
Non Residential (A)	500	Total Dialed (B)	1,000
A divided by B			50%
Working Phone Rate			50%

Average WPR by sample type:

Listed - 80%

Random B (unscreened) – 52% (range 40% to 65% by state)

Random A (unscreened) – 39% (range 27% to 48% by state)

A non-U.S. sample should have a WPR similar to a U.S. random B sample, but will vary by country.

For directory-listed samples, the WPR is primarily impacted by the mobility of the population. In the U.S., 18 percent of households move in a year (the average life span of a telephone directory) meaning that an average of 18 percent of directory-listed numbers might have been disconnected by the time a sample is selected in an area where a new directory is about to be published. Higher mobility rates in urban areas can mean higher disconnect rates for listed samples from urban areas while lower mobility rates in rural areas can mean lower disconnect rates for listed sample.

For RDD samples, the WPR will be significantly lower than for directory-listed samples. RDD samples improve coverage of telephone households over directory-listed samples by including numbers that are not found in directories (ex-directory) but are in 100-blocks that contain directory-listed numbers. However, many of these RDD numbers that are not listed will be either non-working or ineligible, resulting in a lower WPR.

The WPR for an RDD sample is directly proportional to the number of residences present in the frame of possible RDD numbers. Over the past decade, in an effort to meet the demand for more telephone numbers, telephone companies in the U.S. and around the world have modified their numbering systems. The introduction of new area codes, overlays and exchange partitioning in the U.S., and the standardization of telephone number lengths in many countries have negatively affected working phone rates by substantially increasing the pool of possible RDD numbers in RDD frames.

Since 1995, the U.S. RDD frame has grown 44 percent while the number of telephone households has only increased 17 percent. The probability of an EPSEM RDD number being a working residential number has declined an average of 1 percent per year from over 51 percent in 1995 to only 39 percent in 2006. To use a favorite analogy, the number of fish in our pond has not changed much over the years but the pond has doubled in size. It is simply getting more difficult to find our fish.

After a decade of expanding telephone numbering frames, the resulting decline in RDD WPR in the U.S. and around the world has been exacerbated by recent declines in the demands for telephone numbers. More and more households and businesses are replacing their multiple lines with a single broadband connection while still others are giving up their landline numbers altogether, relying solely on wireless phones. Although some of these numbers may be recycled to new subscribers, many remain unused or not-in-service.

Adverse effect

Local number portability (LNP) has also had an adverse effect on sample efficiencies. LNP is the ability of a subscriber to change his telephone service provider within a particular rate center without changing his telephone number. By December 2004, almost 31 million landline numbers had been ported to another landline provider. Porting requires two 10-digit numbers for each telephone line. One is the original subscriber number and the other is the number associated with the switch belonging to the new carrier to which the call is connected. In most cases today, the new numbers - sometimes referred to as ghost numbers - do not connect if dialed, but their presence in RDD frames contributes to the overall decline in WPR.

The way in which local telephone companies assign telephone numbers within their allotted prefixes may also affect WPR. In areas where number conservation (1,000-block pooling) has not been mandated, random assignment of numbers is more common and working blocks in these prefixes will have fewer working numbers than in the past.

Small area samples may have unusually low or unusually high working phone rates. Urban areas generally tend to have a lower WPR because they have higher mobility rates, more renters, more businesses and more wireless-only households. Listed samples in rural areas tend to have a higher WPR because they have lower mobility rates, fewer privacy concerns and fewer businesses. However, RDD samples in rural areas may have a lower WPR because there are fewer new listings or unlisted numbers to be found among RDD numbers that are not listed numbers. Suburban communities, with their high growth rates and high unlisted rates, generally have a higher WPR.

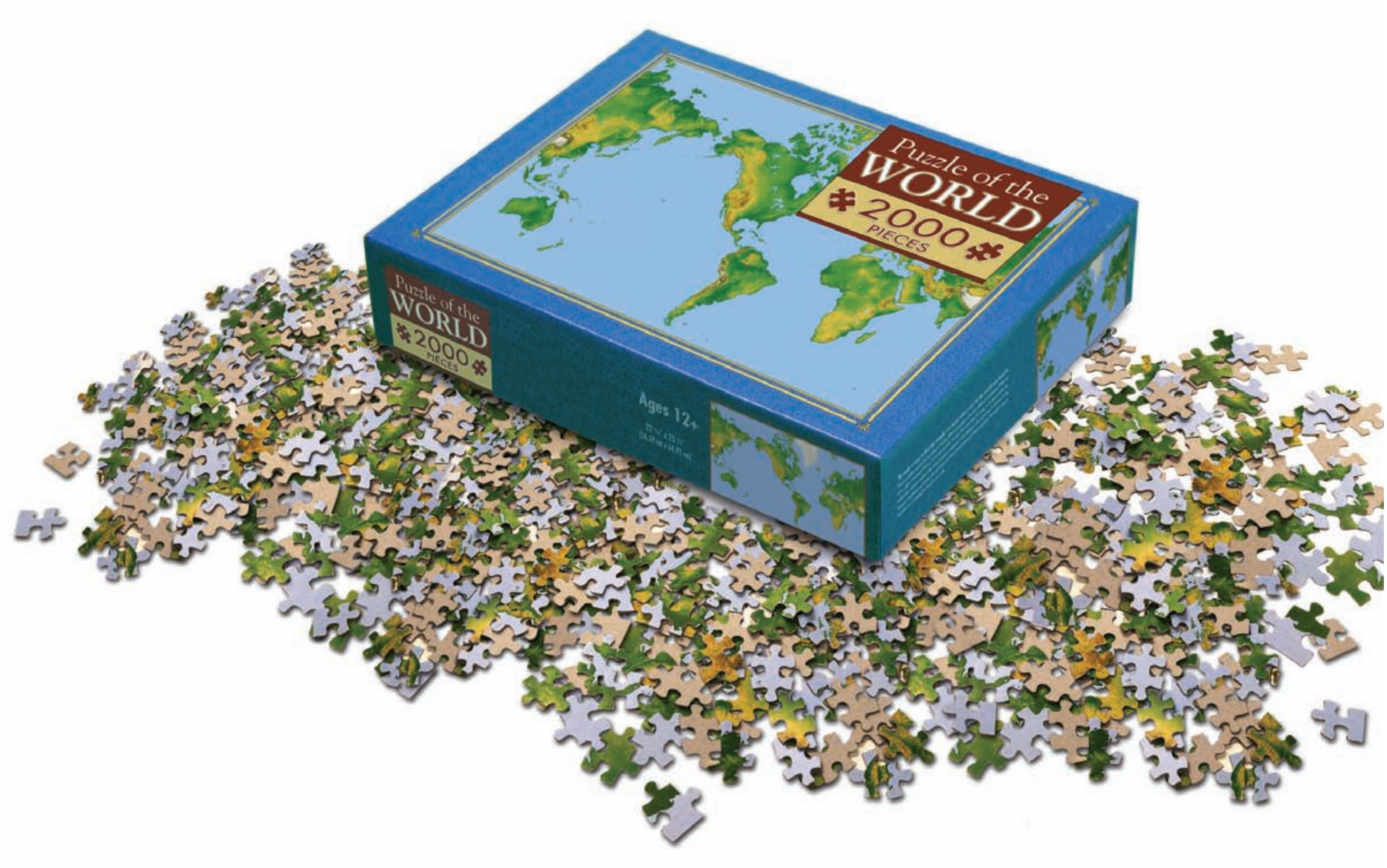
Using a file of 12.5 million business telephone numbers, SSI identifies and removes known business numbers from its listed and RDD databases. However, most businesses have multiple voice lines (rollover lines, direct inward dial lines) which are not listed in directories or business files. This means that RDD samples will always contain unlisted business numbers as well as unlisted fax and modem numbers. The percent of unidentified business numbers in the sample is naturally higher in urban areas and lower in rural areas.

Screening can improve the WPR of a sample by identifying about 50 percent of the non-working and modem/fax numbers in a sample. Clients should expect to find roughly the same number of disconnects in their delivered sample as was removed by a screener. The more bad numbers identified by the screener, the more bad numbers will remain in the sample. For example:

Sample	1,000	1,000
Screened out	150 (15%)	300 (30%)
Delivered	850	700
Remaining bad	150 (17.6%)	300 (42.9)
Sample WPR	70%	40%

SSI has monitored this situation for more than a decade. We will continue to do so and periodically report our findings in order to help researchers set realistic expectations and allocate fieldwork resources appropriately. | Q

Complicated.



By Tim Macer

Techneos Entryware 6

While many of the major marketing research data collection developers are heading in the direction of multi-modal interviewing, Canadian firm Techneos Systems is resolutely sticking to the field it knows: mobile computer-aided personal interviewing (MCAPI). And with good reason too, as it is a field that keeps growing – thanks to the freedom that wireless data communications offers researchers and the chipping away of the dominance of the Palm OS by pocket versions of Windows. In fact, when Techneos talks about mixed-mode support, it now means being able to deploy the same interview on everything from a monochrome Palm bought several years ago through to tablet PCs, in one direction, and smart phones in another.

Techneos came early to the market, specialized and produced a groundbreaking product which has spawned many imitators. But for some buyers, its sole allegiance to the Palm OS, rather than Windows, made it rather too specialized for comfort. While Palm has remained very common in North America, in Europe and in Asia, Windows CE has long been dominant, and Palm is no longer viewed as mainstream. That changed when Entryware 6 emerged last fall, as it offers support across the range of Windows devices, from Windows tablets or touch-screen/kiosk devices to Pocket PCs and the new ultra-mobile mini-tablet PCs.

Not that Palm has been forsaken. Rather than reimplement as a native Windows application, Techneos made use of a Palm emulator on the Windows devices. This is in no way apparent to the end user in either convenience or performance. Both the software and the emulator have a tiny footprint, so plenty of room is left for data on even the smallest devices, and there is complete compatibility between the two platforms, so any survey written for one type of device will run on any other.

Entryware Version 6 MCAPI software by Techneos Systems (www.techneos.com)	
Pros	**Cons**
• Works online or offline	• No support for CATI or paper
• Excellent international capabilities	• Built-in reporting tool is basic and inflexible

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There are only three fairly specialized features which are Windows-specific, which will fall back to less-sophisticated counterparts on a Palm in each case. Indeed, a survey written for a Palm PDA will dynamically scale itself up to the larger screen of a Windows laptop or tablet. Texts re-flow and pop-up lists become grids on the larger screen, for instance. It is a true "design once, deploy to all" multimodal approach within the different modes of CAPI.

Achilles' heel

The Achilles' heel of MCAPI has always been the open-ended question. Even veteran survey writers

don't agree on the best way to handle them. After all, an open box on screen, with no keyboard, inevitably means a lot of frenzied tapping with a stylus for the interviewer and a disruption in the flow of the interview. Writing it down and punching it in later is no better. For many, the simple answer is just not to do open-end questions. But now, sound recording is a viable option, and Techneos has added an audio capture-type question to take advantage of the audio capabilities of many of the devices around today. For usable sound quality, this means using a device with a microphone port and a decent clip-on or handheld microphone.

The move to Windows makes the software highly suitable for kiosk interviewing situations too, where a larger screen is required. It functions well with or without a keyboard, using a touch screen, and the built-in wireless communications capabilities mean it can be controlled centrally, with instant upload of data or download of new surveys, yet it needs no more than an AC outlet to plug into.

The software is also strong on international features. It supports multiple languages and character sets, and language translations are handled efficiently by exporting, for example, the English version into an Excel file, where the translator enters translations into the next column. You then re-import the file and select the language into which all the translations will flow. Each interview is then multilingual, and interviewer or respondent can complete in whichever language is most appropriate.

Simple and straightforward

The route through the software, from design to deployment to data, is highly streamlined. Design takes place in a Windows application which is simple and straightforward, and the actual appearance of the survey on the target device can be simulated to make sure everything fits. Options abound for data transfer, either by direct push to each device (via a PC workstation and cable, cradle or Bluetooth) or pulled from the device over the Internet. Whenever an Internet connection is available, the device will constantly poll for new surveys or instructions, and hand back any data collected. But if the connection is severed, it will work in standalone mode without restriction and synchronize again when it can. Internet communications are provided via Techneos' hosted Entryware Server service for an extra cost. Using it makes sense when you have a dozen or more devices.

Entryware 6 also introduces the ability to interact with other applications, such as to perform database lookups or conversions or to interface to your own custom research technique. Applications can be written in JScript or Visual Basic, two very common programming languages.

Perhaps the weakest area of Entryware is in the reports it provides, where there are virtually no options to change or customize them. The reports present an unflattering picture of an otherwise immensely capable and versatile application, one that eases the burdens of fieldwork managers, interviewers and even respondents.

Moved to Entryware

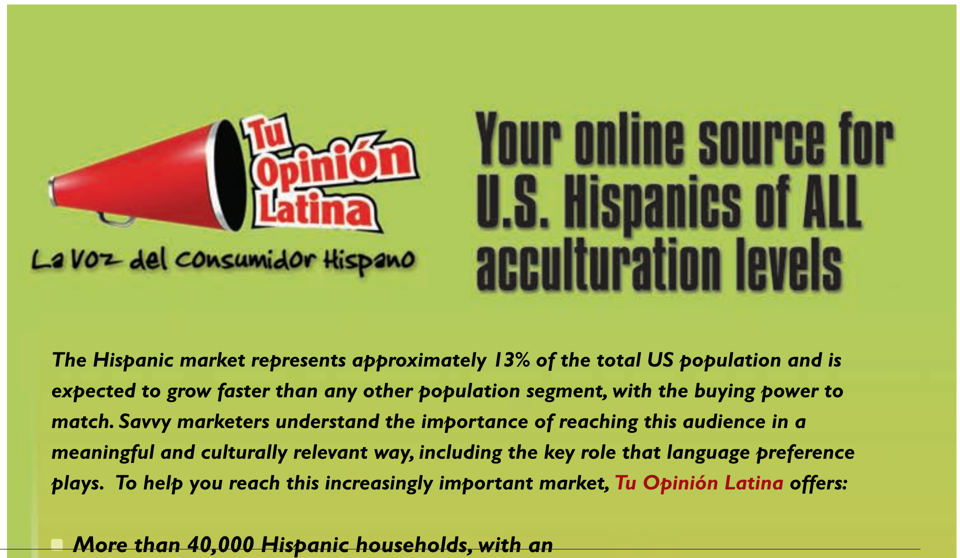
Blackstone Group is a full-service research firm with offices in Chicago and Chennai, India. The company has recently moved to Entryware on Palm PDAs for face-to-face interviewing at on-site locations. Blackstone Group Vice President Dan Rangel has been overseeing the transition and is enthusiastic about the streamlining that wireless data capture brings to the disjointed process of in-person interviewing. "With a paper-and-pencil interview, there was always the possibility of human error such as missed skip patterns in a survey or the interviewer just forgetting to ask a question," Rangel says. "Once the surveys were completed we would then have to edit them, input the data and then convert it to Excel or SPSS. Now with Entryware, we program the survey and sync the logic into our Palm Pilots. The inter-

spend the time writing or typing open-end responses. You will spend money on programming, but overall, it will pay off in efficiencies."

Self-completion work

Arnold + Bolingbroke, a London- and Sydney-based research consultancy, has used the technology for self-completion work. What used to be diary-type surveys, where a booklet would be left with a household, is now likely to be a Palm PDA running Entryware.

Matt Crane, data manager at Arnold + Bolingbroke, had Techneos make a small number of adaptations to the software to make it respondent tamperproof, and the company now has 1,000 Palm PDAs running Entryware which shuttle around the globe, from respondent to respondent. The result is a new diary capability in the software which any



Techneos user can take advantage of. One key development was to make the survey captive on the device, ensuring that respondents cannot break out of it to use the PDA for anything else and making it unattractive for respondents to "lose" or steal the devices. "So far we have used them in Australia, South America, across Europe and the United States many times. And we have used them in many languages - in Russia with Cyrillic script and in Japan with Japanese script," Crane says.

The questionnaire runs as a loop, so the respondent cannot leave the survey without knowing the special password the fieldwork managers use to set up the device and unload the data at the end of the assignment. The device simply snoozes between each data capture episode and wakes up again when the respondent taps on the screen.

"The idea was to put a standard diary questionnaire on a PDA and give it to respondents, who could then keep it and fill it in on an hourly basis over a period of days," Crane says. "We put together a basic questionnaire on a PDA, but at that time had not worked out how we would get respondents to complete this on an hourly basis. The calendar functions within the PDA are not good enough, so we spoke to Techneos and they developed Entryware to take into account this need for the diary. We now have the functionality within the software to program an alarm function which repeatedly lets the respondent know it is time to complete the next section of the survey."

A great feature of Entryware is its ability to set a reminder, either by time of day or a relative time (e.g., one hour later). It can even be programmed to allow respondents to determine the times they want to be prompted. It makes respondents more likely to respond closer to that elusive "moment of truth" and is therefore likely to increase the validity and completeness of diary surveys, and avoid the situation where a respondent fills in a whole week's worth of events from the false perspective of the half-hour before the diary has to go in the mail. The timestamp in the data provides useful corroboration that events have been recorded as they happened too. And as multi-level data structures have never presented a problem to Entryware, researchers can make diaries much more sophisticated than they would dare on paper while keeping things simple for respondents.

"The software is very intuitive. But as you get more used to using it you realize there are a lot of features to allow you to do quite complex things. Yet even the more worried respondents soon become blasé - they often say it is just as easy as using a mobile phone, which really it is," Crane says.

"The beauty of the PDA survey is that people can take them with them wherever they are going. The diary is designed to be a very straightforward set of questions at any one stage, so you do not get respondent fatigue. We kept it very simple and as a result we get very rich data." | Q

advertising research

By Jerry W. Thomas

Beware of big egos and agency killers

Breaking down the barriers to effective advertising

Editor's note: Jerry W. Thomas is president and chief executive officer of Arlington, Texas-based Decision Analyst Inc. He can be reached at 800-262-5974.

As a whole, the advertising industry has the poorest quality-assurance systems and turns out the most inconsistent product (ads and commercials) of any industry in the world. This might seem like an overly harsh assessment, but it is based on testing thousands of ads over several decades. In our experience, only about half of all commercials actually work; that is, have any positive effect on a consumer's purchasing behavior or brand choice. Moreover, some ads actually produce negative effects on sales. How could these assertions possibly be true? Don't advertising agencies want to produce great ads, and don't clients want great advertising? Yes, they do, but they face formidable barriers.

Unlike most of the business world, which is governed by numerous feedback loops, the advertising industry receives little objective, reliable feedback on its advertising. First, few ads and commercials are ever tested among consumers (less than 1 percent, according to some estimates). So, no one - not agency or client - knows if the advertising is any good. If no one knows when a commercial is good or bad, or why, how can the next commercial be any better? Second, once the advertising goes on the air, sales response (a potential feedback loop) is a notoriously poor indicator of advertising effectiveness because there is always so much noise in sales data (competitive activity, out-of-stocks, weather, economic trends, promotional influences, pricing variation, etc.). Third, some of the feedback is confusing and misleading, including agency and client preferences and biases, the opinion of the client's wife, feedback from dealers and franchisees, complaints from the lunatic fringe, etc.

Many obstacles

Advertising testing could provide a reliable feedback loop and lead to much better advertising, but many obstacles stand in the way.

