QUIRK'S

Marketing Research Review

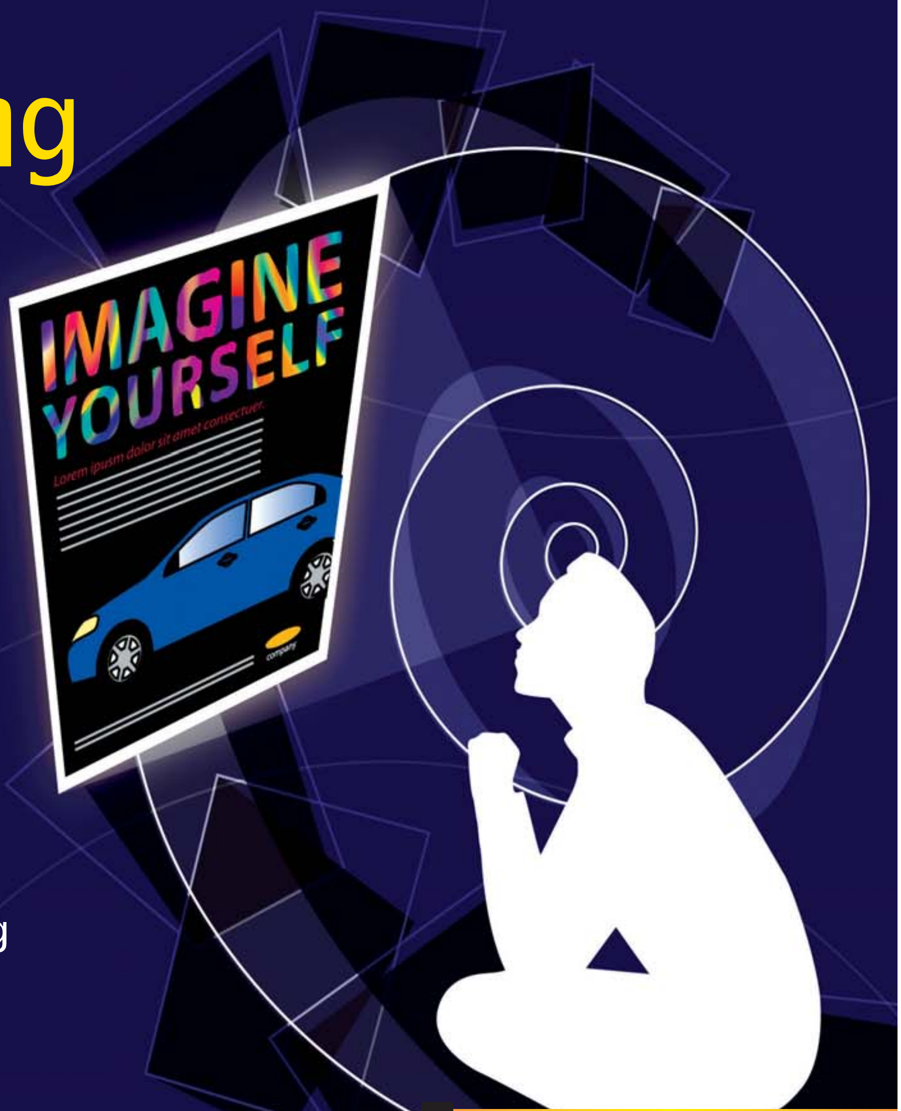
APRIL 2008

Advertising research

> What drives idea engagement?

> When is the best time to introduce a brand in a commercial?

> Seven insights from holistic campaign testing



2008 Telephone Facilities Directory

Quirk's Marketing Research Review
Volume XXII Number 4

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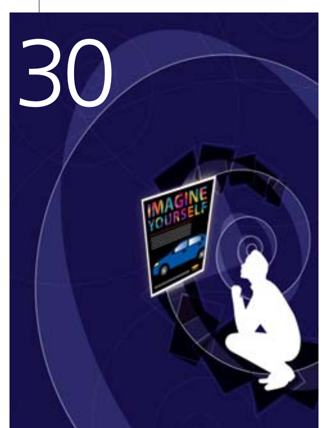

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Atlanta	May 20-22
Cincinnati	Jun 24-26
New York	Jul 28-30
Minneapolis	Aug 26-28
San Francisco	Sep 29-Oct 1
Chicago	Nov 4-6
Philadelphia	Dec 8-10

104 | Designing Effective Questionnaires: A Step by Step Workshop $2,095

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Los Angeles	Feb 26-28
Chicago	Apr 29-May 1
Baltimore	Jul 8-10
San Francisco	Sep 9-11
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106 | Online Research Best Practices & Innovations $1,695

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Cincinnati	Mar 11-14
Cincinnati	Apr 29-May 2
Cincinnati	Jun 17-20
Cincinnati	Aug 5-8
Cincinnati	Sep 22-25
Cincinnati	Nov 4-7
Cincinnati	Dec 9-12

203 | Specialized Moderator Skills for Qualitative Research Applications $2,595

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Cincinnati	Aug 11-14
Cincinnati	Nov 10-13

207 | Qualitative Technology Workshop: Recording, Reporting & Delivering $1,695

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301 | Writing & Presenting Actionable Marketing Research Reports $2,095

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Baltimore	Aug 5-7
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Cincinnati	Jun 10-13
New York	Aug 19-22
San Francisco	Oct 14-17
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Chicago	Jul 8-11
Baltimore	Sep 16-19
San Francisco	Nov 18-21

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New York	Jul 22-24
Los Angeles	Oct 14-16

607 | Forecasting Models for Customer Behavior and Lifetime Value $1,695

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802 | Linking Customer, Employee & Process Data to Drive Profitability $1,695

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Los Angeles	Jun 5-6
Chicago	Nov 20-21

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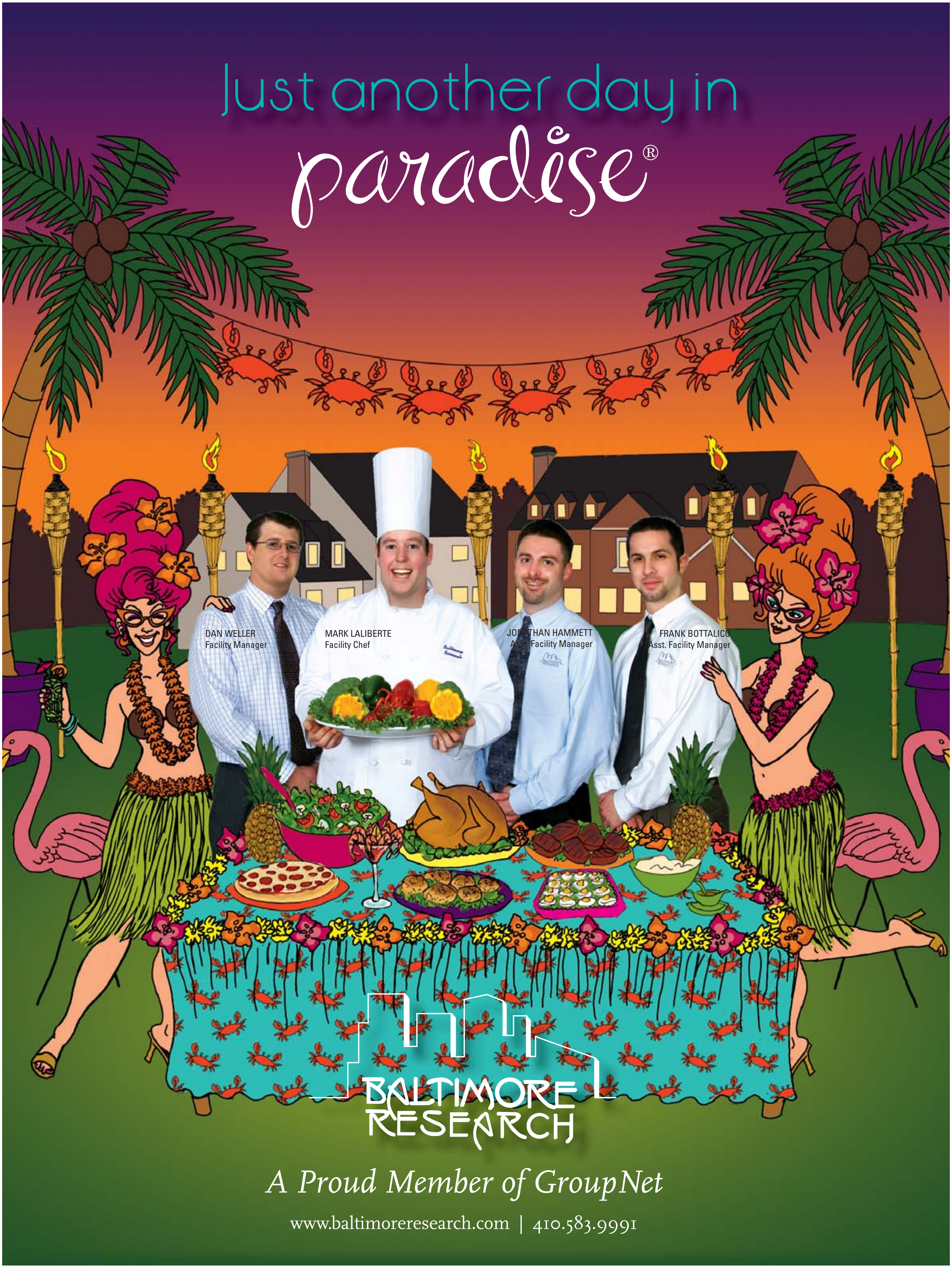
3. "SICK OF PIZZA AND CHINESE?.... WE UNDERSTAND"
4. "OUR HOSPITALITY STAFF HAS ZERO CALORIES"
5. "YOU ARE WHAT YOU EAT...SOMETIMES"
6. "IT'S HARD TO KEEP A GOOD MAN OUT OF THE KITCHEN"
7. "HOT FOOD....HOTTER SERVICE"

Vote for your favorite slogan at www.baltimoreresearch.com
The winning slogan will appear in a future issue of Quirks.



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in case you missed it...

news and notes on marketing and research

What a tattoo can say about you: naughty, nice or neutral?

A recent survey reveals a discrepancy between how people with a tattoo view themselves and how they are perceived by others. Thirty-six percent of those with a tattoo say it makes them feel more rebellious, and 31 percent say it makes them feel sexy. Conversely, 47 percent of respondents without a tattoo say people with are less attractive (up from 42 percent from 2003), and two in five (39 percent) say people with a tattoo are less sexy.

Research company Harris Interactive, Rochester, N.Y., conducted a nationwide Harris Poll of 2,302 U.S. adults, surveyed online, between January 15 and 22, 2008, to learn how having a tattoo makes people feel/do things differently. Currently, 14 percent of the population says they have a tattoo, just slightly down from 2003, when 16 percent had a tattoo.

When presented with eight different personal characteristics, majorities say that compared to not having a tattoo, having one makes them feel no different. This is especially true when attributed to being healthy, athletic or intelligent, where more than nine in 10 with tattoos say it makes no difference in how they feel. On the other hand, just about one-quarter of those without a tattoo say those with are less intelligent (27 percent) and less healthy (25 percent).

While survey results show that people with a tattoo view their tattoos positively, one-third of those without a tattoo (32 percent) say people with tattoos are more likely to do something most people would consider deviant, compared to 12 percent of those with a tattoo who say the same. Two-thirds (67 percent) of those without a tattoo say having a tattoo makes no difference in whether someone would do something deviant. Over half of those without a tattoo (54 percent) do believe that someone with one is more rebellious, almost the same as those who thought this in 2003 (57 percent).

Internet advertising predicted to be a fertile new frontier

Boston research company the Yankee Group announced that the U.S. online advertising market will reach $50.3 billion in revenue by 2011, more than doubling 2007's revenue. The Internet accounts for approximately 20 percent of overall media consumption in the U.S., but advertisers currently invest only 7.5 percent of their budget online. By 2011, nearly 25 percent of all media consumption will be online, drawing 15 percent of the advertising dollars.

According to the Yankee Group Research Report, The Cowboys Dance On…and On: 2007 Online Advertising Forecast, online advertising will grow rapidly in the coming year and beyond as the marketplace evolves. The factors driving this growth are increased online audiences, the development of new types of advertising and the creation of new publisher business models that help sell interactive advertising.

Despite large online audiences and growing Internet media consumption, advertisers' online budgets continue to lag compared with traditional media. The challenge for digital media companies is to convert Internet media into online advertising revenue. "With Internet connectivity nearly ubiquitous, online advertising growth is inevitable," said report author Daniel Taylor, senior analyst at Yankee Group. "And yet the Internet is still a relatively new digital medium. Steady growth in online advertising will require publishers to invest extensively in new media and advertising product development."

Yankee Group provides some predictions for the online advertising market, including: search will get bigger before it gets smaller; low cost-per-thousand (CPM) "dancing cowboys" ads will continue to drive much of the revenue growth even as high-CPM brand advertisers shift their budgets online; privacy will remain a sticking point with users; and social networks will merge into the media fabric (though questions remain whether social networks are the cornerstone of digital media or if they are the "better mousetrap" of the ad server business).

Steady growth requires publishers to invest in new technologies, which lead advertisers to test new ad formats and consumers. Formats that work will become more commonplace, ultimately displacing the most popular forms today. "You have to spend money to make money, and the proverbial buck will stop with the publishers," added Taylor.

For online marketers, e-mail delivers

Eighty-two percent of the online marketers surveyed by Datran Media indicated that they plan to increase their use of e-mail marketing in 2008. Further, 55 percent of the respondents said they expect the ROI from e-mail to be higher than any other channel.

New York media solutions company Datran Media surveyed 2,000 online marketing professionals from 90 companies in December 2007 to gain insight into the online channels that impact business.

Overall, the firm's survey results are consistent with the Direct Marketing Association's recent report, which found the ROI from e-mail is much higher than other channels. In fact, e-mail ROI will hit $45.65 for every dollar spent in 2008, more than twice the ROI of other mediums including search and display.

Sixty-seven percent of respondents stated that e-mail has helped boost sales through other channels. In these scenarios, e-mail is leveraged as a tool for sales as well as a media channel.

Commenting on their e-mail programs and plans for 2008, marketers shared a wide variety of thoughts.

"We expect e-mail marketing to drive more sales and increase ROI of the e-mail channel in 2008," said Matt Rihtar of Insurance.com.

"E-mail keeps us in touch with our customers in an industry where we only have contact for one or two months a year," said survey respondent Joanne Carry of dmg world media, an exhibition and publishing firm. "As we are producing shows, it allows us to continue a conversation and keep [consumers] interested."

"In 2008, e-mail will become a more significant contributor and a more important media element in the sophisticated advertiser's marketing arsenal," said Howard Koval of Hit Start.

In addition to increased use of e-mail as a media and lead-generation channel, the Datran Media survey found that 80 percent of respondents indicated e-mail was the strongest performing media buy ahead of search and display; search is the favored channel for complementing the e-mail channel; and more than 80 percent of marketers send targeted e-mail campaigns.

Tailored ads likely to hit target consumer

Seventy-three percent of U.S. Internet users feel they are overexposed to advertising, according to a study from New York-based Nielsen Company and Irvine, Calif., online small-business advocate WebVisible. The study sought to measure how consumers in the Web 2.0 world find and interact with advertising, rather than be found by advertising. The study investigates the Web's role in shaping the information and advertising that consumers want to see and examines where they go to find it and what they do with the information as they look to make purchase decisions.

The Web 2.0 community is using the Internet to build online experiences where advertising not only supports the sites, but, in many cases, the advertising increases the value of or is part of the experience. Destination sites that employ ads targeted conveniently to users' specific interests and needs create loyalty and value with users and lead to more revenue for their properties.

Local-related sites have a unique opportunity for personalization, loyalty and relevance in reaching local consumers and advertisers.

The Nielsen//NetRatings and WebVisible survey reports several key findings: while, as mentioned, 73 percent of U.S. Internet users believe that they are over-exposed to advertising, only 24 percent of people say their shopping habits are never influenced by advertising they encounter, and 72 percent say they would prefer finding products and services using search engines than having advertisements sent to them. Among the 73 percent that feel they are over-exposed to advertising, 91 percent would prefer using a search engine to having advertisements sent to them. At least once a month, two-thirds of people wish the advertising they encounter was better targeted to their needs.

Search engines have now become the No. 1 resource for people looking for a local retail or service business from which to shop, with 74 percent using Google, MSN, Yahoo! or something similar. Additional choices include: yellow pages (65 percent), Internet yellow pages (50 percent), a local newspaper (44 percent), white pages (33 percent), television (29 percent) and consumer review Web sites (18 percent). (Some panelists selected more than one answer.)

Relevance of advertising is of particular interest to consumers today. Only the Internet and television provided consumers with at least a few ads per month that they actually wanted or needed, at 56 and 53 percent, respectively. Consumer responses reported yellow pages and magazines the least-used, at 17 and 27 percent, respectively. For more information visit www.webvisible.com.

Greed and dishonesty markedly absent in U.K. survey respondents

Recent research from Survey Sampling International U.K. (SSI), London, found that the majority of survey respondents find compensation for completing a survey less influential than the desire to share opinions or influence decisions and product design when deciding whether or not to participate in surveys. SSI hosted a showcase of online research respondent dilemmas and resolutions at Insight 2007 in London to determine what motivates people to take surveys. The questions at hand are why people take surveys and why they don't; why they drop out of surveys and why they persevere; and why they join more than one panel.

Elaine Barker, a member of the U.K. OpinionWorld community, said she takes surveys because she enjoys it. "I'm a lady of a certain age and semi-retired now, so it helps keep my mind occupied," she said. SSI's research confirms that Barker is not alone. The majority of people surveyed in France, Germany and the Netherlands are intrinsically motivated and say they take surveys because they want to give their opinions. Influencing decisions and the designs of products and services is also high on the list of reasons.

Beyond that, people welcome an opportunity to make a little money and win prizes. Directly asked about payment for surveys, Barker concurred: "Yes, that would be nice. I'm a member of a few panels that do pay for surveys, but I haven't actually received any money yet."

Still, survey-taking can be frustrating, and occasionally people drop out before they finish surveys. SSI research reveals that one reason people drop out of surveys is because of repetitive questions. In addition, respondents become angry or frustrated when they start to

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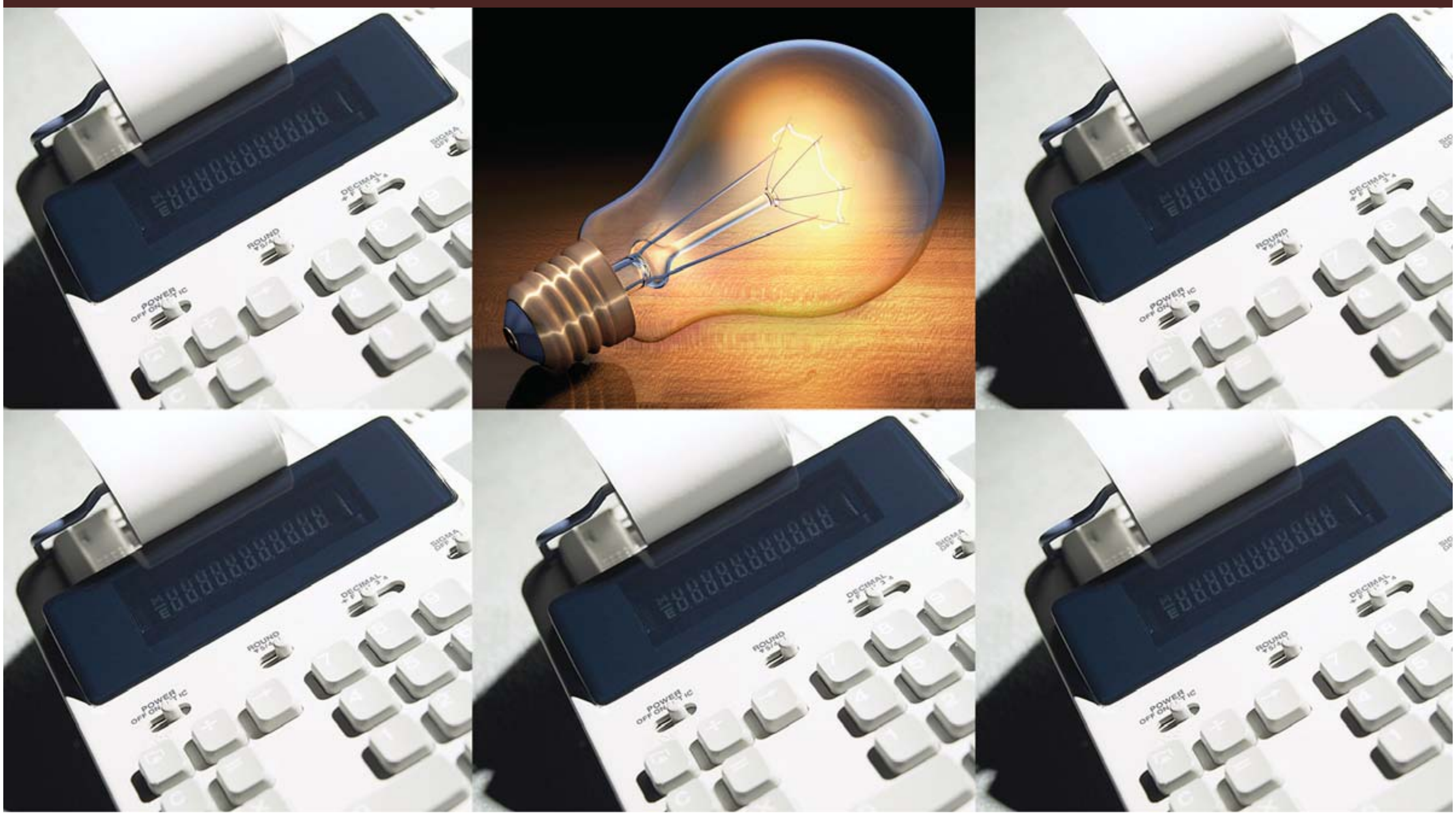
Which of these research providers should you partner with?



Maybe you're torn between conflicting marketing concepts. Perhaps its critical to understand customers who are hard to contact. Or possibly your product's destiny is riding on research outcomes, and you have only one chance to get it right.

That's when you need to go beyond providers who are great at crunching numbers. You need a partner who also thinks strategically...who recognizes deeper issues, develops out-of-the-ordinary solutions, and delivers critical insights. And that's what you'll discover at Beta Research – intuition, inspiration, innovation.

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names of note

U.K. research firm *Research International* has named **Kirk Ward** global product development leader, **Paul Edwards** CEO, **Julian Bond** chairman, **Andrew Wish** worldwide infrastructure and operations director and **John McHarry** CIO. Separately, in the U.S., **Bridget Armstrong** has joined Research International as CEO and a member of the worldwide board of directors.

Worthington, Ohio-based *BIGresearch LLC* has appointed **Kim Rayburn** as senior vice president, global solutions.

Jon Berry has returned to New York research consulting firm *GfK Roper Consulting* as vice president.

New York research firm the *Medefield Group* has added **Tina Reevers** as senior account director of Medefield America and **Antony Hughes** as an account director of Medefield Europe.

Wayne A. Marks has joined Portland, Ore., research company *GCR Custom Research* as president.

Cincinatti research firm *Burke Inc.* has hired **Steve Perkins** as a senior consultant, decision sciences and promoted **Tara Marotti** to senior vice president, client services.

