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Marketing Research Review

APRIL 2009

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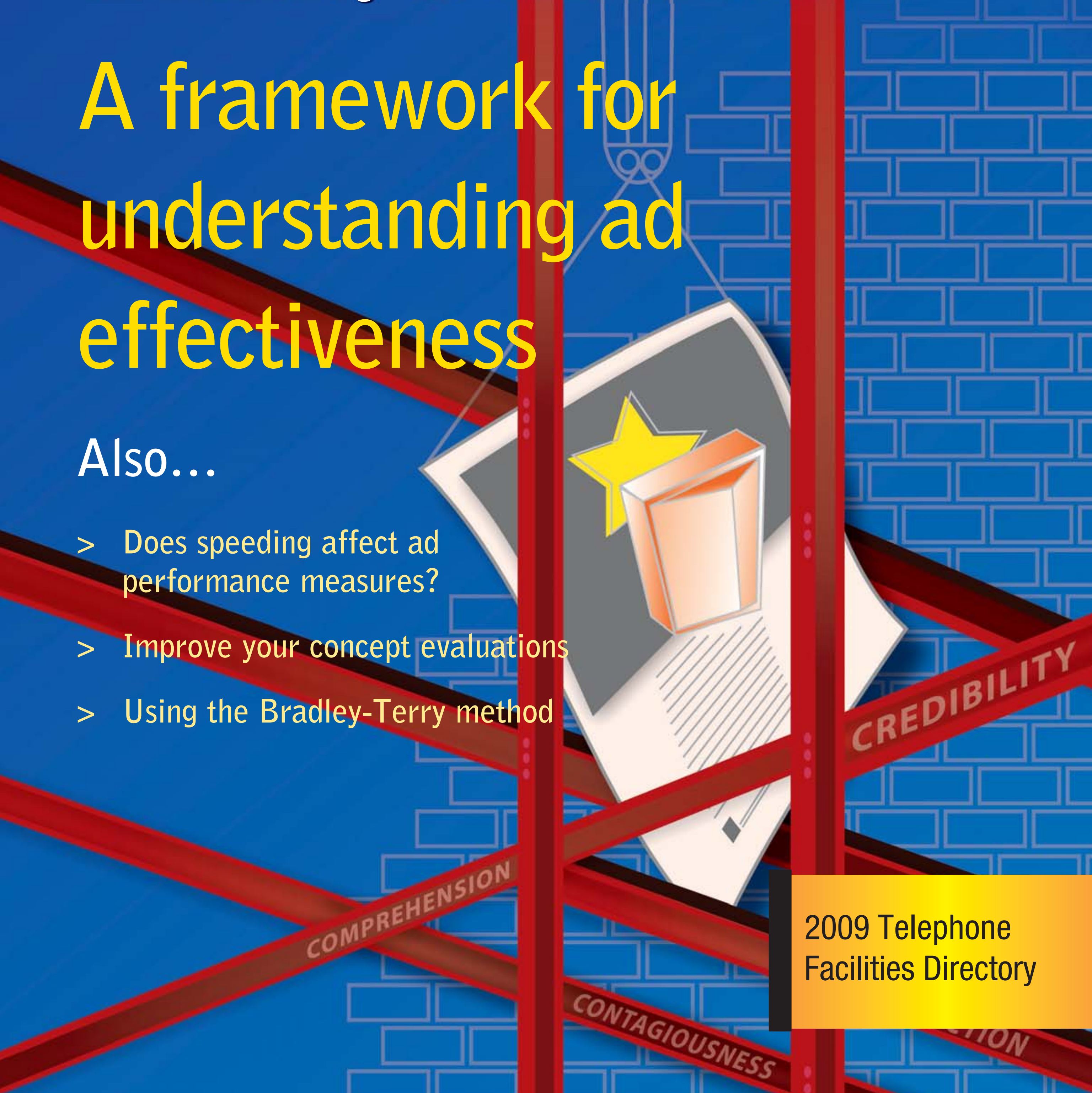
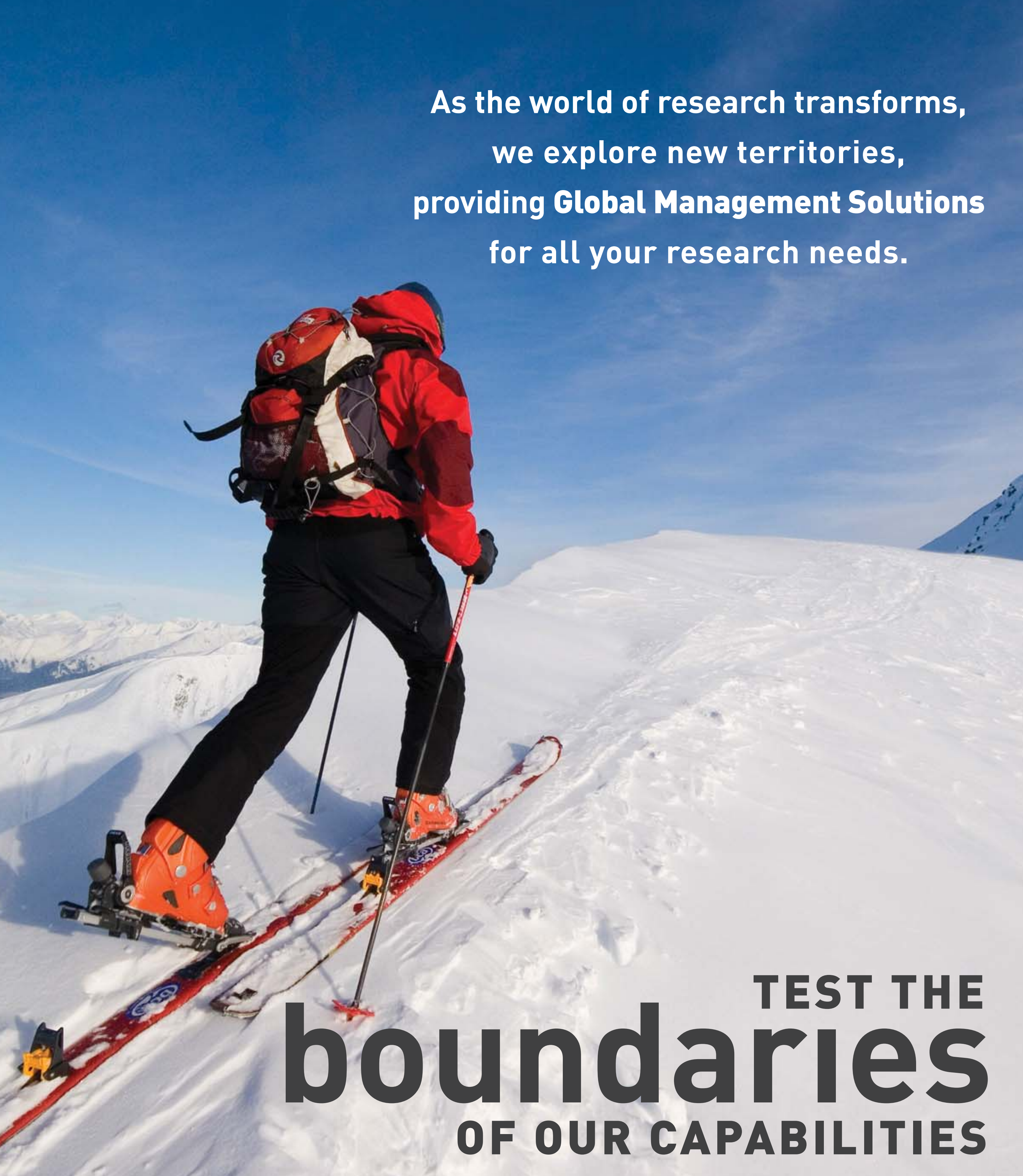


2009 Telephone Facilities Directory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Volume XXIII Number 4

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in case you missed it...

news and notes on marketing and research

Great minds taste alike

Having a "taste" for the finer things or fashion or football may be more literal than you think, and researchers may have uncovered yet another way to segment an audience - by what they eat.