Self-delusion

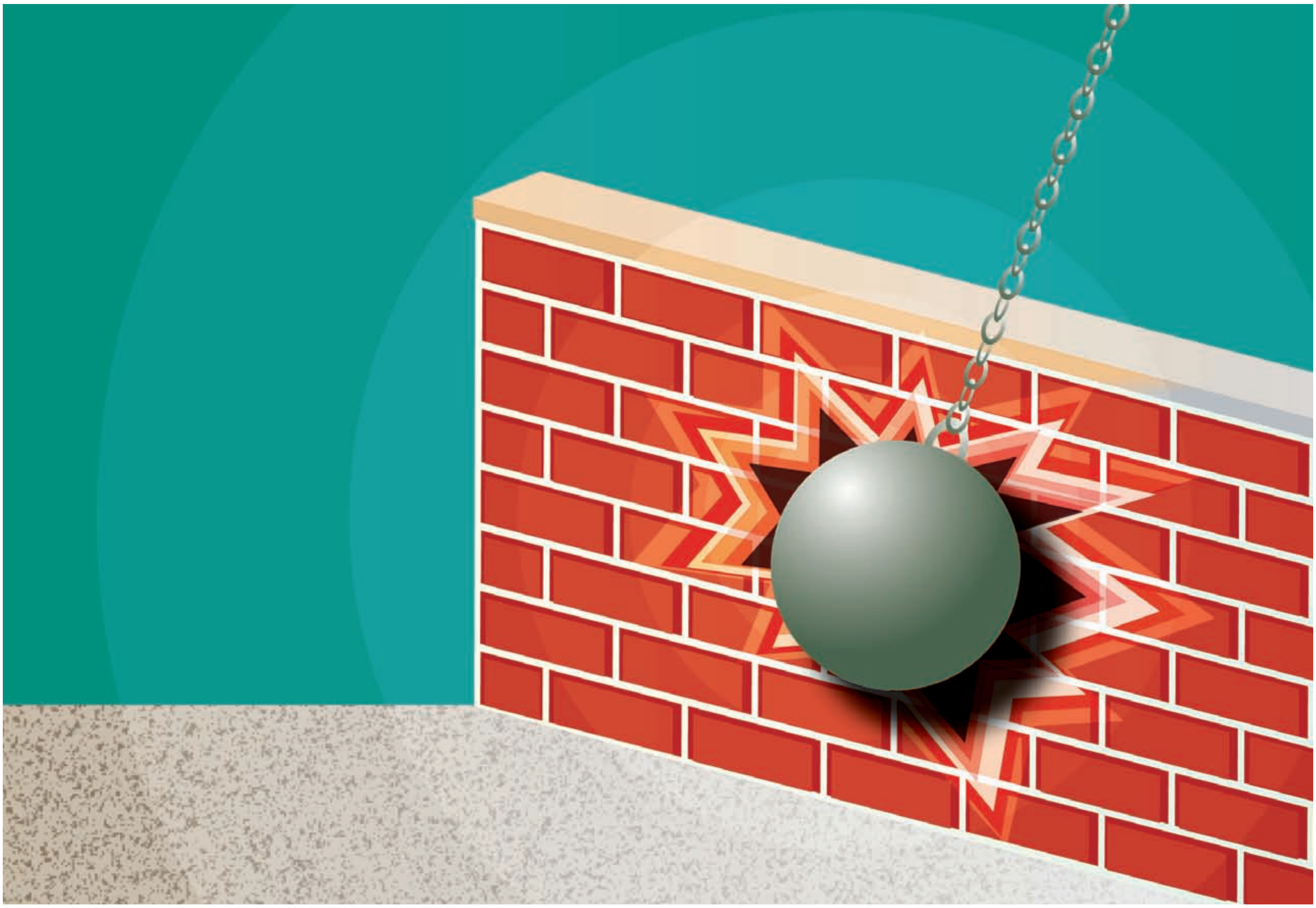
The first great barrier to better advertising is self-delusion. Most of us believe, in our heart-of-hearts, that we know what good advertising is and that there is no need for any kind of independent, objective evaluation. Agencies and clients alike often think that they know how to create and judge good advertising. Besides, once agencies and clients start to fall in love with the new creative, they quickly lose interest in any objective evaluation. No need for advertising testing. Case closed.

Strangely, after 40 years of testing advertising, we cannot tell you if a commercial is any good just by viewing it. Sure, we have opinions, but they are almost always wrong. In our experience, advertising agencies and their clients are just as inept at judging advertising as we are. It seems that none of us is smart enough to see advertising through the eyes of the target audience, based purely on our own judgment.

Sales performance will tell

A second barrier to better advertising is the belief that sales performance will tell if the advertising is working. Unless the sales response to the advertising is immediate and overwhelming, it is almost impossible to use sales data to judge the effectiveness of the advertising. So many variables are beyond our control, as noted, that it's impossible to isolate the effects of media advertising alone. Moreover, some advertising works in a few weeks, while other advertising might take many months to show positive effects, and this delayed response can confound efforts to read the sales data. Also, advertising often has short-term effects that sales data might reflect, and long-term (years-later) effects that most of us might easily overlook in subsequent sales data. Because of these limitations, sales data tends to be confusing and unreliable as an indicator of advertising effectiveness.

Sophisticated marketing-mix modeling is one way to measure these advertising effects on sales, but it often takes millions of dollars and years of effort, and requires the building of pristine databases of sales information along with all of the marketing input variables. Few companies have the budget, the patience, the accurate databases and the technical knowledge necessary to succeed at marketing-mix modeling. Even so, marketing-mix modeling does not help us evaluate the contribution of a single commercial but rather the



cumulative effects of many different commercials over a long period of time. Also, marketing-mix modeling does not tell us why the advertising worked or failed to work. Was it message, or media weight, or media mix that made the advertising effective? Generally, marketing-mix modeling cannot answer these types of questions. So, again, sales data is of limited value when you make critical decisions about your advertising.

Delay, undermine and thwart

A third barrier to better advertising is a pervasive tendency of many (but not all) advertising agencies to delay, undermine and thwart efforts to objectively test their creative babies. Who wants a report card on the quality of their work? It's very threatening. The results can upset the creative folks. The results can upset clients. The agency can lose control. Agencies can be quite clever in coming up with reasons to avoid copy testing. Some of our favorites:

"There's no time. We have to be on air in five days, so we'll just have to skip the testing."

"These ads are built on emotion and feelings, and you can't measure such delicate, artful subtleties."

"We've already tested the ads with a focus group during the development process."

"These are image ads, and you can't test imagery with standard advertising testing techniques."

"We have so much equity in this campaign that it doesn't matter what the testing results are. We can't afford to change."

"We're in favor of testing, but let's remove those questions about purchase intent and persuasion from the questionnaire."

"We are in a new age, with new media and new messages, and none of the old copy testing measures apply any more."

The big creative ego

The fourth barrier to more effective advertising is the big creative ego. The belief that only the "creatives" in the agency can create advertising - and the conviction that creativity is their exclusive domain - constitute a major barrier. Great advertising tends to evolve over time, with lots of hard work, fine-tuning and tinkering based on objective feedback from target consumers. Big creative egos tend to resist such evolutionary improvements. We have seen great campaigns abandoned because agencies would not accept minor tweaks to the advertising. To be fair, big egos are not limited to advertising agencies. Big client egos can also be a barrier to good advertising. Research firm egos are yet another problem. Big egos create barriers because emotion is driving advertising decision-making, instead of logic, reason and consumer feedback. Big egos lead to bad advertising.

Copy the competition

A fifth barrier to better advertising is the widespread belief that one's major competitors know what they are doing. Under this way of thinking, you just copy the advertising approaches of the competition and success will surely follow. We recently had a client who was about to copy the advertising strategy of a major competitor but we were able to persuade the client to test all major competitive commercials as a precaution before blindly copying that advertising approach. This competitor was the industry leader in market share and profitability. Our testing quickly revealed that this industry leader was the industry leader in spite of its bad advertising. The testing also revealed that another competitor, in contrast, had great advertising. Needless to say, the client's desire to copy the industry leader quickly vanished.

Lack of strategy

The sixth barrier to better advertising is lack of strategy, or a poor strategy. The client is most often at fault here. The client has not done his homework, has not thought deeply about his brand and its future, and has not developed and tested strategy alternatives. The client tells the agency to go forth and create great advertising without providing any strategy guidelines. The agency is left to guess and speculate about strategy. Great advertising is rarely created in a strategy vacuum. If the client cannot

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define a sound strategy, the agency cannot create great advertising. Again, the responsibility for strategy falls squarely on the client.

Client ineptness
A seventh barrier to better advertising is client ineptness. Some clients' processes, policies and people tend to discourage the creation of great advertising. Arrogance, ambiguity, impatience, ignorance, risk aversion and inconsistency tend to be the hallmarks of these "agency killer" clients. Bad clients rarely stimulate or tolerate great advertising.

Poor copy testing
The eighth and last barrier to better advertising is poor copy testing by research companies. Many advertising testing systems are limited to a few markets and cannot provide representative samples. Some systems are so expensive that the cost of testing exceeds the value of the results. Research companies have been guilty of relying on one or two simplistic measures of advertising effectiveness, while completely ignoring many other very important variables. For instance, for several years research companies argued publicly over which was more important: persuasion measures or recall measures. The truth is that both are important, but of greater import is the fact that neither of these measures ,alone or in combination, measures advertising effectiveness. To judge the effectiveness of an ad, many different variables must be measured and considered simultaneously.

Work together
Given all of these barriers to better advertising, how can client, agency and research company work together to create more effective advertising?

1. The client must craft a sound strategy for its brand, based on facts, not wishful thinking and self-delusion. The client must carefully define the role of advertising in the marketing plan and set precise communication objectives for the advertising. What exactly does the client want the advertising to convey, to accomplish? Agencies are too often asked to create advertising in an informational vacuum. Agencies are not miracle workers. Once strategy and positioning alternatives are identified and tested, the strategy should be locked down and rarely changed thereafter.

2. As creative executions are developed against the strategy, each execution should be pre-tested among members of the target audience. (Pre-testing refers to testing advertising before it is aired, and/or before final production. When the term testing is used in this article, it is a shorthand term for pre-testing.) The greater the number of executions pre-tested, the more likely it is that great advertising will emerge. Testing the creative provides a reliable feedback loop that helps agency and client alike to get smarter over time. Once a conceptual family of commercials is identified as the optimal campaign of the future then the campaign should be locked down. Long-term continuity of advertising message is


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essential to maximizing effectiveness.

3. Use the same pre-testing system consistently. There is no perfect advertising pre-testing system. Some are better than others, but any system will help improve your advertising. The secret is to use one system over and over so that everyone (client, agency and researchers) learns how to interpret the results for the category and specific brand.

4. If budgets permit, test the advertising at an early stage in the creative process (i.e., the storyboard stage) and also test at the finished commercial stage. Early-stage testing allows rough commercials to be tweaked and fine-tuned before you spend the big dollars on final production. Early-stage testing tends to be highly predictive of finished commercial scores, but not always. Testing the finished commercials provides extra assurance that advertising is on-strategy and working.

5. Build your own action standards over time. As you test every execution, you will begin to learn what works and what doesn't work. Think of the pre-testing company's norms as very crude, rough indicators to help you get started with a testing program. But, as quickly as possible, develop your own norms for your category and your brand (yes, all the advertising effectiveness measures vary by product category and brand). What you are searching for, long-term, are not norms but action standards (that is, the knowledge that certain advertising testing scores will translate into actual sales increases).

6. Use a mathematical model to derive an overall score for each execution. It doesn't matter that an ad has great persuasion if it does not register the brand name. It doesn't matter that an ad registers the brand name if no one will notice the commercial itself. It doesn't matter that an ad increases short-term purchase interest if it will damage the brand's quality reputation over time. So, all of the key variables must be put together intelligently to come up with a composite or overall measure of advertising effectiveness.

7. Use the pre-testing results as a guide, as an indicator, but do not become a slave to the mathematical model. Read all of the open-ended questions carefully. Make sure you really understand the underlying reasons. Base your decisions on this comprehensive assessment of the results, and leave yourself some wiggle room. No model or system can anticipate every marketing situation or give a 100-percent perfect solution every time. Informed human judgment remains important.

8. Client and agency need to accept that continuous improvement of the advertising is an important goal. This means that every execution is tested and tweaked based on scientific evidence from the target audience. We are not talking about changing the strategy or changing the campaign, but making sure that every execution is on-strategy and working as hard as possible.

9. The ultimate goal of testing is an advertising success formula. That is, the goal of advertising creative development, and the goal of advertising testing, is to identify the elements/ideas essential to advertising effectiveness, and then to make sure that those elements/ideas are consistently communicated by all advertising executions.

The power of advertising

We believe in the power of advertising, based on thousands of studies in our archives. Advertising has the power to persuade, the power to influence the mind and shape destiny. It has the power to change markets and improve profit margins.
Advertising has short-term power (conveying new information, building awareness, enhancing credibility, etc.) and long-term power (conveying brand image, attaching emotional values to the brand, building positive reputation, etc.).
The great power of advertising is seldom achieved in practice, but we can't give up. The potential and the promise are too great. The companies that master the creative guidance and the testing systems to consistently develop and deploy great advertising will own the future and the fortunes that go with it. Great advertising is a cloak of invincibility. |Q

advertising research

Tags are it

By Charles Young

How advertising creates memories has long been a principle subject of advertising research. After all, it is only through the processes of memory that advertising can create the long-term value which sets it apart from other forms of marketing such as promotion or price competition. Indeed, the equity of a brand can be thought of as the sum total of the ideas, images and emotions that we associate with a given product or service and store in our long-term memories.

Not surprisingly, therefore, the first standard for measuring TV ad performance was day-after recall. This metric is still widely used today and generates much controversy among research practitioners and agency creatives because the counterintuitive results it regularly produces. Highly emotional advertising, for instance, frequently does not generate good recall scores. The reason for this conflict is the underlying assumption of recall testing that memory works in only one way. In fact, the current science of cognitive psychology suggests that traditional recall research has it only one-third right.

The grandfather of modern memory research, Endel Tulving, actually described three different memory systems in his book *The Elements of Episodic Memory*: 1) the semantic memory system, where the brain stores facts, concepts and language; 2) the episodic memory system, where the brain stores sensations, emotions and personalized memories, i.e., the private memories that define the self; and 3) the procedural memory system, where the brain stores learned behaviors and sensations of bodily movement, such as how to tie your shoelaces, drive a car or play a violin.

The four types of brand memories

The memory systems of the brain are highly organized, not simply "junk drawers" of the mind into which the traces of our experience are dropped at random. As modern researchers in cognitive neuroscience have pointed out, this organization of our memories is necessary for the brain to form internal models or representations of the external world (i.e., ideas, concepts, brands, etc.) which determine the functional usefulness of our memories of past experience in guiding our future behaviors. Critical to understanding how our memories are organized is knowing how the perceptions of our experiences are tagged for future retrieval.

Building blocks

In his book *Hidden Order* John Holland points out that tags are fundamental building blocks that make up complex dynamic systems of

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STOP YOUR MOTOR – NO SMOKING

all kinds, from biology to the stock market. Tags are essential for creating order out of chaos. At a higher level of description, brands themselves are tags for the marketplace. To understand how advertising forms memories, we ad researchers need to be able to identify the four different types of tags that form the basis of long-term brand building.

In his book *Information Theory and Esthetic Perception* Abraham Moles writes about the different types of information that plug into the different memory systems of the mind. He makes a key distinction between what he calls semantic information and esthetic information, or the "non-literal" kind of information contained in works of art such as music, poetry and film. Semantic information is the part of a message that can be translated from one channel of communication to another, e.g., the part of a picture you can describe in words. The esthetic information is the part of message that is lost when you change channels - the part of the picture that you cannot put into words. For television commercials the primary channel for semantic information can only loosely be thought of as the copy (minus the word images or poetry) while the primary channel for esthetic information is the visual.

The way various types of information enter the brain is also different. Semantic information is processed in a linear, logical sequence, while the esthetic information is acquired through a nonlinear, right-brain "scanning and sorting" process. One of the reasons the picture-sort methods described below work so well in explaining advertising performance is that pictures from the ad itself provide an ideal visual vocabulary for reverse engineering the scanning and sorting processes in which the brain acquires esthetic information from moving pictures.

Through the work of the imagination, information of different types can be expressed as images to be sorted into all three memory systems. Words can create mental pictures through poetic devices such as analogy and metaphor, to be stored by association in the semantic system. We have imaginary relationships with images of celebrities or even cartoon characters like Calvin and Hobbs that are stored in the episodic system. Golfers rehearse their swing by visualizing perfection in the form of a virtual swing just before they release the stored memories from their procedural system as they swing the club in real life.

How tags come into play

Let's look at some examples from advertising of how tags for each of the three different memory systems might come into play.

1. Knowledge tags

Knowledge tags are the card catalog to the library of the mind. They are the key words, the author or title that you use to search through Amazon.com to find the book you want. Word tags are important, which is why good domain names can be so valuable on the Internet. Marketers spend a fortune just to put their names on the sides of sports stadiums.

Knowledge tags are critical at the beginning of a brand's life-stage; when advertising a new product, semantic information content is high. That's why new product commercials need to be introductory in tone, heavy with semantic baggage, because they have the job of introducing the baby brand to consumers, teaching them who the baby is and how it fits into their world.

Knowledge tags are the most familiar form of tags studied by advertising researchers since they're the basis of recall testing, with the brand name being used to retrieve advertising memories. Because the semantic system deals with language, these tags can be identified by researchers through the study of verbatim responses to open-ended recall questions or closed-ended rating statements.

2. Emotion tags

The creation of easy-to-use tags by YouTube for ordinary people to search through the creative landscape of a hundred million homemade videos is one secret of its current success. Hallmark built a fortune by marketing tags for human relationships in the form of greeting cards.

In an Advertising Research Foundation study conducted by Ameritest on two of the famous seven-minute online movies the Fallon advertising agency made for BMW, incorrect tagging of emotional memories made all the differences in how this new form of branded entertainment performed. One of the movies was a good ad for BMW, but the other - actually the more emotional of the two movies - was a good ad for cameras and film, but not for a BMW car. Incorrect tagging, in this second case, lead to the creation of a brand vampire movie.

One of the longest ongoing debates among ad researchers concerns the correct types of cues - or tags - to retrieve long-term memories of advertising: recall versus recognition. Both methods are valid since ad memories reside in all the memory systems of the mind. But emotional memories are more likely to be retrieved with visual recognition cues - which is the reason we all keep family albums of photographs to retrieve the Kodak moments of our past.

The historical emphasis on verbal recall is really an artifact of last-generation technology: telephone WATS centers were the cheapest way to collect advertising tracking data. Now that all ad tracking is moving online, the shift to visual recognition cues is gaining momentum, and with it the growing number of articles on the importance of emotion in advertising creative.

3. Action tags

The greatest trick Google ever played on us was teaching all our fingertips to learn its name. The images of flying in an IMAX theater can make you experience motion sickness. Video games, one of the most important advertising forms of the future, will deliver their value to advertisers to the extent that the embedded brands, integrated into the action of the games, become the tags for reliving the excitement of the game experience. Action tags reference the physical body, real or imagined. The Google experience is a form of kinetic imprinting. For ad filmmakers, the focus is on how to use the camera to reach through the eye to activate the other senses/sensations of the audience, such as smell, taste, heat and movement.