Ceri Thomas has been named executive vice president of global accounts for London research company *TNS Healthcare*.

New York research firm *Echo Research Inc.* has appointed **Dan Soulas** as executive vice president and director of its new primary research unit.

MarketResearch.com, a Rockville, Md.-based market research distributor and publisher, has named **Patrick W. Allen** CTO.

London-based market research company *Synovate* has named **Jerome Vadot** as managing director of Synovate Saudi Arabia and **Simon Duval-Kieffer** managing director for the Czech Republic.

Peter B. Tilles has been named president of Dresher, Pa., research company *TVG Marketing Research & Consulting*.
Separately, TVG's **Scott Lauder** has been named director of the Pharmaceutical Marketing Research Group's education committee.


Tilles **Tapper**

New York marketing research company *Ziment Inc.* has promoted **John Tapper** to CEO of Ziment Custom, the group's strategic primary marketing research and consulting company.

Marjon de Bruin has joined Fairfield, Conn., research firm *Survey Sampling International* as director of European client services and delivery, based in Rotterdam, Netherlands.

London-based research group *TNS* has appointed **Robert I. Tomei** as president, areas of expertise and marketing for the U.S. custom research business; **Kimberly Bastoni** as senior vice president, U.S. custom marketing and development; and **Trixie Cartwright** as regional director for interactive research for Latin America, based in Buenos Aires.

The Week has named **Danielle Yuen** marketing director.

Amy Shea has joined New York research company *Brand Keys Inc.* as executive vice president, global director of brand development practice.

Austin, Texas, advertising firm *GSD&M Idea City* has named **Jim Wilkerson** senior research analyst in the agency's accountability and analytics department.

New York-based market research firm *Interpret LLC* has appointed **Christina Costa** as European research director for its newly-opened London office.

Waltham, Mass., research company *Observant LLC* has appointed **John Hartman** as vice president and **Jennifer Potter** as director.


Hartman **Potter**

New York pharma research company *P\S\L Group* has appointed **Paul Barnes** to the new position of group president in charge of its recently-restructured research division.

Anton Timergaliev has joined London-based *Synovate Healthcare* in

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Meet Nick. Zoomerang Sample Member Nº 2,487,103. He's a dad. An anthropologist. A poker player. And a sucker for coming-of-age movies. He's ready to tell you all about that—and more than 500 other aspects of his life, opinions, preferences, and tastes.

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The MSR Group takes APECS 2.08 to the banks

The MSR Group, an Omaha, Neb., market research company, has released version 2.08 of the APECS Performance Monitor, its proprietary customer advocacy measurement tool designed to measure customer satisfaction and advocacy. The new version offers enhanced functionality for retail banking clients who need a program that can provide actionable information to individual branch managers.

Features new to version 2.08 include: the dashboard and overall score monitor, which are designed to provide an instant view of overall net advocacy rating and positive or negative trending and also indicate trends for each branch's overall score compared to the previous year; the key driver analysis, which uses a key symbol to indicate specific items on each client's survey that have the greatest impact on overall satisfaction for customers in each region; and color-coded key symbols, which show how individual branches scores compare to the average for the region.

Improvements to version 2.08 include: an action alert status, which displays the percentage of alerts within each status category in a pie chart at the top of the action alert status page; a coding summary report feature, which displays the percentage of action alerts within nine pre-coded categories; detailed responses within each category that are provided through a "show details" function; and a "switch to" function, which allows users to immediately shift between current and historical scores within the same branch.

APECS will continue to offer advocacy charting, net advocacy rating and APECS national banking norms. For more information visit www.themsrgroup.com.

DSS announces Medicare market research program for 2009

DSS Research, Fort Worth, Texas, has announced the last revision of its Medicare Product Design Research program for 2009 MA and PDP planning. Focusing on the senior population and carriers of Medicare insurance products, the program is intended to quantify potential buyer preferences and attitudes; tell clients how much value consumers place on different product features; identify natural segments that exist in the market; identify over- and under-valued product features using actuarial data and "value to customer" estimates from the research; and tie the information to data from KnowledgeBase Marketing or Experian to make the results actionable in marketing programs. For more information visit www.dssresearch.com.

Invoke introduces the Engage Family of Research Solutions

Waltham, Mass., research firm Invoke Solutions has introduced the Engage Family of Research Solutions, a Web-based feedback and interaction technology, and has added it to a series of new applications designed to get real-time quantitative and qualitative insights from key constituencies. Invoke Engage was created to maintain data quality in online and mobile research applications and maintain participant focus during surveying. For more information visit www.invoke.com.

Itracks launches new Socrates integration

Saskatoon, Saskatchewan-based market research company Itracks has launched a new integration with Socrates, an automated probing tool designed for use in qualitative and quantitative market research. Itracks has partnered with Quester, a West Des Moines, Iowa-based linguistic research and technology company, to feature Socrates in the Itracks OLFG and bulletin board offerings, with the goal of helping moderators uncover insights in an online setting. Socrates is designed to probe quantitative open-ends programmed and hosted by Itracks; be programmed at various levels; probe on one or two open-ends or to carry on a full conversational exploratory interview lasting 15 minutes or more; and assist the researcher in time-sensitive projects where many repetitious one-on-one interviews must be completed. For more information visit www.itracks.com/socrates.

Harris Interactive receives patent; debuts two new products

Rochester, N.Y., research company Harris Interactive has been awarded a business method patent for its Rapid Exposure system. Rapid Exposure controls the length of time survey respondents can view an image online. While images are viewed for a quarter of a second or longer, depending upon the specific application, this new technique enables the exposure length to be calibrated to within 1/100th of a second regardless of Internet connection speed and browser type.

Rapid Exposure flashes images to survey respondents for a brief period of time in order to determine "package impact" (which packages cut through the clutter and are memorable) and "package findability" (which packages are most easily located). While both types of exercises are normally conducted within the framework of a competitive-shelf context, Rapid Exposure can also be used to create a rapid exposure simulation to help identify whether consumers notice subtle changes in a product or package in standalone situations. Rapid Exposure can also be employed for ad copy testing to assess what elements in print, outdoor or online ads are mentally processed during varying time

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News notes

Germany-based research group **GfK** and London media company **UBM** announced in late January that they had reached a settlement in an ongoing lawsuit. GfK acquired market research company NOP World from its parent UBM in May 2005. Following completion, UBM filed a court action in August 2006 against GfK AG in London to recover certain balances owed by the NOP World companies to UBM pre-completion. The result of the settlement with UBM is below the amount claimed by UBM.

San Mateo, Calif., media research company **Integrated Media Measurement Inc.** (IMMI) has closed a $25 million Series C financing. The financing is led by **Kantar Media Research**, the media research division of London-based communications group WPP. The funding will allow IMMI to continue to develop additional products and services, expand into new markets and grow its panel participant base.

Basking Ridge, N.J., research company **Lightspeed Research** has signed a deal to give a new incentive for completion of its questionnaires. The agreement with London-based EMI Music via Dublin-based digital content specialist the Licensing Agency will offer respondents free music and video downloads. Respondents will receive a code redeemable for a download of their choice from a library of at least 168,000 EMI tracks and videos at www.songs4surveys.com. The deal covers the U.K. and Ireland, France, Germany, Spain, Italy, Sweden and the Netherlands. The U.S. and Canada were covered in a deal previously struck between EMI and the Licensing Agency.

Research company **Harris Interactive**, Rochester, N.Y., will close its offices in Orem, Utah, which includes the firm's last remaining U.S.-based phone center. During the transition, the phone center and mail services work will shift to Harris' facilities in Canada as well as to other resources outside of North America.

Five members of U.K.-based

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Calendar of Events April-June

The Society of Competitive Intelligence Professionals will hold its annual conference on April 14-17 at the Manchester Grand Hyatt Hotel in San Diego. For more information visit www.scip.org.

The Council of American Survey Research Organizations will hold its global international research conference on May 6-7 in New York. For more information visit www.casro.org.

The Qualitative Research Consultants Association and the Association for Qualitative Research will hold a worldwide conference on qualitative research on May 7-9 in Barcelona, Spain. For more information visit www.aqr.org.uk or www.qrca.org.

ESOMAR will hold its annual Latin American conference on May 11-14 in Mexico. For more information visit www.esomar.org.

The American Association for Public Opinion Research will hold its annual conference on May 15-18 at the Sheraton Hotel in New Orleans. For more information visit www.aapor.org.

The U.K.-based Business Intelligence Group will hold its annual conference, which focuses on business-to-business marketing and research, on May 21-23 at the Marriott St. Pierre Hotel in Chepstow, England. For more information visit www.bigconference.org.

The Mystery Shopping Providers Association will hold its annual Europe conference on May 21-23 at the Mövenpick Hotel Berlin. For more information visit www.mspa.org.

Canada's Marketing Research and Intelligence Association will hold its annual conference on May 25-28 in Winnipeg. For more information visit www.mria-arim.ca.

LIMRA International Inc. will hold its marketing and research conference on May 28-30 in Baltimore. For more information visit www.limra.com.

ESOMAR will hold WM3, a conference on worldwide multimedia measurement, on June 1-4 in Budapest. For more information visit www.esomar.org.

The Marketing Research Association will hold its annual conference on June 4-6 in New York. For more information visit www.mra-net.org.

IIR will hold its return on marketing investment conference on June 23-25 at the Hyatt Regency Coconut Point Resort & Spa in Bonita Springs, Fla. For more information visit www.iirusa.com.

The Advertising Research Foundation will hold its Audience Measurement 3.0 conference on June 24-25 at the Millennium Broadway Hotel in New York. For more information visit www.thearf.org.

The Conference Board will hold its marketing research conference, themed "Moving Market Research Beyond the Online Virtual World," on June 26-27 at the Hotel InterContinental in Chicago. For more information visit www.conference-board.org.

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. For a more complete list of upcoming events visit www.quirks.com/events.

By Michael Carlon

Evolving ethnography

As you begin to read this article, I ask that you put yourself in the following situation: you have taken two hours off of work and are sitting on your couch in your living room wondering what will transpire over the next 120 minutes. There is a knock at the door. You open it to find three people, strangers really, asking to be let in. One of them is holding a video camera so large you worry what the neighbors will think. It is raining lightly outside and you pray that your guests have the common sense to take their shoes off so as not to ruin your beige carpeting.

After taking 15 minutes or so to set up the cameras, adjust the lighting and do a quick A/V check, they are ready to interview you. Your interviewer is sitting to your left and directly across from you is the video camera whose operator is also staring right at you with headphones so large you feel he is stuck in the '80s. The third person is a tad quiet, off to the right, and holding a notepad to write down his thoughts on what you have to say. From time to time you wonder why he writes down some things over others – are those things more important?

Every now and then the phone rings and taping has to be paused and the note taker is visibly upset likely because it is hot in the house and the air conditioner had to be turned off because it interferes too much with the microphone. Then you notice it: the interviewer squirming as if he has to use the bathroom and you just cannot bear the thought of a stranger using your bathroom.

How do you feel? Relaxed? Ready to talk? Ready to open up about your feelings? I didn't think so. You are more likely worried about how you are going to straighten up the house before you have to get back to work.

Ethnography is a topic that has gained a fair amount of attention over the past five years as marketers continue to drink the "traditional focus groups are dead" Kool-Aid. It is important to note that the term ethnography, in many people's minds, is a sexy way of saying in-home interview. Real ethnography is much more observational in nature and deals with communities of people and not individuals. That said, ethnography has come in vogue as marketers believe that people will be more open in their own homes than in a traditional focus group facility. In addition, by being in someone's home you can learn things that you cannot learn anywhere else, such has how they use certain products, how they interact with packaging, where products are stored, etc.

Ethnography as we know it has downsides (just like other forms of

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marketing research). Budget constraints often limit researchers to one or two geographies. Ethnography projects tend to take longer to field as a team typically cannot conduct more than three in a day as they have to drive from house to house to get to their next interview. Additionally, clients cannot participate as much as they would like as the ratio of interviewer to interviewee should not exceed 3:1.

Then there is the million-dollar question: you are in someone's home expecting to learn all those things that you cannot learn in a traditional group setting - but how much can you really learn about a person's behavior in the scope of two hours during a non-typical day (i.e., the kids are not home, a spouse is not present, you actually have two hours to devote to something)? Is this real behavior?

Ethnography, or some variation of it, has its place in the qualitative world. Certainly there are research issues that require being in locations where behavior happens. However, what we call ethnography must be evolved in order for researchers and marketers to obtain more value out of it. What researchers need is an approach that accomplishes the following:

• captures behavior on film that happens over a longer period of time during the course of days which are more typical for participants;

• captures behavior that occurs outside of the home (for example, a snack-food company only studying how snacks are consumed inside of the home is missing out on a large number of usage occasions);

• overlays behavior with attitudes (i.e., allows for probing into why certain behaviors occur); and

• is flexible to include participants from multiple geographies.

I would like to discuss two approaches I have used recently that account for the above while still staying true to the reasons for doing ethnographic work. Both involve video diaries and follow-up interviews but differ in terms of how the footage is sent back to the researcher and how the follow-up interview is conducted (offline vs. online).

Video diary/in-person interview

Video diaries are a technique whereby qualified participants in select markets are sent compact video cameras along with a guide or checklist of what we want footage of (i.e., please film a typical meal in your household, please film some of the things you do with your friends to have fun, please film all of your snacking occasions during a typical day). Cameras and tapes are sent back to the researcher for viewing.

The research team views each tape and takes notes on points to follow up on during an in-person interview. Participants are invited to a facility for their follow-up interview where the researcher asks probing questions to uncover reasons behind why certain behavior was observed (clients can participate by observing in the back room). An edit of the participant's footage is used as stimuli for discussion. The final deliverable is a professionally-edited short film in which the participant's self-generated footage is overlaid with the depth interview footage so that marketers can "see" behavior and at the same time "hear" why it is important.

Video diary/online interview

This technique is similar to the previous one in that participants are sent cameras and directed to record specific behaviors. However, the ways they interact with the researcher are significantly different. Instead of sending back a tape, participants are asked to upload their footage to a secure Web site (think of it like YouTube meets market research). The researcher (and clients) then log into the site and can view footage as soon as it is uploaded. An online interview can be conducted with participants either through threaded discussion or online chat sessions.

Overlaying attitudes and behavior

Both techniques allow for researchers to record behavior beyond what is typically captured during a two-hour in-home depth interview. Additionally, both techniques allow for overlaying attitudes and behavior (albeit using different mechanisms). That said, there are some instances where you should consider using one over the other.

Consider using the video diary/in-person interview when production value is important. As professional videographers are used to film the in-person interview follow-up, the quality of video is high. Additionally, while the online interview allows you to overlay attitudes with footage, it is done via typed interaction between the participant and the researcher - therefore, you cannot create a video edit linking both aspects of the technique.

The video diary/online interview should be used in cases where timing is very tight. Since footage is reviewed online and the researcher posts follow-up questions immediately, these projects take significantly less time to field than those including an in-person follow up. In addition, these projects are preferred when there is a need for a more nationally-representative group of participants as interviewers don't have to fly to multiple geographies to conduct follow-up interviews. Finally, this technique is preferred when budgets are small as the technique eliminates travel expenses.

Found a market

Ethnography is a tool that has found a market in the realm of consumer insights. However, it is not without its share of limitations. We live in a world where average consumers are very comfortable in generating their own footage, and we as researchers should be tapping into this in ways that serve to evolve ethnography. | Q

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By Julia Lin

Does the rating scale make a difference in factor analysis?

In the article "Rating scales can influence results" published in *Quirk's* (October 1986), a study conducted by the Income Survey Development Program compared and contrasted the use of a seven-point scale vs. a 10-point scale. The results showed that 10-point scale data have greater variability. The article also mentioned that 10-point scale data is more effective when conducting multivariate analysis, due to a higher variance, but that point was not discussed in detail. This article aims to briefly investigate the effectiveness of using a seven-point scale vs. a 10-point scale in factor analysis.

Attitudinal segmentation

In 2006 a 12-country study was conducted to understand consumer behaviors and to segment the telecommunication market. The research team decided on an attitudinal segmentation approach, and a seven-point scale was used to measure consumers' attitudes toward telecommunication products and services. However, the segmentation exercise failed to provide a satisfactory solution due to highly skewed seven-point scale data in most of the countries.

In 2007 the same study was repeated in 18 countries. To avoid the pitfall of 2006, a pilot study was conducted in Australia to test the effectiveness of a seven-point scale vs. a 10-point scale, before the study was rolled out in the rest of the countries.

The pilot study adopted a split-sample design with a total sample of 400. The control group used a seven-point scale with half of the sample, and the test group used a 10-point scale with the other half. Target respondents were general consumers aged 13 to 65. Quotas of age, gender and household income were imposed within each group to ensure that the samples were representative of the population; these quotas were comparable across the two groups to ensure the comparability of results. This survey was conducted online.

A needs-based approach was adopted for the segmentation. A battery of 11 category needs statements was developed. Respondents were asked to assign importance to 50 potential category drivers, using a 10-point scale, where 1 meant "not important at all" and 10 meant "very important."

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Factor analysis

In the book *Multivariate Data Analysis* the authors (Hair, et al) explain that factor analysis has "played a unique role in the application of other multivariate techniques." Factor analysis is a data reduction technique which compresses the original variables to fewer uncorrelated factors. The optimal solution reduced the original set to a number of uncorrelated factors, that is, the key themes. The factors were interpreted by examining the constituent variables that received high factor loadings. The entire sample was then clustered using the factor scores as clustering variables.

Rating scales are often used in conjunction with a survey to collect consumer opinion, preference or attitude data, so an effective rating scale

is crucial to factor analysis. Usually a long list of statements or attributes is used, but only a few underlying conceptual dimensions are actually being measured. Factor analysis helps to reduce the list of the statements to a few dimensions, i.e., factors. Hair, et al believe that the most efficient factor analysis is when conceptually-defined dimensions are represented by the derived factors.

Flatlines

In the telecommunications survey, some respondents gave the same rating score - maximum, middle point or minimum - to all or most statements. (For example, they answered 1 on all questions.) There is a high probability that these respondents were not sincere in their answers - that is, they were "messing with" the survey. This causes flatlines: suspect data that need be removed before conducting factor analysis.

Principle component (PC) extraction is applied in the analysis. The PC method is based on a correlation matrix, which accommodates some of the variables with greater variability than others.

The possible factors and their relative explanatory power can be expressed by their eigenvalues, when selecting the number of components to be retained for further analysis. Table 1 illustrates the eigenvalues of 11 factors and total variance explained with seven-point scale data, and Table 2 illustrates the eigenvalues of the same 11 factors and total variance explained with 10-point scale data.

The result of the above factor analysis is acceptable, with 65 percent variance. As Hair, et al pointed out, over 60 percent total variance can be considered satisfactory in a social research context.

Table 1

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	4.1	37.0	37.0	4.1	37.0	37.0	2.6	23.9	23.9
2	1.6	14.8	51.7	1.6	14.8	51.7	2.3	20.9	44.8
3	1.0	9.4	61.1	1.0	9.4	61.1	1.8	16.3	61.1
4	0.9	8.3	69.4						
5	0.8	7.5	76.9						
6	0.6	5.6	82.5						
7	0.5	4.5	87.0						
8	0.5	4.4	91.4						
9	0.4	3.2	94.6						
10	0.3	3.0	97.6						
11	0.3	2.4	100.0						

Table 2

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	4.4	40.4	40.4	4.4	40.4	40.4	3.0	27.0	27.0
2	1.5	13.6	54.0	1.5	13.6	54.0	2.5	22.9	49.9
3	1.2	10.9	64.9	1.2	10.9	64.9	1.7	15.0	64.9
4	0.8	7.4	72.4						
5	0.7	6.4	78.7						
6	0.5	5.0	83.7						
7	0.5	4.5	88.2						
8	0.4	3.8	92.0						
9	0.4	3.4	95.4						
10	0.3	2.8	98.2						
11	0.2	1.8	100.0						

Data from both scales produced comparable factor solutions. In viewing of the eigenvalues which are close to 1, a three-factor solution would be

Table 3

	Rotated cumulative % of variance			Unrotated cumulative % of variance		
Component	7-point	10-point	difference	7-point	10-point	difference
1	23.9	27.0	113%	37.0	40.4	109%
2	44.8	49.9	111%	51.7	54.0	104%
3	61.1	64.9	106%	61.1	64.9	106%

the most appropriate - i.e., there are three main dimensions of consumer needs in telecommunications.

When comparing the variance explained for 10-point vs. seven-point data, the variance is greater for 10-point, as shown in Table 3. With one factor, 10-point scale data explains 13 percent more variance in rotated method, or 9 percent more variance in unrotated method. With two factors, 10-point scale data explains 11 percent or 4 percent more variance, in rotated and unrotated methods respectively. Overall, 10-point scale data explains 6 percent more variance with three factors, and the three factors retained represent 65 percent of the variance of the 11 variables.

With a greater number of factor solutions (for example a four-factor solution), the cumulative variance explained by 10-point scale data is also greater than seven-point scale data. However, as the number of factors increases, the difference in variance progressively decreases.

The screen plot result or other criteria are not included, and the conceptual dimensions of the factors are not discussed here due to space considerations.

The split sample analysis also provides validation of the results. Since the results of both scale points are comparable with similar communality, we can be assured that the result is stable within the total sample and the result can be projected onto the population.

Better output

A more effective factor solution can ensure a better segmentation output, especially in a cross-cultural study, where the scales responses can be influenced by cultural norms (e.g., in the Philippines, people tend to give positive answers, which caused highly skewed data). Thus this study eventually adopted a 10-point scale in all 17 countries and the segmentation exercise produced satisfactory results with nine interesting and discriminating segments.

The insights provided by factor analysis can be incorporated into other multivariate techniques. In terms of limitations, the comparison is done in a consumer research context, and the needs statements used are mostly emotional, which by nature entail greater variability. | Q

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By Ron Weidemann and Albert Fitzgerald

Mastering the art of writing quantitative research reports

Let's face it: we've all seen those dreaded reports, full of mind-numbing tables. Data here; data there; data, data everywhere! But aren't quantitative research reports all about numbers? Isn't it necessary to show the results of questions with numerical tables? Maybe we can show a few pie charts or a bar chart or two, but isn't the core of the research the numbers? Our answer is no. Numbers do not tell the story. As researchers, that's our job.

Quantitative research reports are really about telling a story and using the data as supporting information. Of course this is easier said than done. Numbers are often just as tedious for the analysts as they are for the person reading the report. The good news is there are a number of things an analyst can do to ensure that a quantitative report will be readable, tell a story and allow the consumers of the information (our clients) to make critically important business decisions.

First of all, know your market. Stay up to date on current events, macro/micro trends and the competition. This information can be invaluable when giving insights into why the market has shifted in an unsuspected way.

Next, use study objectives as a guide. Review the objectives and match them to specific question batteries. This makes certain you are meeting the critical needs of the study. Write down each objective and review the questions that address them. Then write a single sentence that answers each objective. For example, if the objective is to identify the optimal price point for a new product, write down the ideal price point. Keep it simple and short. Don't elaborate or try to explain methodology or give supporting materials at this point. We need a 10,000-foot view before we address the details.

Then draft a one- to two-page summary. This always helps get out of the trees and see the big picture. Once you have your summary, the storyline should take shape. By rearranging your points you can find an ideal flow - a way of presenting the critical information that communicates the most important results of the study.