DervalResearch, Amsterdam, the Netherlands, has discovered a link between the perception of taste and an individual's job and hobbies. Scientific research conducted between November 2008 and January 2009 on 500 people from over 25 countries may have opened the door to new product development and commercialization based on a perception of taste being directly linked to color and shape preferences.

Diana Derval, president and research director of DervalResearch, refers to the composite taste preferences as the Hormonal Fingerprint. "Our perception, skills and physical traits are greatly determined by our hormones while we are still a fetus," said Derval. "Based on this Hormonal Fingerprint, we can predict an individual's preferred food, beverage, color and shapes as well as his perfect matching job, hobby or even partner.

"For example, we have discovered that nurses and rugby men are more likely to be non-tasters - that means they host fewer taste buds on their tongue and can therefore eat or drink almost anything including bitter, spicy and very sweet food. On the other hand, entrepreneurs and ballerinas are super-tasters and more picky with food."

The components of a Hormonal Fingerprint are simultaneously unique and predictable, the company maintains, and may in the future be used to help predict where new product launches might succeed or fail.

Remote-Free TV comes at a premium

In an approach it's dubbing Remote-Free TV, Fox is running shorter commercial breaks on some programs in the hopes of keeping viewers' attention and minimizing channel surfing.

According to Brian Stetler's February 12, 2009, article "Fox TV's Gamble: Fewer Ads in a Break, but Costing More," in *The New York Times*, Fox has charged movie studios, wireless companies and retailers a premium price for commercials on just a few Fox programs to partly compensate for a lighter commercial load so that viewers can enjoy one 60-second commercial break (comprised of two 30-second ad spots) instead of what often feels like an eternity.

But has the new format worked? Fox says the shorter commercial breaks indeed keep viewers more engaged and improve brand recall for advertisers. Viewers are also less likely to change the channel or fast-forward past the ads, but not to the degree that Fox would have liked; the network does not appear to be recouping all the costs of the experiment. For Fox to break even on the format, the premium pricing for the ads has to outweigh the revenue that is lost by showing fewer commercials. Asked whether that was happening, Jon Nesvig, president of sales, Fox Broadcasting, said "the jury is still out on the economics." It is unclear whether Remote-Free TV will be back for another season.

The Fox format includes several advertisers in each hour but limits the total number of commercials. When Fox pitched the strategy to advertisers in May 2008, Fox Chairman Peter Liguori said that fewer commercials would present fewer reasons for viewers to "to grab the remote and change the channel." Liguori said the format could potentially "redefine the viewing experience."

Some advertisers have lauded Fox for taking a step toward reducing commercial clutter, but others have expressed skepticism that marketers experience sufficient benefits in exchange for the premium price that is being charged.

According to Nesvig, it is commonly accepted that the first position in a commercial pod is most effective for advertisers. The second-most effective position is the last commercial before the program resumes. Presumably viewers who are changing the channel, fast-forwarding their DVR or taking a break are exposed to the bookends of the commercial break. By shortening the commercial breaks, Nesvig said, "you basically have all first and last positions and you have lower clutter." With less clutter, in theory, there's better recall. "There will be ongoing attempts to keep commercial viewing as high as possible. It behooves all of us to keep changing the model," Nesvig said.

Twitter - a research panel waiting to happen?

Twitter.com has unexpectedly taken the online world by storm by offering a free social messaging utility for staying connected in real time. With the ability to update a "status" from a mobile phone, computer or any online portal, the common man and celebrities "tweet" alike, and Twitter's wide reach has piqued the interest of market researchers as a potential access point to a social network rich in tech-savvy and connected consumers.

The Silicon Alley Insider blog hosted a contest, titled "Create Twitter's Revenue Model," which invited contestants to come up with a business/revenue model to turn Twitter into a financially-viable social network. Silicon Alley's competition enticed contestants with promise that it would post the winner's plan and résumé on Alley Insider and e-mail the winning information to Twitter CEO Evan Williams. Chicago advertising agency Denuo, a division of Publicis Groupe, took top honors in the contest.

Denuo's Twitter revenue model suggests Twitter charge marketers for two things: access to opted-in users willing to field the occasional question from brands; and dashboard access to deep user analytics.

What Silicon Alley most liked about the plan was that it explained how ad agency executives have shown interest in paying sites like Twitter and Facebook to "anonymize" their data and open it up for mining; and a potential customer submitted it, which is another indication that there's real appetite for the product.

Criticism of Denuo's proposed model includes Twitter running the risk of being taken over by brands, so a limit or a cap to the amount of brand-related messages allowed may be required. For example, perhaps only 10 percent of messages can be from advertisers so that those who tweet less are not inundated with more ads than communication from their acquaintances.

Kosher products thrive on quality, not religion

Christians, Muslims, Jews and atheists alike are helping fuel the robust market for kosher foods, as the No. 1 reason people buy kosher is for food quality (62 percent), according to Chicago research company Mintel. The second-most common reason people say they purchase kosher food is general healthfulness (51 percent) and the third is food safety (34 percent). This contrasts sharply to the 14 percent of respondents who say they purchase kosher food because they

follow kosher religious rules. Another 10 percent buy kosher because they follow some other religious rules with eating restrictions similar to kosher.

"Kosher food has gained the reputation of being more carefully produced and thoroughly inspected than non-kosher food," says Marcia Mogelonsky, senior analyst at Mintel. "With recent food-safety scares causing people to rethink even the most familiar food products, we can expect more adults to turn to kosher food as a way to ensure food safety and quality."

The market for kosher food is strong and growing in the U.S. Sales of kosher foods totaled $12.5 billion in 2008, a 64 percent increase since 2003. Furthermore, Mintel's survey revealed that 13 percent say they intentionally purchase kosher foods. Over one in four (28 percent) new food and drink products launched in the U.S. during 2008 bore a kosher symbol. Kosher has been the top individual claim on new food and drink in the U.S. since 2005. For more information visit www.mintel.com.

Doritos' Super Bowl ads paid off in brand-improvement points

In a post-Super Bowl survey, Reston, Va., researcher ComScore asked respondents whether the various ads improved, damaged or left unchanged their perception of the advertised brands. Doritos scored the highest net improvement score of 42 percentage points, followed by Bud/Bud Light (40 percentage points) and Denny's (39 percentage points), whose offer of a free Grand Slam breakfast to everyone in America on Tuesday, February 3, apparently resonated with the public.

GoDaddy.com had the highest brand damage score (15 percent), which resulted in the lowest net brand improvement score (13 percentage points). In fact, GoDaddy.com was the only advertiser with a brand damage score higher than 6 percent. Nevertheless, GoDaddy.com registered the third-highest ad recall (53 percent of respondents), trailing only Bud/Bud Light (72 percent) and Doritos (59 percent).

Prior to the game, when asked which three companies' ads they were most looking forward to, respondents demonstrated a strong preference for beverage brands. Specifically, the most anticipated brand's ads were those from Bud/Bud Light (76 percent of respondents), followed by Coca-Cola (48 percent) and Pepsi Co. (43 percent).