Product-in-use shots, bite-and-smile food shots, the images of cars accelerating around California coastal highways, and accident scenes where your insurance man was there to hold your hand are all obvious examples of advertising imagery that imprint an image into the procedural memory system. When the camera "consumes" a McDonald's hamburger on screen, it's as if you - taking the point of view of the camera - ate the burger. Similarly, in other ads you drove the car, let your fingers do the walking or reached out and touched someone. That's how it's recorded in your mind.

It is the interaction of memory and our projective imagination that creates the experiences of our inner life. Indeed, it seems likely that one of the chief functions of advertising is to create false memories of brand experiences that you never really had in real life. When these imaginary experiences are mixed together in the mind with real experiences of the brand, the mind stores the false with the real in the same memory systems. Importantly, when these memories are later played back, the mind does not distinguish the false from the real.

Food advertising can constitute a form of virtual consumption, which is why advertisers have long been taught to sell the sizzle not the steak. Virtual consumption events multiply the number of experiences you share with a brand beyond the real ones. That's one of the reasons large advertisers enjoy such a strong business advantage over non-advertisers in terms of their ability to use advertising to strengthen brand relationships. You can create more memories that this product, which the consumer may have never actually eaten, tasted really good.

It is important not to interpret the role of action tags literally, however. Not every food commercial needs to show a bite-and-smile shot. The role of metaphor can be important here. Target's advertising is not just about style - all that cool color and dancing are metaphors for the store experience so that you remember how much fun it was shopping at Target. It's the visual warping special effects on screen that make you feel the sensation of the tight curve of the road, so that later you remember what a fast car that was. It's the warm-and-fuzzy hug from the Snuggle bear that makes you remember that this product is soft enough for your baby's skin.

In general, while both emotion and action tags are about feelings generated in the audience, the difference is that emotion tags are centered on human relationships (including the relationship to the self) while action tags are centered on objects and physical behaviors.

Thus we see that the old dualities of the mind-body problem of classic philosophers, updated to the rational versus emotional debates that take place every day in advertising agencies, lead to an incomplete analysis of the communication problem; interpretation of the creative image must deal with the trinity of mind-heart-body.

In the language of ad researchers, the trinity was the classical hierarchy effects model: think, feel, do. Contemporary researchers debate the order of the first two constructs. Does feeling come before thinking, or thinking before feeling? What's been overlooked is the "do" leg of the triad, the consumer consumption behavior, which is usually interpreted as taking place after the ad experience. What's new here is the understanding that the doing can also take place inside the ad, with action images mentally rehearsing the consumer behaviors the advertising is trying to motivate.

A fourth tag

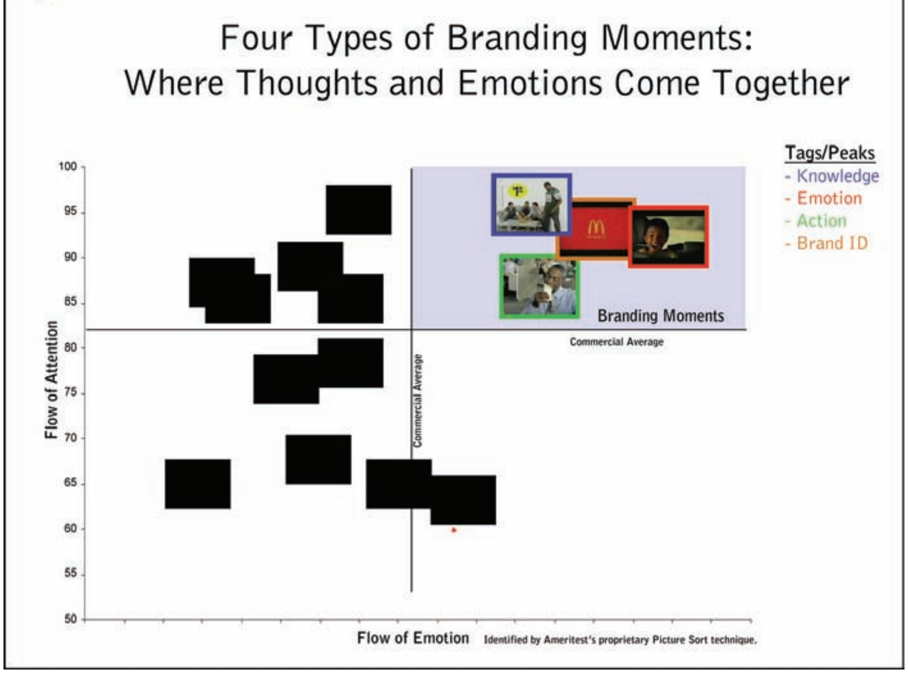
Finally, while there are three memory systems of the mind involved in the processing of experiences of all kinds, for brand-building advertising a fourth kind of tag is needed to integrate the other three: the identity tag. Without a brand identity tag, advertising still might drive sales by growing the category but it won't drive market share.

Names are only one way of tagging a commercial so that your brand doesn't end up in the lost luggage of the mind. Visual icons, like the McDonald's golden arches, can tag a commercial. Sounds, like the Intel tones, do the same. Recognizable shapes, like the curves of the classic Coca-Cola bottle, can tag a moment of falsely-remembered refreshment. Even colors can tag memories - if the actors are drinking out of a blue can, and not a red one, do you know which brand of cola it is? And, of course, verbal taglines such as Nike's "Just do it" can act as brand identity tags.

Put the pieces together

How can we put these different pieces together to get a whole picture of how advertising creates meaning and memory in the mind

Figure 1



of the consumer? We know from our pre-testing work that the Flow of Attention and the Flow of Emotion picture sort graphs provide different and complementary insights into how an audience interacts with film, in terms of the cognitive processes of selective attention and with respect to their emotional response to advertising images.

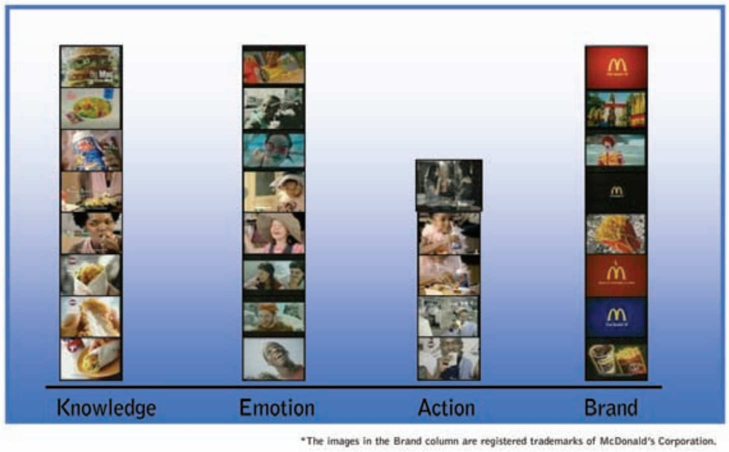
If we plot the two time-series of visual information in a grid, like that shown in Figure 1, we can now cross-reference the two dimensions of how the audience thinks and how the audience feels about each image in the ad. What we get is a scatter plot, confirming the independence of the two measures. Pictures plotted in the upper-right-hand corner of this grid are special – they represent the moments in the commercial that are both high in audience attention and emotional engagement.

We know from our earlier published research on long-term ad effects that these are the branding moments of the ad. Only these key images from the ad enter the long-term memory of the consumer to form the long-term image of the brand. In other words, these images are the memory tags.

Content analysis of the branding moments can now be used to code for each of the four types of branding moments, or memory tags, we have described. This classification of images can be done using the trained judgment of skilled researchers, or more precisely, using consumer input based on a three-

Figure 2

Deposit Levels in the Four Image Banks



dimensional picture sort. The output of this analysis can then be shown in the form of a four-tiered histogram, as shown in Figure 2, which shows the cumulative branding moments across a number of commercials in a fast-food campaign.

This graphical display gives brand mangers a tool for managing advertising campaigns. Each of the four tiers can be thought of as a memory bank into which brand images must be deposited by advertising. A given commercial might, for example, deposit one or two or even three images in the knowledge bank. Another might make deposits in the emotion bank. A third commercial might deposit images in the first two banks but make the heaviest contribution to the action bank. Each of the commercials, to be well-branded, must also make deposits in the brand id bank.

Importantly, this leads us to a new form of "triple-entry" bookkeeping for the three different memory systems of the consumer. Current neuroscience suggests that, over time at least, an ad campaign should try to keep the image deposits roughly in balance. To build a complete representation of a brand in the mind of the consumer, all three memory systems must be engaged. If deposits are only made in the knowledge bank, you are building a concept, not a brand. Similarly, if deposits are only made in the emotion bank, without regard to rehearsing consumption behaviors in the action bank, or without occasionally grounding the brand in product news for the knowledge bank, the brand image will be similarly incomplete and out of balance over time.

In the end, this discussion about the different memory systems in the mind of the consumers leads us to a more simplified and holistic view of advertising. In an age where the various media alternatives for reaching the consumer seem to be growing exponentially, and where the focus of advertising research is shifting to the measurement of integrated advertising campaigns, it's useful to remember that all forms of advertising must do their work against the mind of the brand customer, measured one at a time. | Q

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advertising research

Finding an optimal mix

By Michael Latta

Spending promotional dollars for chronic and acute drugs

Pharmaceutical marketing strategists such as Kolassa, Perkins, Siecker, and Smith (2002) tell us that pharmaceutical business success is related to the characteristics of the product and to the promotional leverage managers can generate. However, early as well as recent research has tended to take a single-variable approach to increasing sales of pharmaceuticals. Some have examined samples (Groves, Sketris, and Tett, 2003), others examined the ROI of detailing (Neslin, 2001), and more recently several researchers including most recently Wosinska (2005) have examined the economics of advertising directly to consumers (DTC). All of these efforts are narrowly focused and do not include the rich variety of promotional variables that may contribute to increases in pharmaceutical sales.

Furthermore, previous research on promotional mix variables that affect pharmaceutical sales has not taken the nature of the product into account such as whether it is primarily for acute or chronic conditions. Every pharmaceutical product manager can benefit from knowing which promotional mix variables will drive sales in order to optimize expenditures. Integrated promotional strategy combined with effective allocation of budget resources, given the nature of the product, may help to efficiently increase sales.

This study was undertaken to show the relative contribution to pharmaceutical sales from five promotional mix variables: sample dollars, DTC advertising dollars, hospital detailing dollars, and journal advertising dollars. It is an attempt to use a rich variety of promotional variables to see which contribute most to increases in pharmaceutical sales for chronic and acute drugs.

Hypotheses

Product characteristics

Drug development and marketing strategy are directed at having products in the company portfolio which have characteristics encouraging adoption, trial, use and long-term sales. For example, chronic drugs such as statins to lower cholesterol may sell more than acute drugs in the absence of large promotional dollars because of loyal consumers and regular and life-long administration to avoid serious illness. On the other hand, acute drugs that treat specific symptoms such as allergy medications may require higher promotional dollars to increase sales because they are only needed sporadically.

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Drug Type	Sales Dollars (Mill. $)	Samples (Mill. $)	Office Detailing (Mill. $)	Hospital Detailing (Mill. $)	DTC Advertising (Mill. $)	Medical Journal Ads (Mill. $)	N
Acute	297.1/ 376.9	42.1/ 30.1	20.5/ 15.9	3.9/ 3.7	18.9/ 25.1	2.4/ 1.5	47
Chronic	748.2/ 104.1	68.8/ 74.1	25.8/ 23.0	4.8/ 5.6	24.1/ 33.3	2.8/ 2.3	56
All	542.4/ 836.4	56.6/ 59.6	23.4/ 20.1	4.4/ 4.8	21.8/ 29.8	2.8/ 2.3	106

Table 1: Means/Standard Deviations for 47 Acute and 56 Chronic Drugs

Promotional leverage

Promotional leverage has been studied more in pharmaceutical sales than many of the other marketing variables. For example, the first promotional study done in pharmaceutical marketing was done in 1954 looking at the effects of medical journal ads, detailing by sales representatives, providing physicians with peer-reviewed journal articles and sampling. A complete description of this study can be found in Rogers (2003).

In this study, an investigation of the contribution to sales dollars made by five types of promotional expenditures will be conducted. For example, it will look at the amount of money expended on hospital and physician office detailing. Office detailing is expected to have a positive impact on sales of both chronic and acute drugs because it can not only promote the doctors' understanding of the drugs but also enhance their friendship with the reps and their trust of the brands and the companies. Likewise, hospital detailing can increase drug sales for acute drugs because hospital detailing increases the doctors' understanding of acute drugs such as antibiotics and enhances exposure to soon-to-be-practicing physicians completing their internships. Developing relationships with physicians during their internship may lead to a lifetime of use of a specific brand. However, to the degree that chronic drugs are not the province of hospital-based physicians, promotional leverage may not be present for chronic drugs utilizing hospital detailing. In addition to detailing, samples can increase drug sales. Samples increase drug sales because samples give physicians and patients no-cost experience with drugs and encourage trial and adoption. Because chronic drugs are an ongoing expense for patients, the use of samples may provide stronger leverage than for acute drugs. More recently, direct-to-consumer advertising has been found to increase drug sales. DTC many times raises public awareness of new drugs and prompts patients to ask for them by name in a physician office visit. In addition, DTC can foster a positive brand image within the public and can remind the doctors to write a prescription and help prevent substitution of a generic or other product at the pharmacy. Because of the ability to raise awareness, the leverage of DTC may be stronger for acute drugs than for chronic drugs. Finally, medical journal advertising may have a positive impact on sales because it reaches the physician regularly, helps them understand when to use an acute product and reminds them to write prescriptions for chronic drugs.

H1: Sales of acute drugs will be influenced by office detailing, hospital detailing, DTC advertising and medical journal advertising.

H2: Sales of chronic drugs will be influenced by office detailing, samples and medical journal advertising.

Method

Both secondary and primary data

Table 2: Acute Drug Correlations

	Samples	Office Detailing	Hospital Detailing	DTC Advertising	Medical Journal Ads
Sales Dollars	.510(**)	.668 (**)	.436 (**)	.615 (**)	-.017
Samples	1	.812 (**)	.593 (**)	.236	.072
Office Detailing		1	.742 (**)	.458 (**)	.137
Hospital Detailing			1	.394 (**)	.352 (*)
DTC Advertising				1	.030

** Correlation is significant at the 0.01 level (two-tailed)
* Correlation is significant at the 0.05 level (two-tailed)

were collected for analysis. Data were collected for 103 top products from 2001. Secondary data were provided by IMS Health (2004). Variables used included sales (in dollars ranging from $3.3 million to $4.7 billion), and promotional expenses in dollars including:

- dollars of samples ($1,000-$328.5 million)
- dollars of hospital detailing ($30,000-$32.5 million)
- dollars of office detailing ($40,000-$131.6 million)
- DTC advertising dollars ($12,000-$160.8 million)
- journal advertising dollars ($7,000-$14.9 million).

Primary data were also collected from five clinical pharmacists. These pharmacists were asked to classify each drug into two categories: chronic or acute. The pharmacists' classifications were collected in a Delphi approach and resulted in consensus assignments of each drug to either the chronic or acute category. The data were coded, entered into SPSS and checked for errors.

The general analytical framework was to utilize stepwise multiple regression to determine the promotional mix variables which uniquely influence sales dollars in the 47 acute drugs and 56 chronic drugs.

Table 3: Chronic Drug Correlations

	Samples	Office Detailing	Hospital Detailing	DTC Advertising	Medical Journal Ads
Sales Dollars	.792 (**)	.570 (**)	.495 (**)	.614 (**)	.523 (**)
Samples	1	.809 (**)	.741 (**)	.705 (**)	.602 (**)
Office Detailing		1	.942 (**)	.599 (**)	.638 (**)
Hospital Detailing			1	.637 (**)	.622 (**)
DTC Advertising				1	.368 (**)

** Correlation is significant at the 0.01 level (two-tailed)

Results

The means and standard deviations for the dependent measure sales and the five predictor variables used in the multiple regressions appear in Table 1. As might be expected, chronic drugs generate higher sales and have larger promotional expenditures on average in every category compared to acute drugs.

Analysis of variance (ANOVA) done on sales dollars and the promotional mix variables showed significant differences in these measures for only sales dollars [$F(1, 101) = 7.94$, $p < .006$], samples [$F(1, 101) = 5.36$, $p < .023$], and marginal significance for journal ads [$F(1, 101) = 3.61$, p .060].

As can be seen in Table 2, with the exception of journal ads, the correlations among sales dollars and the promotional mix variables are significant across the board for acute drugs.

Unlike the acute drugs above, all of the correlations in Table 3 of sales with the promotional mix variables are significant for chronic drugs.

Stepwise multiple regression was utilized to test the hypotheses as well as to determine the unique contribution of each of the five promotional mix variables to the dependent variable sales dollars.

Acute drugs

The final solution for the 47 acute drugs [$F(2, 44) = 36.19$, $p < .0001$] found office detailing (standardized $\beta = +.488$) and DTC advertising (standardized $\beta = +.392$) uniquely contributed to sales dollars. Thus, office detailing and DTC advertising accounted for over half of the variance in sales ($R^2 = .567$).

Chronic drugs

A different final solution was found for the 56 chronic drugs [$F(1, 54) = 90.86$, $p < .0001$] found only samples (standardized $\beta = .792$) uniquely contributed to sales dollars accounting for almost two-thirds of the variance in sales ($R^2 = .627$).

Model summary

The final model for acute drugs can be expressed as:

Sales Dollars = Constant + (.488 * Office Detailing Dollars) + (.392 * DTC Advertising Dollars) + Error

On the other hand, the final model for chronic drugs can be expressed as:

Sales Dollars = Constant + (.792 * Sample Dollars) + Error

Discussion

Hypothesis 1

Hypothesis 1 stated that office detailing, hospital detailing, DTC advertising and medical journal advertising will have a positive impact on sales for acute drugs. This hypothesis was not fully supported and the analysis suggests product managers of acute drugs could cut back on promotional spending for hospital detailing, samples and medical journal advertising and reallocate those budget dollars to office detailing and DTC advertising.

Hypothesis 2

Hypothesis 2 stated that office detailing, samples and medical journal advertising will have a positive impact on sales for chronic drugs. This hypothesis was also not fully supported by the results and the analysis suggests product managers of acute drugs can cut back on the other four promotional expenditures in favor of samples.

Drug diffusion study

A mentioned earlier, research on pharmaceutical promotion began in 1954 with the Columbia University drug diffusion study of tetracycline. This field study sponsored by Pfizer was done among 125 general practitioners, internists and pediatricians in Bloomington, Galesburg, Peoria and Quincy, Ill. An additional 128 physicians who were colleagues of these physicians were included as members of the social system. The results indicated that medical journal ads, detailing by sales representatives, providing physicians with peer-reviewed journal articles and sampling created awareness and knowledge of product attributes and benefits among members of the medical community, but were insufficient to persuade the average physician to adopt tetracycline.