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Road map

Now it's time for reporting. The first step is to lay out a road map of the report. Using your executive summary, ask yourself, "How do I want my client to consume this information?" This is a critical step, one often overlooked due to time pressure and the availability of cookie-cutter report templates. Remember, each story you tell is different, and your report should reflect its uniqueness. Once you have the report laid out it is time to tell the story.

Executive summaries are always a good way to begin a report. Keep the insights tight and pithy. No matter how long the survey was, executive summaries should never be more

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than one or two slides. If yours has more than this, you are sure to have superfluous information. Next follow your road map by building slides that support your insights from the summary. Also, keep in mind that each slide should be able to stand on its own with both graphical and text-based content.

When writing your report, ignore the order in which the survey questions were asked. Few reports flow well and few stories are compelling when the information in the final report follows in the exact order of the questions in the questionnaire. Instead, present the most important information up front. Follow the flow that made sense in the summary. This will help the final report tell a compelling story.

Today many reports are crammed with data. Take time and ask yourself: Why did I put that data there? What is its purpose? What point does each number convey? If the data is not essential for communicating the point, leave it out. Use flow charts, arrows and other graphical tools to walk people through your slide. You want the reader to spend their time absorbing the information rather than trying to figure out what is going on in the slide.

Other tips: use color to denote differences and carry readers through your report. Also, omit data cuts or segments where differences do not exist. Few things clutter up a report more than slides showing comparisons between data cuts which then conclude that there are no differences worth noting!

Educate and enthrall

At the end of the day it is important that you effectively and efficiently communicate the information to your client. But realize that your client wants information to help make critical business decisions, not mountains of numbers that are difficult to sift through. Put yourself in their shoes and you'll write reports that enlighten, educate and enthrall. | Q

advertising research

By Owen Hannay

Two methods, same goal

Dallas agency tests concepts for Dave & Buster's TV spots online and in traditional focus groups

It has always seemed reasonable that there are really only a couple of things that would dramatically impact whether a specific piece of creative would have its desired impact on consumers or not, which at its most simple is three parts: Did we get their attention and did they look at what we had to say? Did they understand what we were saying? Did what we say have meaning and motivate them to action?

Over the years I, like many of you, have spent a great deal of our clients' money on a myriad of pre-testing tools for television and print concepts including focus groups, dial readings or emotion-based measures…almost all of which (and certainly the most widely used of which), while useful, have a single, very important commonality: forced exposure.

Because of that forced exposure, while they do a very good job of measuring a consumer's interest in the content, his or her ability to recall the messaging, and gauge the likeability of the creative, it has always occurred to me that if your audience did not turn around or look up from whatever (or in today's era of multi- or hyper-tasking often the many things) they were doing while they were watching television, then they never got the chance to be engaged with the creative, to appreciate the messaging, recall it or purchase the product or service. In short, it doesn't effectively answer question No. 1 above; at its least complex, that is the "made you look" factor. It has also historically been a very difficult measure to come by.

In this article I will discuss one solution that, while very simple and unrefined at this point, has the potential to set the stage for a new era in creative testing, one that will lead to better creative executions and better results for advertisers. Certainly, it is an opportunity to think differently about how we go about testing creative concepts overall.

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New positioning

For one of our clients, Dave & Buster's, a Dallas-based operator of upscale restaurant/entertainment complexes, we had a history of using focus groups and post-production copy testing as the primary methodology for evaluating creative concepts for television. As we embarked on the development of a spot designed to bring a new brand positioning to life, we were looking for a method to measure the "made you look" factor in addition to our usual focus group methodology.

After considering a number of approaches, we decided upon a two-pronged strategy. The first half of the testing would involve creating animatics (very rough black-and-white mockups with limited motion and a scratch voiceover) of five concepts and showing them to focus groups in three markets to gauge customer interest in the concepts as well as their recall of the key messaging. The second, more unusual, approach would involve taking those same animatics and running them online, as standard video advertising on a variety of Web sites. The primary thesis with this approach is that unless you believe that consumer behavior is somehow fundamentally different online than it is offline, any difference in performance of one animatic over the other would indicate a potential preference for,

The Dave & Buster's "Summer Games" concept tested well in both the online and focus group research.

and intrusiveness of, that message and or creative unit over the others tested and would be useful in predicting that same customer reaction to that creative and messaging in a traditional media environment.

We knew that we could test not only different creative executions but also specific online content channels, by using a broad-reach network. So we approached ValueClick Media, which represents over 13,500 Web sites on which we could purchase ads, which they group into specific areas or "channels" similar to television or radio content (movieinsider.com for example would be grouped in Movies & Television while lyrics.com would be in Music & Radio). We purchased inventory on four channels to see if context played any role in consumers' preference for one creative approach versus another. We also had the ability to query customers who chose to interact with the creative online by serving them a small survey to find out what drove them to click on the creative, or watch it again, what caught their attention and what they found compelling about the messaging - many of the same measures we were asking for in the focus groups.

Now, from a pure research perspective there were (and are) several things to consider. The animatics were extremely rough and might or might not communicate effectively online (one of the expected results was that there would be no difference between the creative executions because they "looked" the same, as our historical experience with online creative had indicated that the color and look of the creative dramatically impacted its performance). We also had no basis for comparison and no norms to compare these results with anything else.

That said, however, we recognized that we could not overlook an opportunity to measure something that is very difficult to get at using traditional research methodologies.

We had five concepts that we took to animatic stage: "Blind Date," "Food and Fun," "Distraction," "Grapevine" and "Summer Games." For all five, in addition to bringing them to focus groups in three cities/areas (Dallas; Austin, Texas; and Orange County, Calif.) they ran individually online on four separate channels within ValueClick Media's network so that it was possible to measure what differences, if any, the context made in the consumers response to the creative.

The first result - which was an indication that, directionally, the approach had some merit - is that the two spots that respondents in the focus groups preferred - "Blind Date" and "Summer Games" - also scored better in the online portion of the testing, albeit in reverse order. "Summer Games" was No. 1 in the focus groups and "Blind Date" was No. 1 in the quantitative testing. In both methodologies those two did significantly better than the others tested.

The second interesting finding was that, while three of the media channels had action rates that were almost identical, the Movies & Television channel had an action rate that was 50 percent higher.

Table 1: Placement Results

ValueClick Channel	Click-Through Rate
Movies & Television	.21%
Music & Radio	.13%
Entertainment	.13%
Sports & Recreation	.13%

Course was correct

The similarity in result between the traditional focus group methodology and the online research provided an additional data point indicating that the course that we were choosing was correct not just from a messaging feedback standpoint but also from a general "interest" or "made you look" perspective.

Further, the difference in the response of consumers to the Movies & Television channel indicated that the fun nature of Dave & Buster's might play better in that environment. While we considered the possibility that the higher result on that channel was due only to the media, we have not been able to find evidence that the sites in the Movies & Television channel had higher click-through rates during other campaigns that we had previously run, relative to other channels. That possibility notwithstanding, it would seem to indicate that a placement within television programming associated with or in movies and broad television interest programming might have more impact than sports or another channel.

Finally, the responses to the online

questionnaires reinforced what we had learned in the focus groups, which is that customers found "Summer Games" to be more impactful and engaging for the same reasons that they articulated in the focus groups, further confirming that they received the creative in the same way.

Historical highs

In the end, though the research results pointed to a toss-up between the two spots, we went with "Summer Games" because we had done focus groups many times before and the online quantitative was a new methodology.

The finished spot scored well above industry norms and hit historical highs compared to other Dave & Buster's spots during testing. In addition, sales in the supported periods were up significantly in a category that was flat to down slightly. While all of this cannot be attributed to the advertising, Dave & Buster's CEO Steve King was quoted as saying, "We are thrilled with our results for the first half of the year. Effectively communicating our unique combination of food, drink and games continues to translate into strong sales performance across the country.

A fuller story

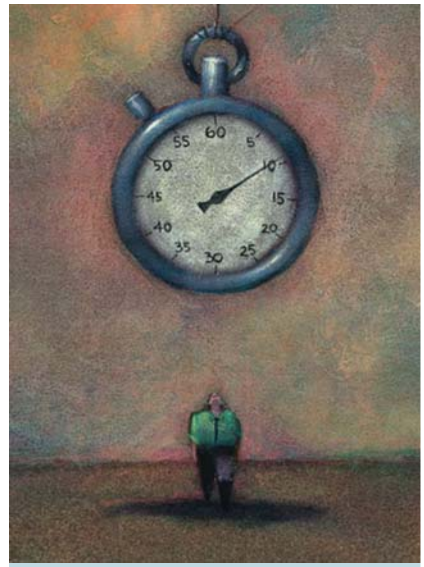
We are continuing to recommend that this combined approach to testing to be used for our television clients, and we have recommended using the same basic technique for print and outdoor as well as broadcast. While neither methodology tells the whole story, combining traditional focus group research with online testing tells a fuller story, and it is my belief that understanding and incorporating the "made you look" factor will lead directly to more aggressive creative solutions, ones that not only resonate with audiences, but those that they are really interested in.

I think it is important to note generally that digitally-centric partners have advantages that go beyond just their ability to create and develop in multiple platforms. While as an industry we have begun to think in terms of online and offline activities supporting each other, ultimately many of the lessons learned on the digital playing field can inform how we operate on the traditional media side. While it is clear that traditional advertising is critically important now and into the future, we can and should be blowing up old-fashioned ways of looking at problems when there are newer solutions or additional perspectives readily available by looking to the digital world's data and metrics.

Someday it will be possible to measure a consumer's interaction with all television advertising as the television delivery systems gain more sophisticated metrics. At that point clearly this kind of quantitative engagement testing can and will occur. Until that time, however, the kind of testing reported on in this article can provide useful data that improves overall effectiveness of traditional advertising. | Q

advertising research

Call the right play



By Charles Young

Football coaches put together their offensive playbooks by evaluating their teams and scouting the competition. Do they have more speed than size? Are they strong at quarterback and weak at tailback? Do they have a big offensive line and some good running backs? Or perhaps they need to run a power offense and pound it between the tackles?

Likewise, advertisers have to design their offense based on their strengths and weaknesses versus the competition. Do they have real product news or do they have to sell on emotion? Who has more money to spend on media? Are they launching a new product? Are they an old or established second-tier brand? Are they a power brand in the field? How these questions are answered determines the play of the creative.

One of the most important creative decisions to be made in the design of a television commercial is determining the right time to introduce the brand into the flow of the ad. Traditional copy testing researchers, particularly those who measure day-after recall, recommend the "early and often" rule. Their research suggests that commercials that identify the brand name in the first five seconds of the ad score best.

Creative teams have long resisted this rule, frequently wanting to withhold the identity of the brand to the very end of the ad. Their argument for delaying the introduction of the brand is that consumers don't want to watch hard-core sales presentations, but rather need to be seduced by the entertaining qualities of commercials. They argue that consumers must be drawn into a brand story before the sponsor's name is revealed.

When is the best time to introduce a brand in a commercial?

A variant of this "misdirection" approach is based on the following brand-switching argument. If you are a regular user of Brand A, then as soon as you see in the opening seconds of a commercial that it is for competitor Brand B, you will tune out the rest of the ad because you have already made your brand choice in the category and don't want to be bothered with second-guessing yourself. Therefore, to overcome consumer defenses and get users of Brand A to take a second look at Brand B, this advertiser should withhold the brand identity as long as necessary to get the consumer interested in their brand's story.

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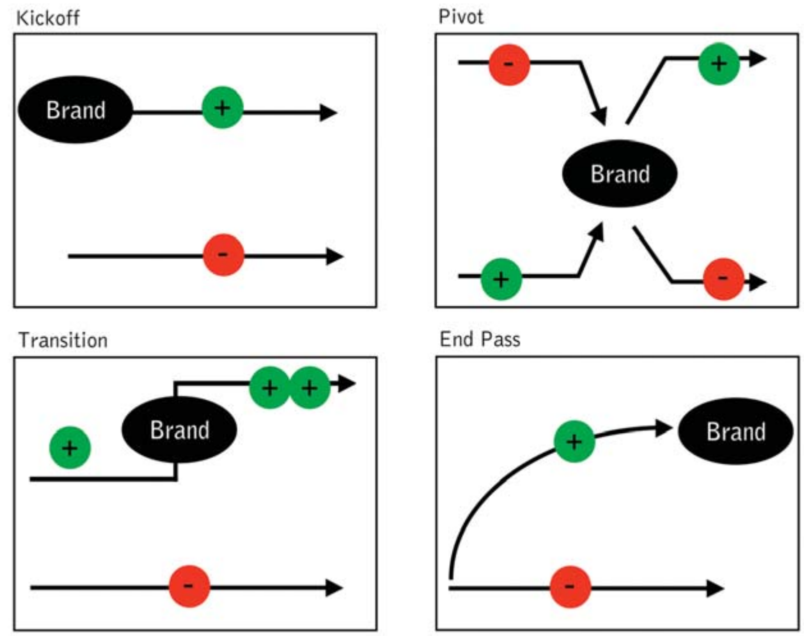
An advertiser must overcome the viewing audience's defenses, not unlike the way a professional coach must devise strategies to win a football game. If a coach runs on first-down every time, the defense will move up and crush the play before it begins. The winning coach has to have a sophisticated playbook. He has to create misdirection and use the defense's strategies against them. Run a play-action pass, a reverse, a screen. Catch the defense over-committing and over-pursuing. Likewise, advertising pros must go to their creative playbooks to win the battle for the hearts and minds of the consumer.

Our experience in testing advertising provides us with many examples of television commercials that generate high brand linkage scores when the brand is introduced in the middle, when it is not identified until the end or when it is introduced in the beginning of the ad. This suggests that the traditional strategy to always introduce the brand in the opening few seconds of a commercial is based on too simplistic a view of the game.

Coaches spend hours studying film to learn their adversaries' tendencies, philosophical beliefs and preferred plays. Likewise, ad pros spend hours studying ad film to learn consumer cognitive viewing strategies, their reactions to different kinds of emotional moves and when the consumer's eye is, or is not, on the brand.

Figure 1: Four Different Plays for the Creative Coach



A fixable problem

From our experience, we can say that a weak branding score is usually a fixable problem. Unlike low scores for attention or motivation, which may be due to a weak creative concept or a poor communication strategy, a weakness in branding can almost always be strengthened in the editing room - if you understand the underlying structural principles that determine well-branded advertising executions.

There are two principles of branding that we refer to as focus and fit. From a focus perspective, we know from our mathematical modeling of brand linkage scores that somewhere in the flow of the commercial there must be at least one moment - what we call a "single-minded branding moment" - where the identity of the brand being advertised is at the center of the audience's visual field of interest. ("Single-minded" means there is no within-frame competition for attention to the brand identifier. Unfortunately, this competition is a common problem.) In short, there must be at least one moment where the audience's attention is focused solely on the identity of the brand that's sending them a message.

The second principle is that an advertising idea should be custom-tailored to fit the particular brand being advertised. In other words,

your distinctive brand should be able to wear the ad like a millionaire athlete wears a custom-made suit, not like something purchased off-the-rack that another brand could wear equally well. Generic creative concepts do not produce well-branded advertising executions.

In both cases quantitative diagnostic research can be used to measure how well an advertising execution focuses attention on and fits the brand. Focus is measured with an Ameritest Flow of Attention graph. It's an online picture-sorting methodology that is used to freeze time. It gives us a stop-action view of how audience attention flows and focuses from moment-to-moment on the different images in a commercial. Fit is measured with a rating statement where the consumer is asked to rate the ad on a continuum from "it could be an ad for almost anything" to "it could only be an ad for this particular brand."

The third principle of branding addresses the timing of when a brand should be introduced into an ad. The timing of a brand's arrival on the screen is not arbitrary; it's a well-determined function of the creative choices that you make about the kind of brand story you want to tell. And it's driven by the emotional structure of the ad.

From our analysis of consumers' emotional responses to television commercials, we have identified four archetypal structures that can be used to transfer an audience's emotional response from a television commercial to a brand (see Figure 1). These represent four different plays that the creative coach can use to move the brand forward in consumer emotions in order to score a sale. Each of the four can be powerfully effective – but each of the four structures calls for a different, right time to introduce the brand in the running flow of the commercial.

The first play is the kickoff, where the brand is brought on the field at the very beginning of the commercial and positive emotions are engaged to generate as much momentum as possible for the full run of a 30-second ad. The second play is the pivot, where negative emotions are deliberately built up in the opening moves of the play. Then, at the critical moment when the brand arrives, those emotions are reversed, leaving the audience with strong positive feelings toward the brand by the end of the ad. The third play is the transition, which starts with audience emotions in a mild, positive state (e.g., fun) until the brand appears to jump audience emotions to a higher, more intense positive state (e.g., excitement). The fourth play is the end pass, where audience emotions fly toward the brand, which is waiting in the end zone of the commercial, to receive the accolades of the fans cheering in the stadium.

These primary structures have been identified empirically through the use of a second type of picture sort instant replay, the Flow of Emotion. Pictures from an ad are sorted not on recall, but rather on a respondent's positive and negative feelings toward each image in an ad. (See examples in Figure 2.)

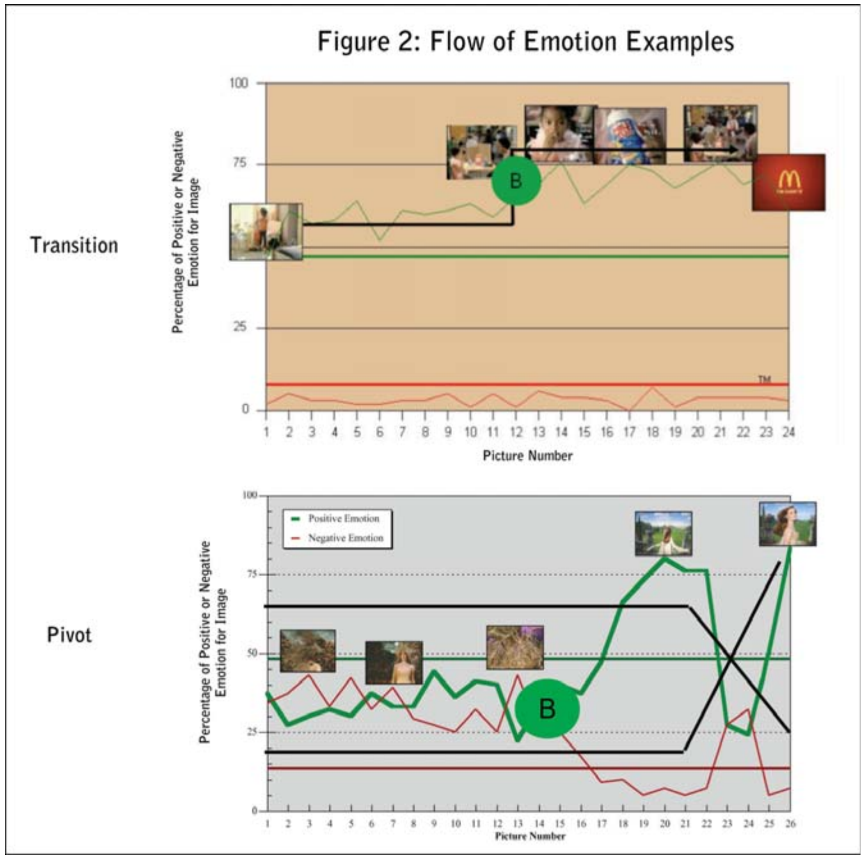


Figure 2: Flow of Emotion Examples

In longer commercials, these plays can be used in combination to construct more complex advertising experiences. And while each type can work well, the choice of which one to use depends on the overall marketing strategy for winning the game. A creative pro, for example, takes into account the life stage and the inherent energy of the brand being advertised in timing the brand introduction. To see why, let's examine each play in detail.

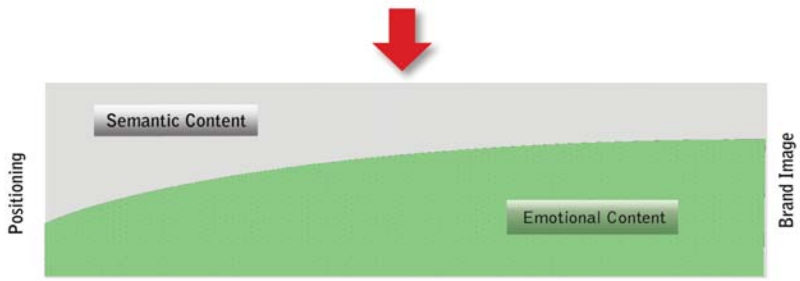
The kickoff

This presentation-style advertising is a particularly effective play for launching a new product. The goal of introductory advertising is to position an unknown brand clearly in the consumer's mental map of competing alternatives in the category. Positioning a brand is like identifying your team with a particular city – the Bears are from Chicago, the Cowboys are from

Figure 3: Creative Choice Varies as a Function of Brand Life Stage: Some Common Plays

Dramatic Structure	Life Stage: New Product	Life Stage: Established Brand	Life Stage: Power Brand
Kickoff	X		
Pivot		X	
Transition		X	
End Pass			X

Choice varies as a function of communication content



Dallas and the Packers from Green Bay. A positioning anchors a brand experience in the semantic or verbal part of the brain. By definition, a commercial for a new product must send information about the product concept to a new hometown address or positioning in the brain. That's why, for example, the commercial should first cue the category (e.g., the city) before introducing the brand name (e.g., the street address) of the new product.

A new product is a rookie that has to prove itself with functional performance before an emotional relationship with the crowd can be formed. For that reason, a new product commercial tends to be loaded with factual information - features, benefits, product advantages versus the competition, what the package looks like. Rational information like this is most easily processed by the semantic side of the brain in a linear sequence where it can be filed away in memory for future recall. This is the reason why kicking off the brand name in the first few seconds of this type of commercial is a good idea.

The pivot

You open the ad by intentionally creating negative tension - you make your audience squirm, be engaged, get involved.

Two young people are sitting in a dark room. They type furiously on their laptop computers in some hidden place. The guy breaks into the corporate payroll system. "Whoa I got in!" "Look at what that VP makes compared to that VP," the woman responds. "I bet he doesn't know that!" "Sure he does," the guy says as he pops the return key. "I just e-mailed everyone in the company." Then a superimposed message appears on the screen: "You Are So Ready for IBM."

Problem/solution commercials have been a very popular genre of advertising. Using drama to make a problem seem important is one way of making the solution seem important. Indeed, for some established brands, preemptively "owning" the consumer problem may be the marketing strategy rather than selling one specific solution.

Pivots in our inner emotional states can be quite rapid, with one emotional state flipping over to its opposite in the blink of an eye. The tipping point between one emotional state and another can be quite precise. Such a boundary between emotional states is the center of maximum drama.

This is the precise moment when a brand should be introduced in a pivot-type ad. By placing the brand at the boundary between a negative emotional state and a positive emotional state, the brain unconsciously draws the conclusion that the brand is the cause of the transformation from negative to positive - and so the brand becomes the hero of the spot! In contrast, we have a number of empirical examples of commercials that were poorly branded because the brand was introduced five seconds too soon into the dramatic storyline.

The transition

Here is a sample scenario for a positive transition ad:

Traffic is moving along slowly, with cars herded together like comfortable cattle. We see a driver in his 4X4 SUV. He looks around cooly, pops a gear and unexpectedly turns off the crowded highway to climb a 60-degree incline. You feel the exhilaration of

driving his brand-new car as he flies over the mountain.