When asked post-game which ads they would like to see again, respondents selected the same top five advertisers from the most-anticipated list, though in a slightly different order of preference. The dark horse of the Super Bowl ad race turned out to be Doritos, which proved even more popular than its high expectations, with 34 percent of respondents indicating they would like to see the brand's ads again (second only to Bud/Bud Light, 42 percent). For more information visit www.comscore.com.

The money's not gone, just hiding

Contrary to the current thinking that the pool of money available for consumers to invest has dried up, a new study from Target Research Group, Nanuet, N.Y., shows that one out of five Americans has moved from stocks and mutual funds into more liquid safe havens (e.g., checking accounts, savings accounts, CDs and money markets). The study also revealed that consumers are less concerned with return and more interested in safety.

"Financial decision makers in some 90 million homes have transferred assets to safe havens. Considering the average amount transferred per household, we estimate some $7.5 trillion has created a pent-up demand for new investment and credit products. Despite the gloom and doom one hears every day, companies that can meet consumers' demands with low-risk products should be able to take advantage of this opportunity," says Greg Spagna, Target Research Group.

Among all credit card owners, the main financial goal is to pay down/off debt (28 percent). In addition, when the data are viewed by those who are Credit Worthy (the 40 percent of households, as defined by Target Research Group, who have no trouble paying their balances) and Credit-On-The-Edge (the 60 percent who would be challenged to pay off

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names of note

The MSR Group, an Omaha, Neb., research company, has promoted **Julian Vermaas** to senior research director. The MSR Group has also hired **Sara Martens** as vice president and **Erica Jones** as assistant research analyst.

Vermaas **Jones**

Schlesinger Associates, an Edison, N.J., research company has hired **Amber Leila Jones** as executive vice president to lead its online community InspireOpinions.

Research International, Chicago, has made 12 promotions: **Peter Burgi** to vice president; **Elena Izakson** to vice president, marketing; **Matt Day** and **Matt Hanlon** to senior research executive; **Oliver Pangborn** to associate creative director; **Christine Kiriazes**, **Nyssa Packard** and **Jaclyn Peek** to account executive; **Kale Lepak** to senior research manager; **Yan Zhao** to research manager; **Lupe Martinez** to senior advisor, human resources; and **Mark Yates** to manager, IT.

Chicago research company *Synovate* has made several new appointments within its international offices. **Diana Arday** has been named associate director, qualitative field services and patient research, of Synovate Healthcare, London. **Daniel Finder** has been named managing director of Synovate's Buenos Aires, Argentina, division. In Synovate's Sao Paolo, Brazil, division, **Manuel Lopes** has added the title of director of operations to his position as managing director. Also in Sao Paolo, **Jesus Caldeiro** has been named director, client services and practices.

Kadence, a London research company, has made three appointments at its U.S. headquarters in Boston: **Mary Jo Emery** has been named vice president, international client services; **Kristin Farrell** has been named project manager; and **Lynn Burke** has been promoted to vice president, client service operations.

G & S Research, Indianapolis, has promoted **Mike Bandick** to senior vice president and **Wendy Martin** to senior manager, client services.

Bandick **Wells**

Angela Wells has been promoted to vice president, sales and marketing, of Atlanta research company *CMI*.

Verve Partners, a London research company, has hired **Jeannie Arthur** as partner, co-founder and U.K. managing director and **Peter Chopra** to lead the strategic finance and international development division.

Innerscope Research, New York, has hired **Caleb Siefert** as senior scientist, statistical analyses and study designs in emotional response measurement.

Vovici, a Dulles, Va., research company, has promoted **Nancy Porte** to vice president, operations.

Mike Read has been promoted to senior vice president and managing director of *comScore Europe*, a London division of Reston, Va., research company comScore.

McCallum Layton, a Leeds, U.K., research company, has promoted **Julia Horlov** to partner.

Richard Thornton has been hired to open a London office for *Cint*, a Stockholm, Sweden, research company.

Thornton

Maritz Research, St. Louis, has named **Dorothy Long** research manager, pharmaceuticals group.

Cassie Punches has been named director, product management, at New York research company *Authentic Response*.

Abt Associates, a Cambridge, Mass., research company, has named **Valerie DeFillipo** vice president, international business development and communications.

MarketTools, a San Francisco research company, has named **Cynthia McCloud** executive vice president and general manager, research solutions.

Dinko Svetopetri has been appointed to assume full management of *Ipsos Poland*, a division of Paris research company Ipsos. Separately, *Ipsos North America*, a New York division of Ipsos, has appointed **Renee Smith** as vice president, global operations.

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product and service update

Ipsos debuts brand research tools

Ipsos Marketing, a London branch of Paris research company Ipsos, has launched two brand research tools: PerceptorPlus and BrandStretch.

PerceptorPlus is designed to advise consumer product companies on how to optimize consumer share of choice and increase loyalty to their brands using a predictive model that considers a brand's composition, namely its functional properties, brand image, emotional needs served and personality. It also assesses brand value by taking into account the importance of price to predict brand choice.

BrandStretch aims to help consumer product companies identify categories that represent the best opportunities for extending their brands. The tool answers questions about the brand, its place in the market, the potential opportunities for extending into new categories, addressing new needs and the impact that extension would have on the brand. For more information visit www.ipsosmarketing.com.

Companies partner to offer personalized digital signage

TruMedia Technologies, a Tampa, Fla., research company, and dZine, a Belgian ad agency, have partnered to provide a targeted advertising solution by integrating TruMedia's PROM (proactive marketing solution) with dZine's out-of-home digital signage solution. The solution is designed to allow users of the dZine player to trigger advertising content change based on the demographic characteristics of the viewing audience.

The PROM logs viewers in front of the display using a structured feature in the dZine DISplayer. One can choose the data filters to perform targeted marketing. Statistics, created afterwards, show the relation between the played content and demographic composition of the viewer groups by timestamp. The Smart Scheduling system changes the actual playing content depending on the gender and age of the person(s) in front of the display. Conditions can be imposed so the right content is played depending on the gender or age of the audience. For more information visit www.tru-media.com.

Gongos introduces online community

Gongos Research, Auburn Hills, Mich., has debuted Consumer Village, an online community intended to provide companies with a way to conduct qualitative and quantitative research among consumers. Different from a consumer panel, Gongos established Consumer Village as a socially-interactive research network designed to create two-way relationships with consumers.

When used for custom online quantitative research, responses from community members are intended to help target consumer segments and mine insights over time. For exploratory research, flash polls generate reads on consumer attitudes or behavior, with responses emerging within 24 hours, and customized dialogues yield responses that average 70 words. For more information visit www.gongos.com.

Adaptive CBC examines buyer considerations

Sawtooth Software, Sequim, Wash., has released a new adaptive choice-based conjoint (ACBC) system. ACBC is used for studying how people make decisions regarding complex products or services, including price sensitivity, and then predicting their preferences. ACBC's question flow incorporates the theory that buyers make complex choices by forming a consideration set (typically using cutoff rules) and then choosing a product within that consideration set. It displays relevant products for respondents to consider by patterning them after the preferred product that respondents have first specified using a build-your-own exercise. ACBC aims to capture the specific "must-have" and "unacceptable" rules that respondents use to screen products into their consideration set. For more information visit www.sawtoothsoftware.com.

Confirmit has multimode SaaS on the horizon

Confirmit, an Oslo, Norway, research software company, has launched Confirmit Horizons, an on-demand, multimode platform for market research, customer feedback and employee feedback. Confirmit Horizons version 14 is a software-as-a-service (SaaS) solution intended to enable market research organizations to deliver multimode research using the Web, telephone interviewing, paper questionnaires, face-to-face interviewing and offline data collection methods.