The results here suggest that a parsimonious use of promotional mix resources can be made for both acute and chronic drugs. The current results suggest there is considerable leverage in having the right promotional mix. Future research in this area could include such variables as distribution, pricing, brand image/equity, presence of generic competition and packaging. Although these variables are deemed important, little research has been done to understand their effects on sales in context with the classes of variables studied here. Furthermore, no interaction terms were utilized in this analysis. There may be synergistic effects of two or more promotional mix variables that suggest both must be present for effects on sales to be realized. Future research may uncover some of these combined effects of promotion variables. | Q

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quantitative research

Take a risk, keep it simple

By Gary A. Schmidt

Follow these guidelines to give more effective research presentations

Good researchers deliver accurate information. Great researchers deliver business insights. The challenge for many research managers is how to be perceived as insightful thinkers who are actively involved in corporate strategy sessions rather than as pure "data heads" who have little more to offer than the basic information their studies kick out.

Let's suppose you're a market researcher with at least several years of experience and a track record of delivering pretty good presentations. Chances are you may be reaching that point in your career where you want to be more than just a trusted conduit for research data - you want to have a larger, more strategic role. In short, you want an invitation to sit at the table where the business implications of your team's research are discussed.

So what's the best way to get an invitation to the party? Or to revitalize your career and really get noticed? The first place to start is with your presentations themselves - and realize that "pretty good" just isn't good enough. In my opinion, as someone who has both sat through hundreds of presentations (including many, many painfully boring ones) and given hundreds of presentations to audiences ranging from middle-managers to corporate boards, the best way to get a seat at the decision-making table is to deliver presentations that 1) are engaging and 2) actually provide meaningful, relevant insights to decision makers. In other words, if you want to play at the senior level, you have to give senior-level presentations.

Change perceptions

So how do you craft a senior-level presentation - and get a more favorable response from top management? How do you change organizational perceptions so you're viewed as something other than a faithful number cruncher?

First, it's important to understand that data is one thing, but its significance - or what it actually means for the business - is quite another. Many research presentations are simply too long, too academic and/or too conceptual. They are data-intensive when they really need to be insight-intensive.

The purpose of a presentation is not to showcase all your hard

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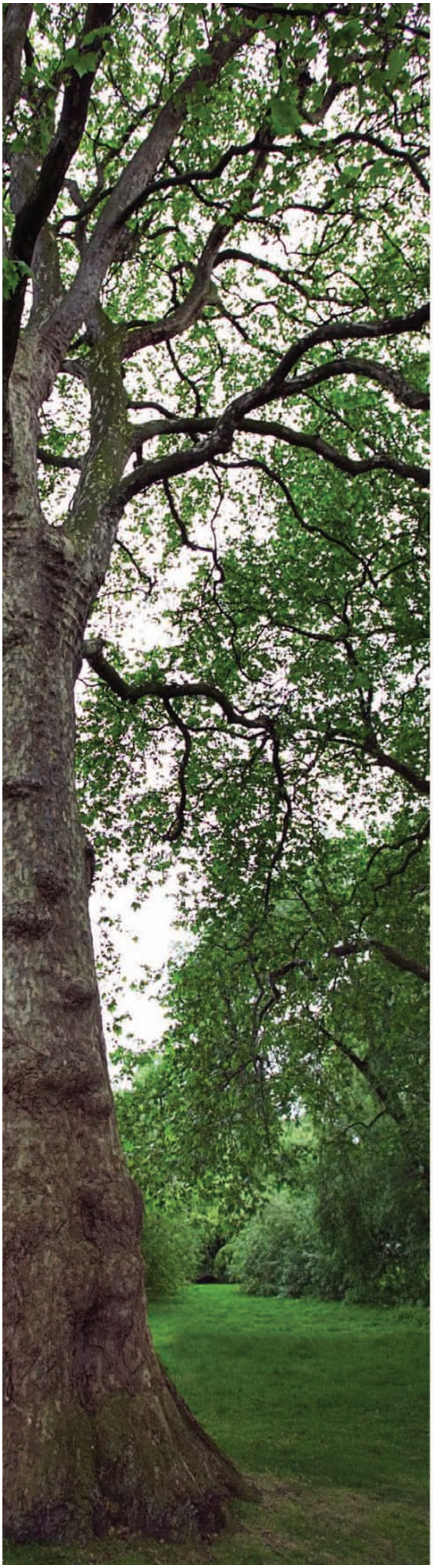

Keep it simple - and relevant

Robyn Gilson is a director of customer and market insights at WellPoint, an Indianapolis-based health benefits company. For some time she has been working with other staff at the company in trying to improve the way it communicates the significance of its market research data to upper management and other internal audiences. This effort was bolstered recently when she was asked to lead a market research team charged with the responsibility of compiling customer feedback on how well the company is meeting its long-term strategies.

In leading the team, Gilson knew that conventional market research presentation approaches - such as relying on jargon and using presentation slides loaded up with charts and graphs - would not be effective with audiences. Instead, she and her team pursued a very straightforward approach in focusing on the power of simplicity. "We learned that getting our point across in a simple manner is far more powerful than hitting them with reams of data," she says.

In the end, Gilson and her team of researchers came up with a concise, relevant story that succeeded in weaving many pieces of research information together. "This approach has been very meaningful and motivational for the company. It's helped us to clearly see what customers want," she says.

According to Kate Quinn, WellPoint vice president of brand strategy and marketing development, this change is being felt across the organization. "What we're trying to do now is to create a bridge between what we know from our research and how we talk about it. We began this initiative at the director level and have since implemented it across all levels of our organization," Quinn says.

This initiative has had positive results for both the company overall and its market research staff, Quinn says. "People are being pulled into projects earlier and are involved in strategy sessions more than ever before."

Paul Peterzell is vice president of research and market analysis at the San Francisco offices of the Charles Schwab Corporation, a financial services firm. By learning and applying some key guidelines and principles, Peterzell and his team are now delivering presentations that are more fully valued and that as a result have more significance for the company.

"Probably the most important thing we've done is to look at our presentations from the viewpoint of the client," Peterzell says. "Our initial impulse as presenters is to stand up and present a lot of data and detailed analysis, which shows what a great job we've done. Unfortunately, management doesn't care about lots of information or about how smart we look."

What management cares about is what the information means for the business. "A great way to improve someone's ability to drive the business with a presentation is to get them to think about how others will react - and then act," Peterzell says.

work, or to justify your existence, or to tell the audience everything you know about a particular topic. Rather, the purpose is to communicate insights that can help make critical business decisions easier (the experiences of two of my clients, WellPoint and Charles Schwab Corporation, which are covered in the sidebar, shed some light on the power of this process). Top management wants to know "What do we do differently next Tuesday as a result of your work?" And that's all they want to know.

If you have a tendency - as we all do - to be enamored of all the wonderful data you brought into this world, the first step toward delivering a presentation that has an impact is to take a machete to your jungle of data. Eliminate everything that isn't perfectly relevant to your core story. By imposing some rigorous self-detachment, you can begin to learn how to separate the hard-won raw data from the more significant or larger business story it supports.

The fab five

In 25+ years of observing and guiding others in crafting presentations, I've seen great presentations and really bad presentations. There are many aspects that contribute to a compelling, effective presentation. If one adheres to the following "fab five" principles I've devised, you're generally ensured an engaged audience who will embrace your message - and, more importantly, act on it.

1. Keep it tight.

Many research presentations appear to be sold by weight - they can run 75-80 pages or more. In today's business climate, no one has time to sit through 40 pages, let alone 80. Keep your findings brief and focused on insights. And don't waste time on the nitty-gritty details of methodology or the analytical techniques employed - no one cares. Management trusts you to do good work and just wants to know what you learned.

2. Keep it simple.

The work we do is often very complex but our success depends on our ability to make it appear simple - so the audience can easily follow what we're saying. Sometimes, in attempting to keep a presentation brief, we seem to compete to see who can get the most information on one slide. I've seen eight-point type in a 20x10 matrix and I've seen four graphs, two pie charts and five paragraphs all on one slide. This is a great cure for insomnia but it doesn't sell ideas. Data are not your offspring - it's OK to leave them behind. Remember to tell the audience just what's important - and resist the urge to tell them every little thing you learned along the way.

3. Focus on the audience's needs - not yours.

A presentation can serve many purposes. It can help executives make tough decisions, educate audiences about a selected topic or sell an idea, product or service. In all cases, the idea is to engage the audience - it's all about them. The purpose of a business presentation is not to showcase how incredibly hard you worked or how remarkable your research models are, nor is it to demonstrate your formidable command of presentation software. You just need to explain what the findings mean for the business.

4. Be engaged - and engaging.

You don't have the right to be boring! A researcher I know once said, "How excited can we get about this? It's only research." Yikes! If we want others to take us seriously and become engaged in the value we can bring to strategic discussions, we need to be engaged ourselves. Excitement and enthusiasm are contagious. Our presentations need to tell a great story, not read like a dictionary. Again, explain what the findings mean for the business. That's exciting to business decision makers.

5. Take a risk.

In our efforts to be consummate professionals, many of us are almost fanatic about presenting absolutely accurate information. Consequently, we sometimes resist drawing conclusions on anything outside the specific scope of our study findings. The fact is that executives make calculated guesses based on imperfect information all day, every day. If we can't join them in embracing uncertainty and taking an informed risk, we won't be invited to the table when the big strategic decisions are made. Run with the big dogs - take a risk, answer the questions, and explain what the findings mean for the business. If it walks like a duck, quacks like a duck and swims like a duck, go out on a limb and call it a duck. Then explain what it means for the business.

Rarely tell you

If your presentations are characterized by careful tables of data, really densely packed slides, ripe with all kinds of great information and impressive discussions of methodology, chances are your audience is bored to tears - but they'll rarely tell you. With presentations, as with life in general, most people tend to keep their toughest responses bottled up inside because they don't want to hurt anyone's feelings - especially if they see you as a sincere, well-intentioned data geek.

In a recent conversation with the president of a Fortune 250 company, he asked me to pass along a message for him - something I've heard all too many times and that I affectionately refer to as "The Five Things Top Management Wants To Tell Research - But Just Can't."

1. "You're boring us to tears."
2. "Enough with all the numbers already - what do we do?!"
3. "I don't have all day to listen to you - how about 10 pages next time instead of 50?"
4. "I don't care what fancy methodology you used - what's the bottom line?"
5. "Take a position, will you? I don't want to hear about 'confidence levels' or 'statistical significance'!"

Want to avoid these career-limiting reactions to your presentations? Want to look at engaged, interested faces instead of the unfocused stares of people about to slip into unconsciousness? Then, once again, present clear, concise, simple insights instead of data findings.

Different light

Insights don't require dense charts and tables with eight-point type - they do require clear, concise, simple information for people who don't care about research details but do care very much about the business implications of your work. Want a seat at the table where the decision-making happens? Give your organization's decision makers the business implications of your research and why it should matter to them - in 15 pages or less - and before you know it, you'll be viewed in a different light. You'll be a regular at the strategy table. | Q

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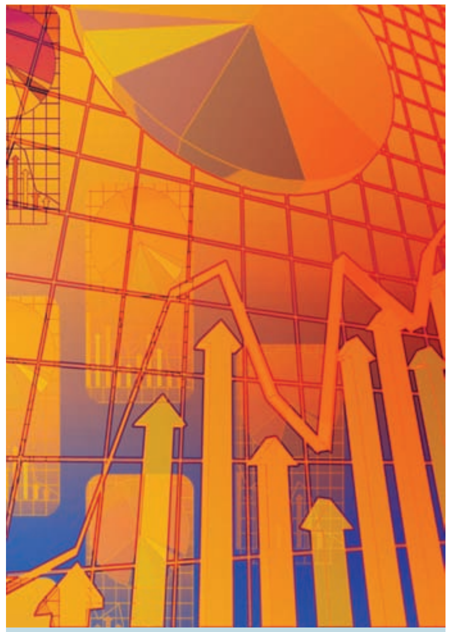
Look beneath the numbers



By Ron Sellers

With talk of the 2008 election already heating up, we'll soon be bombarded by election polls. Rather than relegating them to the political arena, there's a lot business leaders can learn from these polls and how they are used and reported.

As seemingly contradictory polls are released every week through news organizations, there are a number of lessons for people who use marketing research as part of their day-to-day jobs.

• Most people will come away with only a few key insights – right or wrong.

One thing we can learn is that people will typically shorten research findings to a few key results – even if those results don't address the real meaning of the study. This is how a 46-to-45 percent result in a poll with a four-point margin of error gets turned into a one-point "lead." It's just easier (and more interesting) to communicate things this way, even if it's inaccurate.

In business, if you present a finding such as "90 percent of potential customers had no specific complaints about our product," watch how quickly people shorten that to "90 percent of potential customers like our product" or even "We have a 90 percent satisfaction rate," even though those things are not the same at all.

As researchers, we must communicate in as clear and concise a manner as possible, and serve as watchdogs within the organization to make sure the way the findings are actually used is consistent with how they are meant to be used.

Business researchers can learn a few things from political polling

• Conflicting poll results might not be measuring the same things.

On the same day, one national poll suggests the Republican leads the Democrat by 4 percent, while another suggests the Democrat leads the Republican by 5 percent. The results are outside the margin of error (3 percent for both studies), so how can this happen?

The two different studies might be asking different questions. Question wording can heavily influence the outcome of research.

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For instance, "If the presidential election were held today, would you vote for Senator Hillary Clinton, Senator John McCain, or someone else?" is not the same thing as, "Who are you most likely to support in the upcoming presidential election, Democrat Hillary Clinton or Republican John McCain?"

Including party identification in the question can produce higher polarization (Democrats voting for Democrats, Republicans for Republicans). Asking people who they are most likely to vote for, compared to who they would vote for today if forced into a choice, is simply asking different questions. "Vote for" and "support" also may carry different meanings to respondents. Where the question is placed in the questionnaire also carries an impact; asking a series of questions about key issues one candidate supports and then asking who voters are likely to support can influence the survey outcome, for instance.

Question construction is enormously important in business-related research. Asking "What do you dislike about our product" is not the same thing as asking "What are the things you like least about our product?" Questions should be as simple, clear and concise as possible, and be open to only one interpretation. Survey results are only as good as the systematic methods used to produce the results; this includes the way questions are phrased and the order in which they are asked.

• Just because it's reported doesn't mean it's accurate.

Reporters are not researchers, and often don't understand (or sometimes don't bother with) details such as the sample composition or the margin of error. Editors can bury or delete important details that seem too technical for the average reader or viewer. Yet these details are often crucial to knowing exactly what the research really discovered.

You'll have the opportunity to read about plenty of surveys and studies in the media that might be meaningful in your work - but just because a trade publication is reporting that 30 percent of Americans engage in a particular activity doesn't necessarily mean the data is being reported accurately.

Ellison Research releases significant amounts of non-proprietary research information to the national media, and it is unfortunately rather common for the media to get key details wrong. For example, we'll release a study conducted among a representative sample of clergy from all Protestant denominations and include findings from subsamples of larger denominational groups such as Methodists, Lutherans and Baptists. The media frequently reports this as a study of "Methodist, Lutheran and Baptist ministers," or somehow decides that "Methodist" must mean "United Methodist" - excluding all of the other Methodist groups included in this category. The information we release and the eventual coverage that results sometimes has relatively little in common.

Before you rely on a critical statistic you read in an article or hear quoted by some expert, check it out carefully with the source - you may find that the key survey finding you were going to rely on to build your business case or presentation isn't really what it seemed to be.

• People will infer causality even when they shouldn't.

A candidate makes a snide remark about senior citizens, and three days later a poll shows his support among seniors dropped by eight points. Obviously it's because of his unfortunate remark, right? Not necessarily. It could be he also supported a bill many seniors oppose. It could be he trivialized an issue important to seniors in another speech. It could be his opponent said something highly meaningful to seniors in her speech, which has swayed some senior support over to her.

But it's much easier to assume a link between the remark and the dwindling support, because it seems so obvious. Particularly through the media, where people expect instant news and analysis, polling sometimes isn't in-depth enough to get at the key issues.

Business too often makes the same mistake. We want to make obvious connections, because they're, well, obvious. But survey research cannot infer causality, and bivariate analysis doesn't always tell the whole story.

Let's say your customer satisfac-

tion study shows African-Americans are significantly less satisfied with your service than are other customers. You might immediately try to figure out why this particular segment has concerns about your service.

But digging further, you find that your African-American customers are also substantially younger than your other customers. Now, is your lower service satisfaction connected to race or to age or both? Simply looking at the crosstabs may never tell you - it will take a multivariate statistical analysis to determine if there is a relationship between only one or both of these variables and customer satisfaction. Even then, you may find out there is a strong relationship between age and satisfaction, but you cannot accurately say a younger age "causes" lower satisfaction.

• **Labels are easy, but often inaccurate.**

Consider a political poll saying one candidate leads the Democratic primary among Catholics. Seems simple enough. But what defines a Catholic, for the purposes of this study? Is it people who are baptized in the Catholic church, regardless of whether they are active in it? People who call themselves Catholic? People who actually attend a Catholic church occasionally? People who attend regularly?

It's easy to label people, but not always accurate to do so. This is also why so many studies seem to contradict each other - one poll may define Catholics (or moderates, or evangelicals or any other group) one way while another defines them in a completely different manner.

This happens in business, as well. Who are your customers? Anyone who bought from you in the last five years? In the last six months? Or who shopped you even if they didn't buy anything?

If you have multiple sales channels (e.g., direct response, e-commerce, wholesale and retail), is a "customer study" measuring all customers in the correct proportions? Is your study going to define "younger customers" in the same manner as one conducted by another department?

• **Is the study measuring the important things in the right way?**

One thing too few people seem to understand is that it really doesn't matter if 51 percent of the country votes for a particular presidential candidate - what will determine the election is the electoral votes, which are winner-take-all, state by state. Yet people too often look to nationwide surveys to suggest the outcome of the election, because they're easier to conduct, report and understand - they're a convenient shortcut, even if they're not terribly meaningful to the end result.

How often do we fall into the same trap of taking convenient shortcuts in the business world?

Surveying customers at a trade show because it's cheaper and easier than trying to reach a representative sample nationwide. Asking quantitative questions in focus groups because it "saves having to do a follow-up study." Cutting out the quantitative research because "so many people in the focus groups liked the product." Interviewing donors or customers online, even though the database has active e-mail addresses for only 15 percent of the file, because it's faster and cheaper than doing it by phone.

Even if the research is done the right way, is it measuring the right things? Just because most of your customers are satisfied does not mean they are loyal to you. Just because donors don't think your organization is misusing funds doesn't mean they think you are using donations for the greatest impact. Just because people recognize your logo and slogan does not mean your brand resonates with them or has a clear position in their minds and hearts.

• **Research is not perfect and has a margin of error.**

Egad! A researcher saying research can't do everything! That's because no matter how valuable it is, research really can't do everything. For one thing, all studies have a margin of error. It's not uncommon to give customer service representatives a bonus if the satisfaction research among their customers reaches a certain level. But is it defensible not to provide the bonus if the goal is 60 percent complete satisfaction and a survey with a five-point margin of error shows 57 percent satisfaction?

The margin of error also doesn't take into account things such as whether the question was asked correctly or whether it was analyzed properly.

On top of that, consumers are notoriously poor at accurately predicting what they will do in the future when asked directly - which is why even political polls that show a clear leader sometimes don't correctly predict the outcome of the election.

This is not to say research is not extremely valuable, because it is. But don't fall into the trap of thinking research is omnipotent and will predict exactly what your target market will do in the future. Research is a tool that provides you with insight and helps your organization make wiser decisions with a greater chance of success - but it isn't infallible.