In this type of advertising there is no role for negative emotion, but nonetheless the structure represents a movement from one emotional place, a low positive, to another place, a higher positive or different, more intense emotion. Commercials that attempt to reposition established brands in an emotion space or those that communicate a "new and improved" message might be examples of this category of advertising.

In many ways commercials of this type are like pivot ads in that the brand plays an explicit role in the story's action. Again, if the brand is timed to arrive at the precise boundary of the quantum jump from one emotional state to another, the brain will interpret the brand as the cause of the transition to a more positive state. And as a result, as with pivot ads, the appearance of the brand would be expected in the middle, not at the beginning nor at the end, of the ad.

The end pass

A guy walks into surgery all scrubbed up. A nurse dramatically puts the surgical gloves on him. He goes to work on the patient, saving his life. But wait, who is this guy? A nurse asks him what hospital he's from. "Oh, I'm not a surgeon," he says confidently, "but I did stay at a Holiday Inn Express last night."

The end pass is a powerful play, but it's a somewhat risky play for a new product launch or a small brand with little to spend. There is a chance that consumers who do not stay involved to the end of the storyline will not learn the brand's identity. This would inhibit the building of awareness and thus trial or penetration of the brand.

This type of advertising is usually used to add to a brand's image by telling brand stories of a humorous or dramatic nature. Its content is almost entirely emotional, though the emotions still have to fit the positioning established by the brand early in its life stage. Usually power brands have earned the right to do this kind of advertising through large investments in media over time or by developing such a distinctive, recognizable style of advertising that the consumer has no trouble predicting who the brand will be when it appears, inevitably, at the end of the commercial. An example of a power brand would be IBM, which rarely shows its name before the end of its blue letterbox television commercials.

Opposing creative principles

At the most basic level, positioning a brand and building a brand image are the opposing creative principles of advertising. Positioning anchors a brand in the mind by establishing a rational context within a relevant frame of competing brand claims. It requires clarity and consistency of communication. Positioning is about semantics or how, on a conceptual level, a brand fits clearly into the mental map that the consumer has formed of the category.

In contrast, image is the part of a brand that grows and flowers with each new ad execution that creates emotional connections to the consumer's inner self - so that a consumer will come to feel ownership of a brand over time. Brand image requires freshness and variety of expression. Brand image is about aesthetics - or how you touch a consumer emotionally.

From a marketing standpoint, in terms of the job that a particular television commercial has to do, the balance of effort involved in positioning a brand and building a brand shifts as a function of the brand's life stage (see Figure 3). Semantic information content tends to be higher at the beginning of a brand's life; emotional content tends to be higher as the brand matures. It is within this framework, the longer view of the marketing time scale, that the creative decision about which dramatic structure to use in a particular commercial must be made. On multiple levels, therefore, creating well-branded advertising is about getting the timing right. |Q

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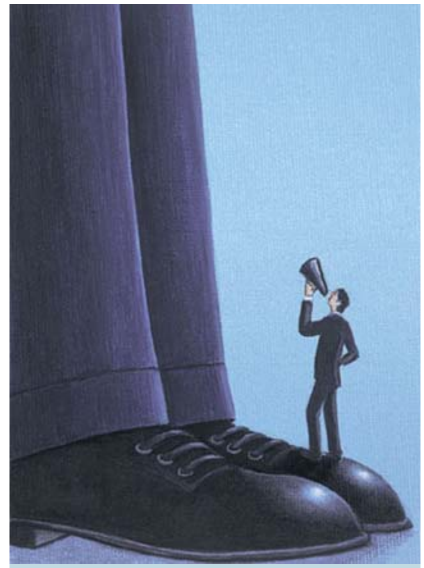
advertising research

Capture my interest, capture my business?



By Neil Kalt

A look at what drives idea engagement

The concept of idea engagement is causing quite a stir. The reason: idea engagement holds out the hope that advertising can create brand relationships that will induce loyalty to these brands.

It is well documented that a number of consumers form emotional attachments to some of the brands and products that they use. For example, the Gallup Organization interviewed 3,611 customers in the automobile industry, the airline industry, consumer banking, mass retail, online retail and consumer electronics.[1] With the exception of the airline industry, Gallup found that roughly one-third of the customers in each of these industries had formed emotional attachments to one or more of the brands they use (in the airline industry it was 19 percent). What makes these attachments so valuable is that they increase dramatically the propensity of these customers to patronize the brands that have earned their loyalty.[1]

Idea engagement takes the position that emotion-driven advertising can generate a richly articulated relationship between the brand and the consumer, and that the consumer plays an active role in this process, bringing - and here I quote William Cook of the ARF - "her own stories, experiences and associations in her memories to our ads, and may substitute her own elements into the unfurling drama to help it become more relevant or meaningful to her."[2] When an ad tells a story, that story is likely to - and again I quote Cook - "engage the consumer's emotions and trigger stored associations, personal stories, brand experiences and images and generate that first emotional imprint in the brain. Emotion involves the consumer and the ad's story gets integrated into the mesh of memories and schema in the consumer's long-term memory."[2]

Not in the cards

Although there are brands and products for which idea engagement seems like an excellent fit, logic and a fair amount of data suggest that emotional relationships between brands and consumers are not in the cards for many brands and a great many consumers. Let's look at why:

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Table 1: The Percentage of Respondents in Each Quadrant That Expressed Interest in the Product					
	Quadrant 1: High Information High Emotion %	Quadrant 2: High Information Lower Emotion %	Quadrant 3: Lower Information High Emotion %	Quadrant 4: Lower Information Lower Emotion %	Overall Product Interest %
Commercial					
Capital One	85	50	42	17	39
Chase Freedom	86	58	38	24	51
Verizon Wireless	89	62	56	25	56
Nextel	80	53	10	15	40
AFLAC	78	57	31	15	50
MetLife	90	64	44	24	55
Hyundai: Upside Down	75	33	29	10	34
Tunnel	79	37	33	20	43
Obstacle Course	73	48	39	23	47
Crash Test Rating	78	57	31	15	48
Mean	**81**	**52**	**35**	**19**	

1. Most people don't have the time or, I suspect, the inclination to create and nurture multifaceted emotional relationships with all the brands they're interested in and all the brands they use. Their lives are increasingly fast-paced, and they cram large amounts of activity into their waking hours. All of which leaves little time for forging relationships with all these brands, certainly not the amount of time that idea engagement seems to require.

2. A recent study by Nielsen of nearly 1,000 consumers[3] found that only a third could recall any TV commercials they had seen. If two-thirds of the consumers polled couldn't remember any of the commercials that they were exposed to, some of which were surely driven by emotion, and if we assume that people recall commercials that engage their emotions, then these commercials either failed to engage the emotions of receptive consumers or these consumers were simply not open to the possibility of an emotion-based brand relationship.

3. The results of the research conducted by the Gallup Organization[1] indicate that the relationships consumers have with brands are much more often transactional than emotional - that is, roughly two-thirds did not appear to form emotional attachments to the brands and products that they used. As their perceptions and attitudes are rooted in brand usage, and as a fair number probably have rational/analytical/ practical personalities, it seems unlikely that they will be susceptible to the blandishments of emotion-driven advertising.

Cast doubt

Recently, we conducted research to evaluate a new commercial testing methodology. Coincidentally, the results of this research also cast doubt on the validity of a cornerstone of the concept of idea engagement.

This methodology uses both conventional and new measures to evaluate commercials, which it does from the following perspectives:

1. Conventional measures, such as the communicability of the commercial, attitudes toward the commercial and how much interest in the product the commercial generates.

2. The cognitive/emotional profile of the commercial, which sheds light

Table 2: Commercials That Were Perceived to be More Informational, Commercials That Were Perceived to be More Emotional, and Interest in the Product

	Commercial is Perceived to Have Ample Informational Content %	Commercial is Perceived to Have Ample Emotional Content %	Product Interest %
More Informational			
Crash Test Rating	73	31	48
Verizon Wireless	59	32	56
Chase Freedom	52	41	51
MetLife	52	43	55
Obstacle Course	54	46	47
AFLAC	59	53	50
Mean			**51**
More Emotional			
Nextel	47	50	40
Upside Down	40	49	34
Capital One	29	41	39
Tunnel	40	59	43
Mean			**39**

on the cognitive/emotional strengths and weaknesses of the commercial, and which acts as a road map for increasing the commercial's ability to generate interest in the product.

3. The cognitive/emotional profiles of the respondents, which enable us to determine how the commercial performs among two key personality types that together comprise a sizable percentage of the population: respondents who are emotional/intuitive/ expressive and respondents who are rational/analytical/objective.

4. The extent to which sensory overload, and the competition between the auditory and visual components of a commercial for each viewer's attention, cause respondents to miss important pieces of information after multiple exposures to the commercial.

The results of this research yielded important implications for evaluating a commercial's performance and increasing its effectiveness. They also cast doubt on the power and preeminence of the emotional content of commercials, which is assumed to drive the process of idea engagement:

• We used tests of 10 commercials in four product categories to evaluate our methodology. The level of product interest that each of these commercials generated was nearly universal when respondents felt that both the commercial's informational content and its emotional content were considerable. When they felt this way about a commercial's emotional content but not its informational content, interest in the product plummeted - on average, from 81 percent to 35 percent (see Table 1, quadrants 1 and 3).

• When a commercial was felt to have a good deal of informational content, or a good deal of emotional content, but not both, informational content generated considerably more interest in the product than emotional content (on average, 52 percent versus 35 percent - see Table 1, quadrants 2 and 3).

• On average, commercials that were felt to be more informational generated more interest in the product than commercials that were felt to be more emotional (51 percent versus 39 percent - see Table 2).

• Idea engagement doesn't assign any role to personality. Accordingly, people should be more responsive to emotion-driven advertising than

Table 3: Commercials That Were Perceived to be More Informational, Commercials That Were Perceived to be More Emotional, and Interest in the Product Among Emotional/Intuitive/Expressive Respondents and Rational/Analytical/Objective Respondents

	Commercial is Perceived to Have Ample Informational Content %	Commercial is Perceived to Have Ample Emotional Content %	Product Interest %	
			Emotional Respondents %	Rational Respondents %
More Informational				
Crash Test Rating	73	31	53	52
Verizon Wireless	59	32	64	44
Chase Freedom	52	41	52	53
MetLife	52	43	68	49
Obstacle Course	54	46	62	37
AFLAC	59	53	60	45
Mean			**60**	**47**
More Emotional				
Nextel	47	50	40	36
Upside Down	40	49	52	18
Capital One	29	41	52	27
Tunnel	40	59	61	33
Mean			**51**	**29**

they are to information-driven advertising, regardless of their personalities. What we found was quite different, though in light of the preceding findings, not unexpected:

1. Respondents with rational/analytical personalities were much more likely to express interest in the product when the commercial was regarded as more informational as opposed to more emotional (on average, 47 percent versus 29 percent - see Table 3).

2. Even emotional/expressive respondents, who might be expected to prefer commercials that were more emotional, tended to express interest in the product more often when the commercial was regarded as more informational (on average, 60 percent versus 51 percent - see Table 3).

Less than conclusive

While these findings are clearly suggestive, they are less than conclusive. Although we looked at the relationship between the content of commercials and the extent to which those commercials generate interest in their products, we did not look at the variables that presumably mediate this relationship - that is, the extent to which emotion-driven commercials lead to the establishment of emotional relationships between brands and consumers, and the extent to which these relationships induce brand loyalty. Still, the data have considerable face validity - the findings are consistent, they make sense and they appear to shed considerable light on the drivers of idea engagement. They should be treated accordingly.

Does idea engagement have a role to play? We have no doubt that it does, though not quite as currently envisioned:

- Idea engagement does not appear to be driven solely by the emotional content of advertising - at least not in the product categories in which we conducted research (cars, credit cards, insurance and telecommunications) nor, in all probability, in similar product categories. Indeed, when advertising in these categories forges relationships between brands and consumers, these relationships are likely to be based on both the advertising's informational and emotional content, with informational content usually the more important of the two.
- It seems likely that these brands comprise a comparatively small subset of the brands that consumers consider using and actually use.
- The consumers with whom these relationships are forged appear to be a decided minority of the consumer population. As for the rest of the consumer population, for whom relationships with brands and their products are essentially transactional affairs, idea engagement seems destined to be a quixotic pursuit that seldom, if ever, bears fruit.

The last two considerations notwithstanding, the willingness of consumers to purchase brands that have earned their loyalty makes the creation of advertising that uses informational and emotional content to forge relationships between brands and consumers a goal to be ardently pursued. | Q

[1] Appelbaum, Alec. The constant customer. *Gallup Management Journal*, June 17, 2001.

[2] William Cook. "Idea Engagement: Feelings Stirred, Not Shaken." ARF paper, 2007.

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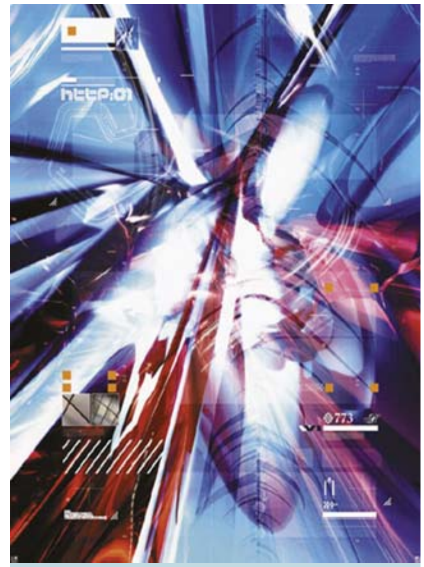
advertising research

In search of synergy



By Frank L. Findley

Seven insights from holistic campaign testing

The media landscape is undergoing a continuous evolution that expands far beyond television, radio and print media. Today's marketers are using multiple media executions delivered through touchpoints as diverse as the Internet, mobile personal devices, outdoor communications, public events and dynamic digital signage in such places as movie theaters, elevators, escalators and public restrooms. As Wal-Mart's Chief Merchandising Officer John Fleming has said, even the retail environment has become a delivery vehicle for marketing messages: "Our primary focus is using the store as a media channel and figuring out ways to add to the customer experience but give them the information that they need to make good product decisions," he said. Simply put, marketing has evolved from mass communications delivered to people gathered around their radios and televisions to targeted messages that quite literally surround consumers wherever they go.

This proliferation in the use of diverse touchpoints is driving a reprioritization by senior marketing executives. In the Association of National Advertisers' 2007 survey, the issue of integrated marketing communications ranked as marketers' No. 1 concern. Second in importance was accountability, which is where research and measurement enter. In a 2006 *Wall Street Journal* interview, Procter and Gamble's Global Marketing Officer James Stengel summarized the dynamic tension between these two priorities: "As we get more diversified and creative in our marketing, how do we keep up with that in our measurement?...I don't think the industry has been terribly advanced on that. What we try to do is push creativity and measurement at the same time. The best businesses do both." Today's marketers must have a way of evaluating how all their communications influence consumers, both as individual media experiences and as combined, holistic media campaigns.

In response to this challenge, our firm developed a holistic communications test that uses cross-media metrics to capture the impact of the campaign as a whole, the contribution of the individual executions in each touchpoint and the synergies between them. Based on our past communications research, these metrics were chosen because they capture the impact on the two key factors which drive

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sales: consumers' relationships with a brand's communications and their relationships with the brand itself. Over the past year, this system has been applied to campaigns in America and Europe for brands competing in a variety of categories. Testing encompassed campaigns with wide-ranging touchpoints and executions in various levels of production quality, from finished advertisements to early-development mock-ups. Because a consistent methodology has been applied, these cases provide an understanding of the strengths of integrated campaigns. Following are the seven key insights gleaned from this knowledgebase.

Insight #1: All touchpoints can be effective.

While television is often the strongest single element of a multimedia campaign, other touchpoints can be just as strong. ARSgroup recently tested a campaign consisting of two television ads and two print ads. Conventional wisdom would predict the two television ads to be the strongest individually as well as suggest that they would produce the most synergy when combined. However, one of the print ads performed on par with the better television ad and provided a stronger synergy with this television ad than did the second television ad. Each situation is unique; the mix with the greatest synergy may not be obvious.

Insight #2: The strongest synergies come from leveraging emotional and rational content across brand encounters.

Testing of individual executions has shown that ads which drive both emotional and rational consumer connections have double the success rate of those that don't. Our research on campaigns has exhibited a similar yet unique pattern.

Campaigns give marketers the flexibility to use some brand encounters to drive emotional appeals and others to drive rational appeals. In fact, the largest synergistic gain observed to date was between one brand encounter which primarily drove positive feelings and another which primarily drove positive rational thoughts. Examples of this technique can be found among pharmaceutical campaigns. While the pharmaceutical companies are careful to provide sufficient product details in all media channels, they often use television ads to convey emotional benefits and print ads to convey in-depth clinical and usage information. This is good news to brands in other categories with advertising messages containing both emotional and rational components.

Table 1: Main Point Communication

Main Point Communication (All Women)	Total Campaign (All 3 ads)	"Reducing Waste" :30 video	"Energy Efficiency" :30 video	"Reduced Emissions" :30 video
Environmental: (Net)	**87%**	**80%**	**77%**	**75%**
Sustainability-focused company	41%	13%	25%	23%
Policies are good for the Earth/environment	26%	19%	9%	17%
Applies emerging green technology	19%	10%	6%	9%
Promotes a green lifestyle	13%	5%	11%	9%
Reduces/cuts down on plastic waste	9%	34%	-	1%
Less/smaller packaging	2%	11%	-	-
Has recycling program	-	4%	-	-
Saves/uses less electricity	2%	-	13%	-
Conducts regular energy audits	-	-	21%	-
Uses 5% wind-generated electricity	1%	-	15%	-
Uses off-peak power	-	-	9%	-
Plants trees to offset emissions	2%	-	-	22%
Reducing company's carbon footprint	7%	-	-	15%

Insight #3: Campaigns often move communicated messages from "lower" to "higher" levels.

One of the more interesting findings across the cases is the difference in the message taken away from an individual ad versus an entire campaign. We have regularly observed that campaigns ratchet up the perceived messaging of the individual ads. Take, for example, a blinded three-ad corporate branding campaign geared toward educating consumers on different green initiatives the company has undertaken. Each ad focuses on a different initiative:

- waste reduction program;
- gains in manufacturing energy efficiency;
- reductions in plant air emissions.

As shown in Table 1, consumers who see just one of the ads tend to take away only the message from that ad (e.g., "reduces/cuts down on plastic waste," "conducts regular energy audits," "plants trees to offset emissions"). However, as consumers see multiple ads they tend to take away the much broader message that it is a "sustainability-focused company." The implication of this messaging synergy is that brands can achieve communication of difficult or vague concepts through a simpler advertising approach than previously thought.

Insight #4: Interactions vary among respondent groups, and these differences must be taken into account in test design.

This insight is not really new; it has been observed in traditional copy tests for decades. What is new is the proliferation of media types and how respondent groups are defined.

When evaluating multiple media


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touchpoints, the respondent group must be defined not only by appropriate demographics but also by media consumption patterns. For example, if you plan on advertising via a special podcast, your insights should come from consumers with access to and usage of iPods and other personal media players. While this may seem obvious, it is a design consideration which has been overlooked by some when conducting non-traditional touchpoint research.

Insight #5: Negative interactions sometimes occur and can result from executional issues.

Almost all campaigns make at least small synergistic gains by using multiple pieces of copy, but in a few cases negative interactions have been observed (i.e., adding additional pieces of copy actually decreased the effectiveness of the campaign). In these cases, the negative interactions corresponded to an unexpected effect of an executional detail such as wording or graphics that detract from the intended message.

A quintessential example is a print advertisement for a digital camera which intended to communicate the camera's ease of use. At the heart of the ad is a zoomed-in image of the user and the camera, with the camera in sharp focus amidst a blurry background. The unintended, net takeaway by prospective purchasers was that the camera was of low quality and produced blurry images. This resulted in a drop in effectiveness for the entire campaign. In fact, if the print ad would have gone forward without improvement much of the gains driven by the campaign's more expensive television copy would have been lost. The lesson to be learned is that holistic communication evaluation must look at each individual piece of copy to guard against negative interactions.

Insight #6: Both single and multiple messages can create effective campaigns.

In the marketing industry there are different schools of thought when it comes to varying a brand's message within a campaign. Some advocate using a single message which gets reinforced with every exposure. Other marketers advocate using multiple messages to broaden the appeal of the brand. Examination of tested campaigns has shown no clear winner in this debate; both approaches have been successful.

This suggests that the real question at hand is: "When should a brand use a multiple-message approach and when should it use a single-message approach?" An examination of ARSgroup strategy test results sheds some light on this issue. Brands that have identified a straightforward brand-differentiating message that appeals to a broad consumer segment may best be served by focusing on it in their campaigns. In this way, they will "own" this space in the minds of consumers. Brands that cannot communicate their differentiation with a single straightforward message may best be served by including multiple messages in their campaigns.

Insight #7: Synergies within a campaign can have a substantial impact on the bottom line.

While it is currently not easy to manage media allocation across touchpoints because there is no cross-touchpoint measure of media weight exposure, a number of industry efforts are striving to provide this capability. Until this has been achieved, campaign test results can only be used to accurately allocate media between executions within a touchpoint.

Typically, today's processes call for testing a few ads within a touchpoint and choosing the one with the strongest individual score. The media spend for the touchpoint is then placed behind this "winning" ad. However, experience with television advertising shows that sizable sales gains can be realized by allocating media dollars across multiple ads based on their respective contributions to the campaign. That is, optimizing dollar allocation within touchpoint increases ROI.

This may require a process change for many marketers and their media agencies, but this change has great potential to increase marketing return. And because of the sizable potential for additional ROI increases by optimizing media expenditures across touchpoints, corresponding changes in media allocation practices will follow once the industry has equated its media weight systems.

Key first step

With the ever-changing marketing and media landscape, building strong, holistic campaign communications is more important now than ever. Understanding how ads in different touchpoints work together is the key first step. At the 2006 annual Association of National Advertisers conference, Burger King's Russ Klein, president of global marketing, strategy and innovation, cautioned: "New media is not some bleeding-edge risky move. We are all collectively in an all-out gallop to catch up with our consumer. The eyeballs have moved." At the same conference, Procter & Gamble CEO A.G. Lafley pointed out the need for measurement of media, both traditional and new: "We can't obviously think of any medium or touchpoint in isolation. ... We must be able to measure the response we get to the stimulus - the effectiveness and the efficiency of every medium ... the whole media mix and communication plan."

By consistently applying consumer-centered measurement systems to holistic campaigns, we will generate the knowledge needed to successfully navigate the rapidly changing media landscape. | Q

advertising research

Getting to know all about you

By Jean Durall, Cate Riegner and Josh Crandall

The role of the Internet in brand discovery

With its vast and interwoven world of information and entertainment, the Internet has given consumers unprecedented choice and control, transforming the purchase process and the rules of advertising in its wake. Less than a decade ago, marketers clung to the time-worn goals of making consumers 1) aware of their products, 2) consider their products and 3) purchase their products. Today, with consumers in the driver's seat and armed with limitless brand and product information, a more accurate description of the purchase process would be 1) research, 2) compare and 3) decide. The consumer is now involved in the purchase process to a greater degree than ever before, with the information and autonomy to make highly informed decisions.