Core to Confirmit Horizons is a new CATI module for telephone research, designed to give respondents choice when completing surveys and give supervisors capabilities to manage respondents, interviewers and calling activity. A new hosted telephony service is another feature, providing on-demand telephone interviewing. For more information visit www.confirmit.com.

Briefly

Edison, N.J., research company Schlesinger and Associates has launched InspireOpinions, an online patient health and wellness community, through its joint venture with Inspire, a McLean, Va., company that builds and manages online health and wellness communities.

InspireOpinions includes

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News notes

New York research company **Arbitron Inc.** has reached an agreement with the **Office of the Attorney General of Maryland** regarding the company's Portable People Meter (PPM) radio ratings services in Washington, D.C., and Baltimore. Arbitron has agreed to: recruit panelists using a combination of telephone-based and addressed-based sampling methods; use the address-based sampling technique for at least 10 percent of its sampling efforts by or before October 1, 2009 and at least 15 percent of its recruitment efforts by the end of December 2010; increase cell-phone-only sampling to at least 10 percent of all recruitment efforts by or before October 1, 2009, and at least 15 percent of all recruitment efforts by the end of December 2010; take all reasonable measures to insure a minimum sample performance indicator (SPI) of 15 percent and to obtain and maintain a minimum SPI of 17 percent by June 2010 with a target SPI for the market of 20 percent or higher; take all reasonable measures to ensure average in-tab rates of at least 75 percent for the overall persons age six and older, and to ensure that categories and subcategories comprising 10 percent or more of the radio population for the market fall within 85 percent of the overall 75 percent target; provide to Washington, D.C., market subscribers monthly reports detailing the PPM installed and in-tab sample sizes by individual zip code; take all reasonable measures to obtain accreditation for the PPM radio ratings service from the Media Rating Council; and include a disclaimer on written promotional material and Web sites indicating that PPM ratings are based on audience estimates and should not be relied on for precise accuracy or precise representativeness of the radio market.

Separately, Arbitron Inc. has reached two separate settlement agreements with **Ipsos S.A.**, **Ipsos America Inc.** and **Ipsos U.K. Ltd.**, and with **International Demographics Inc.** (aka The Media Audit). Both settlement agreements relate to the patent infringement lawsuit that Arbitron filed against Ipsos and The Media Audit on October 10, 2006, in the United States District Court for the Eastern District of Texas. The lawsuit alleged that the two companies infringed three U.S. patents relating to the PPM electronic audience measurement technology developed by Arbitron.

On October 23, 2008, Arbitron and The Media Audit entered into a settlement agreement in which The Media Audit acknowledged that the three Arbitron U.S. patents were valid, enforceable and not otherwise subject to any equitable

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Calendar of Events April-June

Photizo Group will hold its annual managed print services (MPS) conference on April 26-28 at the Omni La Mansion del Rio in San Antonio. For more information visit www.managed-print-services.com/conference.htm.

The AMA will hold a marketing research executive forum on May 3-6 at the Westin Michigan Avenue in Chicago. For more information visit www.marketingpower.com.

The QRCA will hold its first symposium on excellence in qualitative research, themed "Meeting Challenge. Achieving Success," on May 7 at the Hotel Intercontinental in Chicago. For more information visit www.qrca.org.

The Business Intelligence Group will host its annual BIG Conference 2009, themed "B2B Research: New Dimensions," on May 13-15 at the Marriott St. Pierre in Chepstow, Wales. For more information visit www.bigconference.org.

The International Mature Marketing Network and the Market Research Global Alliance will hold a workshop, themed "New Insights for Companies and Their Agencies: Targeting Boomers and Beyond," on May 15 from 7:30 a.m. to 5 p.m. at the Marriott Residence Inn Arlington in Arlington, Va. For more information visit www.immn.org or www.maturemarketing.com.

The AAPOR will host its annual conference on May 14-17 at the Westin Diplomat Resort and Spa in Hollywood, Fla. For more information visit www.aapor.org.

The MRIA will hold its annual conference, themed "In Tune," on May 24-26 at the Hyatt Regency Hotel in Montreal. For more information visit www.mria-arim.ca/Conference2009.

Parks Associates will hold its Connections 2009 conference, focused on advanced digital lifestyle solutions for residential and mobile environments, on June 2-4 at the Santa Clara Convention Center in Santa Clara, Calif. For more information visit www.connectionsconference.com.

The Marketing Research Association will hold its annual conference on June 3-5 in Chicago. For more information visit www.mra-net.org.

CASRO will hold its international research conference on June 18-19 at the Fairmont Hotel in Washington, D.C. For more information visit www.casro.org.

The TTRA will hold its annual conference, themed "Catch the Wave: Tourism Research!," on June 21-24 at the Hilton Hawaiian Village in Honolulu. For more information visit www.ttra.com/hawaii2009.html.

IIR will hold a conference, themed "Voice of the Customer," on June 22-24 at the Chicago Marriott in Chicago. For more information visit www.iirusa.com/voc.

MarketTools' Webcast, "Serenity in the Storm - How Researchers are Achieving Deeper Insight In Spite of the Chaos," is available at no cost. To view, visit https://quirks.webex.com/mw0305l/mywebex/default.do?siteurl=quirks.

To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail Emily Goon at emily@quirks.com. For a more complete list of upcoming events visit www.quirks.com/events.

By Laurie A. Sossa

Give your groups the transcript they deserve

Much time and consideration goes into selecting a focus group facility, one that will provide top-notch recruiting and state-of-the-art features. It shouldn't stop there though. Care must also be taken if your goal is to obtain high-quality transcripts.

First, choose a transcription company that offers options in price, content and turnaround time. For example, do you really need a full verbatim transcript? Verbatim transcription includes a full record of everything said by the moderator and the respondents. Much of what the moderator says is contained in the moderator guide and it is often not necessary to include their words in all of the transcripts for each market.

In addition, a verbatim transcript contains all of the repeated words – whether in the form of stuttering, speech crutches such as um and uh, filler phrases such as "you know" and "so" – that were spoken, thus it obviously takes longer to produce and costs more.

A transcript that edits the moderator's comments, filters out unnecessary words as noted above and leaves intact verbatim respondent comments can result in a smooth, focused and easy-to-read document that is less expensive to produce.

There are, of course, projects that may require a full verbatim transcription, such as for legal reasons. But if you really don't need it, don't end up paying for it. Consider trying a lightly-edited transcript, which won't take as long to transcribe, costs less, has fewer inaudibles and is basically a neatened-up focus group record.

Requiring less time

A high-quality recording is also key, as it can make your transcription more affordable by requiring less time for the transcriptionist to complete.

There are a number of factors that can lead to a poor-quality recording, one that requires a transcriptionist to insert the notation (inaudible) after numerous efforts of rewinding and trying to capture everything:

- poor audio quality;
- sounds that drown out conversation, such as noise from the air conditioning system; ice rattling in respondents' drinks; respondents munching on chips; respondents coughing, sneezing or laughing;
- strong foreign accents;
- technical or industry-specific terms;
- crosstalk among respondents or the moderator's verbal acknowledgements; and
- mumbling or soft-talking respondents.

While some of these factors are unavoidable, most are actually controllable. Below we present some helpful hints to obtain the highest-quality recordings and transcriptions.