Lessons to be learned

This article is not meant to be a condemnation of political polling or the media. There are many valuable insights that come to us through political polls. However, there are also lessons to be learned, lessons that apply to businesses and non-profit organizations on a daily basis. Applying these lessons means having the ability to make a greater impact in a clearer way on the company or organization you serve. | Q

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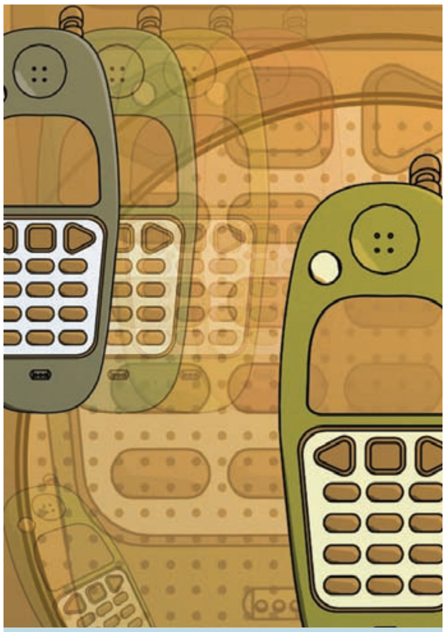

By Hugh Davis

A decade or two ago - in the Stone Age of market research - there were very few choices for gathering consumer feedback. As the pace of business in general has increased over the years, the market research community has had to respond in kind, developing ways to gather relevant consumer feedback faster. When market research was largely conducted in person, mostly in shopping malls, market researchers would pull customers aside while they were shopping and ask them a few questions - a very slow method of gathering consumer input. At the same time, the even slower mail-based survey research delivered respondent data that was often out-of-date or irrelevant by the time it was received. Finally, in the 1980s, market research moved to the telephone, which was faster still, but unfortunately the methodology and timing associated with the calls served to alienate many of the very respondents market researchers were desperately trying to reach.

Each method improved on the speed of research, but each has drawbacks: they intrude on potential respondents' lives and take control out of their hands when it comes to choosing the timing for participation.

Enter the Internet - a market researcher's dream. No longer were researchers relegated to a four- or five-hour window when research could be conducted. Respondents could take surveys on their own terms and in their own time. And market researchers could engage consumers with cool features like video and animations. The Web's interactivity also meant that researchers and clients alike could often view survey results and make critical business decisions much faster. Comparatively, it was like instant gratification. At last, market research was now doing business on "Internet time" as well.

Research via mobile devices offers another - perhaps our last? - chance to earn the trust of respondents

Not surprisingly, the fertile ground of cyberspace attracted legions of market researchers and it seemed the supply of online respondents and the novelty of completing surveys online would never wear thin. Web surfing respondents who were enthralled by the online research experience could now complete surveys on their own schedule and this

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introduced a whole new pool of people willing to participate in the market research process.

More selective

But in recent years, the Internet has been transformed from a Web surfer's paradise to the world's business district. Today, for much of the world's working population, the Web is now associated with getting their job done. Checking e-mail has become somewhat of a chore, and due to the e-mail volume most people now receive, it has to be done daily, if not hourly, and it takes a lot of time. Rather than strolling leisurely through cyberspace, happily taking surveys to which they are invited, survey respondents have begun to be more selective and it is even more challenging to attract and retain panel respondents and keep high levels of respondent cooperation.

So, as it becomes harder and harder to stand out as a compelling choice for consumers online, market researchers are scrambling to make surveys more appealing, adding one glitzy feature after another to entice consumers to devote a few minutes of their valuable and limited time to their online surveys. In fact, market researchers rely on people to volunteer their time for little to no compensation, amidst a myriad of other online digital distractions.

The result? We're entering a new era of market research. Marketing research professionals understand that they need to provide a "value proposition" beyond the traditional survey and the traditional online research panel to cut through the clutter and engage survey respondents. Over the next few years, you'll notice a dramatic change - a focus on the survey respondent rather than the researcher. The respondent will dictate when, where, how long and how often they are willing to participate in research.

Have to adapt

To continue to dialog with respondents, researchers will have to adapt to the changing lifestyles of today's connected digital consumer. To remain compelling, market research must fit into the tight spaces that exist between consumers' busy lives of juggling work and family. Today's mom might be negotiating a business deal on the phone while carpooling her iPod-listening kids to school, checking her BlackBerry with one eye for the latest e-mail from her boss. All this before 8:00 a.m. Fitting into this lifestyle and gaining a portion of this increasingly typical consumer's time is a major challenge in the new era of market research.

In this hyperspeed culture, marketers can't afford to wait weeks or months to find out how consumers feel about their products - by then consumers will have moved on to the next hot product. They can't even afford to wait days in some instances.

Now that the Web has become such a major element of many individuals' daily business lives as well as their personal lives, the novelty and attraction of Web-based research has decreased. The bad news is that we need a new medium. The good news is that the perfect new medium already exists, and it's right in the palms of potential respondents' hands. Like the Internet 10 years ago, wireless devices like the cell phone, the BlackBerry and other handheld Internet-ready devices have become ubiquitous. They have helped consumers adopt new means of surfing the Web, checking e-mail, and, most importantly, interacting.

Imagine what you would have thought if someone had told you in 1990 that in about 15 years or so you would own a small electronic device upon which you would receive electronic mail messages, photographs, telephone calls, instant messages, even entire documents, and use it to surf the Web and carry thousands of your favorite songs? Further what if they also said it would fit in the palm of your hand, that you would carry it everywhere with you - that you would be almost obsessive about it, never leaving home without it? That you would even wear it attached to your belt, or in your pocket or carry it in your handbag? Most importantly, that this device could be used for market research?

New best friend

At Greenfield Online, we believe that mobile phones and other handheld wireless devices are about to become every market researcher's new best friend. Here's why: The world is literally blanketed with cell phones and wireless devices. The number of mobile phone subscribers is expected to reach 2.6 billion globally in 2006 and 4 billion by 2010, according to market researcher iSuppli. Sales of mobile phone devices continue to grow and were forecasted to reach 986 million units worldwide in 2006 by Gartner Dataquest, as users upgrade their equipment and mobile phone usage spreads to new geographic markets. The growth in both device sales and subscribers shows the expansion of the market researcher's potential pool of mobile respondents.

Cell phones and handheld devices

are generally with users at all times, not left behind at the office or packed in a briefcase. Wireless devices become such an integral part of most people's lives that anyone who owns one cannot even imagine what they did without it. If lost, they are immediately and unquestionably replaced.

Wireless surveys can be designed to fit into the brief cracks in people's lives: while waiting for a plane or commuting to work on the train. A busy executive who can't take time out of his or her day for an online survey just might respond to a few questions on his or her cell phone while riding the rails to work. A harried stay-at-home mom might be inclined to take a survey while she is waiting in the long checkout line at the supermarket or while waiting for a teller at the bank. Once again, people can take surveys on their own terms and on their own time.

Teens are a unique audience that is difficult to reach via traditional market research methodologies. In fact, they are even difficult to reach via Internet panels. Research shows that today's teens "text more than they talk." According to The Mobile Life Youth Report from The Carphone Warehouse, the "talk ratio" is falling, as 74 percent of teens use their mobile phones predominantly for text messaging, averaging approximately nine text messages per day. It is a natural evolution for teens to participate in the marketing research process via their phones.

Mobile devices, with their customized ring tones and styles to match every taste, are uniquely personal. So users view wireless activities as personalized and fun.

Wireless devices and personal computers are becoming interchangeable devices in many respects. For your e-mail, your contacts, your appointments, etc., the files are identical on both systems.

The programs that enable survey programming for wireless devices today are as powerful as the programs that enabled survey programming for PCs five years ago. With the speed at which technology advances, one can only imagine how things will progress in the future.

Gets even better

The news gets even better. New tracking technology - which improves every day - offers the promise of being able to capture data from respondents at exactly the right time and place. Imagine being able to question a fast-food restaurant customer about her fast-food eating experience as soon as she leaves the restaurant! And what if, during the Super Bowl's halftime show, you could survey football fans via their mobile device about the effectiveness of a television commercial that ran during the first half of the game? The ability to recruit that person in aisle six of Wal-Mart for a product awareness test is right around the corner, and could change the way we approach marketing research. While we're certainly not there yet, it's exciting to think about the possibilities for this medium as it continues to evolve.

The rules have changed

The new wireless world offers almost unlimited potential for expanding the current pool of survey-takers. But, if market researchers are going to thrive in the new landscape, it is important to understand that the rules have changed. In this new environment, it is imperative that we think not simply about our business needs but the needs and the expectations of the respondent. We will only succeed if we are able to maintain the convenience and "newness" that once buoyed online research by investigating new means of survey completion.

Clearly, it is impractical to expect that anyone will take a 30-40-minute survey on a mobile phone or handheld device. While this has unfortunately become commonplace for online surveys, it is imperative that we understand the value and the limitations of the wireless platform - while respecting respondents. We must accept that the respondent experience is paramount and look to provide wireless survey takers with a few well-timed and concise questions to maximize the potential for this exciting platform.

Researchers looking to capitalize on the wireless wave will have to become experts in minimalism; they will need to create dramatically slimmed-down surveys with four to eight focused questions designed to give them just the information they're seeking. Obviously the standard question grid is not appropriate for a wireless survey, neither is a lengthy open-ended text question. Marketing researchers need to look beyond the traditional survey and ask the most essential questions, quickly and in the most concise form possible. When thinking about the mobile respondent, don't forget: concision is best - they are likely typing with their thumbs.

In control of their world

In an environment in which the 2006 *Time* magazine Person of the Year was You, where blogging, social networking and online communities dominate Internet usage, the individual is clearly in control of their digital world. They can reach out to the entire Internet community if they choose or they can selectively block people from contacting them. Of course, they can control the messages they receive on their mobile devices as well.

With the power the mobile device brings the market research industry, we have a responsibility to respect and maintain the privacy of the respondent. We must remember to honor the respondent and use their time responsibly. It is a privilege to be allowed to contact respondents on their personal mobile devices for the purpose of market research. If that privilege is abused, make no mistake, the respondents will simply block us from contacting them again. It is their right and the power is in their hands. Such is the way of the digital world. | Q

new product research

Optimize your line optimization

By Jeffrey M. Kirk
and Susan H. Sayre

Today's American supermarkets, mass merchandisers, convenience stores and club stores offer more variety in packaged goods to consumers than ever before. Consumers are faced with a myriad of choices between brands and product lines, and also with a myriad of fragrance, flavor and color options within those lines. The relatively modern phenomenon of fast-to-market, continuous innovation has created a marketplace deluged with both first-to-market and fast-follower copycat products that do everything from automatically cleaning your shower to keeping your house smelling like a grove of mangoes.

Operating in this SKU-proliferated environment, in which shelf space is not at quite the premium it once was (because there's simply more of it in more places), calls into question the appropriateness of traditional product-line optimization research, which generally takes the approach of cannibalization analysis. With the number of variants available for most packaged goods product lines, substantial cannibalization can only be expected. In fact, we posit that for some categories, especially food categories, cannibalization is not only expected, it is desirable.

Demand choices

Consumers have come not only to expect but to demand choices in the products they purchase. Even within a consumer's chosen brand set, they want options for flavors, colors, fragrances, etc. This expectation is especially important for products with a sensory component, the largest category of which is food. Within a category, even those consumers who have an overall favorite flavor, color or fragrance will likely reach a point when they need or desire alternatives. For example, they may paint the bedroom and demand a different color for their box of facial tissues, or they may tire of their strawberry yogurt for breakfast and opt for some raspberry for a change of pace. Consider what would happen if there were only one variety (the initial favorite) available in each brand: the consumer would look to another brand for the product variety they seek.

Traditional methods of analyzing the effects of line extensions no longer suffice

The ice cream category provides a perfect example of how offering variety - not minimizing cannibalization - should be the strategy of choice in optimizing a flavor line. Consider the three basic flavors:

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chocolate, vanilla and strawberry. It is safe to say that with these three flavors alone, virtually all consumers who like ice cream are reached. A cannibalization analysis would inform us that we don't need other flavors because any new flavors would overlap in appeal (i.e., cannibalize) the core three. However, consider what would happen if Dreyer's offered only chocolate, vanilla and strawberry: consumers would shop the case and buy alternate brand(s) that offered variety in their flavor lines. Other categories that exemplify the desirability of variety are canned soup, frozen dinners, ready-to-eat cereal, and disposable air fresheners.

Another primary problem with cannibalization analysis in consumer packaged goods (CPG) research is that it fails to take into account a very important purchase dynamic: buying multiples per purchase occasion. The underlying, unstated assumption of cannibalization analysis is that consumers will purchase one product. For many categories (ironically, the categories for which cannibalization analysis is most often conducted), consumers buy multiple "cannibalizing" varieties per occasion. A consumer will often buy two, five, 10 or more individual units across several different varieties in a single purchase occasion, and even more over time. If there isn't enough variety within one brand, the consumer moves to another brand in his/her product set.

Relied on TURF

The principal, and virtually only, analytic technique on which CPG manufacturers have relied for product line optimization is TURF (total unduplicated reach and frequency). It is often requested as part of the standard deliverable from a concept test. In short, the analysis is used to suggest a line of variants that have minimal consumer overlap with regard to appeal. For all the reasons already mentioned regarding the concept of cannibalization in general, this analysis fails to deliver optimal, actionable insights for most product categories. Understanding the nuts and bolts of the analysis will elucidate its limitations in most situations.

TURF was borrowed for marketing research from the world of advertising. It was developed to measure the breadth and depth of an ad's household penetration. In that context, reach refers to the percentage of households who have been exposed to a particular advertisement at least once; frequency refers to the average number of times each reached household is exposed to the ad.

Consider the notion of extending this analysis to a flavor line optimization (we will use flavor generically, to indicate product varieties such as color, flavor or fragrance). In this context, reach represents the percentage of consumers who show interest in at least one of the potential varieties of the product being tested; frequency refers to the average number of flavors in any particular line that are of interest among those consumers who are reached by the line. The objective of the line optimization analysis

under the TURF paradigm is to determine what varieties should be included in the product line to maximize its reach. While frequency might help us to understand overlapping appeal of products within the line, the theory driving TURF analytics necessitates minimizing this metric in order to maximize reach.

TURF is essentially a determination of net interest. The analysis usually begins with an investigation into the number of individual flavors that should be introduced to reach a majority of the consumers interested in the product line. For some manufacturers, the number of flavors to introduce is an easy call as they only have the equipment or the budget to produce a limited number of flavors. For others, the number of flavor varieties is open to discussion, in which case it is incumbent upon the research to provide a recommendation for both the optimal number of flavors for the line as well as what those flavors should be.

In executing a TURF analysis, what the computer program does is evaluate the net appeal (reach) of every possible combination for each feasible size of product line and return a list of the "best" lines for each number of products possible. The best lines are defined as those that reach the greatest number of people in total with the least amount of overlap among themselves. Using this model to determine the number of flavors to include in the line presents its own set of problems for, as mentioned, a very few basic flavors (e.g., vanilla, chocolate and strawberry) will generally reach most interested consumers.

For the purpose of argument, let's say that these three flavors capture 95 percent of interested consumers. Adding an additional flavor might get us to 97 percent, another to 97.5 percent, and another to 97.8 percent. Is it realistic to expect to reach 100 percent of interested consumers? And how much sales volume can we actually expect from reaching an additional 0.5 percent or 0.3 percent of the interested consumers who are participating in a market research study in which the sample may be only 100 or 200 people?

Additionally, when most of the interested population is reached by just a few flavors, yet there is a wide variety of flavors proposed, it becomes very difficult to determine which single flavor to add to increase reach. Most of the time, several flavors present themselves as equally appealing, so we are again reduced to making the decision arbitrarily as opposed to mathematically. Furthermore, basing business decisions on increases in reach of tenths of a percentage point is not a sound practice, as these minute differences in reach are not statistically significant, anyway! Yet manufacturers do it all the time.

Even though chocolate, vanilla and strawberry ice cream covers the bases with respect to reach, the critical component of volume is missing. While in theory, a TURF analysis might recommend a carrot- or beet-flavored ice cream to capture the very small percentage of consumers not reached by chocolate, vanilla or strawberry, would the manufacturer not actually be better off with a "Double Chocolate Explosion" flavor to increase penetration among their chocolate, vanilla and strawberry buyers? While TURF would say no, we would say yes.

Sales volume is more important

At the end of the day, sales volume is much more important than reach. So we need to employ metrics that measure the absolute appeal and volume impact of a flavor vis-à-vis others in a set, not the overlap of its overall appeal with other products in the line. Our recommendation is a simple but robust one, and is consistent with metrics used in concept volume forecasting: the chip allocation. Its execution is simple and its results are far more intuitive and impactful than TURF.

To determine volume impact, consumers are asked in the concept test not only how often they intend to purchase the product but also how many units they would expect to buy at each purchase occasion. From these questions we are able to derive a total number of annual units for every consumer in the study. Consumers are also asked to allocate their next 10 purchases of the product among all possible flavors in the line (or category, as applicable). The chip allocation is used to proportionally allocate each consumer's annual unit volume across all flavors being evaluated. When summed across all consumers, a share of potential volume can be calculated for each flavor variant.

A key benefit of this approach is that shares are much more intuitive to interpret than TURF results. Beyond that, they convey powerful information about the absolute and relative volume impact of each flavor variety. Because we have taken into account every consumer's intended purchase volume, the shares that result incorporate the proportional volume impact as well. Furthermore, cannibalization is naturally reflected in the results as those flavors selected were chosen in the context of all possible flavors available. Finally, a share of volume analysis can also suggest the number of SKUs that will be needed to capture the majority of category volume, as diminishing returns result from adding more and more SKUs to the line.

A rethinking

The advent of big-box retailers with acreage to fill, coupled with a proliferation of channel options where consumers can fulfill their shopping needs, has necessitated a rethinking of CPG firms' traditional approach to line optimization. The belief that it is sufficient only to reach each consumer with a single product in a product line fails to take into account the variety-seeking behavior of our culture and the sky's-the-limit possibilities that new distribution channels afford. Volume is a key component that must be taken into account to make informed, insightful choices when defining a multi-variety product line. By borrowing a line out of the volume forecasting playbook, we will take a quantum leap forward in actually optimizing our product line optimization research. | Q

continued from page 10

results being strong category growth.

Of the nine top categories listed, four categories were in the fresh arena - fish and seafood, ready-to-eat salads, soup, and herbs/spices. Many of these categories grew due to new product availability as well as more space being allocated in fresh/refrigerated sections of the store. In comparison, the frozen and shelf-stable varieties of the above items showed slower growth than their fresh counterparts did, and in the case of soup, actually showed a decline.

It is interesting to note that retailer private-label products have a strong presence in fresh categories. In fact, of the top 10 private-label food and beverage categories in terms of share, nine are fresh items (cakes, ready-to-eat salads, pizza, eggs, complete ready meals, soup/bouillon/stock, savory fillings/pastes, dairy/milk, fish/shellfish/seafood), with five (cakes, ready-to-eat salads, pizza, soup/bouillon/stock, fish/shellfish/seafood) growing at a rate faster than manufacturer brands within the same category.

"It is clear that private-label dominates many of the fresh categories in retail stores," says Perrin. "Retailers are focused on their consumers' needs, and some have even created specially designed in-store areas for fresh and prepared foods. Consumers can quickly and conveniently shop for the meal components they need for their families."