Does this diminish the role of advertising? Hardly. Heightened consumer involvement means that advertising has the opportunity to be more effective than ever before in directing attention to relevant products and brands. Nowhere is this more true than online where, given the inherent qualities of the Web, advertising is exceedingly more targeted and accountable.

Marketers are realizing that online is the place to be and advertising is following in that direction. According to *The Wall Street Journal*, few marketers have spent more than five to 10 percent of their marketing budgets online up to now. But the portion of online spending will increase 18 percent in 2008 according to some projections[1]. In addition to moving advertising dollars online, marketers are developing creative, diversified approaches to brand placement on the Web - virtual worlds, YouTube videos, online panels that provide product feedback - all aimed at harnessing the ability of the Web to create shared experiences for viral marketing.

Challenging task

Exciting? Yes. But what influence does the Internet bear on what is still, perhaps, a marketer's most challenging task: making consumers aware of new products and brands?

To answer this question, we examined how two groups of online consumers - recent shoppers and those involved in entertainment content - learn about new products or brands. These groups are part of our larger study of the online habits of broadband-enabled consumers in the United States[2], whose number now stands at approximately 127 million[3]. Data presented here is drawn primarily from the leisure/entertainment and shopping sections of our Netpop survey, which is a tracking study

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of broadband users in countries around the world.

People who have recently made a purchase, or who are actively shopping, should be open to information about new products or brands, particularly new brands in the categories of interest. Among a subgroup of 1,450 broadband users who either bought a product from among 10 general categories in the previous three months or plan to buy such a product in the next three months, 15 percent say they recently learned about a new company, product or brand. There is no difference in recall of new brands between recent purchasers and those who are actively considering making a purchase in the near future.

Was the Internet instrumental in creating new brand awareness among this group of broadband users? Undeniably. Over half (53 percent) of those who recently became aware of a new company, brand or product say they first learned about it from an online source - most commonly through a search engine (23 percent). In addition to search engines, online ads (10 percent) and e-mail newsletters (10 percent) are also instrumental in creating awareness of new brands among those saying they learned about a new brand online.

Traditional media and interpersonal sources have equal importance in generating awareness of new companies, products or brands but, taken together, they are not as effective as online sources in creating new brand awareness. Television is mentioned by half of those naming traditional media as the source where they first learned about a new brand and 21 percent mention magazines.

New brand awareness is highest among those in our broadband sample who were shopping for business services, office supplies or professional services such as accounting, IT support or legal services. Almost one-quarter (23 percent) of these shoppers recently learned about a new brand. In contrast, shoppers in a category where new products and brands proliferate - health and beauty products - show the lowest awareness of new brands, just 8 percent[4]. Across the 10 categories, the highest level of new product or brand awareness occurs in those ar-

Figure 1: Time Spent in Each of Five Areas of Involvement

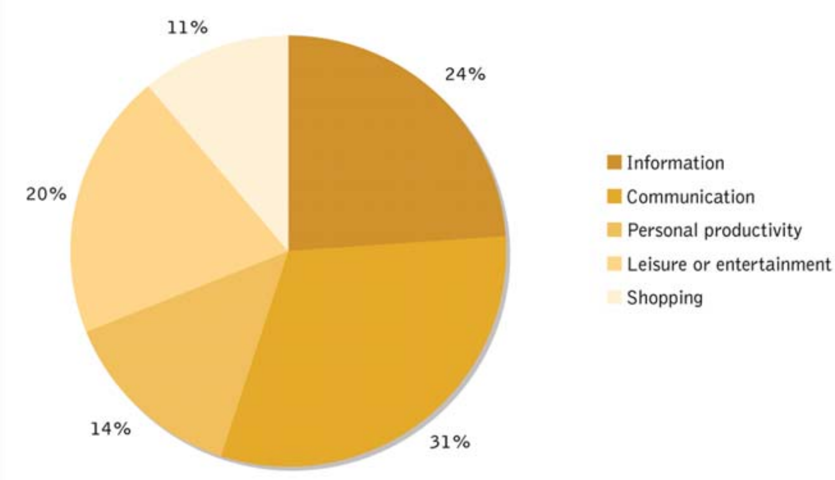


Figure 2: Sources for First Learning about a New Company, Brand or Product

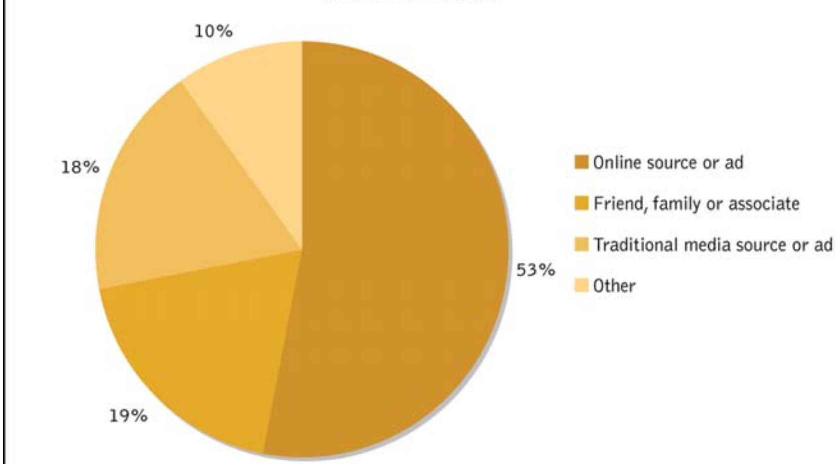
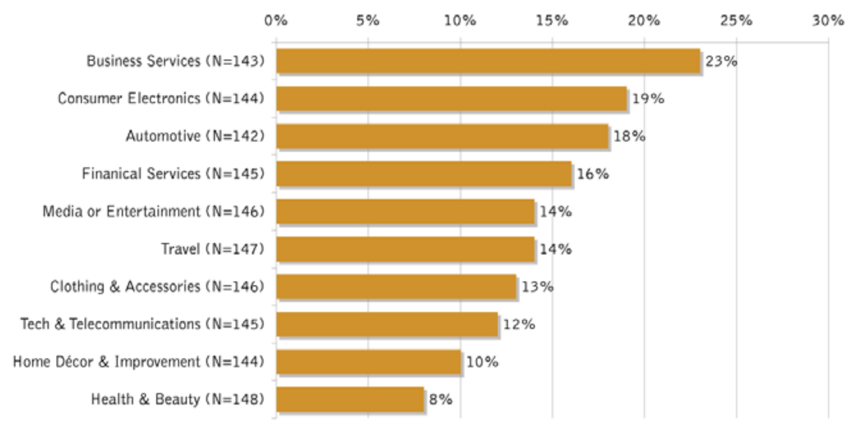


Figure 3: New Brand Awareness Among Ten Category Shoppers



eas that involve the highest costs and most risk: automotive and consumer electronic purchases in addition to business services.

Only the first step

Of course, creating awareness of your brand is only the first step. Did these recent shoppers make any effort to learn more about the products and brands they learned about? Again, the answer is yes and their choices of where to seek more information are dominated by online sources.

Three-quarters (77 percent) of the recent shoppers tried to get more information about a new product or brand. Keeping in mind that over half first learned about that new brand online, it is not surprising that online sources are among the most common choices for more information, with search engines again used most often (23 percent). Still, when we look at the sources used by over 10 percent of those looking for more information about a newly discovered brand, there are three patterns that stand out:

1. Source diversity: Those seeking information about new brands turn to a range of online and traditional sources - 19 different sources attract more than 10 percent.

2. Source specificity: Other than search engines, the most popular sources are retail-oriented Web sites - sites for brands, manufacturers, stores or shopping areas on general Internet sites (Yahoo! Shopping or MSN for example).

3. Support for viral marketing: Social networking sites, blogs and chat rooms are a small but consistent block of resources for learning more about new brands, along with online video clips.

Widest array

It is clear that our group of recent shoppers support the shift in marketing emphasis away from traditional media and toward greater use of the widest possible array of relevant online

Table 1: Sources for Learning More About New Brands

Search engine	23%
Shopping area on general Internet site	16%
Brand/manufacturer site	16%
Auction site	16%
Retail site	15%
Consumer review/rating site	15%
Store Web site	14%
Browsing in a retail store	14%
Newspaper	14%
Catalog/brochure	13%
Comparison shopping site	13%
Online video clip	13%
Social networking site	13%
Family/friends	12%
Blog	12%
Magazine	11%
Chat room	11%
Instant message (IM)	11%
News/information site	11%

Base: Shopper subgroup, learned about a new brand and tried to learn more (N=164)

Table 2: Sources for Learning About New Entertainment Content

TV	48%
Friends/family	43%
Search engines	28%
Magazines	26%
Newspapers	25%
Radio	24%
My favorite site	22%
E-mail newsletters	20%
Entertainment areas on general sites	19%
Online video clips or trailers	18%
Browsing in retail stores	17%
News/information sites	16%
Video-sharing sites	12%
Programming guides (offline)	12%
Social networking sites	11%
Out-of-home media	10%
IM/chat	10%
Blogs	9%
Coupons	9%
Forums/discussion boards	9%
Review/ratings sites	8%
Search ads	8%
Online programming guides	6%
Online ads	6%
RSS feeds	3%

Base: Entertainment subgroup (N=1284)

sites. Does this reliance on online sources for information about new brands and products extend to areas of interest other than shopping?

To answer this question, we switch perspective to the entertainment subgroup, 1,284 respondents who spend some portion of their online time on leisure/entertainment activities. People interested in movies, TV shows, music, games, books and other media are always on the lookout for new content so the entertainment subgroup was not asked specifically if they learned about a new company, product or brand recently. Instead, they were asked about the traditional and online sources they use to lean about new content in the entertainment category they use in a typical week.

Unlike the shoppers, those looking for information on new entertainment content turn to the traditional sources of TV and friends and family more than the Internet. Magazines, newspapers and radio each attract one-quarter of those focused on entertainment. Search engines again emerge as the online source used most to learn about new content. And, as we saw with the shoppers, a wide range of online sources attract between 10 and 20 percent of those interested in knowing what's new in entertainment.

Specialized sites - identified as "my favorite site" in Table 2 - are particularly popular for learning about new entertainment brands. Open-ended responses about why they like these sites include insights on how these sites contribute to new product awareness.

"Like checking out new sites for products." (kerclink.com)

"(I) might find something I'm interested in buying." (youtube.com)

"I look and see if I want to buy anything." (pogo.com)

"New games come out all the time." (pogo.com)

"They have good previews of games." (gamespot.com)

"It's one of my main ways of finding out about new music." (iTunes)

While traditional sources - television, magazines, newspapers and radio

Table 3: Importance of Source for New Content Purchase Decision

	Top 2 Box (Responses 6-7)
Friends and family	60%
IM/Chat rooms	55%
Video-sharing sites	52%
Forums/discussion boards	51%
Trailers or video clips	50%
RSS feeds	49%
Search engines	46%
Review/rating sites	45%
Social-networking sites	44%
Coupons	43%
Online programming guides	43%
E-mail newsletters	43%
Print yellow pages	42%
News & information sites	42%
Entertainment areas on general Internet sites	40%
Television	39%
Blogs	38%
Browsing in retail stores	37%
Radio	37%
Display/Rich media ads	37%
Programming guides	33%
Newspapers	32%

Base: Entertainment subgroup, use source to learn about new entertainment content (Ns vary)

Table 4: Sources Expected to be Used More to Decide on New Entertainment Content in the Future

Coupons	37%
Online programming guides	37%
Video-sharing sites	36%
IM/chat	35%
Search engines	31%
Social networking sites	31%
Forums/discussion boards	30%
Entertainment areas on general sites	28%
Search ads	28%
Review/ratings sites	27%
News and info sites	26%
Trailers/video clips	26%
Online ads	25%
E-mail newsletters	25%
Friends/family	24%
Blogs	24%
Event sponsorships	23%
Magazines	20%
Programming guides	19%
Radio	19%
Browsing stores	18%
Newspapers	17%
TV	17%
Out-of-home media	12%

Base: Entertainment subgroup, use source to learn about new entertainment content (Ns vary)

- are used by more than 24 percent of those interested in new entertainment brands, online sources, particularly those involving user-generated content, are very important to those who do use them. These people also expect to use such sources more in the future.

Advice through word-of-mouth sources, including friends or family and instant messaging/chat, are most important when deciding whether to purchase new entertainment content. Over 55 percent rate these personal sources with a six or a seven on a seven-point scale of importance (top two box). The next group of important sources - those with top two box ratings between 40 percent and 52 percent - is almost entirely online.

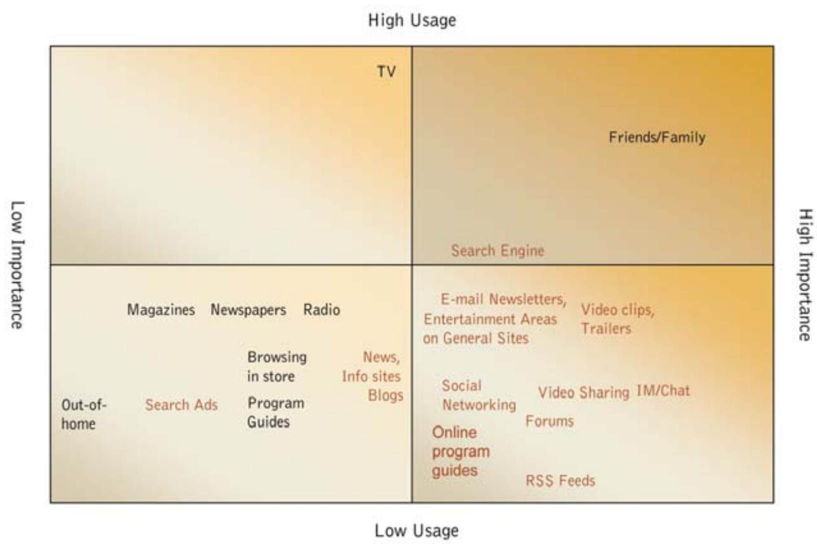
Most striking is the fact that ratings of importance are almost in reverse order of popularity based on the number of people who use each source; just 10 percent use instant messaging/chat rooms to learn about new entertainment content but over half of those say those sources are very important for deciding what content to buy, for example. Still, the 39 percent of TV users who say that source is very important in deciding on new entertainment content, while a much lower percentage than for many of the online sources, is a much larger number of consumers overall.

The influence of online sources on entertainment content purchases is most likely to increase in the future. Coupons are the only traditional source of influence that more than 25 percent of current users expect to use more in the future to help them decide what new entertainment content to purchase. Roughly one-third of those currently using video-sharing, instant messaging or chat, social networking, or forum and discussion board sites expect to rely on those sources more for entertainment direction in the future (30 percent to 36 percent).

Influence will grow

The segment of the Internet population with a broadband connection

Figure 4: Online and Traditional Sources Used to Learn About New Entertainment Brands: Usage and Importance



uses a wide array of both online and traditional sources to learn about new brands. Further, our data clearly support a diversified marketing and advertising strategy that includes a wide range of online sites as well as traditional media – particularly television. It is also clear that, while social networking and other user-generated Web sites, such as YouTube, Facebook, MySpace or Flikr, have received extensive media attention in the last year, very few consumers are currently using such sites to learn about new brands. But such sites clearly cannot be ignored because they are so important to those who do use them and their usage and influence will grow. | Q

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2 Findings from Netpop | U.S. are derived from an online survey of 4,068 broadband users in the United States conducted in August 2007. Respondents who started the survey were asked one question to identify those who access the Internet via a high-speed or broadband connection (any connection greater than 56 kilobits per second). Respondents who indicated they "usually" use a high-speed or broadband connection completed the survey. Start rates were representative of the U.S. Internet population based on age and gender. Respondents were offered a cash incentive to complete the study. Based on randomly chosen samples of this size (n=4,068), there is 95 percent confidence that the results are statistically accurate to within approximately 1.55 percent of the entire U.S. broadband population if the entire population had been polled

3 Sources: Pew Research Center, U.S. Census, Media-Screen LLC.

4 Difference between new brand awareness among business services shoppers and health and beauty shoppers is statistically significant at the 95 percent level.

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advertising research

They watch, you learn

By Jon Puleston

A look at eye tracking and click testing

Eye-tracking studies have been heralded as the closest thing to mind reading, while in the same breath being dismissed as an expensive approach that doesn't really tell a usability analyst much more than they already know. So what major lessons can market research and advertising professionals learn from the practice of eye tracking techniques in the Web usability world? Can other available alternatives such as click testing meet research needs involving visual interactions?

Eye tracking follows and records the movement of the eye as it looks at something. The technique claims that it can not only work out what someone is focusing their attention on, but also how long their eye looks at a target area and what the viewer is thinking. Eye tracking uses infrared technology to show where the pupil is by reflecting light off the retina of the eye. The sensors can be placed in a monitor, or more frequently in head gear.

Eye tracking is not new. Russian scientist Alfred Yarbus was already experimenting with it back in 1967. In one experiment, Yarbus asked respondents to examine a painting of a family in their home. In each case, the picture being observed is the same, but the pattern of eye movements differs vastly.

• When asked to examine the picture with no suggested goal, faces were the first thing that people focused on before taking in the rest of the picture.

• When asked to estimate the material circumstances of the family, people's focus mostly went to objects, such as a piano and a table.

• When respondents were asked to estimate the ages of the people in the picture, like a heat-seeking missile, everyone's eyes darted from one face to the next.

When Yarbus asked participants to guess the ages of the people in the picture, the instructions he gave greatly affected where participants focused their attention. After Yarbus concluded his research, he noted, "It is easy to determine from these records which elements attract the observer's eye (and, consequently, his thought), in what order and how often."

Really shines

Eye-tracking studies have been used to contribute to scientific advancements for close to a century now. Web site usability is where

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eye-tracking technology really shines. Traditional usability techniques are often quite powerful in providing information on clicking and scrolling patterns. Eye tracking offers the ability to analyze user interaction between clicks. This provides valuable insight into which features are the most eye-catching, which features cause confusion and which ones are ignored altogether. In the realm of Web site usability and online advertising, here are some of the major lessons learned from eye-tracking research:

1. Ads in the top and left portions of a home page receive the most eye fixations. Ads in the right column are treated by users as an afterthought area. Ads at the bottom of the page are typically only seen by a small percentage of people.

2. Close proximity to popular editorial content helps ads get noticed. When an ad is separated from editorial matter either by white space or a rule, the ad receives fewer fixations than when there is no such barrier.

3. Of all types of ads tested, text ads are viewed most intently. On average, text ads are viewed for about seven seconds, and the best display-type ads are only looked at for one to two seconds.

4. When it comes to ads, size matters. Bigger ads have a better chance of being seen. Small ads on the right side of home pages are viewed about a third of the time. Small ads on the rest of the page rarely attract attention, but this may not equate to the relative costs of these different advertising formats.

5. Larger images hold the eye longer than smaller images. Interestingly enough, people often click on photos, even if clicking doesn't take them anywhere or lead to any significant information.

6. Clean, clear faces in images attract more eye fixations on home pages.

7. People are more likely to correctly recall facts, names and places when they were presented with that information in a text format. New, unfamiliar, conceptual information is more accurately recalled when participants receive it in a multimedia graphic format.

8. Shorter paragraphs perform better than longer ones and generally receive twice as many eye fixations as those with longer paragraphs. Attention is clipped on the Internet, therefore short bursts of attention are the best you can hope for. There is a caveat: longer product descriptions do better than shorter ones in e-commerce situations. As with all usability findings, context is key.

9. On a Web site, eyes most often fixate first in the upper left of the page, then hover in that area before going left to right. Only after perusing the top portion of the page for some time do eyes explore further down the page. This may be a learned response since this is the same left-to-right pattern we use to read. If you are building a Japanese or Arabic Web site, then it would be the mirror reverse.

10. People do typically look beyond the first screen. Their eyes scan lower portions of the page seeking something to grab their attention, and may fixate on an interesting headline or a standout word, but not on other content.

Also benefit

Beyond the realm of Web usability, print advertising, brand awareness and product layout can also benefit from eye-tracking techniques to some extent. Because eye tracking shows what people actually focus their attention on, it can reveal what brand elements were noticed in an ad, a piece of collateral or product packaging. With the help of a heat map (an amalgamation of what users looked at), it is easy to see exactly which areas were looked at, and which sections were completely ignored.

But is eye tracking really a one-size-fits-all solution to address all the visual and virtual research needs of professionals? It would be great if simply asking respondents always resulted in them telling the truth, but people don't always consciously know what catches their attention. Other times, they won't admit what catches their attention simply because they would be embarrassed to admit it.

An average eye-tracking study costs $20,000. That sort of price tag can make the technology unrealistic for the average advertiser who is hoping to refine an ad campaign or a marketer who is testing product packaging. When it comes to advertising, feedback is key. Unfortunately, offering feedback is a weakness of eye tracking. In advertising, simply pointing out which areas grab attention doesn't tell the whole story. A negative visceral reaction will capture someone's attention, but it won't effectively sell a product or develop brand loyalty. Knowing that an element in an ad gains attention isn't helpful unless you know why. In order to generate an accurate heat map, users can't be asked too many questions because participants look away from the screen and toward the facilitator too often.

An eye-tracking simulator is another, cheaper alternative. The simulator creates a window of focus by blurring the rest of the image. Mouse movements are recorded as respondents move the window of focus over areas that catch their interest. By creating a small area that is in focus, the eye-tracking simulator forces the respondent to move that area of focus to areas they want to see. There isn't much need to ask the respondents questions or give complicated instructions, all that is needed is an image to test. The area of focus acts as the eyes in the eye-tracking simulator. Any movement of the area of focus is recorded. After the test is finished, you can see which areas were focused on most, least and the order in which things were viewed.

This system works well for large images because shapes can be made out even though the image is blurred. The system doesn't work as well if there are smaller elements in the ad, like text. Eye-tracking research has proven that people quickly scan headlines and text to search for areas that catch their attention. With an eye-tracking simulator, the only way to quickly scan text is to bring the area of focus to the words, so you can read.

Click with their mouse

Similar to eye tracking, click testing is an online diagnostic research technique that can be used to evaluate everything from advertising and editorial layouts to product design. Respondents are asked to click with their mouse on the elements they notice most on a page presenting visual stimulus material. After consolidating the results from 200 to 300 respondents, a visual heat map is produced highlighting the elements that are noticed most frequently on that page.

The technique mirrors the results of eye movement tracking surveys, but with the added advantage that it can be undertaken at a fraction of the cost and with rapid turnaround times. Click testing integrates questionnaire design, data harvesting and reporting in a way that makes it a cross between a survey and an eye-tracking simulation.

Simply highlighting areas that catch people's attention doesn't give the whole story, as emotion plays a huge roll as well. Click testing is designed to find out why people are interested in particular elements of an ad. With click testing, a set of instructions comes before each item to be tested. Respondents can be asked to click on the elements that catch their attention, making it similar to an eye-tracking simulator. They can also be asked to click on any elements that are off-putting, titillating or cause any other emotion. It allows advertisers to test people's reactions not just where they focus their attention.

Click testing has been used in a range of applications:

- print and outdoor creative ad testing, including comparative evaluation test of ads in real street environments, poster click-testing and brand recognition tests following microsecond exposures to measure impact and appeal;
- broadcast media evaluation, involving the integration of video and sound footage into online surveys, minimizing wait time for video or sound footage to be downloaded;
- print ad placement testing;
- Web page layout and design testing; and
- shelf product design projects.