Go digital: More and more

Editor's note: Laurie A. Sossa is president of MRT Services Inc., a Loganville, Ga., transcription firm. She can be reached at 770-554-6775 or at lsossa@mrtservices.com. To view this article online, enter article ID 20090401 at quirks.com/articles.

snapshot

A transcriptionist offers several steps, such as eliminating background noises and unnecessary utterances, that moderators and other researchers can take to get the best-possible audio record of their focus groups.

moderators are choosing facilities that provide digital recording. Not only does this save shipping charges and expedite a quicker turnaround, but files with soft-talking respondents or other problems can often be enhanced, for a fee, to produce a better recording or reduce background noise, thus minimizing the transcriber's use of the (inaudible) notation.

Simply ask the facility to upload the digital files to your transcription company's FTP site between each session or upload them from your PC. If uploading of digital recordings is not available, request DVDs or CDs in lieu of audio cassette tapes so that they can be converted to MP3.

Avoid snacks/drinks in focus room: Moderators, instruct your facility hostess to keep snacks and refreshments in the lobby and not to place any bags of chips, cans of soda or ice in the focus group room. This will eliminate sounds, such as bags of chips being crinkled, that can drown out a respondent's words.

Compile industry terms: It would be beneficial for the moderator to furnish a list of any technical or industry-specific terminology, product brand names or industry association names or acronyms referenced in the sessions. This will reduce the time the transcription company spends searching the Internet to find the correct spelling. Otherwise, these terms are often typed phonetically or inaccurately. If they are indistinguishable, (inaudible) notations are inserted within the text.

On a related note, if you are doing the interviewing and taping, it would be helpful for you to say and spell out your respondents' names at the beginning of the recording, before starting the interview, and speak any other related information that you would like on the transcript, such as how you want the header typed, e.g., the date, the time, the job title, etc.

Control crosstalk and muffled respondents: Moderators are encouraged to take better control of their groups. When one or more respondents talk at the same time, or when there is constant secondary conversation in the background while the main respondent is speaking, the transcriptionist's job is made more difficult.

Some crosstalk is unavoidable. After all, the whole idea of a focus group is to get people talking! But the best way to control crosstalk is to tell respondents at the outset what is expected of them. As crosstalk occurs thereafter simply remind them to speak one at a time, as the microphone only picks up one voice at a time and the recording will be listened to and transcribed.

Hold your yeahs: Some moderators verbally acknowledge that they follow what the respondent is saying by uttering yeahs, mmm-hmms or OKs while the respondent is speaking. Unless it is necessary to do so, we suggest nodding your head. Otherwise, each time a yeah or an OK slips out, a much more important word or group of words spoken by your respondent may be rendered indistinct.

Come alive

Following these hints will help the transcriptionist to produce the best-possible record of your groups. In the end, you will receive an easy-to-read transcript in a timely manner, one from which you can comfortably pull all of the colorful verbatims that make the respondents come alive for your end clients. | Q

By Thomas Murphy

An alternative to finding the best of the best

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snapshot

Ranking long feature lists is an onerous task for respondents. This article explores the pros and cons of various approaches to using the Bradley-Terry method to assign scores to tested features.

As part of the process of planning product improvements or introducing new products, marketers often consider long lists of features for inclusion. As researchers, we regularly get requests, particularly by marketers in the technology sector, for lists of product features ranked in descending order of customer preference. Our clients also want to know the relative strength of features and like to see a "strength score" for each. Quite often our clients have extensive lists, numbering 70 features or more.

In the past we have provided results in descending order of preference so that product development teams can set their product requirements, feature lists and release plans. Alternative analyses may be rejected because product managers and developers like to have lists sorted by priority.

Most often a Bradley-Terry analysis would fit their needs, giving them a list of 70 scores corresponding to the features' relative strength. The client could then sort product features from high to low. It is a seemingly simple approach, except that ranking 70 items can cause respondent fatigue and result in data-quality concerns. Also, 70 items can make the implementation of a Bradley-Terry analysis problematic. This article explores different ways of implementing Bradley-Terry for large lists and proposes an optimal solution.

A Bradley-Terry analysis uses ranking data to assign each feature a score, known as the BT score. These scores can then be scaled so that they add up to 100 for ease of use. In addition, the scores represent probability, so one can determine how often one feature is preferred over another.

This analysis is an often-used technique because it is relatively simple (and therefore inexpensive) to create a list of items with a relative-strength score attached. These lists can be used in many different ways.

For example, say the client wishes to rank five features of a software product to determine which features to add in what order: scalability, strong life cycle support, delivers good return on investment, multimodality and strong self-service capabilities.

The respondents are asked to rank the features by importance from 1 to 5, and a Bradley-Terry analysis is run. Say the results are as follows:


Get in touch
...with people
London | Paris | Frankfurt | Amsterdam | Seattle | New York | Dallas | Haifa | Sydney

Feature	BT Score
Scalability	50
Strong life cycle support	20
Delivers good ROI	15
Multimodality	10
Strong self-service capabilities	5

This gives a descending list of preferences with a relative strength attached. The scores represent probabilities with which one can determine how often one feature would be picked in relation to another. For example, out of 70 respondents in this case, 50 would rank scalability over strong life cycle support. The probability that one feature outranks another is found by dividing a score by the sum of two scores of the benefits being considered. For scalability versus strong life cycle support, the probability that scalability is preferred is 50 / (50 + 20), which is about 71 percent.

Statistical significance is difficult to determine, as it is in derived weights. A good rule of thumb is that when one item has a probability of 60 percent of being preferred over another item, it is starting to become strong. "Delivers good ROI," with a Bradley-Terry score of 15, and multimodality at 10 is an example of this 60 percent: 15 / (15 + 10) = 0.60, so "delivers good ROI" meets this criterion over multimodality.

A Bradley-Terry analysis can be run on various software platforms. It's simple enough that the analysis can be done using Excel. There are two steps: 1) create a win/loss matrix in which items are the rows and the columns and each cell of the matrix represents how often (percentage) the column item outranks the row; 2) project a two-dimensional matrix down to one dimension giving the BT scores.

Some effort

Despite its usefulness, the main issue with implementing Bradley-Terry analysis is that it requires some effort by the respondent. Bradley-Terry forces the respondent to rank items, a potentially strenuous task. Moreover, if the number of items to be ranked is large, it could be a nearly impossible task.

Another issue is the number of items that a respondent can accurately rank. Can a respondent accurately rank 20 or 30 items? Or is 10 a better number? The top end and the bottom end will, most likely, be pretty accurate, but what about the middle? What if there are 30 items?

A common way of dealing with this is to have the respondent rank the top several of a long list, such as the top eight in a list of 30 items, leaving the rest blank. In terms of analysis, these blanks are considered to have a rank of nine, so they are outranked by items one through eight and tied with the others with a rank of nine (the other blanks). This isn't a true Bradley-Terry, as all items should be ranked, but it is probably more accurate than asking the respondent to rank all 30 items and is a common technique.

This approach becomes more problematic as the number of items increases. What if there are 70 items? Asking the respondent to rank the top 10 of 70 means he or she is ranking only one-seventh of the items and must pore over a list of 70 - a strenuous (or most likely impossible) task. For both these reasons, the resulting BT scores are suspect. One could try to mitigate this by doing the bottom 10 as well as the top 10.

Another technique is to have the respondent rank a random 10. (Bradley-Terry handles missing values.) This method requires only one ranking of 10 items and theoretically should work well. Unlike the previously discussed methods, however, respondents tend to rank many items in the middle of the list and will most likely have more issues with this as opposed to ranking items on the top or bottom of the list or picking the most-liked or -disliked from a list. In addition, the data are missing, which could prove problematic in subanalyses. Also, some clients are suspicious of this method; they do not like the idea of respondents randomly evaluating a subset of the attributes.