Other product categories that showed fast growth were those that made consumers' lives more convenient. Ready-to-eat salad, baby formula and frozen meal starters all were among the fastest growing categories and had an element of convenience to them. Similar performance was seen within markets.

In China for example, baby food and formula were fast-growing because of focused marketing efforts on promoting these products as more convenient for younger families. In Hungary, meat-based baby food products drove the growth while baby food in jars sold well in Czech Republic and Slovakia.

The frozen meal starters category was driven primarily by the large year-over-year growth of these products in North America, particularly with new "breakfast starter" products. A relatively new category in many markets, this category again addresses consumers' need for quickly prepared meals for their families.

The survey measured 66 markets around the world across more than 100 categories, comparing mid-year 2006 with mid-year 2005. These 66 markets account for more than 90 percent of the world's real GDP and over 75 percent of the world's population. The markets were grouped regionally into five areas (in order of market size): Europe, North America, Asia-Pacific, Latin America, and emerging markets.

The report was based on purchase information from retailers in grocery, drug and mass merchandise outlets and generally excludes kiosks or vending machines. In a few markets, sales from convenience stores may be included. Both total category and private-label information was collected for the report. For more information visit http://acnielsen.com.

Moviegoers just saying no

There's nothing quite like watching a film on a giant screen. But as home theaters become more and more common (and affordable), should theater owners be worried? In a survey of consumers by Zogby Interactive, Utica, N.Y., nearly half (45 percent) said that, while they still go to the movies, their movie attendance has decreased from five years ago - 27 percent said it is much less, and 9 percent said they never go to the movies anymore.

As Hollywood struggles with a years–long box office plunge, Zogby finds that those age 25-34 are most likely to say their attendance has decreased over the past five years - and the oldest respondents (age 70 or older) are most likely to say they no longer go to the movies at all (23 percent).

Slightly more than a third (36 percent) say their movie attendance is about the same as it was five years ago. Overall, just 10 percent say their movie attendance has increased during that period of time - those age 18-24 are most likely to say their movie attendance has increased - 16 percent said they attend more now than they did five years ago. The Zogby Interactive poll of 10,145 adults nationwide was conducted January 26-29, 2007, and contains a margin or error of +/- 1.0 percentage points.

High ticket prices (30 percent) and a dislike for the movie selections (30 percent) are the top reasons given for falling movie attendance - 13 percent said they don't like the crowds in the theater. Those age 18-24 are most likely to complain about costly tickets - nearly half (46 percent) said high ticket prices have kept them away from the theater. Among older adults, dissatisfaction with the film selections is the main deterrent - 46 percent of those age 65 or older said this.

More than a third (37 percent) of respondents said they go to the movies fewer than six times per year - 21 percent said they don't even make it to the movies once a year. Overall, 10 percent said they never go at all. The youngest adults in the survey (those age 18-24) are most likely to say they go to the movies several times per month (9 percent) - this age group leads all others among those who said they go to the movies between six and 12 times per year. Attendance numbers decline among increasingly older respondents, the Zogby Interactive survey shows.

Theaters may offer massive screens and superior sound systems to moviegoers, but most would rather stay in the comfy confines of home and watch DVDs, the survey showed. The majority (63 percent) said they would rather have free unlimited DVD rentals with no late fees for a year than a year's worth of free unlimited movie passes (30 percent). Those who live in large cities - and most likely have access to better theaters and more films - were more likely to choose the movie passes

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than those living in less populated areas. More than a third (37 percent) who live in cities favor unlimited movie passes, compared to 23 percent who live in rural areas. Rural respondents without access to as many theaters and films were much more likely to choose the DVD rentals - 71 percent picked the DVDs compared to 58 percent who live in large cities.

DVDs again beat out movies by a wide margin when people were given the choice between 100 free DVDs of their own choosing (71 percent) or 100 free movie passes (24 percent). Women (26 percent) were slightly more likely than men (22 percent) to favor 100 free movie passes, while nearly a quarter (72 percent) of men and (69 percent) of women would choose the DVDs. For more information visit www.zogby.com.

C-store shoppers go in thirsty

Today's convenience store shoppers are seeking cold beverages, friendly employees and know what they want before they get through the door, according to a new study by Meyers Research Center, New York. The findings are part of Meyers Convenience Store Close-Up Wave Six, which takes a look at behavior, attitudes and decision-making patterns of c-store shoppers in the United States. The study also disclosed that nearly half of all consumers surveyed said they are making sacrifices to pay higher gas prices at the pump.

"C-store shoppers are telling us that the helpfulness and the friendliness of the employees was rated high when selecting a store to shop in, along with fast checkout and cleanliness," says Jeff Friedlaender, vice president, Meyers Research Center.

"Higher gasoline prices are driving consumers to less convenient locations in search of lower prices, which are more important than finding the most convenient c-store," Friedlaender says.

The study was fielded in July, August and September of 2006. The research was conducted via in-store intercept interviews with consumers as they were exiting the convenience store, immediately after they finished paying for their purchases. A random sample of 1,074 convenience store shoppers were interviewed in 31 locations across 17 geographically dispersed U.S. cities.

The cost of gas is of concern to c-store shoppers and the majority would choose access to lower-cost gas above their own convenience. Half of the subjects (48 percent) said they had to give up something in order to pay higher gas prices over the summer of 2006. Most often relinquished were vacations/travel, dining out/take-out and entertainment (movies, theater, sporting events). To a lesser extent, people also cut back on shopping, particularly of apparel and DVD movies/games. A minority of 2 percent said groceries or utility bills were sacrificed.

Seventy-five percent of shoppers surveyed said "helpful, friendly employees" outweighed factors such as good prices (38 percent), fast checkout (38 percent), wide selection (27 percent) and prepared foods (3 percent) when deciding which c-store outlet to shop in.

The influence of in-store factors in c-stores has dropped since the study was last conducted in 2004, falling from a 2004 level of 12 percent to 4 percent in 2006. Either there is less in-store marketing being used or it is less compelling to consumers. "Convenience store shoppers are making purchasing decisions based on category planning and the role that the c-store plays in their day-to-day activities," says Friedlaender. Over 85 percent of products purchased at the c-store are consumed within 30 minutes of checkout and over half within five minutes, usually by the shopper him/herself and nobody else. More than half (56 percent) of shoppers said that they plan to consume their purchases in the car while traveling.

A cold drink purchase is made by about half of the shoppers - the most typical purchase by far. Shopping for snack food and cigarettes is also highly prevalent. Gas is frequently purchased at stores selling gas; among the shoppers buying merchandise in a c-store with an attached gas station, 25 percent were purchasing gas, slightly lower than in 2004 (30 percent).

Purchasing a cold beverage leads the list of things that lure consumers to c-stores. The purchase of gas and cigarettes also plays a very important role in driving much convenience store traffic. However, the need to buy gas is slightly less of a driver to c-stores than in 2004, being replaced by snack food and lottery ticket purchasing. For more information contact Jeff Friedlaender at 800-221-5015 or visit www.meyersresearch.com.

2006 saw a record number of new CPG products

According to the Mintel Global New Products Database, in 2006 a record-breaking barrage of new products flooded store shelves. Close to 182,000 new products were introduced globally, with key booming areas focusing on mind, body and general good health.

Almost 105,000 food and drink products were launched last year alone - around 300 for every day of the year. Coupled with more than 77,000 non-food product launches hitting the market last year, new launches overall experienced a 17 percent gain on 2005 launches. This more than doubled the growth in new CPG launches from 2004 to 2005.

"The significant shift to more products with better-for-you positioning helped boost new product launches in 2006," says David Jago, director of Chicago-based Mintel Custom Solutions. "The strong focus in many categories is on promoting good health, which can be seen in the most popular product claims. Companies are offering more products that enhance well-being for consumers."

Low-carb products continue to move out of grace with consumers, with the category posting only 500 global food introductions in 2006. This is less than half the level of

launches achieved in the same category in 2005, and only 15 percent of the launches introduced during its peak in 2004.

In contrast, other "food minus" trends - products that highlight a reduced amount of fat, calories, sugar and cholesterol - are sharply on the rise. Low/no trans-fat and gluten-free are the key movers of this category, showing major increases. Low/no trans-fat products are up by nearly 120 percent, more than doubling from 2005, due primarily to North American regulations (the region accounts for 80 percent of these food and drink claims). This trend shows development promise, particularly in Europe.

Gluten-free experienced an 86 percent jump in 2006 product launches, with strong growth in North America, Europe and Latin America. Companies are placing a stronger focus on allergen-free foods, which have seen greater growth into mainstream retailers.

Food and drink product launches with an ethical positioning nearly doubled last year, with ethical labeling appearing in more diverse product categories.

Ethical products are defined as those that include ingredients linked to fair trade or sustainability, also expanding to products that make ecological claims or link to charitable concerns. The ethical movement has spread through more countries globally within the past year, and doesn't show any signs of slowing in 2007. Non-food ethical claims tripled their growth in 2006, including significant gains by products with fair-trade ingredients and cause-related focuses.

Organic is also continuing to see major developments. As a claim, organic has been a rising star in food for the last few years. However, in the non-food arena, products that are wholly or partly organic grew by about 30 percent.

In 2006, superfoods greatly impacted mainstream CPG product launches. Pomegranate was one of the strongest stars of the year, especially in beverages. Due to the fruit's major success, companies are looking for the next big star. Mintel has seen great promise in açaí, an antioxidant-rich berry. "Açaí lends itself well to premium, indulgence positioning, offering all of the health benefits of other superfood ingredients," says Lynn Dornblaser, director of Mintel Custom Solutions. "It has a strong exotic appeal, bolstered by its Amazonian origination. We really see the fruit as the one to watch for ingredient sourcing in the future." For more information visit www.mintel.com.

Digital divide still exists in Canada

A study by Vancouver-based Ipsos Reid, Older Canadians and the Internet, has found that older Canadians lag significantly behind those in other age groups when it comes to their online usage and proficiency, showing that the digital divide is still alive and well in Canada.

Currently, only 61 percent of Canadian adults aged 55 or older have access to the Internet from any location, compared to 88 percent of adults aged 18-54, a gap of 27 points. And while this gap has narrowed slightly in the past three years, it is not significant enough to draw any conclusions about longer-term implications. In 2001, just over eight of 10 Canadian adults aged 18-54 (82 percent) had access to the Internet, while just under half of those aged 55 or older (48 percent) had access. The gap was between 34 and 36 points from 2001 to 2003, and has since narrowed to 24 to 27 points in the past three years. In addition to being less likely to be online overall, older online adults spend nearly 35 percent less time online per week than younger Canadians (8.7 hours aged 55+; 13.3 hours aged 18-54), and the gap in terms of usage has not narrowed appreciably over the past six years.

"Some experts would like us to believe that the Internet is a universal medium that can reach all Canadians whether it be for a marketing, communications or social perspective, but our research shows that there are considerable flaws in this thinking," says Steve Mossop, president of market research Canada West for Ipsos. "The Internet is by no means universal, and there are important gaps like the older Canadians segment that simply cannot be ignored. The digital divide was predicted to disappear but our research shows that while the gap is narrowing slightly, the divide is very real."

Behaviorally, older Canadians lag behind the younger groups in each of 20 common online activities online Canadians have ever participated in. The gap is largest for listening to Internet radio (34 percent), downloading free MP3 files (32 percent), visiting blogs (23 percent), conducting online banking (21 percent), researching courses and schools (21 percent), comparison shopping (20 percent), searching for real estate (18 percent), researching trips (17 percent), using the Internet at work for personal reasons (17 percent), and purchasing online (14 percent). The gap is smaller for activities such as purchasing travel (6 percent), using online photo services (7 percent), and visiting homes for sale first found online (zero gap). The only online activities online Canadians aged 55 and older are more likely to participate in are taking courses directly online (+3 percent), buying/selling investments (+3 percent) and earning a degree or diploma online (+4 percent).

Attitudinally, the gaps are quite large. Only one in eight online adults aged 55 and older (13 percent) claim to be expert/very skilled users of the Internet, compared to 35 percent among 18-54-year-olds. There is a large difference in how older and younger Canadian adults feel they use the Internet in their daily lives. Those aged 55 and older are less likely to feel the Internet is an important part of their daily routine (41 percent agree among those aged 55+ vs. 53 percent agree among those aged 18-54), and online Canadians aged 55 and older are significantly more likely to be "very concerned" about online security (45 percent aged 55+; 37 percent aged 18-54). For more information visit www.ipsos.ca/reid.

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Product and Service Update

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marketplace. This new segmentation solution shows the LOHAS consumer's role as a predictor in ethical consumerism and reflects the mainstream appeal that many LOHAS product categories have migrated to. It also captures the nuances that exist in various consumer targets, with the new segments being LOHAS consumers, Naturalites, Drifters, Conventionals and The Unconcerned.

The LOHAS Index looks at corporate social responsibility (CSR), combining actual CSR performance and consumer-perceived responsibility. It uses investment analyst data and consumer perceptions on the same companies from NMI's 2006 LOHAS Consumer Trends Database.

In conjunction with Silvercliffe Media, each report includes an analysis of the dollar size of the consumer LOHAS marketplace. For more information visit www.nmisolutions.com.

Mystery shopping-based training for frontline employees

Norcross, Ga., mystery shopping firm Shop'n Chek Inc. has launched Triggered Training, a new frontline training and learning solution designed to improve operational performance at the store level.

Through Triggered Training's real-time, immediate delivery of training content and feedback loops, clients can reduce or eliminate the time gap between the measurement of operational performance and resulting customer service improvements. The software product helps clients deliver focused, Web-based training to all store locations where customer service deficiencies are detected. The system works by triggering immediate action at the store level based upon the results of a client's customer experience measurement programs.

To further ensure that frontline associates and managers understand the training material, clients can elect for tests to be administered in conjunction with the training. Automated scoring and status reporting provide ongoing verification and management follow-up. Triggered Training incorporates customized performance standards into real-time training at all brand locations. For more information visit www.shopnchek.com.

New comScore products for pharma, blogs

Reston, Va.-based comScore Pharmaceutical Solutions and partner Evolution Road have developed consumer e-marketing effectiveness benchmarks for the pharmaceutical industry based on aggregate and blinded data across a multitude of studies. Covering patients and prospects, these new benchmarks focus on the impacts of specific e-marketing initiatives, such as online banners, search and visitation to brand and disease-specific Web sites, and key brand business objectives, including brand awareness, brand favorability, generating incremental new patient starts, incremental adherence/next fill and data for ROI calculations.

Separately, comScore Networks and Federated Media, the representative of more than 110 independent conversational media sites (including Digg, PROTRADE, BoingBoing and Dooce), announced a research and development initiative designed to provide comprehensive measurement of conversational media such as blogs and community-driven sites. As part of this research endeavor, comScore will build a database using a customized weighting and projection system designed specifically for measuring the conversational media and blogging sector. For more information visit www.comscore.com.

Foodservice database from Technomic

Chicago-based foodservice consultancy Technomic Inc. and European firm CHD Expert are offering access to a large database of foodservice providers with over four million addresses in North America and Europe. Food manufacturers and other suppliers to the industry can use the CHD Expert database to reach over 820,000 commercial foodservice establishments in the U.S., encompassing limited- and full-service restaurants, in addition to bars and taverns. Over 150,000 other foodservice providers, including lodging, health care, transportation, recreation, business and industry, and education segments are also available. For more information visit www.technomic.com.

Survey TV fans via Buddy TV site

Seattle-based research firm QuestionPro and BuddyTV, an entertainment-focused community Web site, have created a new way for advertisers to acquire input from viewers of shows that feature their ads. BuddyTV uses custom online surveys from QuestionPro to gather information and opinion from the community of fans that cluster on its site to discuss their favorite programs.

BuddyTV community members take online surveys - developed by the research groups of advertisers and facilitated by QuestionPro.com - within hours of when a show airs up to a few days afterward. BuddyTV's analysts compile the results and produce a report. For more information visit www.questionpro.com.

Briefly

Focus group video transmission firm FocusVision Worldwide, Stamford, Conn., has launched FocusVision Librarian, a new service which gives researchers a secure central location for all their focus group video and documents. Users can create video clips, order transcripts and download audio podcasts in their Librarian. A free 90-day trial is available. For more information visit www.focusvision.com.

U.K.-based Kynetec Limited and Doane Marketing Research Inc., St. Louis, have merged to create a new marketing information business, dmrkynetec. The firm serves the crop protection, biotechnology and animal health industries from 10 offices across North America, Europe and Asia. For more information visit www.dmrkynetec.com.

Bruzzone Research, Alameda, Calif., has released results of its post-testing of ads aired during the 2007 Super Bowl. Recognition, advertiser awareness and 52 other diagnostic tools were used in the evaluation. For more information visit www.bruzzone-research.com.

Synovate has launched its PAX Latin America media consumption survey. It will poll 4,500 affluent consumers in Mexico, Brazil and Argentina, including business decision makers and managers such as C-level executives. For more information visit www.synovate.com.

First Choice Facilities, a consortium of owner-operated focus facilities, has added new members: Focus on Boston (with two locations), J. Reckner Associates in Philadelphia, and House Market Research in the Washington, D.C./Baltimore area. For more information visit www.firstchoicefacilties.net.

New York-based Scarborough Research is offering a complimentary report on Wal-Mart shoppers at www.scarborough.com/freestudies.php. The report examines the success of Wal-Mart in converting its store shoppers into buyers.

Prezza Technologies, Cambridge, Mass., has released the latest version of its Checkbox Web Enterprise Edition Web-based form, feedback and survey software. Prezza has also renamed its technology platform from Ultimate Survey to Checkbox. For more information visit www.prezzatech.com.

Toronto research firm Angus Reid Strategies is developing Angus Reid Forum, a national online market research panel representing a cross-section of Canadians. For more information visit www.angusreid-strategies.com.

Dallas research firm Parks Associates has launched 2007 Digital Health Service: Analyzing Health and Wellness Markets for Digital Devices and Services, a new research program that will provide ongoing updates and analysis on the emerging digital health market. The service includes a free monthly newsletter, a monthly compilation of key industry events and a client-based program. For more information visit www.parksassociates.com/digitalhealth.

London research firm All Global now offers an online panel of 80,000 U.S. physicians. For more information visit www.allgloballtd.com.

ResearchPAYS Inc., a market research firm based in Hastings-on-Hudson, N.Y., is offering a new primary market research solution, ResearchPAYS, which is designed to help marketers learn what America's Hispanic consumers want and how to reach them. Surveys are delivered to a consumer's home address, where they use a proprietary phone-based process to enter their responses. For more information visit www.researchpays.net.

The Qualboard software for discussion boards and research journaling from Nashville-based research firm 20/20 Online has been translated into Chinese/Mandarin. For more information visit www.2020research.com.

New York-based communications firm KCSA Worldwide has created an advertising and media practice dedicated to serving the advertising, market research, publishing and media industries. For more information visit www.kcsa.com.

San Francisco research firm Telephia has launched Residential Market Metrics, a new product that measures residential access line share at the metropolitan market level on a monthly basis. The product allows companies to see a view of their market share defined for their specific footprint. For more information visit www.telephia.com.

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company **WPP** has acquired **All Global**, a U.K.-based marketing research company that specializes in health care information services. All Global will be integrated into WebSurveyResearch, a New York-based firm which is part of WPP.