New developments in click-testing techniques are also looking at mouse movement tracking. Instead of prompting people to click on what grabs their attention, respondents are asked to simply move their mouse over areas of the page they are looking at. The computer then records the mouse position every few milliseconds.

See what they offer

So which technique is right for you? The information these techniques present helps us recognize how consumers form impressions and process information. Before you decide on one approach or another, call a few companies and see what they offer.

A sound knowledge of human cognition and user behavior is needed to draw meaningful conclusions from eye-tracking data. Not all eye-tracking companies have this expertise, so ask if they help you interpret the data or if they just hand you the results with a few colorful heat maps.

If you decide you'd like to use one of the eye-tracking simulators, check out a demonstration first, and ask the vendor if you can see a detailed explanation of their methodology. Many companies will let you experiment with their software before you buy it.

If you determine click testing is for you, remember that it is a capability that can also be easily outsourced, should your team become swamped with workload and deadline.

Like eye-tracking simulators, click testing has the ability to follow flow of attention, but it cannot measure how long someone lingers on certain visual elements.

No matter which technique you choose, both are highly interactive methods that help researchers and advertisers see how consumers form impressions and process information. They can provide the input that lets advertisers break the mold and forge creative new trails. | Q

advertising research

Target their baser instincts

By John Hallward

Marketers around the globe spend hundreds of billions of dollars a year on advertising. Yet fewer than half of their campaigns succeed. That's a lot of money wasted. One of the reasons many advertisers fail is they forget that their target markets are humans! It's pretty simple: successful marketing appeals to the way our genes and brains work. Our human traits - our needs, values and emotions - factor into whether advertising has an impact on us.

These criteria are what I call the "gimmes" - the self-centered demands we all have for emotional fulfillment of our different moods. As much as selfishness is viewed as a negative personality trait, it is innate and genetic. This isn't what our parents would have had us believe when they said, "Gimme, gimme never gets!", but it's the truth. Wanting things is genetically natural; humans are wired to be self-centered to ensure survival. So above all, marketing efforts should offer emotional payoffs that satiate consumers' moods, desires and insecurities, while enhancing their own view of their status in the world. To be more effective, marketers should focus on consumers' "gimmes" and less on brand features.

For example, a company wants to advertise a power hand-drill. One strategy would be to discuss its features - its suitability for many jobs, a long battery life or a low price point. The problem is that consumers aren't looking for a drill, per se. They are looking to put holes and screws into things. But the choice of brands will be influenced by more than that.

Ads should focus less on features and more on consumers' core needs and emotions

Consumers who buy drills want emotional payoffs. They want to avoid the disappointment of ruining a surface by inexpert drilling. They want to experience pride and feel competent. They want their spouse to exclaim with delight (proving their worth). They want to show off their accomplishment to the neighbors. Most consumers want to experience many of these payoffs. And since many drills put holes in things equally well, a successful brand will go beyond advertising its features to assuring emotional payoffs. We see in our Ipsos databases that brands that do this tend to achieve greater brand commitment and brand equity, as well as commanding higher prices and profitability.

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Struggle to maintain

We often see mature, established brands struggle to maintain their success. When I realized how our brain works to tune out familiar stimuli - in order to be ready for any new danger or new input - the challenges faced by established brands became clearer, as did possible solutions. This also helped to explain why frequent advertising exposures encounter diminishing returns in their impact on consumers. Marketers need to keep evolving and changing the consumer experience to avoid desensitization.

Advertisers really have two main jobs, and they need to know which is most required for their brand: 1) get the right brand associations into consumers' minds and then 2) trigger, or activate, these at the right time.

An example of excellent triggering is the old "It's Miller Time" campaign, which leveraged the concept that after a hard day's work, it was time to relax and enjoy a Miller beer. "It's Miller Time" is a beautiful, simple slogan that activates positive feelings of quitting time, triggers the beer consumption period and ties in the brand name - all in one easy-to-remember unit. This is not about product features, how the beer is made or purity or taste. These elements are already known to consumers. "Miller Time" triggers the brand and payoffs at the relevant time association.

Smart marketers appreciate the key role that emotions play in brand choice. Consumers consciously and subconsciously evaluate choices based on the expected emotional payoffs from their choices. Emotionally-rich brands such as Starbucks, iPod, Hallmark, eBay, Blackberry, Nike, Viagra and Virgin have earned great equity and business success. These brands satisfy many emotional desires while avoiding the use of a strongly-stated unique selling proposition (USP). They also seem to avoid reference to product features and prefer to support the attitudes and emotions associated with the brand experience.

Further, these successful brands don't use narrow definitions of their target groups. The power of their vagueness invites all types of consumers to approach the brand and to create their own (varied) emotional payoffs. This is a BSP - a broad selling proposition!

A wonderful example is Apple's "silhouette" campaign for the iPod. The use of the silhouettes avoids defining who or what an iPod owner looks like. This brand has done a wonderful job of not targeting one age, gender, or cultural group, or any one type of music lover. In turn, this avoids alienating any potential customer and allows all consumers to see themselves as being a brand user. We can all approach the iPod brand to form our own personal emotional benefits. Apple is not telling us which one narrow USP should be considered and by which ideal target group.

Distinct groups

Although segmentation research allows us to place consumers into distinct groups and to put a descriptive label on each person, this is not a stable reality. All consumers have all emotional needs within them. To simply pick one strongest psychographic or attitudinal profile to label each person grossly misrepresents the multitude of values/beliefs we each hold and how our moods constantly alter them.

Our emotional desires fluctuate such that what appeals to one person in one need state might be less appropriate for the same person for a different need state. Instead of segmenting people into distinct groups (is he Dr. Jekyll or Mr. Hyde?), brand managers should identify the different need states in all consumers. The goal is to promote which emotional needs the brand can satiate -- hopefully it is more than just one!

Already know

So many established mature brands continue to spend money telling consumers about product features that they already know. Such brands need to change their goals towards activating or triggering these brand beliefs at the right time, with the right emotional promise. If a consumer knows some fact about a brand but fails to think of the brand's emotional promise then the brand will not be considered. The brand must be triggered and come to mind in order for it to be evaluated. This is well beyond a focus on brand features and a USP. It is about highlighting when you want the consumer to think of your brand with the emotional payoffs they seek.

A consumer-centric approach to marketing requires a better appreciation of how emotional associations drive consumer behavior, with less emphasis on USPs, less focus on segmentation, and a better appreciation of triggering. How do you do all that? Below are some suggestions for brand managers drawn from my research at Ipsos and found in my book, *Gimme! The Human Nature of Successful Marketing*:

• Be fresh and original. For something to stand out and register in our long-term memories, it needs to be somewhat irregular. The Aflac duck is one example of a brand that has done a great job of leveraging uniqueness and irregularity to engage the brain.

• Simple is good. Our brains are bombarded with stimuli. Our firm's experience has shown that advertising messages served up in units, slogans and stories win out over fragmented-if-attractive alternatives. Simple, emotional enriched memory units get into long-term memory better.

• Enhance the brand with marketing properties. Brands that use devices like icons, mnemonics, spokespeople, cartoon characters and other extra properties often get great results. Consider Tiger Woods for Nike, the Aflac duck, the Michelin Man and the little Tetley Tea Folk. Each has added a personality and something more to evaluate than the basic functionality of the product.

• Enhance the brand with the human senses. For example: Johnson & Johnson's Baby Powder offers a unique smell; Perrier water comes in a distinctive green pear-shaped bottle; Pepto-Bismol is a shocking pink. In these examples, the brand is creating and leveraging elements beyond what is necessary for product performance. These extra senses offer more for consumers to latch onto and allow the brand to be stored in more parts of the brain, in the different centers for touch, taste, vision, sound and so on. | Q

Name:	Kelly
Age:	37
Profession:	Mother, Web Designer
Earnings:	$38,000, part time
Location:	Park Slope, Brooklyn
Reads:	Architectural Digest
Watches:	Never Mind the Buzzcocks on BBC
Listens to:	Garrison Keillor, every Saturday
Thinks:	Her avatar's hair should be longer
Feels:	Your client's brand…

"Gets me"

"Makes me feel good about myself. Reflects who I am and who I want to be."

As a marketing researcher, it's vital to understand Kelly. And to find others like her who are passionate about your client's brand. But people with eclectic interests can't always be found in homogeneous sampling sources. Just because they buy diapers or fly a particular airline doesn't mean they're right for your sample.

You need a sampling provider who understands and appreciates the complexity of people. And the complexity of sampling. A partner to consult with you on your questionnaire. To help refine issues with language, lifestyle, logic or length. Even let you pre-test questions or screen respondents in advance.

SSI has worked for 30 years to perfect sampling. While serving more than 1,800 clients and the best marketing research firms worldwide. In more than 50 countries and dozens of languages.

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take a survey but are not allowed to continue and when they encounter a technical error. For Barker, the greatest frustrations in online survey taking are when surveys are closed when she opens the e-mail invitation, and extensive screening questions that lead to a, "Sorry, you are not eligible for this survey."

SSI researchers asked Barker if she was ever confused by the surveys or the language used. "Only if the survey uses language I don't understand. One question I got was about what sort of broadband connection I had. The answer list was a lot of technical gobbledygook to me. It didn't let me say I didn't know, so I just picked one to move on in the survey," she said.

SSI's research also addressed how being on multiple panels affects survey results. SSI found that just because a respondent belongs to multiple panels does not necessarily mean they generate bad data. Findings from studies in the U.K., France, Germany, Australia and the Netherlands of members of multiple panels show that these respondents are no more motivated by money than those on a single panel; do not take too many surveys; do not complete surveys faster than those on a single panel; and pay as much attention as anyone else.

It's interesting to note that people said they join other panels because sample suppliers restrict the number of survey opportunities.

Other key findings:

Respondents rarely let another person take a survey for them; respondents rarely find the fastest way through a questionnaire just to collect the reward; respondents rarely answer a survey question untruthfully on purpose; and 70 percent of respondents admit they have, on occasion, stopped paying attention to a survey when it is boring, too long or uninteresting and 58 percent have abandoned a survey under these conditions.

Researchers can keep respondents engaged by asking sensible questions in a straightforward manner and telling the truth about how much time it will take to complete the survey. For more information visit www.sureysampling.com.

High gas prices tighten wallets; retailers feel the pinch

New York-based Nielsen Company conducted a survey to determine how consumers compensate for high prices at the pump and found that many retailers are suffering the effect of overall consumer cutbacks and a growing affinity for one-stop shopping. Results are based on Nielsen Homescan survey responses from nearly 26,000 U.S. consumers, geographically and demographically representative of the total U.S. population. The survey was conducted in December 2007, when regular gas averaged $3.06 per gallon.

The survey finds that 49 percent of U.S. consumers are reducing their spending to compensate for rising gas prices, up four points from June 2007. Consumers are also battling high gas prices by combining shopping trips and errands (70 percent), eating out less (41 percent) and staying home more often (39 percent).

"Our research shows consumers are adjusting their spending to a significant degree in order to counterbalance rising gas prices," says Todd Hale, senior vice president of consumer shopping and insights, Nielsen Consumer Panel Services. "Large numbers of consumers eating out less and staying home more often signal a tough year for some restaurants, but there may be an opportunity for consumer packaged goods manufacturers and retailers to find continued growth in healthy, at-home meal solutions and at-work meals."

Nielsen's survey finds that record-high gas prices likely contributed to 2007's less-than-stellar holiday sales season. Sixty percent of consumers surveyed said they had less money to spend during the holidays due to increased gas prices, and 44 percent of consumers reported they planned on spending less money on holiday gifts in 2007 as compared to the year prior.

"Unlike 2005 and 2006, gas prices didn't drop in the fourth quarter of 2007 to enable consumers to do their typical holiday binge buying," says Hale. "That said, our research shows a jump in consumers shopping on the Internet as a way to deal with high gas prices. This should be a wake-up call for manufacturers and retailers alike to step up their direct-to-consumer efforts and utilize the Internet to communicate directly with consumers in 2008, emphasizing value, variety and convenience."

Nielsen finds that gas prices are impacting where consumers shop, with 27 percent of consumers reacting to gas prices by shopping more at supercenters, megastores and big-box stores, where more items needed are in one store.

"Although recent store expansions mean that supercenters are closer to more shoppers, nearly a third of households still travel 11 miles or more to a supercenter, and high gas prices will likely reduce the number of quick trips these households make. Supercenter retailers will need to entice shoppers with stronger earning power who are less vulnerable to high gas prices," says Hale.

Increased fuel prices are resulting in more coupon clipping, with 25 percent of consumers using coupons to save money, up from 20 percent in June 2007. Twenty-three percent of consumers indicate they will buy less-expensive grocery brands to deal with higher gas prices, signaling a possible boost for private-label or store-brand products and lower-priced branded products.

"Manufacturers and retailers need to be alert to the fact that consumers are looking to save by altering where they shop, how they shop and what products and brands they buy. Value, convenience and competitive pricing will be more important than ever in the year ahead," says Hale. For more information visit www.nielsen.com.

Multichannel campaign tracking shakes interactive marketers' confidence

Most marketers say they don't have much confidence in their ability to get the most out of their digital marketing efforts, with social networking claiming a top spot of both major uncertainty

and major tracking efforts in the future.

Cambridge, Mass., marketing consulting company Sapient revealed the results of its annual Interactive Marketing Survey, which is designed to understand how marketers are implementing and tracking campaigns, the challenges they face and how they plan to allocate marketing spend across channels in 2008. The national survey is based on 120 senior-level respondents, all of whom are either directly or indirectly responsible for managing digital marketing budget allocation across multiple channels.

The Interactive Marketing Survey revealed that marketers lack the tools necessary to optimize their marketing efforts across the full spectrum of digital channels. Specifically, more than half the respondents felt only "somewhat confident" or "not confident at all" in their organization's abilities to track campaigns across multiple channels in real-time, with only 19 percent reporting the ability to make campaign changes in less than 24 hours.

While social networking was cited as the least "trackable" digital channel, according to the survey, it was the channel with the largest anticipated increase in marketing analytics spend for 2008. Only 12 percent of respondents tracked social networking campaign performance in 2007; in 2008, 42 percent anticipate using analytics to track this channel. E-mail (32 percent) and search (30 percent) were cited as the two channels that marketers were most confident in their ability to track

Three of the most major concerns were cross-channel measurement, shifting campaign spending in less than 24 hours and fear of recent acquisitions causing companies to be ignored or forgotten.

Nearly half of the respondents said they do not believe campaign data provided to them evenly measures and compares performance across all digital channels. Difficulty in comparing metrics across channels is the most common hurdle to accuracy in this area, cited by 28 percent of respondents.

Only 19 percent of respondents said they could make changes in campaign spending in less than 24 hours; the rest would need a couple of days or more. In the fast-paced social networking world, this inability to move quickly could become a big issue for marketing organizations, if not properly addressed.

Marketers are concerned about the wave of acquisitions involving Microsoft, aQuantive, Google, Double Click and others. Forty-one percent of survey respondents fear being lost in the shuffle with thousands of other clients as a result of consolidation in the online advertising industry. For more information visit www.sapient.com.

High-value consumers now expect cross-channel shopping

Sterling Commerce, a Dublin, Ohio, AT&T Inc. subsidiary, released the results of a recent survey that shows how consumers want to interact with retailers across channels. The survey found that "high-value" consumer groups – higher-income consumers, college graduates and younger consumers – have made cross-channel shopping a standard, indicating to retailers that achieving cross-channel execution can increase consumer loyalty and share of wallet. Increasingly, consumers are using the Web as a first touchpoint and want to channel-hop to complete their purchases, making integration across channels essential to retail success.

The survey, which polled 1,005 adults between January 18 and 20, 2008, found that nearly two-thirds (64 percent) of all respondents went online before making a purchase in the past three months. That percentage was even higher for "high-value" consumers, such as those with household incomes of about $75,000 (81 percent), college graduates (78 percent) and consumers age 25 to 34 (77 percent).

The survey also queried consumers about which cross-channel activities they deemed to be most important. The top three were: the ability to return merchandise to a store even if it was purchased via telephone or online (81 percent "very important/important"); the ability to pick up merchandise at a store after ordering online (56 percent "very important/important"), and store pickups are particularly important to younger adults (69 percent of those 25 to 34 years old); and the availability of gift registry information in the store, online and over the telephone (56 percent "very important/important"). As with store pickups, having gift registry information available in multiple channels is particularly important to those 25 to 34 years old (66 percent "important").

Shoppers are hopping channels to gain more value out of their interactions with a retailer. In turn, the retailer has the opportunity to gain customer loyalty and share of wallet. The Web is becoming an important first touch-point, often serving as a research tool before a store purchase, according to more than half (57 percent) of the survey respondents. In addition, nearly one-fourth (24 percent) of respondents reported using a coupon or rebate offer found online. One out of six consumers (18 percent) checked an online gift registry as part of the purchase process.

The percentages are higher for the "high-value" consumer groups. Among those with incomes of $75,000 or more, 77 percent conducted research online in advance of an in-store purchase, 32 percent used a coupon or rebate found online, and 25 percent checked an online gift registry within the past three months. Among those who are college graduates, 74 percent conducted research online in advance of an in-store purchase, 31 percent used a coupon or rebate found online, and 21 percent checked an online gift registry within the past three months.

Consumers also are expecting away-from-home access to the Web to enhance their shopping experience. One-third of consumers consider it important to have access to an online kiosk while shopping in the store to conduct product research (37 percent); to have access to their online account while shopping in a store to view items they have tagged online (36 percent); and for call center personnel to have a record of what they have been researching online (32 percent). For more information visit www.sterlingcommerce.com.

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intervals.

Separately, Harris Interactive has unveiled the Harris Interactive commitment model in Singapore, the first research framework that is designed to allow businesses to understand and measure the drivers of customer loyalty to retail and bank customers. The model implements loyalty simulators that allow businesses to see how changes in service delivery, facilities or any other aspect of business will affect their bottom line. Unlike earlier loyalty models, the commitment model is not built on satisfaction metrics alone. Instead, the model looks at the rational and emotional dimensions of commitment.

In addition, Harris Interactive has formed the Harris Interactive Complexity Science Practice, which will focus on the development and application of models that capture and represent the dynamics of complex adaptive systems, designed to help uncover interdependencies in business operating environments that drive growth and profitability. Areas of focus for the new practice include calculating the return on investment of marketing and advertising activity, market mix optimization, forecasting new product adoption, and business system dynamics modeling.

Complexity science is the science of complex adaptive systems designed to act independently, adapt to the environment (such as consumers, brands and firms in the marketplace), operate with a high degree of interdependence (often nonlinear) and produce outcomes that are emergent, rather than predetermined or imposed. Systems can consist of many variables that interact in interesting ways including brands, consumers, marketing activity, macroeconomic factors, competitive behaviors, government influence and even weather patterns. For more visit www.harrisinteractive.com.

SPSS offers the fifth Dimensions

Chicago software firm SPSS Inc. unveiled a new version of its suite, Dimensions 5.0. The new features, including question wizard, updated desktop author, a Web-deployed reporter and remote manager, are designed to ensure higher survey response rates, better access to respondents, easy creation of visually-appealing surveys and faster delivery of interactive results to decision-makers. Market research firms and commercial organizations may use Dimensions 5.0 with the goal of capturing survey data, engaging in customer dialogue and interactivity, conducting election polling and capturing census data. Dimensions 5.0 is integrated with Clementine data and text mining technology and the enterprise feedback management process. For more information visit www.spss.com.

New panel management software update from Nebu now available

Netherlands-based market research software company Nebu has released version 3.0 of its panel management software, Dub Knowledge. Dub Knowledge is designed to handle hundreds of samples per day with users located anywhere in the world. New and updated features in this release include grouped sampling facilities, automatic predictive sampling facilities, Demind-Stephan rim balancing algorithm, genetic algorithm-based rim balancing, multiple panel management capabilities, open interfaces to interviewing software systems and fully integrated mailing and returns management. For more information visit www.nebu.com.

BDRC offers research product for Middle East hoteliers

U.K.-based market research company BDRC is set to launch its proprietary Venue Verdict system in the Middle East. Venue Verdict is designed to provide a real-time customer feedback and competitor benchmarking service for hotels and other meetings venue operators, allow hoteliers to receive electronic information from event hosts providing both positive and negative comments and allow hotel management to see which aspects of the customer experience need to be improved in order to drive up customer loyalty for meetings and conventions. The Middle East launch will initially include hotels in Dubai, Qatar, Oman, Egypt, Kuwait, Jordan and Saudi Arabia. For more information visit www.bdrc.co.uk.

Briefly

Cognicient, a London-based research company, has launched its FusionPoint software system for managing and extracting new insight from existing research data. FusionPoint builds new insight streams and links data with other business information so clients can prove the value and predictability of their research. Through its ability to integrate traditionally disparate sources of information, FusionPoint is designed to allow companies to develop solutions for issues such as segmentation and targeting, advertising effectiveness, customer retention and churn management. For more information visit www.cognicient.com.

Chicago research company National Data Questing (NDQ) has changed its name and is under new ownership. NDQ, purchased by its senior management team, will now operate as Thoroughbred Opinion Research with regional offices in Chicago, Louisville, Ky., and Orem, Utah. Thoroughbred's services include three newly-equipped telephone interviewing facilities, Spanish-language interviewing capabilities, a permanent mall facility and access to Thoroughbred's secure Web reporting where clients can observe daily the progress of their research projects for all methodologies. For more information visit www.torinc.net.

Chicago research facility National Qualitative Centers has expanded and added an eighth qualitative suite with a separate entrance, a 700-square-foot conference room, an observation room that seats more than 18 clients and an attached, close-circuited lounge that seats up to 10 more. For more information visit www.nqcchicago.com.

London research firm TNS is set to launch NightLine, a one-day omnibus service in the U.K. to give clients a quick snapshot of consumer opinion and behavior. NightLine will survey a representative sample of 1,000 British adults. For more information visit www.tnsglobal.com.

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“What’s most impressed me about Decipher is their ability to say ‘yes’ and then follow through on the promise. They’ve executed complex online study designs and custom data delivery requests with rapid turnaround times, and I’ve yet to find a situation where they were unable to accommodate.”

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global trade association **GSM Association** (GSMA), Vodafone Group, Telefonica O2 Europe, T-Mobile International, FT-Orange Group and 3, have formed a working group to define common metrics and measurement processes for mobile advertising as part of the GSMA's Mobile Advertising Program. The working group is conducting a feasibility study, working with each company's U.K. operating business to explore the aggregation of appropriate information on a consistent and audited basis to deliver cross-operator metrics to the media and advertising communities. Operators plan to address the needs and priorities of the media community, such as the development of mobile advertising standards, a common currency for mobile, the delivery of standardized metrics and the measurement and validation of the reach and opportunity that the mobile channel presents. A key priority is the definition of a range of metrics that will describe the mobile audience and measure the effectiveness of mobile advertising.

Kinesis Survey Technologies, Austin, Texas, has been awarded the U.S. trademark for CAMI in support of branding for its survey solution for computer-assisted mobile interviewing. The Kinesis Survey CAMI survey solution combines an SMS Messenger with support for mobile browsers, allowing respondents to access and take surveys over the wireless Web. The Kinesis CAMI solution utilizes a worldwide device library for proper rendering of browser pages to ensure a satisfactory mobile browsing experience.