Smaller subsets

Given the facts that respondents will generally rank smaller lists of items

Figure 1

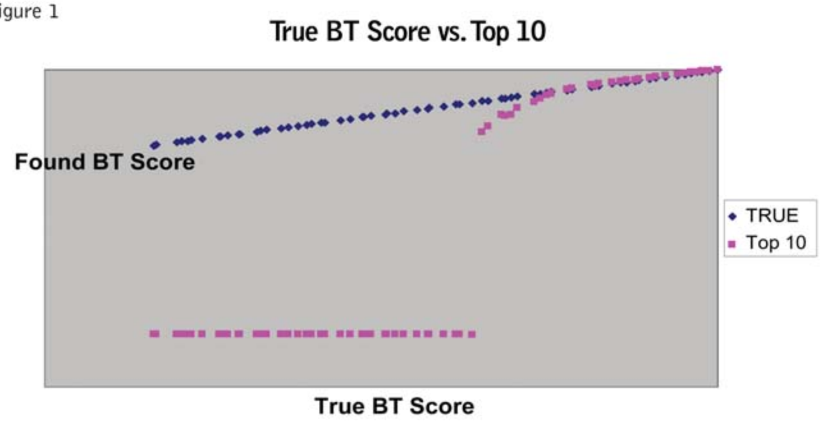
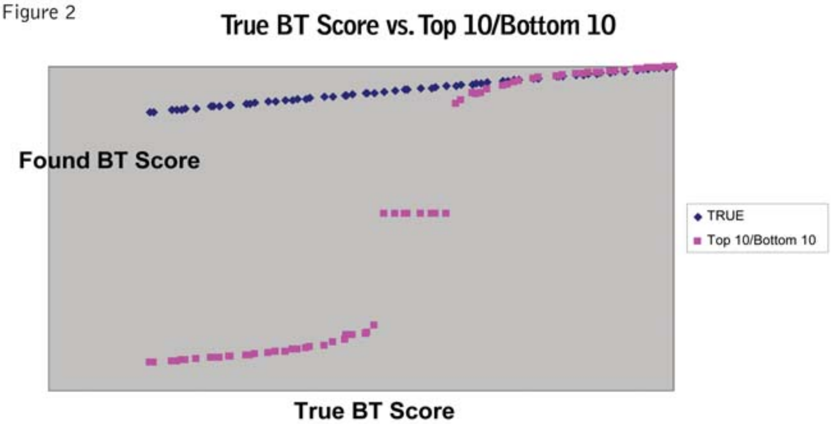


Figure 2



more accurately than larger lists and that BT scores from larger lists are not truly Bradley-Terry in that respondents do not rank all the items but only the top 10 or so, an alternative is to ask respondents to rank smaller subsets of the list. These subsets should be determined randomly for each respondent.

For example, say you have a list of 70 items. Instead of having the respondent rank the top 10 of 70, pose the question like this:

Which one of the following would you rank the highest in terms of xxxxx? Which one would you rank the lowest?

Item 4
Item 26
Item 12
Item 44
Item 62
Item 23
Item 43

Now, of the following list, which would you rank the highest in terms of xxxxx? Which one would you rank the lowest?

Item 51
Item 65
Item 2
Item 61
Item 37
Item 36
Item 16

Do this eight more times so that all 70 items are reviewed. Once the respondent has ranked his or her top choice for each of the subgroups, the top-ranked choices are fed into a single ranking exercise. In the preceding example, the respondent is asked to rank these top 10 "winners." The same is done for the bottom 10.

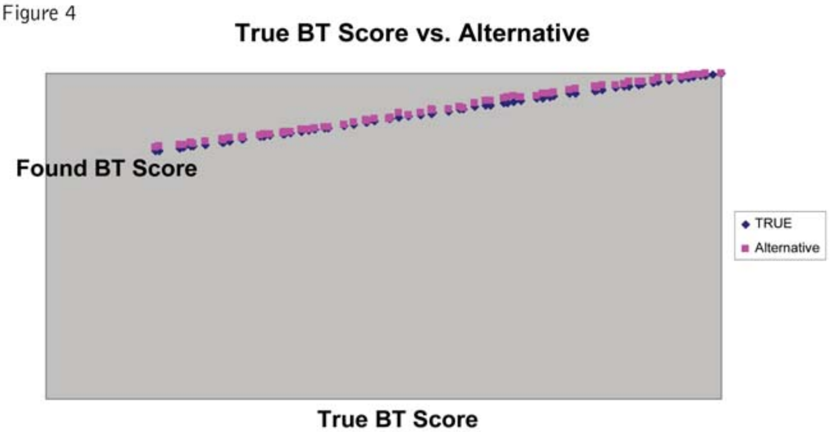
The data are converted to BT scores by doing the analysis on the final ranking exercise, with the items not winning in their respective subgroup given a lower ranking of 11. The bottom 10 features are coded 12 to 21.

Could be tempted

Having a respondent rank all 70 is nearly impossible. The respondent could be tempted to straightline to get through the list and/or drop out

Figure 3

Figure 4



of the survey or fill it out randomly after a start. Even if the respondent were motivated and took the time, the results would probably not be very accurate, particularly the middle-ranked items. How does one judge whether one truly likes a feature as 45th or 46th?

To test various methods, 70 random numbers were generated for each respondent to represent his or her preference. In reality some items will be more popular than others, so the random numbers were generated in Excel from 0 to 35 plus 1 for item number 1, plus 2 for item number 2, plus 3 for item number 3, up to plus 70 for item number 70. This means that the later the number was randomly generated, the lower in rank it would tend to be. There is still a large variability among respondents, however. These scores are then ranked from 1 to 70, with 1 being the highest rank and 70 being the lowest. This means that the "true" ranking will be close to the item number, although there will be great differences per respondent. Five hundred responses were generated.

Note that this is artificial in that there is no way to truly collect this ranking (a nearly impossible task with 70 items being ranked). Using this data, however, allows testing of various methods to see how well they do relative to the "true" ranking.

Top 10

The first analysis tested is a commonly-seen top 10 approach. This is where the respondent is shown the entire list and is asked to rank the top 10. An issue here is that the list is of 70 items. As noted before, it would be difficult and taxing for the respondent to go through the list of 70. Assuming one could, however, how well would it do on the test data?

Figure 1 shows the "true" BT scores with the top 10 BT scores. Note that the 20 or so top 10 BT scores are pretty close. After that the next several start to drop. Finally, there reaches a point where the scores abruptly hit bottom. Now, for 70 items, most researchers would not do only the top 10 but also the top 20 or so. Ranking 20 is difficult on the respondent, however, so there will be some distortion. It also shows that there is a point in the middle where the scores seem to be fine (if one doesn't have the "true" scores to compare) but actually underestimate. From this example alone, one should be concerned about using this method unless at least half the total items are ranked.

Top 10/Bottom 10

This analysis takes the foregoing top 10 analysis and combines it with a bottom 10 as well. Figure 2 shows the results. As you can see, this is a truly unacceptable method. The two analyses do not combine well. What makes this particularly problematic is that at first look the method seems logical.

Random 10

This analysis, as stated above, has the respondent rank a random 10 (of 70) items. The result is shown in Figure 3. Random 10 is very close. It should be, logically, because the data made for this exercise are considered accurate and this method picks a random 10 of them. In reality, the random 10 method has some issues, such as the respondent's being able to accurately rank the 10 items: the respondent could be given all or most of the random 10 that would be in the middle of his or her preference, making it more difficult to accurately rank. Also, because the data have missing elements (not everyone saw everything), it is difficult to run other analyses such as factor and cluster. In addition, there could be client acceptance issues, although the method seems very sound overall.