Alliances/strategic partnerships

New York firms **Arbitron Inc.** and **The Nielsen Company** have signed an agreement that will govern completion of development and testing of the Project Apollo marketing research service and the expansion of the pilot panel to a full national service if the test results meet expectations and generate marketplace support. The parties have formed a jointly-owned limited liability company to continue pursuit of the project. The proposed Project Apollo service would use the Arbitron Portable People Meter system, ACNielsen Homescan technology and other technologies to provide advertisers with an understanding of the connection between consumer exposure to advertising on multiple media and their shopping/purchase behavior.

Association/organization news

The Council for Marketing and Opinion Research has appointed Howard Fienberg as its new director of government affairs. Fienberg brings more than eight years of public policy experience including work on legislative issues affecting the research profession.

Awards/rankings

New York research firm **Frost & Sullivan** gave marketing executive Chris X. Moloney a 2007 Lifetime Achievement Award for Marketing Research and Competitive Intelligence. Over the past 15 years, Moloney, who is chief marketing officer at Scottrade, an online investment firm, has "emerged as a recognized pioneer and forward thinker in the field of marketing research, specifically in the areas of customer loyalty, customer advocacy marketing and drivers of consumer behavior" according to a Frost press release. The Lifetime Achievement Awards are nominated, selected by and voted on by a panel of industry experts assembled by Frost & Sullivan.

Ipsos announced that its researchers have won two awards from the journal *Managing Service Quality* (MSQ) for co-authored papers: Outstanding Paper and Highly Commended Paper. The articles were deemed to have made significant contributions to theory and best practices in the services industry.

The article receiving Outstanding Paper (Best Paper) was "A Longitudinal Examination of the Asymmetric Impact of Employee and Customer Satisfaction on Retail Sales." Its authors were Timothy Keiningham and Ken Peterson (Ipsos Loyalty), Lerzan Aksoy (Koç University), Bruce Cooil (Vanderbilt University), and Terry Vavra (Terry Vavra Associates). One of the key findings of this research was that for companies to benefit financially from improved employee satisfaction, managers must not only achieve consistent levels of satisfaction, they must also achieve performance thresholds that correspond to increased sales.

MSQ awarded "Call Center Satisfaction and Customer Retention in a Co-branded Service Context" a Highly Commended Paper distinction, meaning that it was a finalist for the Outstanding Paper award. This article was written by Keiningham and Barry Wahren (Ipsos Loyalty), Aksoy, Cooil, and Tor Wallin Andreassen (Norwegian School of Management). This paper showed that there is a potential downside to co-branding in that customers may leave the primary brand if they are dissatisfied with the co-brand partner. Copies of the articles can be found at www.ipsos-ideas.com.

Anne Bailey Berman, president of Boston research firm **Chadwick Martin Bailey,** was awarded the 2007 Pinnacle Award for Achievement in Entrepreneurship by the Women's Network of the Greater Boston Chamber of Commerce, in a ceremony honoring the accomplishments of women in greater Boston who have achieved excellence in business and management.

New accounts/projects

The Travel Industry Association has selected Vancouver-based **Vision Critical** to provide an online "Voices of the Industry" panel to help keep the association's finger on the pulse of the travel industry community.

Sonneborn Inc., a Mahwah, N.J., maker of high-purity specialty hydrocarbons, has licensed the Confirmit EFM platform from Norway-based research software company **Confirmit** for its newly expanded customer satisfaction initiative.

Germany-based **GfK** announced several TV measurement contract wins for its associated companies. GfK Romania will measure official TV ratings in Romania for four years initially, starting in January 2008. The TV research contract of Intomart GfK in the Netherlands has been extended by a further three years and the contract of GfK Ukraine until 2012. Beyond this, the GfK Group has equipped viewer panels in India, Pakistan and Cyprus with additional and also new metering instruments.

Seattle-based **Global Market Insite Inc.** (GMI) announced that MacGroup, a Cincinnati agency that designs custom modeling solutions, has selected GMI's Net-MR market research software suite for data collection.

Redlands, Calif.-based GIS software firm **ESRI** has signed an agreement with geoVue, a provider of location optimization tools. ESRI will provide its ArcGIS Server enterprise GIS platform, data and support to geoVue to develop integrated solutions that capitalize on geographic analysis for multilocation businesses.

New companies/new divisions/ new locations/ expansions

Synovate Healthcare has launched a

new office in Hamburg, Germany.

Chicago consulting firm **Frank Lynn & Associates** has formed a new research division called Insight Research.

Company earnings reports

Greenfield Online Inc., Wilton, Conn., reported financial results for the fourth quarter and full year ended December 31, 2006. Total net revenue was $29.5 million for the fourth quarter of 2006 as compared with $24.5 million for the same period in the prior year for an increase of $5 million or 20.3 percent of which approximately $1.1 million or 4.4 percent was due to favorable currency effects. For the Internet survey solutions segment, total net revenue was $22.4 million for the fourth quarter of 2006, including favorable currency effects, as compared with $20.9 million for the same period in the prior year for an increase of 7.2 percent.

Total gross profit was $22.5 million or 76.2 percent of revenues for the fourth quarter of 2006, as compared with $18.5 million or 75.4 percent of revenues for the same period in the prior year.

Operating income was $5.2 million for the fourth quarter of 2006 or 17.5 percent of revenue, as compared to an operating loss of $89 million for the same period in the prior year, which includes impairment and restructuring charges of $91.8 million.

Net income for the fourth quarter of 2006 was $3.5 million as compared with a net loss of $89.1 million, including the charges mentioned above, for the same period in the prior year.

Net cash flow provided by operating activities was $7.6 million for the fourth quarter of 2006 as compared to $7.5 million for the same period in the prior year.

For the fourth quarter of 2006, adjusted EBITDA, excluding restructuring charges and one-time charges, a non-GAAP financial measure, was $8.7 million or 29.4 percent of revenue, as compared to $5.7 million or 23.3 percent of revenue for the same period in the prior year.

Operating free cash flow, a non-GAAP financial measure, was $5.9 million for the fourth quarter of 2006, as compared to $5.7 million for the same period in the prior year.

For the fourth quarter 2006 ended December 31, **Arbitron Inc.**, New York, reported revenue of $79.3 million, an increase of 5.2 percent over revenue of $75.3 million during the fourth quarter of 2005. Costs and expenses for the fourth quarter increased by 17.9 percent, from $63.8 million in 2005 to $75.2 million in 2006, due in part to planned expenditures for the 2007 rollout of the Portable People Meter ratings service in Philadelphia and New York. Non-cash equity compensation for the quarter amounted to $1.4 million.

Earnings before interest and income tax expense (EBIT) for the quarter were $10.9 million, a decrease of 35.7 percent compared with EBIT of $17 million for the fourth quarter of 2005. Interest expense for the quarter increased to $3.2 million from $0.9 million in 2005 due primarily to a one-time "make whole" charge of $2.9 million stemming from the early repayment of a $50 million outstanding senior note in October 2006.

Net income for the quarter was $4.9 million, compared with $11.2 million for the fourth quarter of 2005. Net income per share for the fourth quarter of 2006 decreased to $0.17 per share (diluted), compared with $0.36 per share (diluted) during the comparable period last year.

For the year ended December 31, 2006, revenue was $329.3 million, an increase of 6.2 percent over revenue of $310 million for 2005.

A planned increase in expenses for the 2007 rollout of the Portable People Meter radio ratings system in Philadelphia and New York and for the Project Apollo pilot contributed to an increase in costs and expenses for the year of 16.9 percent, from $216.3 million in 2005 to $253 million in 2006. Non-cash equity compensation in 2006 totaled $6.5 million.

EBIT decreased 17.2 percent from $101.4 million in 2005 to $84 million in 2006. Net income for 2006 decreased 24.7 percent to $50.7 million compared with $67.3 million in 2005. Earnings per share (diluted) in 2006 was $1.68, compared with $2.14 per share (diluted) last year, which included a tax benefit from the reversal of certain tax contingencies relating to prior years of $0.15 per share (diluted).

Mobile and Internet measurement firm **Keynote Systems**, San Mateo, Calif., announced financial results for its fiscal first quarter ended December 31, 2006. Revenue for the first quarter of fiscal year 2007 was $15.8 million, an increase of 4 percent compared to the preceding quarter and a 15 percent increase compared to the first quarter of fiscal year 2006. Net income for the first quarter of fiscal year 2007, which included a $1 million income tax benefit, $920,000 in stock-based compensation expenses, and a $759,000 charge for amortization of intangible assets required under generally accepted accounting principles (GAAP), was $264,000, or $0.01 per diluted share. This compared to net loss of $6 million, or $0.35 per share, for the preceding quarter, and net income of $587,000, or $0.03 per diluted share, for the first quarter a year ago.

The non-GAAP net income for the quarter was $551,000, or $0.03 per diluted share, compared to non-GAAP net loss of $797,000, or $0.05 per share, for the preceding quarter, and non-GAAP net income of $2.4 million, or $0.12 per diluted share, for the first quarter a year ago.

Paris-based **Ipsos** generated consolidated revenue of EUR 857.1 million ($1.1 billion) in full-year 2006, up 19.4 percent compared to 2005. This is the firm's strongest annual growth rate since 2001. The currency effect was almost negligible, with a positive effect of 0.6 percent.

There were major changes in the scope of consolidation, which account for 12.3 percent. Nonetheless, this figure is lower than at the beginning of the year due to the integration of

MORI in the U.K. in October 2005 and Understanding UnLtd. in the U.S. in November 2005. Organic growth was 6.5 percent. In comparison, market growth is estimated at 5 percent, which is a little less than expected at the beginning of the year due to the ongoing development of online data collection systems and the transfer of European budgets to the developing countries. Both of these two trends had a deflationary effect on the market, which remained nonetheless dynamic.

Harris Interactive, Rochester, N.Y., announced results for the second quarter of fiscal 2007 ended December 31, 2006. Revenue for the second quarter was $56.6 million, up 3 percent when compared with $54.8 million of revenue reported for the same period a year ago. U.S. revenue was $43.2 million, down 1 percent from the $43.7 million of revenue reported a year ago. European revenue, including $1.3 million of favorable foreign exchange rate differences, was $13.4 million, up 20 percent from the $11.2 million of revenue reported for the second fiscal quarter of 2006.

Global Internet revenue for the second quarter was $32.4 million, equal to the $32.4 million of Internet revenue reported for the same period a year ago. U.S. second quarter Internet revenue was $28.4 million, down 3 percent when compared to $29.2 million of Internet revenue in the second fiscal quarter of 2006. European Internet revenue for the second quarter was $4 million, up 27 percent from the $3.2 million of Internet revenue reported for the same quarter last year.

Operating income for the second quarter, which included a $0.4 million gain on the sale of real estate in the U.K., was $5.8 million, or 10.2 percent of revenue, up 46 percent when compared to operating income of $4 million, or 7.2 percent of revenue, for the same period a year ago.

Net income for the second quarter was $3.6 million, or $0.06 per diluted share, up 54 percent when compared with net income of $2.4 million, or $0.04 per diluted share, for the same period a year ago.

Revenue for the first half of fiscal 2007, which ended on December 31, 2006, was $104.6 million, up 1 percent when compared with $103.8 million of revenue reported for the same period a year ago. U.S. revenue for the first half was $79.8 million, down 1 percent from the $80.8 million of revenue reported for the first half a year ago. European revenue, including $1.8 million of favorable foreign exchange rate differences, was $24.8 million, up 8 percent when compared to $23 million of revenue reported for the same period a year ago.

Global Internet revenue for the first half was $61.3 million, up 2 percent from Internet revenue of $60.4 million reported for the same period a year ago.

U.S. first-half fiscal 2007 Internet revenue was $52.8 million, down 2 percent when compared to the $54 million reported for the first half of fiscal 2006.

European Internet revenue for the first half of fiscal 2007 was $8.5 million, up 34 percent from the $6.4 million of Internet revenue reported for the same period a year ago.

Operating income for the first half was $6.8 million, or 6.5 percent of revenue, up 13 percent when compared to operating income of $6 million, or 5.8 percent of revenue for the same period a year ago.

Net income for the first half was $4.6 million, or $0.08 per diluted share, up 27 percent when compared with net income of $3.6 million, or $0.06 per diluted share, reported for the first half of fiscal 2006.

Norway-based research software company **Confirmit** reported an increase in revenue in 2006 of 26 percent to $21.8 million. Confirmit achieved revenue of $7.6 million (22 percent growth) in the fourth quarter of 2006 with an EBIT margin of 21 percent.

SPSS Inc., Chicago, announced revenues and earnings for its fourth quarter and fiscal year ended December 31, 2006. The company reported 2006 fourth quarter revenues of $71.1 million, an increase of 14 percent from the same quarter of 2005, driven by increased sales across all product lines and major geographical regions. New license revenues for the 2006 fourth quarter were $35.8 million, up 20 percent over the fourth quarter of 2005.

Revenues in the 2006 fiscal year were $261.5 million, an 11 percent increase from $236.1 million in the 2005 fiscal year. New license revenues for the 2006 fiscal year were $125 million, up 16 percent from $107.6 million in the 2005 fiscal year.

Operating income in the 2006 fourth quarter increased 36 percent to $11.7 million, or 16 percent of total revenues, from $8.6 million, or 14 percent of total revenues, in the same quarter of 2005. Operating income for the 2006 fiscal year increased 22 percent to $34.3 million, or 13 percent of total revenues, from $28 million, or 12 percent of total revenues, for the 2005 fiscal year. 2006 operating income includes the effect of expenses for share-based compensation of $1.7 million and $6.7 million in the fourth quarter and full-year periods, respectively. Excluding share-based compensation expenses, 2006 operating income would have been $13.4 million for the fourth quarter, or 19 percent of total revenues, and $41 million for the fiscal year, or 16 percent of total revenues.

In connection with its ongoing worldwide income tax audits, the company recently became aware of information relating to open tax years and has estimated that certain deferred tax assets on its balance sheet may no longer be realizable. Due to the possible loss of these tax attributes, the company recorded a non-cash charge of $6.9 million to income tax expense in the 2006 fourth quarter to establish a valuation allowance with a corresponding reduction in deferred income taxes on the company's balance sheet. The effect of this income tax charge was to reduce 2006 diluted earnings per share (EPS) by $0.33 for the fourth quarter and by $0.34 for the fiscal year.

As a result of this income tax

reserve, reported EPS for the 2006 fourth quarter were $0.10 compared to $0.30 for the same period of 2005. EPS for the 2006 fiscal year were $0.73, compared to $0.85 for the 2005 fiscal year. The effective income tax rates for the 2006 fourth quarter and fiscal year were 85 percent and 56 percent, respectively, compared to effective income tax rates of 40 percent and 41 percent in the same periods of 2005.

National Research Corporation, Lincoln, Neb., announced results for the fourth quarter and year ended December 31, 2006. 2006 revenues increased by 35 percent. 2006 net new contracts reached $11.9 million, up 81 percent over 2005. 2006 earnings per share were up 15 percent; up 23 percent without the impact of share-based expenses. The quarterly dividend was increased by 20 percent to $0.12 per share.

Revenues for the quarter ended December 31, 2006 were $10.3 million, compared with revenues of $8.6 million for the same period in 2005, an increase of 21 percent. Net income for the quarter ended December 31, 2006 was $1 million, or $0.15 per basic and $0.14 per diluted share, compared with net income of $1.5 million, or $0.22 per basic and diluted share, in the prior year period. Earnings per share for the quarter ended December 31, 2006 were negatively impacted by $0.02 per share as a result of the adoption of Statement of Financial Accounting Standards ("SFAS") No. 123R in the first quarter 2006.

Revenues for the year ending December 31, 2006 were $43.8 million, compared with revenues of $32.4 million for the year ended 2005. Net income for 2006 was $5.9 million, or $0.86 per basic and $0.85 per diluted share, compared with $5.2 million, or $0.74 per basic and diluted share, in the prior year 2005. Earnings per share for the 12 months ended December 31, 2006 were negatively impacted by $0.08 per share as a result of the company's adoption of SFAS No. 123R. Had it been adopted in 2005, the earnings per share would have been $0.70 per basic and $0.69 per diluted share for the year 2005, compared to $0.86 per basic and $0.85 per diluted share in 2006. Excluding the impact of SFAS 123R results in an increase in diluted earnings per share on a comparable basis of 23 percent for 2006 over 2005. The company believes that this non-GAAP measure provides a better comparison for the current year on earnings per share.

IMS Health, Fairfield, Conn., announced fourth-quarter 2006 revenue of $543.5 million, up 14 percent (10 percent constant dollar), compared with revenue of $477.7 million for the fourth quarter of 2005.

Fourth-quarter 2006 diluted earnings per share on a GAAP basis were $0.32, compared with $0.38 in the prior-year quarter. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, earnings per share were $0.43, compared with $0.40 per share in the same period last year. Including the expensing of equity-based compensation, adjusted (non-GAAP) earnings per share for the fourth quarter were $0.40.

Operating income in the fourth quarter of 2006 was $125.7 million on a GAAP basis, up 6 percent, compared with $118.4 million in the year-earlier period. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, fourth-quarter operating income was $135.3 million, up 12 percent on a reported basis and 11 percent constant dollar, compared with $120.5 million in the year-earlier period. Including the expensing of equity-based compensation, adjusted (non-GAAP) operating income in the 2006 fourth quarter was $125.7 million, up 4 percent on a reported basis and 3 percent constant dollar, over the prior year.

Net income on a GAAP basis was $65.5 million, compared with $89.4 million in the year-earlier quarter, a 27 percent decline. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, net income for the 2006 fourth quarter was $87.8 million, compared with net income of $94.1 million in the prior year, down 7 percent. This decline is primarily due to higher interest expense on debt used to fund 2006 share repurchases, and a weaker dollar reducing foreign exchange hedge gains year over year. Including the expensing of equity-based compensation, adjusted (non-GAAP) net income for the fourth quarter of 2006 declined 14 percent to $81.2 million.

For the 2006 full year, revenues were $1,958.6 million, up 12 percent (11 percent constant dollar), compared with revenue of $1,754.8 million in 2005. Diluted earnings per share on a GAAP basis in 2006 were $1.53, compared with $1.22 in the prior year, up 25 percent. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, earnings per share in 2006 were $1.54, a 12 percent increase, compared with $1.38 per share in 2005. Including the expensing of equity-based compensation, adjusted (non-GAAP) earnings per share in 2006 were $1.41, up 2 percent, exceeding analysts' consensus. Net income on a GAAP basis in 2006 was $315.5 million, compared with $284.1 million a year earlier. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, net income in 2006 declined 1 percent to $318.6 million, compared with net income of $320.6 million in 2005. Including the expensing of equity-based compensation, adjusted (non-GAAP) net income in 2006 was $290.8 million, down 9 percent.

For the 2006 full year, operating income was $444.2 million on a GAAP basis, a 6 percent increase, compared with $420.8 million a year earlier. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, operating income in 2006 was $490 million, a 12 percent increase (11 percent constant dollar), compared with $438.7 million in 2005. Including the expensing of equity-based compensation, adjusted (non-GAAP) operating income in 2006 was $450.2 million, up 3 percent on a reported basis and 2 percent constant dollar.

Names of Note

continued from page 12

Portland, Ore., research firm *Doxus* has named **Praveen Chalise** senior analyst, **Emily Hill** analyst, **Nick Knoll** project manager, **Megan Lyle** senior project manager and **James Pozdena** analyst.