The Council for Research Excellence (CRE), an independent forum of media industry research experts created by New York research group **The Nielsen Company**, will commission a year-long study by Ball State University's Center for Media Design (CMD) to observe how individuals consume traditional and emerging video platforms inside and outside the home. The video consumer mapping study, to be conducted jointly by CMD and Sequent Partners, a New York brand and media metrics consultancy, is intended to establish how media, especially television and video, are consumed across multiple platforms, in order to develop best practices in the area of video media measurement.

Separately, The Nielsen Company has formed a national Hispanic/Latino Advisory Council (HLAC), a new independent advisory group established to help inform and enhance Nielsen's efforts to recruit, measure and accurately report on Hispanic television households in the U.S. According to Nielsen, Hispanics remain the fastest-growing national segment of the population, with television households increasing by 4.4 percent in 2007 vs. the previous year.

The HLAC is comprised of industry, community, and business leaders drawn from across the U.S.:

Jenny Alonzo, executive vice president, marketing/brand of Mio.TV.

Juan Andrade, president and executive director of the United States Hispanic Leadership Institute.

David Hayes-Bautista, professor of medicine and director of the Center for the Study of Latino Health and Culture at the School of Medicine, UCLA.

Ernest W. Bromley, chairman and CEO of Bromley Communications.

Jose del Cueto, CEO of Del Cueto Media Group.

Guarione M. Diaz, president and CEO of the Cuban American National Council Inc.

Henry Flores, senior policy analyst at the William C. Velasquez Institute.

Luís A. Miranda, Jr., managing partner of The MirRam Group Inc.

Lillian Rodríguez López, president of the Hispanic Federation.

Catherine M. Pino, co-founder and principal of D&P Creative Strategies.

Susana Valdez, chief of staff to Mayor Manny Diaz, City of Miami.

Acquisitions/transactions

Outsell Inc., a Burlingame, Calif.-based research firm, has acquired the business research division of **Edventures**, a Boston-based higher education research and consulting company. Outsell will assume responsibility for Eduventures' syndicated research business serving content, technology and services companies in the education industry. The companies will maintain independent consulting divisions focused on serving their respective clients; however, they will combine their resources as appropriate on custom client engagements.

Market Force Information Inc., a Boulder, Colo., research company, has acquired **Certified Marketing Services Inc.** (CMS), a Kinderhook, N.Y., marketing firm. The move allows Market Force Information to offer mystery shopping, direct customer feedback, on-site merchandising and analytics services from a single provider.

The management of Rotterdam-based **Global Data Collection Company** (GDCC) has established a majority shareholding in the company. The team increased its holding from 33 percent to 75 percent with an acquisition from fellow Rotterdam research company **BBI Group** for an undisclosed sum.

WPP Digital, the digital investment arm of London-based research company WPP Group (WPP), has acquired a stake in California Web analytics company **NuConomy**. The investment continues WPP's effort to strengthen its capabilities in digital media and research. NuConomy is expected to work closely with Kantar Group companies.

London research company **TNS** has acquired **Prospera Research**

AB of Stockholm, Sweden. The acquisition allows TNS to build further syndicated services in the finance sector and to extend these across the Nordic region and other markets in Europe.

Elmhurst, Ill., marketing firm **Maddock Douglas Inc.** has acquired Norwalk, Conn., marketing research firm **Markitecture** in a deal that will merge Markitecture's proprietary market research capabilities into the company's 3-2-1Launch! new product and services development division.

New York research group **Nielsen Company** has acquired Provo, Utah, analysis and software company **Audience Analytics** and its Audience Watch software. The Audience Watch software will become the primary delivery mechanism for the company's Nielsen DigitalPlus product line, which will provide analytics on tuning and interactive television usage based on set-top box data, as well as measurement of video on demand transactions. Nielsen will develop a single platform to integrate complex and varied data sets. This includes the company's television, Internet, mobile and consumer data, which are integrated for NielsenConnect products, and the TV/Internet convergence panel, which will provide a single-source view of the interactions between television viewing and in-home Internet usage.

Alliances/strategic partnerships

London research company **TNS** has established a preferred partner relationship with London data collection service provider **Livra Panels** to offer online access panel research services across Latin America.

El Segundo, Calif.-based satellite television service provider **DIRECTV Inc.** and London's **TNS Media Research** are developing a national opt-in audience measurement panel of 100,000 DIRECTV subscribers. With plans to introduce TNS DIRECTView in 2008, TNS Media Research intends to measure the total viewing, including the live and time-shifted (DVR) viewing of programs and commercials at a second-by-second interval, of 100,000 representative households within DIRECTV's national fooprint. DIRECTV has been utilizing TNS Media Research's audience measurement capabilities to better understand its customers' anonymous use of the interactive applications it offers. Additionally, TNS Media Research will be marketing the national panel. Using Bangalore, India-based media analysis and planning system company InfoSys, TNS Media Research will offer subscription services that are designed allow clients to directly access data to provide analyses of national viewing patterns.

Seattle software firm **QL2 Software** has partnered with Hendersonville, Tenn., lodging industry research firm **Smith Travel Research** (STR) to provide the hotel and lodging industry with a single source of market intelligence, combining STR's hotel performance data with QL2's real-time pricing data. This combination of historical revenue performance and forward pricing data is intended to help the industry make informed decisions on room rates, availability and future investment. The partnership will result in joint products offered to both QL2 and STR clients, combining each firm's existing products for the travel industry.

Los Angeles research company **OTX** (Online Testing eXchange) has partnered with Mexican research group **RVOX**. The partnership of the two firms includes industry and brand tracking, product and concept testing, copy testing and other methods of quantitative and qualitative research. The two firms plan to work together on large-scale custom pan-American and global projects and jointly build a national online consumer research panel that will be made available to their clients as well as to other online research firms.

New Rochelle, N.Y., product placement and branded entertainment valuation service provider **iTVX** has partnered with El Dorado Hills, Calif., research company **Marketing Evolution** to offer clients a turnkey solution for measuring the media and marketing values of branded integration deals. The new product, designed specifically for new product launches and brand repositioning, addresses the need for a "Total Entertainment Accountability and Measurement Solution" and is identified by its acronym TEAM Solution. The main objective of TEAM Solution is to assess both the media value through iTVX's Q-Ratio and marketing value through Marketing Evolution's ROMO valuation product. The Renuzit brand is the first to engage TEAM Solution for a new product launch featuring the TriScents air freshener integrated on A&E and HGTV.

London-based market research company **Synovate** has integrated its business in Belgium, combining its research operations in Ghent with the local Synovate Censydiam practice in Antwerp.

Association/organization news

The Pharmaceutical Marketing Research Group (PMRG) has appointed Scott Lauder of Dresher, Pa., research company TVG Marketing Research & Consulting as director of its education committee.

Awards/rankings

Austin, Texas, research software company **Inquisite** has been honored as a "Best Solution" at the 2008 Government Technology Conference Southwest for its work with the Texas Department of Information Resources. Texas DIR used Inquisite's survey system to facilitate statewide IT assessments.

New accounts/projects

New York research company **Arbitron Inc.** has announced that Bala Cynwyd, Pa.-based radio group **Entercom Communications Corp.** has signed a multiyear contract for Portable People Meter (PPM) radio ratings services. The agreement takes effect as the new audience ratings technology is commercialized in each of 14 markets encompassed in Arbitron's current PPM rollout plan. The agreement covers all 64 stations owned by Entercom in the radio markets scheduled to convert to PPM measurement by the end of 2010.

Separately, the **Philadelphia Phillies** baseball team has signed a multiyear contract for PPM. Arbitron will generate reports of pre-, post-, in-game and total broadcast listening estimates for the Phillies 2007, 2008 and 2009 baseball seasons.

In addition, **Midwest Television Inc.** has signed a multiyear contract for PPM for KFMB-AM and KFMB-FM. The agreement will take effect as and when Arbitron commercializes the new audience ratings technology in San Diego.

AT&T Advertising & Publishing, a St. Louis Yellow Pages publisher, has adopted a new research strategy to improve the information provided to advertisers about the usage and value of its advertising products. AT&T has retained Irving, Texas-based M/A/R/C Research to measure usage in 275 directory areas. The markets will be supported by three types of quantifiable research: call-tracking studies, proprietary print and Internet Yellow Pages (IYP) studies. The research will measure a rolling 12-month usage average in addition to other key metrics that give a complete picture of how consumers are using AT&T Real Yellow Pages in their buying decisions.

San Mateo, Calif., marketing research company **Coremetrics** has been hired to replace **Publishers Clearing House's** (PCH) existing Web analytics solution and is expected to provide insight into the company's multiple Web properties. PCH aims to understand where each online visitor's interest lies within its range of magazines, merchandise, contests and coupons and provide them with relevant offers.

London-based communications company **BT** has appointed London research company **Kantar Group** to manage its brand and customer tracking research. BT's consumer brand and tracking research is now managed by Kantar company Millward Brown. In addition, U.K. market research company **Research International** has been appointed to undertake BT's concept screening on an exclusive basis.

Interviewer Web from Montreal research software company **Voxco** has been selected by Paris software supplier **Sage France** to replace its current CAWI application.

20/20 Research Inc., a Nashville marketing research firm, has signed a long-term agreement with **Harborside Sales Group** (HSG) of Baltimore. HSG will license 20/20's Qualboard research software to include in its new ClientView program. Qualboard is used for conducting online qualitative research using a bulletin-board platform. In this discussion-like format, participants respond to questions from the moderator, as well as to comments from the other participants. Harborside's ClientView is developed to support the qualitative research needs of financial services firms.

Doylestown, Pa., data collection company **Images To Data** was selected by the **American Red Cross** to provide printing, scanning and verification services relating the REDS-II donor study. Under a multiyear agreement, Images To Data will design and print the automated REDS-II survey instrument to be completed by blood donors at several participating collection centers throughout the country. Donor surveys will be processed and the data will be validated utilizing specific business rules and error-checking software developed by Images To Data.

San Diego-based **CIC Research** has selected Montreal software specialist Voxco's telephony platform.

New companies/new divisions/ relocations/ expansions

London market research company **Millward Brown** and Indian research company **IMRB** have created a joint venture in India. Millward Brown will have a majority share in the business, which will open new offices in Mumbai, Delhi and Bangalore, and the new company is to be called Millward Brown India. The joint venture has been established to market Millward Brown's quantitative solutions. Specialist practices within the Millward Brown group, including Millward Brown Optimor, Millward Brown Precis, Millward Brown Firefly (Qualitative) and Dynamic Logic, will be set up later on and will operate independently of the joint venture.

New York market research firm **Interpret LLC** has opened a London office and appointed Christina Costa as European research director.

Redlands, Calif.-based geographic information system (GIS) company **ESRI** has opened a Sacramento, Calif., office. The new location is intended to allow ESRI to better support its users in central and northern California and Nevada.

During its restructuring, New York pharma research company **P\S\L Group** has appointed Paul Barnes to the new position of group president in charge of its recently-restructured research division. The division, P\S\L Research Group, comprises P\S\L Research

International, P\S\L Research Europe and P\S\L Research Canada.

Dallas-based **Common Knowledge Research Services** has expanded its Seattle office. While the company has maintained sales capabilities in its Seattle office for the past five years, newly-added project management and quality control capabilities will provide multiple-time-zone coverage.

Company earnings reports

Harris Interactive, Rochester, N.Y., announced results for its second quarter and first half of fiscal 2008 ended December 31, 2007.

Fiscal second quarter revenue was up 13 percent. Consolidated pro forma organic revenue dropped 2 percent, mainly due to a 5 percent decline in North America. Fiscal second-quarter operating income was $3.5 million, down 39 percent when compared with operating income of $5.7 million reported for the same period in the previous year. Net income for the quarter was $2.1 million, or $0.04 per diluted share, down 42 percent when compared with the second quarter of fiscal 2007. Adjusted EBITDA, calculated by adding back $1.1 million of non-cash stock-based compensation expense, was $7.1 million or 11.3 percent of revenue, down 14 percent when compared with $8.2 million of adjusted EBITDA, or 14.7 percent of revenue reported for Q2FY07.

Fiscal first-half operating income was $5.1 million, down 24 percent when compared with operating income of $6.7 million last year. Net income for the first half was $3.2 million, or $0.06 per diluted share, down 29 percent when compared with the first half of fiscal 2007. For the half, adjusted EBITDA, adding back $2.2 million of non-cash stock-based compensation expense, was $12.1 million or 10.2 percent of revenue.

Norwalk, Conn.–based **IMS Health** announced fourth-quarter 2007 revenue of $605.9 million, up 11 percent or 6 percent on a constant-dollar basis, compared with revenue of $543.5 million for the fourth quarter of 2006. Operating income in the fourth quarter of 2007, including the previously announced restructuring charge of $88.7 million, was $47.0 million compared with $125.7 million in the year-earlier period. When adjusted for the restructuring charge, operating income for the 2007 fourth quarter would have been $135.7 million. Fourth-quarter 2007 diluted earnings per share was $0.09 on a GAAP basis, compared with $0.32 in the prior-year quarter. The restructuring charge of $88.7 million reduced fourth-quarter earnings per share by $0.32. When adjusted for this item, and the phasing of tax benefits and foreign exchange hedge gains and losses, earnings per share on a non-GAAP basis for this year's fourth quarter would have been $0.43. Net income on a GAAP basis also reflects the restructuring charge and was $18.0 million in the fourth quarter, compared with $65.5 million in the year-earlier quarter. When adjusted for this item, and the phasing of tax benefits, tax provisions, and foreign exchange hedge gains and losses, net income on a non-GAAP basis for the 2007 fourth quarter would have been $83.4 million, an increase of $2.2 million. For the 2007 full year, revenues were $2,192.6 million, up 12 percent or 8 percent constant dollar, compared with revenue of $1,958.6 million in 2006. Operating income for 2007 was $393.3 million, compared with $444.2 million in 2006. Operating income for 2007 included the $88.7 million restructuring charge taken in the fourth quarter. When adjusted for the restructuring charge, operating income for the 2007 full year would have been $482.0 million. For the 2007 full year, diluted earnings per share on a GAAP basis was $1.18, compared with $1.53 a year earlier. In addition to the restructuring charge in the fourth quarter of 2007, earnings per share for 2007 also included a tax charge in the third quarter. When adjusted for these items, on a non-GAAP basis, earnings per share for 2007 would have been $1.53, $0.12 above diluted earnings per share on a non-GAAP basis of $1.41 in 2006. Net income on a GAAP basis was $234.0 million, compared with $315.5 million in 2006. In addition to the restructuring charge in the fourth quarter of 2007, net income for 2007 also included a tax charge in the third quarter. When adjusted for these items, on a non-GAAP basis, net income for 2007 would have been $304.3 million. Preliminary net cash provided by operating activities on a GAAP basis was $467.1 million. Preliminary free cash flow on a non-GAAP basis for the full-year 2007 was $283.4 million.

Omaha, Neb.-based information firm **infoUSA** announced results for the fourth quarter and full fiscal year 2007 ended December 31, 2007. During the fourth quarter of 2007, infoUSA delivered record revenue of $185.8 million, which includes $67.0 million for the marketing research group that was established in December 2006 and has grown through acquisitions during 2007. Excluding the marketing research group, the company's revenue was $118.8 million for the fourth quarter of 2007, compared to $110.5 million for the same period in 2006, an increase of 8 percent. InfoUSA's earnings per share for the fourth quarter of 2007 were $0.22 versus $0.20 in the fourth quarter of 2006. EBITDA for the fourth quarter was $35.9 million versus $29.2 million in the fourth quarter of 2006.

InfoUSA achieved full year revenue of $688.8 million, which includes $221.5 million for the marketing research group. Excluding the marketing research group, the company's revenue was $467.3 million for fiscal year 2007, an increase of 11 percent over revenues of $420.2 million in fiscal year 2006.

Revenue for the full year included $9.9 million received from the final settlement of a lawsuit. InfoUSA's fourth-quarter operating income was $26.0 million, compared to $21.6 million in the fourth quarter of 2006.

For the full year, infoUSA's operating income increased to $88.3 million, which includes $9.2 million from the Naviant lawsuit settlement, net of related expenses, from $64.6 million in 2006. For the full year, infoUSA's earnings per share were $0.76 as compared to $0.61 in 2006. EBITDA for full year 2007 was $127.8 million, which includes $9.2 million from the Naviant settlement, as compared to $94.0 million in 2006.

Chicago-based **comScore** reported revenue of $25.3 million for the quarter ended December 31, 2007, an increase of 39 percent compared to the fourth quarter of 2006 and an increase of 13 percent over the third quarter of 2007. This revenue performance is at the high end of the company's previous guidance of approximately $25.0 million to $25.3 million in revenue for the fourth quarter 2007 revenue.
Fourth-quarter 2007 GAAP net income was $12.7 million, up $10.1 million compared to $2.6 million in the fourth quarter of 2006. ComScore reported revenue of $87.2 million for the year ended December 31, 2007. Revenue rose approximately 32 percent over 2006 reflecting strong growth in the company's subscription-based and project-based businesses, increased penetration of its existing customer base, the addition of new customers at a rapid pace and strong performance in the U.S. and in international markets. GAAP net income for the year ended December 31, 2007 climbed to $19.3 million, an increase of $13.6 million compared to $5.7 million for 2006.

Paris-based **Ipsos** has posted 2007 full-year revenue of EUR 927.2 million, up 8.2 percent compared to 2006 on the back of organic growth of 9.1 percent. Strong performances in Asia-Pacific, Latin America and Europe more than offset a slight decline in the group's North American revenue. Ipsos' marketing research operations performed strongly, with revenues of EUR 445 million and organic growth of 7 percent, against a small increase in revenues during 2006. Media research revenue increased 13.5 percent to EUR 66.7 million, of which 12 percent resulted from organic growth. Customer satisfaction research climbed 13 percent to EUR 91.9 million. Opinion and social research rose 7.5 percent to EUR 123.9 million, and advertising research increased 10 percent to EUR 199.7 million, of which 14.5 percent resulted from organic growth.

Wilton, Conn.-based **Greenfield Online Inc.** reported $38.4 million total net revenue for the fourth quarter of 2007, as compared with $29.5 million for the same period in the prior year, for an increase of $8.9 million, or 30.2 percent, of which approximately $1.8 million, or 6.1 percent, was due to favorable currency effects. The Internet survey solutions segment's total net revenue was $26.7 million for the fourth quarter of 2007, including favorable currency effects, as compared with $22.4 million for the same period in the prior year for an increase of 19.2 percent. The comparison shopping segment's total net revenue was $11.7 million for the fourth quarter of 2007, including favorable currency effects, as compared with $7.1 million for the same period in the prior year for an increase of 65.0 percent. Total gross profit was $29.7 million or 77.4 percent of revenues for the fourth quarter of 2007, as compared with $22.5 million, or 76.2 percent of revenues, for the same period in the prior year. Operating income was $6.1 million for the fourth quarter of 2007 or 15.8 percent of revenue, as compared to $5.2 million, or 17.5 percent of revenue, for the same period in the prior year. Net income for the fourth quarter of 2007 was $4.6 million as compared with a net income of $3.5 million for the same period in the prior year.

Boston research company **Kadence Group** reported growth of 18 percent in 2007, as its global revenue increased to $9.3 million from $8 million in 2006. The U.S. office achieved the largest rise in annual revenue (28 percent) and the U.K. and Asian regional offices also reported growth.

New York research company **Arbitron Inc.** has announced results for the quarter and year ended December 31, 2007. On January 31, 2008, Arbitron concluded the sale of Continental Research (Continental), its U.K. custom research business. As a result, Continental's financial results have been reclassified as a discontinued operation for all periods presented. In 2007, Continental Research generated revenue of $13.6 million and a net loss of $0.3 million. During the fourth quarter of 2007, Continental generated a net loss of $0.5 million on revenues of $4.6 million.

Net income for the quarter was $3.7 million, or $0.13 per diluted share, compared with $4.9 million, or $0.17 per diluted share, for the fourth quarter of 2006. For the year, net income decreased 20.7 percent to $40.2 million compared with $50.7 million in 2006. Earnings per diluted share in 2007 were $1.35, compared with $1.68 per diluted share last year. Increased costs and expenses for both the quarter and full year were due to planned expenditures for Portable People Meter (PPM) ratings service panel builds. For the fourth quarter 2007, Arbitron reported revenue from continuing operations (excluding Continental) of $80.1 million, an increase of 5.4 percent over revenue of $76.0 million during the fourth quarter of 2006.

Costs and expenses for the fourth quarter increased by 10.6 percent, from $72.3 million in 2006 to $79.9 million in 2007, due to planned expenditures for the PPM ratings service panel builds.

Earnings before interest and income tax expense (EBIT) for the quarter were $6.2 million, a decrease of 41.7 percent compared with EBIT of $10.7 million for the fourth quarter of 2006. Interest expense for the quarter declined to $0.4 million from $3.2 million in 2006 due primarily to the early retirement of a $50 million outstanding senior secured note in October 2006.

Income from continuing operations for the quarter was $4.1 million or $0.14 per diluted share, compared with $4.7 million, or $0.16 per diluted share in the fourth quarter of 2006.

For the year ended December 31, 2007, revenue from continuing operations was $338.5 million, an increase of 6.0 percent over revenue of $319.3 million for 2006. PPM radio ratings panel builds contributed to an increase in costs and expenses for the year of 14.7 percent, from $243.4 million in 2006 to $279.2 million in 2007. Non-cash equity compensation in both 2007 and 2006 was $6.5 million. Equity in net income of affiliates for 2007 declined 47.6 percent, from $7.7 million in 2006 to $4.1 million in 2007 due to the formation of the Project Apollo LLC in the first quarter of 2007.

EBIT decreased 24.3 percent from $83.7 million in 2006 to $63.3 million in 2007. Interest expense for the year declined to $0.7 million from $6.1 million in 2006, again largely the result of the 2006 early retirement of the then outstanding senior note.

Income from continuing operations for 2007 decreased to $40.5 million, or $1.37 per diluted share from $50.3 million, or $1.67 per diluted share, in 2006.

Chicago software firm **SPSS Inc.** has announced results for the fourth quarter and fiscal year ended December 31, 2007.

SPSS reported fourth quarter revenues of $79.6 million, up 12 percent from $71.1 million in the same quarter of 2006. New license revenues were $42.1 million, up 18 percent from $35.8 million in the fourth quarter of 2006. Operating income increased 26 percent to $14.7 million, or 18 percent of total revenues, from $11.7 million, or 16 percent of total revenues, in the same quarter of 2006. These results include charges for share-based compensation of $2.2 million and $1.7 million in 2007 and 2006, respectively. Results for the fourth quarter of 2007 also include $2.7 million in charges for previously-announced organizational restructuring and research and development facilities consolidation compared with $0.9 million of similar charges in the same 2006 quarter.

Net income for the fourth quarter of 2007 was $10.0 million, or $0.50 per diluted share, compared to $2.0 million, or $0.10 per diluted share, for the same period in 2006. Results for the fourth quarter of 2006 included a non-cash, non-operating income tax charge of $6.9 million, or $0.33 per diluted share.

SPSS reported maintenance revenues in the 2007 fourth quarter of $30.5 million, up 10 percent from $27.8 million in the same quarter of 2006. Maintenance revenues in the 2007 fiscal year were $118.3 million, 41 percent of total revenues and an 8 percent increase from $109.3 million in 2006.