Alternative

Figure 4 shows the alternative method mentioned previously, in which shorter, separate lists are evaluated by respondents. This is also very close. The method seems very sound. It is equivalent to the random 10 method but does not have missing data, so other analyses like factor and cluster could be done on the data.

Stronger results

If you typically use Bradley-Terry analysis to prioritize a large list of items, we recommend the random 10 or alternative method for much stronger results. We recommend these because of minimal respondent fatigue and also because they will go a lot further in guiding marketers to make successful product development decisions. The random 10 method may present issues in terms of respondents' ability to accurately rank choices, client acceptance and the fact that not all respondents see all items (as they do with the alternative method). If these issues are of concern, the alternative method would be the better approach for researchers to employ. | Q

A discrete choice

Enter article ID 20070309 at www.quirks.com/articles to read how to use discrete choice conjoint to validate stated-choice data.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By Isabelle Albanese

C-ing is believing

A framework for understanding ad effectiveness

The ability to communicate clearly and to identify effective communication has never been more important than today in our hectic, fragmented world. And while there are undoubtedly thousands of books written, papers published and philosophies espoused about how to communicate effectively, I've developed a simple framework called the 4Cs of Truth in Communications, which was designed to offer researchers and clients a way to objectively evaluate consumer response to stimulus.

Using a template we've created, which is explored below, clients follow consumer feedback easily by instantly assessing how the stimulus performs on each of the Cs. When it comes time for the debrief, all of your clients have a consistent format for structuring feedback, which makes the debrief session flow very smoothly.

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The 4Cs process was developed eight years ago for a presentation of insights to a new campaign idea for a venerated brand. The clients in the room appreciated the way we categorized the learning. The 4Cs structure enabled everyone at the table, from sales people to promotion people to HR, to understand the learning in a way that made sense. And the ad agency creative folks felt it was an objective way to think about consumer reaction to advertising ideas. Having spent 16 years in the ad agency business working with creatives, I can tell you this was a personal victory! They are not easy to please, especially when it comes to listening to consumers evaluate – not always in a generous way – their "babies."

snapshot

The author outlines her 4 Cs of Truth in Communications process to explain how it can help frame and inform ad research projects. Marketers can use the concepts of comprehension, connection, credibility and contagiousness to make sure their ads resonate with consumers.

The 4Cs are: comprehension, connection, credibility and contagiousness. Together they capture what everyone connected with the project needs to know about consumer response to stimuli. Separately, they provide clarity for ourselves and our clients, and a simple way to categorize consumer response.

They form a model in which you ask a series of questions about how the consumer responded to stimuli. In the answers (as well as an understanding of how to use the model) lies the direction you and your client are looking for to move forward.

Comprehension

Questions: Is the main message clearly communicated? Simply put, do consumers get it?

The comprehension C is exactly what you think it is - there's no hidden meaning or great deal of explanation necessary, although it is obviously quite fundamental to basic communication. On the surface, this is a simple assessment of whether the intended message is being understood. Simple, in theory, but not always easy to achieve, because sometimes marketers and advertisers seem determined to make consumers work exceedingly hard just to get the message. How many times in showing advertising to consumers have you heard them say with frustration, "What are they trying to say to me?"

Consumers just don't have the time. No matter what category we're delving into - from ice cream to clothing to coffee, shampoo or insurance - consumers are basically saying to us, "Please don't make me work that hard. I am very busy." They're perfectly willing to listen to your message. In fact, many want to hear it. They just don't want to work hard to get it.

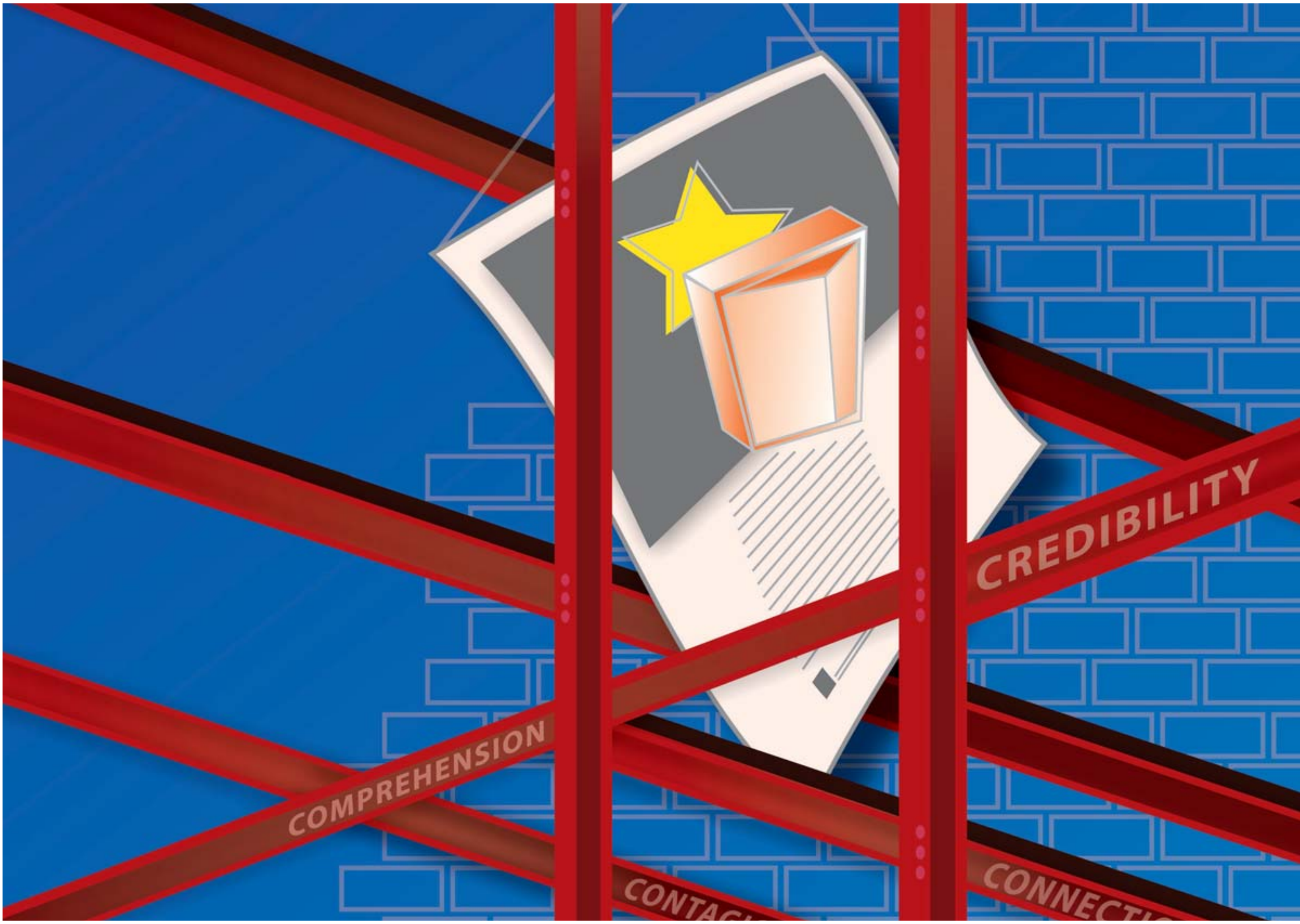
Connection

Questions: Does the message resonate with consumers? Is it persuasive? Does it communicate that the brand knows them simply by the way it is talking to them? Does it motivate purchase?