Cindy R. Ford has been named executive vice president of *The*

Ford O'Rourke

Modellers LLC, a Salt Lake City analytics and predictive modeling firm. **Tim O'Rourke** has been named senior vice president and director of the firm's new East Coast operations.

U.K. retail research firm *ESA* has promoted **Antony Francis** to project executive in the Nielsen team and **Lee Ansell** to project executive in the mystery shopping team.

Stamford, Conn., research firm *InsightExpress* has promoted **Todd Trautz** to senior market research manager and **Lacey Fabrizio** to market research manager and named **Timothy Fitzgerald** market research analyst. The firm also expanded its online media measurement group with the appointment of **Elise Neel** as director, online media measurement, West Coast.

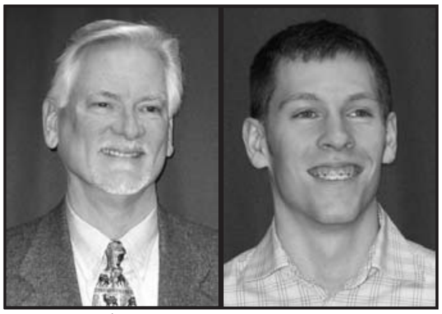
St. Louis research and consulting firm *The Mattson Jack Group Inc.* has named **John R. Haig** vice president, marketing research.

IMS Health, Fairfield, Conn., has named **Gilles V.J. Pajot** chief operating officer. IMS also appointed **Leslye G. Katz** senior vice president and chief financial officer.

New York-based *Arbitron's* **Jon Miller** has been promoted to the newly created position of CBS Radio PPM (Portable People Meter) account manager and, along with a five-person PPM implementation team, will provide PPM training to CBS Radio advertising executives.

Harris Interactive, Rochester, N.Y., announced that **Richard B. Wirthlin** has entered into a long-planned retirement from the board of directors to pursue personal interests, including spending time with his family.

Bellomy Research Inc., Winston-Salem, N.C., has promoted **Ed Hardman** to vice president - marketing sciences.



Hardman Wimmer

Andrew Wimmer has joined the company as a research associate.

Grizzard Communications Group, Atlanta, has named **Bill Jacobs** vice president of research and analytics.

MORPACE International Inc., a Farmington Hills, Mich., research firm, has appointed **Gary Allen**

Allen Cregan

research director and **Bill Cregan** vice president.

Carrollton, Texas-based *Carlson Restaurants Worldwide Inc.* has named **Ted W. Finlay** vice president consumer insights.

Burke Inc., Cincinnati, has promoted **Greg Van Scoy** to senior vice president, client services and promoted **Stacy McWhorter** to senior account executive, Burke client services.

Atlanta market research firm *CMI* has named **Joanna Frankowski** project manager.

Millennium Research Inc., Apple Valley, Minn., has named **Kim Olsen** project director and **Tyler Suter** research associate.

New York research firm *Ipsos* announced a number of executive-level appointments: **Debra Mason** as chief financial officer of Ipsos North America; **Efrain Ribeiro** as COO of Ipsos Interactive Services; **Pushp Kamal** as senior vice president of research analytics for Ipsos ASI's tracking and equity business. The firm also announced the following promotions: **Lauren Demar** to the new role of president of global consumer products and Ipsos Novaction; **Lee Markowitz** to global chief research officer for the new global consumer products division; **Vaughn Ravenscroft** to global chief information and development officer; **Lisa Lanier** to president of Ipsos Insight US Products and Ipsos Novaction US; **David Pring** to executive vice president, Ipsos Insight US Products; **Brian Cruikshank** to executive vice president of the Ipsos Insight Technology and Communications practice, based in Minneapolis; **Brad Bane** to senior vice president of Ipsos Insight US Products, with responsibility for the company's Chicago office; **John Carter** to senior vice president, Ipsos Insight US Products.

Singapore-based *GfK Asia* has expanded its research team, naming **Steven Kaiser** commercial director, consumer electronics, Asia.

Jeanne Fec, principal of Chicago research firm *Frank Lynn and Associates*, has been tapped to lead the firm's new Insights Research division.

GfK Market Measures, East Hanover, N.J., has established a dedicated oncology business unit and appointed **Bill Bowman** to lead the company's strategic efforts in this area of research.

2007

Telephone
Facilities Directory

>>>

The 2007 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.

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halberstam@isacorp.com
www.isacorp.com
Michael Halberstam, President
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Alhambra, CA 91801
Ph. 818-989-1044
mhalberstam@isacorp.com
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Michael Halberstam, President
60-60-60-60
(See advertisement on p. 92)

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639 West Ave., L-14
Lancaster, CA 93534
Ph. 661-726-9480
mhalberstam@isacorp.com
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Joyce Revlett, Director of Surveys
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70-70-70-70
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(See advertisement on p. 79)

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30 Irving Place, 7th Floor
New York, NY 10003
Ph. 212-260-0070
CMcma9@aol.com
125-125-125-125

Consumer Research Services/VNU
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Ph. 646-654-5000
www.vnu.com
70-70-70-70

Ebony Marketing Research, Inc.
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Bronx, NY 10475
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emr@interport.net
www.ebonymktg.com
Bruce Kirkland, Vice President
90-0-90-0

Informa Research Services, Inc.
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New York, NY 10170
Ph. 800-637-6878 or 212-889-5941
inquiries@informars.com
www.informars.com
Jackie Weise, Director Nat'l/Int'l Field
50-50-50-50

Innovative Concepts Marketing Research
200 Stonehinge Lane
Carle Place, NY 11514
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scottsycoff@ic-mr.com
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Scott Sycoff, Exec. Vice President
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rbrooks@ipcgroup.us
www.ipcgroup.us
Rhoda Brooks, President
65-60-60-60

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www.mktginc.com
250-250-250-250

Opinion Access Corp.
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Joe Rafael, Chairman
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(See advertisement on p. 113)

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Global Call Center
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research@sisinternational.com
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New York, NY 10001
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m.schulman@srbi.com
www.srbi.com
Chintan Turakhia, Sr. Vice President
380-380-380-380

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

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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
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Ph. 212-391-5243
kstrassberg@universalsurvey.com
www.universalsurvey.com
Keith Strassberg, Exec. Vice President
275-275-275-275

Rochester

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

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KS&R
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Joe Snyder, Dir. of Ops/Sr. Cnsultant
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GroupNet Charlotte
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www.leibowitz-research.com
Teri Leibowitz, President
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Mimi Parker Rambo
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Greensboro/Winston-Salem

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Sherrie Aycock, Co-Owner
38-38-38-8

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Scott Layne
270-270-270-270

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Dino E. Fire, General Manager
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322 Broadway
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gchristensen@bgai.net
Gordon Christensen
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Teri Knutson, Research Director
85-85-85-85

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drs01@earthlink.net
Chris Cage, Nat'l. Mktg. Mgr.
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Linda Finch
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Irwin Weinberg
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focusmark@fuse.net
Kim Sharp
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info@burke.com
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Steve Clark, V.P. Data Collection
105-105-105-105
(See advertisement on p. 25)

Calo Research Services, Inc.
10250 Alliance Rd.
Cincinnati, OH 45242
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ncalo@caloresearch.com
www.caloresearch.com
Patricia A. Calo, Vice President
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Kathy Renaker, Dir. Mktg. Rsch. Outsourcing
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Ken Fields, President
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Lee Ann Adams, Facility Director
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Randall Thaman
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Jan Hasselo, Director of Client Services
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Josh Hiley, Account Services
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Ron Mayher, General Manager
25-25-25-25

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Amy Morris, President
12-3-10-0
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Jessica Petrovek, Field Director
15-15-15-15

National Survey Research Center
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nsrc@nsrc.com
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Judy Hominy
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Columbus

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Thomas Harvey, Vice President
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Lorne Dillabaugh, V.P., Field Operations
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Judy Frederick, Project Director
8-0-8-0
(See advertisement on opposite page)

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Richard Stock, Director
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Joyce Clevenger, Exec. V.P.
55-55-55-55

Great Lakes Marketing Associates
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www.greatlakesmarketing.com
Mark Lott, Principal
20-20-20-20

Oklahoma

Oklahoma City

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Patty Casteel, President
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www.bnresearch.com
Colby Parry, Focus Group Coordinator
29-29-29-29

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jim@portlandopinion.com
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Jim Weaver, Vice President
18-14-18-0
(See advertisement on p. 126)

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62-62-62-62

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John Stepleton, President
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Linda Zinck, Dir., Consumer Research
25-0-25-0

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Colleen Moore Mezler, President
20-20-20-20

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Allan Geller, President
35-35-35-35

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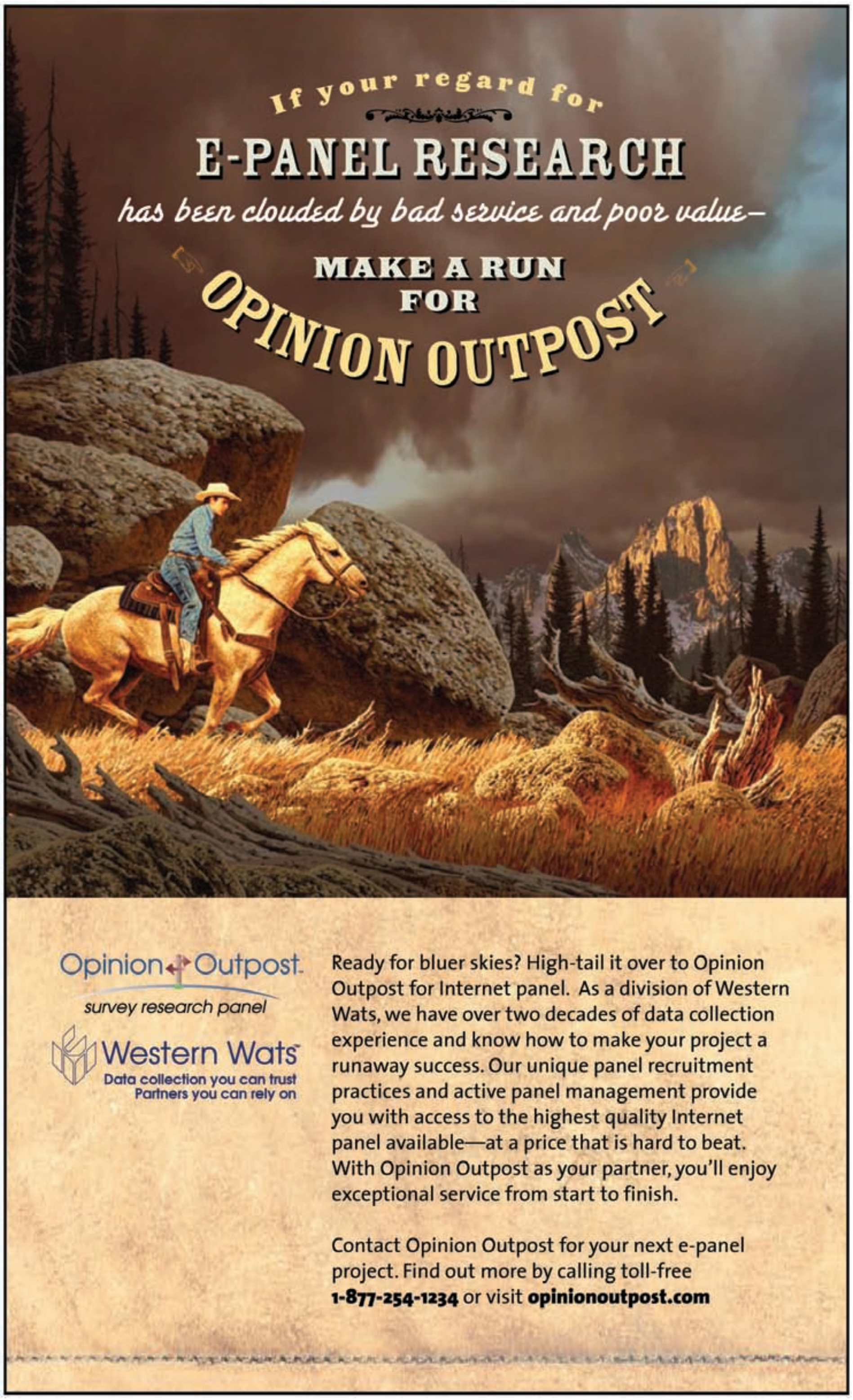

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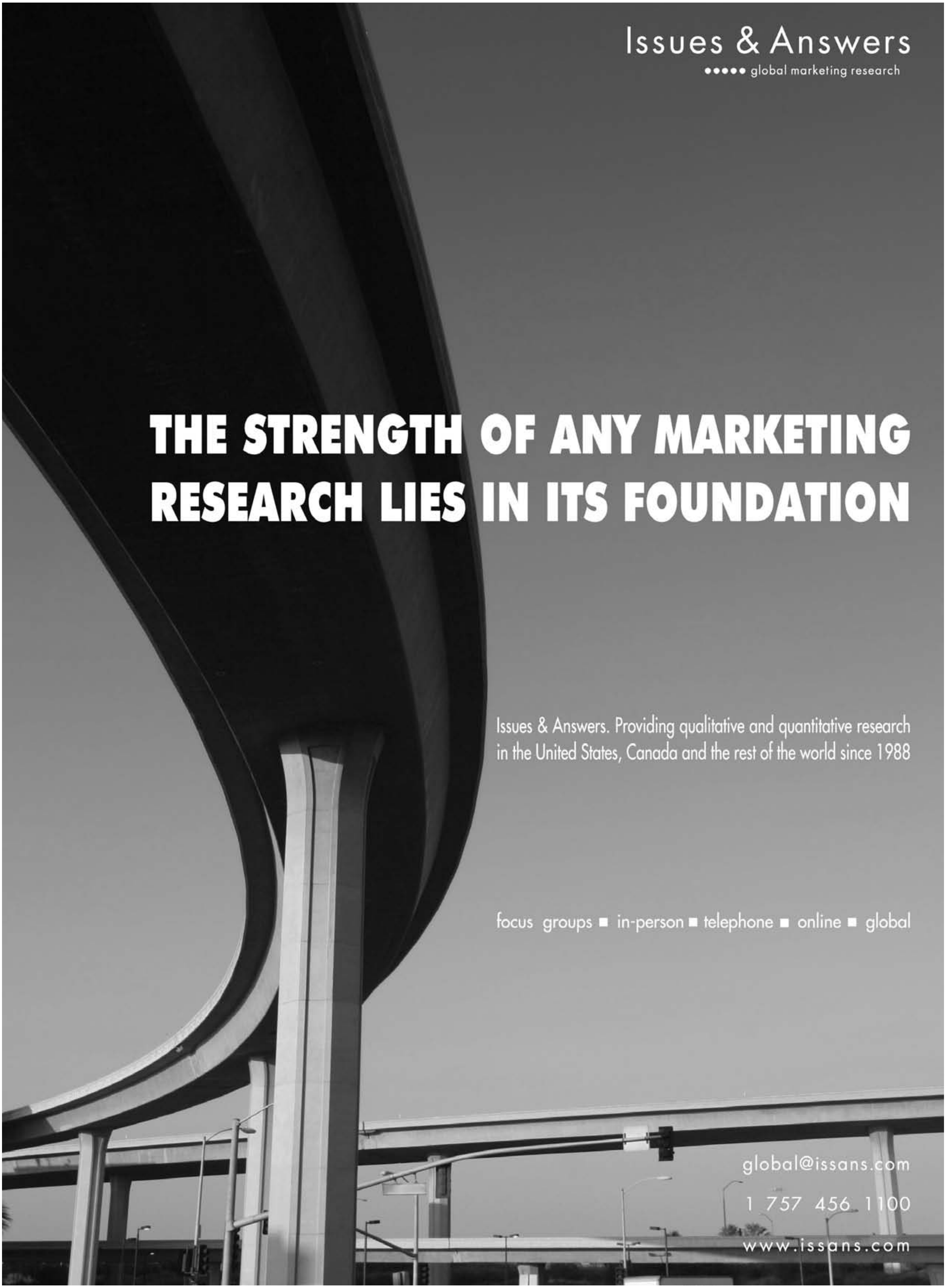
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Due to an editing error, Kari McGlynn, author of the article "Let me show you what I need" (February issue, p. 36), was misidentified as female. In addition, his contact phone number should be 415-430-2200.

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By Joseph Rydholm
Quirk's editor

Book shows how to dominate the Dominator

Whether it's a car crash (hopefully of the non-injurious variety) or some awkward moment captured in a reality TV show, disasters of any scale are hard to look away from. In the world of marketing research, focus groups offer the most opportunities for things to go compellingly wrong. The act of gathering a bunch of strangers together in a room for a few hours of conversation is fraught with potential problems. Personality conflicts, participant inattention and plain old chaos (no, I'm not referring to the goings on in the back room) are just a few of the bugaboos that can rear their heads during the group interview process.

How to handle difficult focus group respondent types and the unrest they cause is the subject of Robert Kahle's book *Dominators, Cynics, and Wallflowers*. In this slim (134-page) but substantive volume, Kahle counsels readers on what to do if they suddenly find themselves faced with potentially problematic participants.

Interspersed in his concise explication of the various troublesome respondent types are real-life examples from veteran moderators of Groups Gone Bad that make the book hard to put down. (These anecdotes are called War Stories. Hmm…where do you suppose the idea for that title came from?) Respondents brandishing guns, drunken doctors, Phil the joker - these are just some of the characters whose exploits are detailed in the book. Following each tale are helpful tips on how to defuse the aforementioned situation.

Six of the types Kahle discusses are sometimes difficult: Wallflowers, Followers, Co-Moderators, Blatherers, Proselytizers and Jokers. Four are always problems: Dominators, Cynics, Hostiles and Intoxicateds. While bad seeds like the Intoxicateds or the Hostiles might be easy to spot right away, the others won't make themselves apparent until after the discussion has started. For some types, the ever-popular "Participant X, you have a phone call" trick is the best way to remove the offending person from the group. But for most others, the moderator has to find a way to roll with the (hopefully proverbial) punches. Group dynamics being the fragile things they are, the moderator who is burdened with a disruptive participant faces a difficult task. You need to shut down that person, or at least lessen their impact, without coming off as a bully or otherwise casting a pall on the rest of the proceedings.

Kahle draws from his own and other moderators' experience to offer ways to handle problem respondents, suggesting statements the moderator can make to the group and ways to use body language to help take away the respondent's power to disrupt. If faced with a Blatherer, for example, Kahle suggests using the following to address the group: "We have a lot to cover today, so I will act like a traffic cop trying to keep our discussion moving and focused. If I cut you off, please understand that I mean no disrespect, but am just trying to stay on topic and let all of you have a chance to voice your opinions."

So effortless

Good moderators are like professional golfers in that they make things look so effortless. Just as weekend duffers see golf pros and think they could wield a 7-iron with the same flair as Phil Mickelson, a lot of marketers watch a skilled moderator in action and think to themselves, "How hard can moderating be? Any idiot can do it!" Well, as Kahle's book shows, only an idiot would think it's easy to keep a focus group moving constructively forward while covering each of the client's discussion topics, handling missives from the back room and identifying and neutralizing problem respondents. |Q

Dominators, Cynics, and Wallflowers *(134 pages; $34.95), by Robert Kahle, is published by Paramount Market Publishing (www.paramountbooks.com). Readers who buy the book through Paramount also receive a set of six laminated 6x9-inch reference cards listing the various problem respondent types and strategies for dealing with them.*