For the 2007 fiscal year, revenues were $291.0 million, an 11 percent increase from $261.5 million in the 2006 fiscal year. New license revenues were $144.0 million, up 15 percent from $125.0 million in 2006. Operating income for the 2007 fiscal year increased 44 percent to $49.5 million, or 17 percent of total revenues, from $34.3 million, or 13 percent of total revenues, for the 2006 fiscal year. These results include charges for share-based compensation of $7.8 million and $6.7 million in 2007 and 2006, respectively. Results for the 2007 fiscal year also include charges of $4.6 million for organizational restructuring and research and development facilities consolidation compared with similar charges in 2006 of $2.2 million, including $1.3 million for the write-off of obsolete purchased software.

Net income in 2007 was $33.7 million, or $1.65 EPS, compared to 2006 net income of $15.1 million, or $0.73 per diluted share. Fiscal year 2006 results included a non-cash, non-operating income tax charge of $6.9 million, or $0.34 per diluted share.

Cash at December 31, 2007 was $306.9 million, up from $140.2 million at December 31, 2006 and $297.1 million at September 30, 2007. Cash flow from operations in the fourth quarter of 2007 was $33.4 million compared to $22.3 million for the same quarter in 2006. For the 2007 fiscal year, cash flow from operations was $84.9 million up from $48.2 million for the 2006 fiscal year.

National Research Corporation, Lincoln, Neb., announced results for the fourth quarter and year ended December 31, 2007.

Annual revenue increased by 12 percent. Annual net income increased by 16 percent. 2007 commercial contract value increased 18 percent, and 2007 net new contracts increased 23 percent. The quarterly dividend increased to $0.14 per share.

Revenue for the quarter ended December 31, 2007, was $10.8 million, compared to $10.3 million for the same period in 2006. Net income for the quarter ended December 31, 2007, was $1.1 million, or $0.16 per diluted share, compared with net income of $1.0 million, or $0.14 per diluted share, in the prior year period.

Revenue for the year ending December 31, 2007, increased 12 percent to $48.9 million, compared to $43.8 million for the same period in 2006. Net income for 2007 increased 16 percent to $6.8 million, resulting in $1.00 per basic and $0.98 per diluted share, compared with $5.9 million, or $0.86 per basic and $0.85 per diluted share, in 2006.

Research Now, London, has announced its unaudited preliminary results for the year ended October 31, 2007. Research Now reports revenue of £25.8 million, including OpenVenue, for an increase of 168 percent compared with the previous year. Organic revenue growth was up 100 percent compared with the previous year. Adjusted profit before tax increased 79 percent to £2.5 million. Reported profit before tax was £0.3 million. Adjusted basic earnings per share increased 34 percent to £11.9 million. Basic earnings per share were (£3.2).

Names of Note

continued from page 12

its Moscow offices as head of Synovate Healthcare Russia.

U.K.-based research agency *Ipsos Health* has named **Fred Lamanna** senior vice president in the U.S. Separately, *Ipsos Interactive Services* in North America, New York, has promoted **Jean Davis** to division president.

New York research company *Arbitron Inc.* has appointed **Tom O'Sullivan** to the new position of vice president, diary market development.

Dallas research firm *e-Rewards Inc.* has promoted **Craig Stevens** to the position of executive vice president, sales. **Kurt Knapton** is also transitioning to become a founding member of the e-Rewards' board of advisors.

Siobhan Treacy has been named operations manager by London-based research company *Cognicient*.

Linda Tholstrup-Smith has been hired as senior research manager of *Bellomy Research Inc.*, Winston-Salem, N.C.

Horsham, Pa., research company *LRA Worldwide Inc.* has added **Jeff Ganis** to its practice as a senior research consultant.

Dallas-based *Common Knowledge Research Services* has hired **Dale Todd** as business development director for the firm's Northeast office in New York City. Common Knowledge has also added several new staff members from the Seattle office of *Informa*, which recently closed: **Laura Arendall**, project manager; **Betsy Roberts**, senior client services manager; and **Krys Postma**, account manager.

Research Now, London, has appointed **Peter Blansjaar** to lead operations, project delivery and quality assurance systems in the Asia-Pacific region. It also named **Phil Rance** to the new position of U.K. commercial director.

M/A/R/C Research, Irving, Texas has promoted **Gwen Amador**, **Lisa Smith**, **Jonathan Hook** and **Frank Wyman** to vice president.

Little Falls, N.J., research firm *Kline & Company Inc.* has hired **Gianluca Gallori** as a director in its management consulting practice.

Market Research International, London, has named **Jean Black** regional director.

Jupiter, Fla., *Quick Test/Heakin Research Inc.* has promoted **Iris Blaine** to director, 3Q research solutions.

Camm Epstein has been hired as vice president, market research, for health care co mmunications company *MediMedia,* Yardley, Pa.

Dallas research company *Common Knowledge* has appointed **Joe Phair** as business development director for the firm's Western sales territory and **Dale Todd** as business development director for the firm's northeast office in New York.

2008

Telephone Facilities Directory

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The 2008 Directory of Telephone Interviewing Facilities was compiled by sending listing forms to firms we identified as having permanent telephone interviewing facilities. This year's directory lists nearly 700 firms, arranged geographically. In addition to the company's vital information, we've included a line of codes showing the number of interviewing stations, the number of stations that use computer-aided interviewing (CATI), and the number of stations that can be monitored on-site and off-site.

A searchable version of this directory is available on our Web site at www.quirks.com.

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

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

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The Parker Group, Inc. has three inter-connected interviewing centers - 150 stations in Birmingham, Ala., 48 stations in Tucson, Ariz. and 32 stations in upstate New York. We provide extensive CATI telephone and Internet interviewing services, both business-to-business and political/public opinion field services, to the survey research community. Data processing including banner books. We are capable of national, regional or local. Fast, accurate turnaround.

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BRC Field & Focus Services has 43 years of experience providing a full spectrum of high-quality telephone data collection services in Arizona, U.S. and Latin America. BRC has 32 CATI stations with ACS WinQuery 6.0 (Fully backwards compatible), remote monitoring, and 80 percent of our carefully-trained interviewers are skilled in both English and Spanish. Specialties include Latino, executive, B2B, medically- at-risk populations, Native Americans, low incidence. Expert professional design, processing, analysis services also available.

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For over 25 years, Precision Research has been servicing the market research community with an array of full-service custom research solutions. We are a firm that is comprised of research professionals who are dedicated to providing our clients with custom, quality research in the areas of consultation, survey design, field and tab, analytical and statistical services. We provide our clients with personalized service, attention to detail and a dependable research partner, all at a competitive price.

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mail@technometrica.com
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Raghavan Mayur, President
35-35-35-35

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Ph. 973-829-1030
jvc@tmrinfo.com
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Joseph V. Calvanelli, Jr.
50-50-50-50

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Jennifer Paulson, President
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Ph. 609-882-9888
lwelsh@olsonresearchpa.com
www.olsonresearchgroup.com
Tricia Kerins, Director, Field Services
20-20-20-0
(See advertisement on p. 15)

Southern New Jersey
(See Philadelphia, PA)

New Mexico

Albuquerque

Sandia Market Research
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Albuquerque, NM 87110
Ph. 800-950-4148 or 505-883-5512
edbergo@nmia.com
www.sandiamarketresearch.com
Janine Vita, General Manager
14-14-14-14

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info@swpm.biz
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Bruce Poster, President
8-8-8-0

New York

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Jeanette Levin, President
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David Levin, Vice President
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geraldgoldhaber@yahoo.com
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Arun Vishwanath, Research Consultant
6-6-6-6

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15-15-15-15

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(See advertisement on p. 73)

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Ebony Marketing Research, Inc.
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Bruce Kirkland, Vice President
90-0-90-0

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65-60-60-60

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Opinion Access Corp.
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Ph. 718-729-2622 or 888-489-DATA
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Joe Rafael, Chairman
200-200-200-200

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research@sisinternational.com
www.sisinternational.com
Ruth Stanat, President
20-20-10-10

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Andrea Waller, President
25-0-25-25

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Chintan Turakhia, Sr. Vice President
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Keith Strassberg, Exec. Vice President
550-550-550-550

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Joe Snyder, Dir. of Ops/Sr. Cnsultant
125-125-125-125

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www.leibowitz-research.com
Teri Leibowitz, President
15-10-15-0

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Pat Rierson
300-300-300-300

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George Matijow, President
10-10-10-0

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gchristensen@bgai.net
Gordon Christensen
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85-85-85-85

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Linda Finch
192-24-192-192

Ohio

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Irwin Weinberg
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focusmark@fuse.net
Kim Sharp
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Cincinnati, OH 45202
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info@burke.com
www.burke.com
Steve Clark, V.P. Data Collection
105-105-105-105
(See advertisement on p. 23)

Calo Research Services, Inc.
10250 Alliance Rd.
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www.fieldsresearch.com
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27-27-27-27

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25-25-25-25

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research@focusgroupsofcleveland.com
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Amy Morris, President
12-3-10-0
(See advertisement on opposite page)

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Cleveland, OH 44125
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nsrc@nsrc.com
www.nsrc.com
Lauren Wagner, Mgr. Customer Relations
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Richard Stock, Director
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29-29-29-29

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www.mdcresearch.com
Lester Harman
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Linda Zinck, Dir., Consumer Research
25-0-25-0

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12-12-12-12

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www.marketingsolutionscorp.com
Greg Surovcik, Vice President
25-25-25-25

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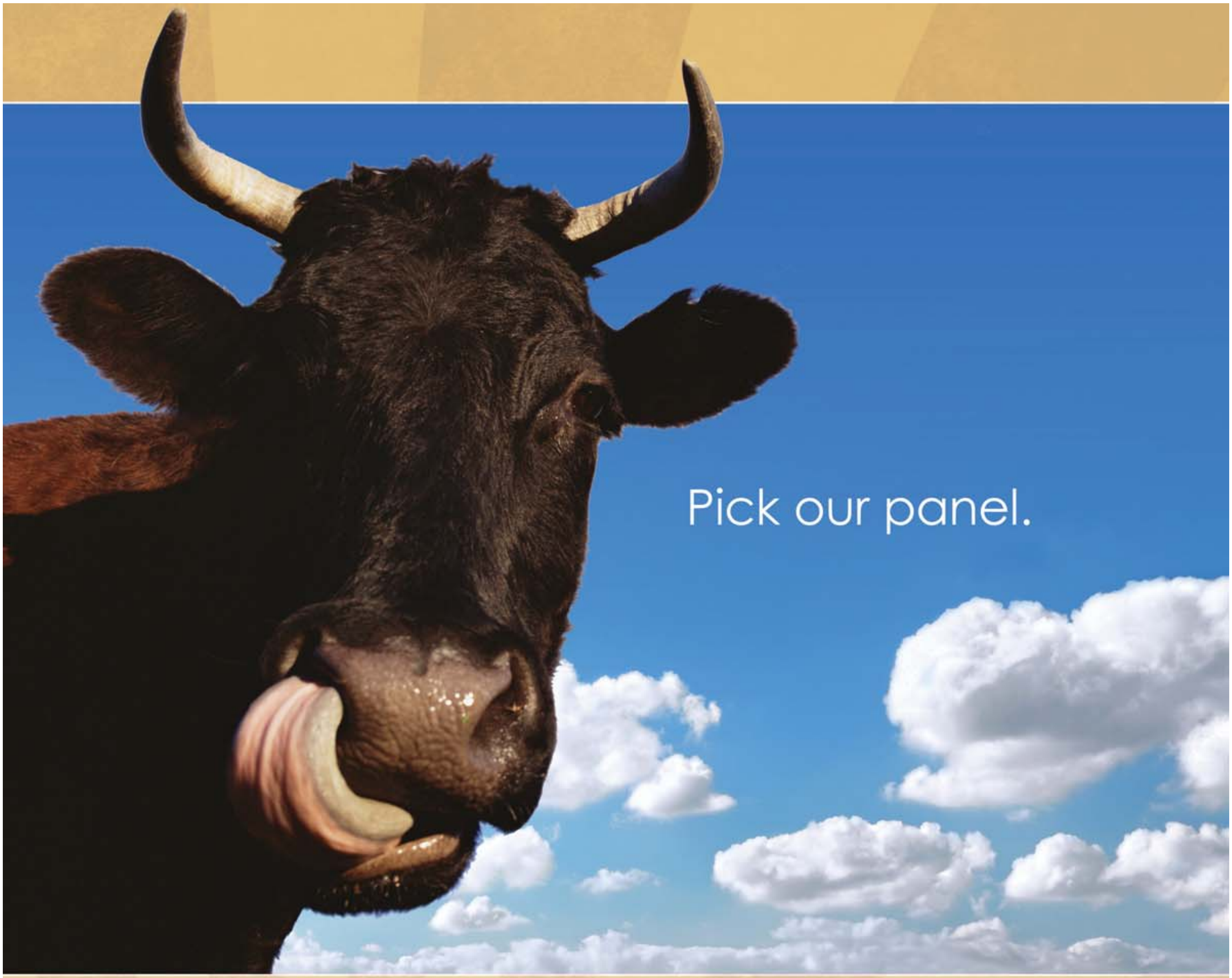

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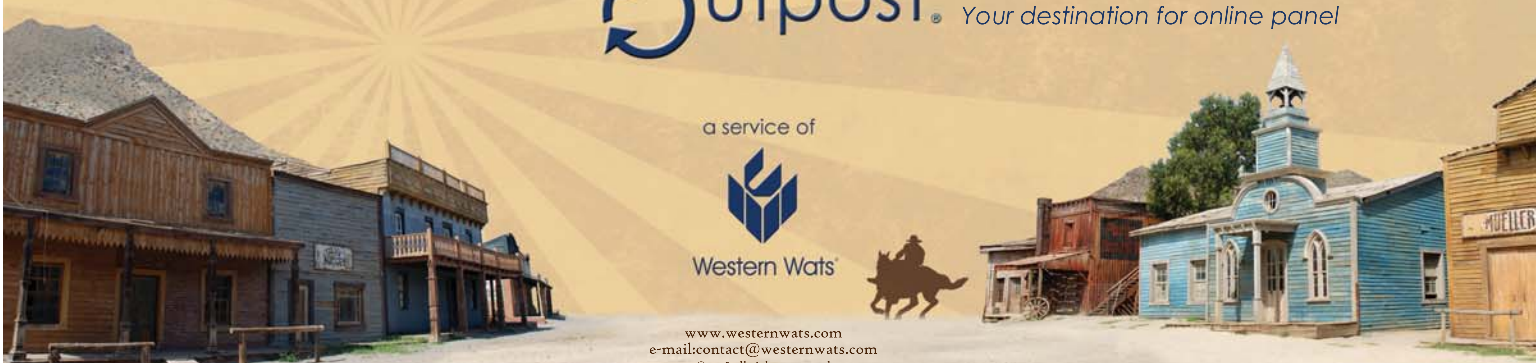

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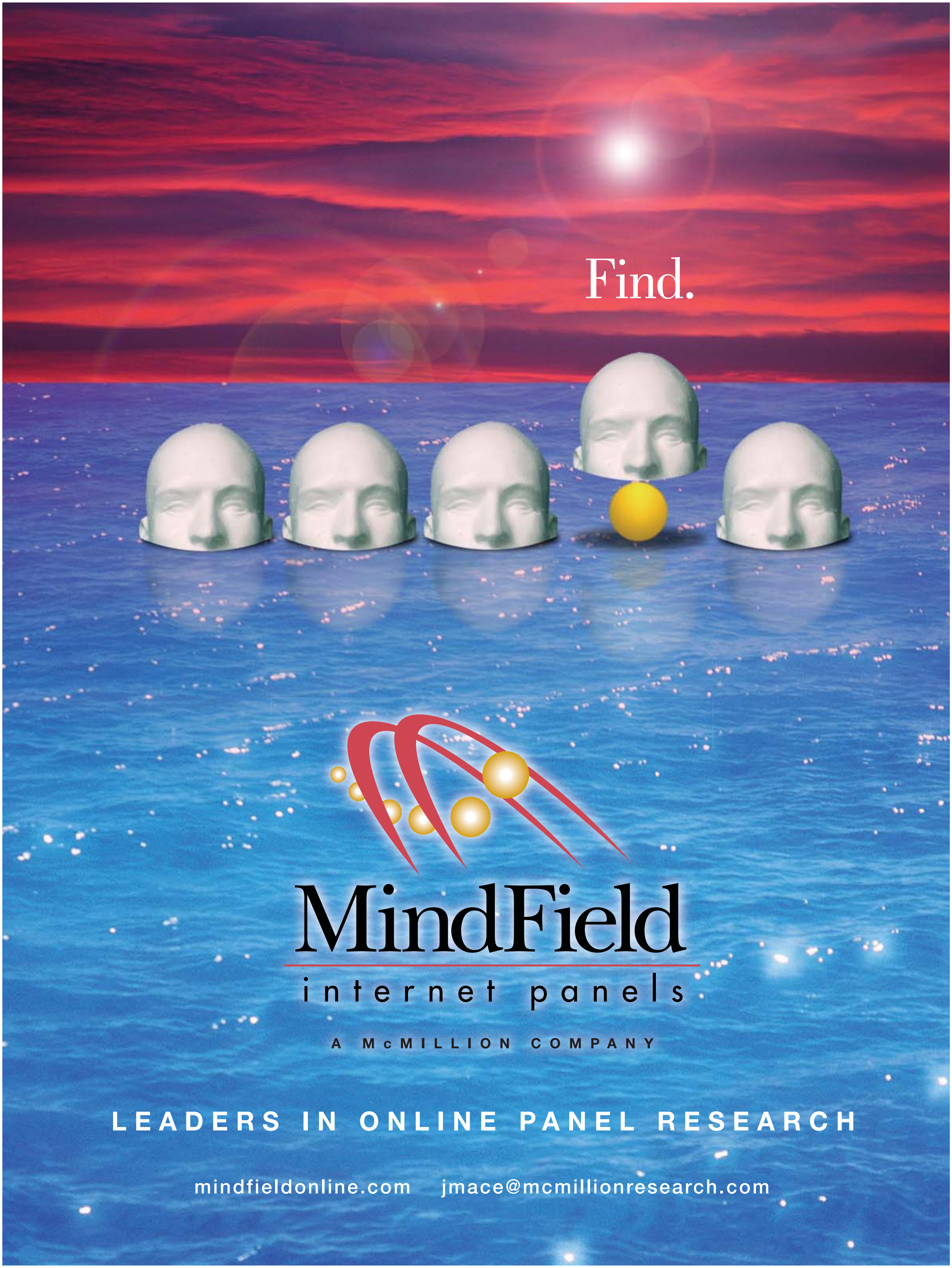
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Trade Talk

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makers or food companies?

Gavan Fitzsimons, a professor of marketing and psychology at Duke's Fuqua School of Business, and Andrea Morales, an assistant professor of marketing at Arizona State's W.P. Carey School of Business, looked at these very questions and published their work in the *Journal of Marketing Research*.

They found that products such as lard and feminine napkins evoke "feelings of disgust" that can reduce the appeal of other products they may inadvertently come in contact with in shoppers' grocery carts or on store shelves.

Fitzsimons and Morales aimed to gauge the effect that these "disgusting" products have on consumers' opinions of other products in their grocery carts. They performed a series of experiments in which participants observed food products placed close to or touching a distasteful product.

Their work suggests that companies may want to reconsider their packaging and shelf-positioning strategies in order to safeguard their brands from the effects of offending products.

Other products that can evoke feelings of disgust in consumers include trash bags, cat litter, diapers, cigarettes, mayonnaise and shortening. "Because these products are so common, consumers are likely to experience feelings of disgust on routine shopping trips," Fitzsimons said in an article on the research posted on the ScienceDaily site.

In all cases, products that touched or rested against disgusting products became less appealing than products that were at least an inch away from the offending products. The effect lingered: The participants who were asked more than an hour after observing the products how much they wanted to try a cookie were less likely to want it if the package of cookies had been in contact with a package of feminine napkins.

While this behavior is perhaps misguided, to the researchers, it's not completely irrational, as it likely derives from basic instincts that caution us against eating foods that have come in contact with insects or other sources of germs. "Our experiments demonstrated quite clearly that caution about eating contaminated food is simply misapplied to contexts where real contamination is not possible," Morales said.

Especially vulnerable

The researchers say food items sold in clear packaging are especially vulnerable to the effects of what they call "product contagion," which occurs when one product's negative properties are transferred to another.

In one experiment participants viewed packages of rice cakes - some wrapped in transparent packaging and some in opaque paper carrying a "rice cakes" label - that were touching a container of lard. The rice cakes in the clear packaging were later estimated by respondents to be higher in fat than those in the opaque packaging. "The product packaging and positioning led the participants to view the rice cakes as taking on fat content from the lard," Morales said.

How can marketers combat product contagion? The study pointed to opaque product packaging, which was seen as a sufficient barrier to prevent the spread of unpleasantness. "Prior marketing research on packaging has held that clear packaging helps sell products because it allows customers to visualize what they are buying," Fitzsimons said. "Based on this research, I would caution marketers that they need to be attuned to not only what is inside their packaging but also to what is around a product that could negatively affect its sales." | Q

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trade talk

By Joseph Rydholm
Quirk's editor

Two vexing questions have been put to rest

One of the many things I love about my job is that it allows me to stumble upon answers to some of the (usually trivial) questions that pop into my head while I'm out in the world being a consumer.

In addition to clearing space for more minutiae, solving these mysteries also provides a measure of comfort: There are other souls out there who have pondered the same issues, and they've actually taken the time to conduct research on the matter.

Over the past several months, two long-pondered queries have been answered.

First, as a veteran clipper of grocery store coupons, I've always wondered if there were shoppers who habitually only buy the items featured in the weekly coupons, in theory gaming the system by short-circuiting the loss-leader concept. Further, if there were a lot of such shoppers out there, could their actions have a tangible impact on a store's bottom line?

As reported by online news source Newswise, a study found that these "extreme cherry pickers" - grocery shoppers who buy only sale items and nothing else - do not harm retailer profits.

The study was conducted by Debabrata Talukdar, associate professor of marketing in the University at Buffalo School of Management, K. Sudhir, professor of marketing at the Yale School of Management, and Dinesh K. Gauri, assistant professor of marketing in Syracuse University's Whitman School of Business, for a study published in the *Journal of Marketing Research*.

The academics looked at several variations of cherry picking to determine the impact on retailer profits and on consumer savings. The research found that extreme cherry pickers barely affected profits. "Grocery retailers' fear of extreme cherry pickers is overblown," said Talukdar in the Newswise article. "Extreme cherry pickers make up only 1.2 percent of grocery store customers and they only reduce profits less than 1 percent."

Some cherry-picking shoppers buy sale items at only one store over a period of time, while others visit different stores across an area to buy sales items.

So is all that effort worth it for consumers? Apparently yes. The professors determined that cherry pickers saved more money than shoppers who hadn't actively searched for promotions. The extreme cherry pickers obtained 76 percent of potential savings, while the store-loyal cherry pickers obtained 68 percent of potential savings in the marketplace. Cross-store cherry pickers over time obtained 66 percent of potential savings. Sheer chance led even those shoppers who were not searching for promotions to capture 54 percent of potential savings.

Unsavory associations

My second question has come up frequently as I've maneuvered the aisles of my local SuperTarget: Does the vast array of products available at the average megamart – everything from motor oil to Bibb lettuce – ever create unsavory associations in consumers' minds as they look in their shopping carts? And, if so, are there any downsides for consumer product

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