These are all critical questions in determining the extent to which any form of communication connects with its intended audience.

Connection is often an emotional response - something that is felt but can't be explained. A genuine rapport has been established, so it's no longer advertiser talking to customer or politician to voter, it's a message from someone who really knows me and understands what matters to me. So much so that I feel that the message is speaking directly to me on a personal level.

Connecting with the consumer means you have begun to establish a relationship with them via your



communication. And how valuable is that? It means something you said or showed to them has resonated – has reached them on some internal level, whether that's in a rational or irrational way – and so the communication resonates too.

The message somehow has tapped into an existing consumer truth for them in their lives relative to the subject, and it usually always extends deep downward to something emotional, or at the very least, something which is not entirely rational: frustration, excitement, anger, passion, joy, happiness, sadness, resignation, etc.

I once worked on communications evaluation for a Suave hair care campaign. At the time, we were aiming to communicate a completely new message based on a new positioning and tapping into a newly-discovered consumer truth. Four print ads depicted "mom" (the target) in various family situations:

- in the kitchen multitasking by making a PB&J sandwich while having a phone conversation – with her kids all around her doing various real-life kid-type things;
- in the bathroom sitting on a (closed) toilet and helping her three-year-old with potty training while her four-year-old is brushing his teeth;
- in her daughters' bedroom playing dress-up;
- in the hallway helping her young daughter get her boots on.

All were very plausible, real-life situations. Of course, you say, if you hold a mirror up to someone they are likely to say "I can see myself!" So what? That doesn't necessarily mean they like what they see, are moved emotionally or otherwise motivated by that image. To be sure. But in this case, it did mean that. One mom looked at those four ads and said, literally as she pointed to each one of them, "That's me, that's me, that's me and that's me!"

The connection wasn't made simply because she could see herself in those situations – and here's the interesting, brand-relevant part – it was made because she saw that each of the moms depicted had great-looking hair. She was able to connect with the message that even though I'm a mom and have a crazy, chaotic mom life, using Suave can help me look good!

And the beautiful epilogue to this story is that in subsequent quantitative ad testing, these ads met all client hurdles for attention, branding, communication and motivation. And the Suave hair care brand experienced share and sales growth.

Credibility

Questions: Does it make sense for the brand to speak to consumers in a certain way? Is the tone and manner consistent with the brand's position in consumers' "brain space" based on their experience with and understanding of the brand's equities and promises? How do you know?

If the message isn't credible, if it doesn't conform to the brand's (or cause's or platform's) truth, it's meaningless. The audience needs to believe who is saying it (e.g., the brand's voice), what is being said and how it's being said. Otherwise any connection previously established immediately begins to break down. And I really mean immediately.

- Who: Does it make sense for your brand to speak to its audience in this way? Does it logically fit, given the equity your brand has developed among its core target and in the marketplace as a whole?
- What: Is it something your audience expects from this brand? This could be good and bad. If it's something expected, it could likely get glossed over or even ignored outright. It may fit, but if it's just "same-old," there better be enough going on in the areas of communication and connection (and contagiousness, the 4th C) to make up for too-smooth a fit.
- How: An unexpected message or delivery can bring a lot of energy and attention to your brand, especially if its history or heritage or equity gives it permission to speak in this way. Or even if it doesn't, it can still be powerful if marketplace conditions and consumer attitudes make it acceptable anyway.

The point is, credibility leads to believability and believability leads to persuasion and persuasion leads to action. So even if it's not instantly credible, it becomes credible because your audience can see a way to make the message fit. That counts too.

The credibility C is all about your brand's truth. It's either going to work for consumers or it isn't. For a message to really drive the credibility train, it must make sense for your brand's message to be communicated in that particular way. It gets an immediate head-nod. Not a trace of doubt in my mind. When credibility is there, it removes a potential obstacle to comprehension, connection and contagiousness.

In fact, when it's instantly credible, consumers don't even think about it. They don't usually look at an ad or package or concept which is delivering a credible brand message and say "Yes, that is a believable message from that brand." In most of the work we do, credibility of the message is not an issue. Most clients know their own brand truth. It's the fiber of their brand. It's been built up and ingrained in consumers' brains and psyches over time.

Contagiousness

Questions: Is there a sense of energy around the message and the way it is executed? Does it offer a new way to view the brand or category? Is it competitively differentiating? Is there something innately memorable about it? Does it evoke a vivid emotional response? Might it have talk potential (it may not always be positive talk)? Does it motivate the target to do something? Does it elicit some kind of highly-charged, demonstrable and visible reaction?

This C is tricky. Tricky, but incredibly necessary. In many cases, it can be all that truly matters.

You know how it is when the room starts buzzing, when the respondents start talking among themselves about what they've just seen. That's when you know the communication is on its way to becoming an unqualified success.

I've found that contagiousness, in the positive sense, is often intimately linked to connection. When a message truly resonates with its audience in a profound way, there tends to be a residual contagiousness effect. They simply can't help thinking about it or mentioning it in conversation. Remember my Suave example – "That's me, that's me, that's me!" For that moment, right there in the room, that woman got excited about the message. She spoke out, her voice rose, she pointed to each ad – she was infected. The brand had found an idea that not only resonated with its target: Moms want pretty hair too! – but executed it in a way that left the recipient feeling empowered and excited by the message. The Suave brand now has the opportunity to sink in with this target – to "infect" the way they think about the brand. That's contagiousness.

Immediately actionable

No matter what the stimulus, applying the 4Cs can help identify if it really rocks and why, or where it needs help to keep from sinking like a rock. The method is immediately actionable – you can use it in your very next project that involves stimulus exposure.

It's also a way to get disparate constituents (brand clients, consumer insights clients, ad agencies, etc.) on the same page relative to evaluating consumer feedback – something that can always be a challenge.

The simplicity of the framework is its power; it is easy to remember and easy to use. It can lead to better creative executions and stronger business results. | Q

When ads make a connection

Enter article ID 20060401 at www.quirks.com/articles to read an analysis of the role of emotion in effective advertising.

advertising research

Sampling the impact

How do respondent behaviors and online sample quality affect measures of ad performance?

By Don Bruzzone

A number of survey-taking behaviors have been found to negatively impact data quality. After isolating eight of them, we conducted a research-on-research study to answer a specific question: Did these eight factors affect the actual answers we were getting from standard ad-tracking questions?

We measured each of them in a large-scale national online survey of broad interest: our firm's 17th annual Super Bowl Study, which tracked the impact of all 55 of the 2008 Super Bowl commercials. Thanks to the active collaboration of Survey Sampling International (SSI), Shelton, Conn., in five days starting a week after the game ended, we received 5,155 replies from both existing and newly-recruited panelists.

In summary, we found that three had a noticeable effect: completing the questionnaire unusually fast; straightlining answers; failing to follow instructions (such as: Check "b" below). The remaining five factors had little or no consistent effect on the answers: how frequently they took online surveys (including never before); how many panels they belonged to; were answers to conflicting questions consistent?; did zip code and state match?; did they say they might buy a non-existent brand?

The proportions of the sample shown to have quality problems by these measures were usually small. We only removed 2 percent. And as shown later, the effect they did have was not very dramatic. The difference they caused in performance scores didn't approach the differences we find between good and bad ads.

snapshot

As part of an annual tracking survey on Super Bowl advertising, Bruzzone Research conducted a research-on-research study to gauge the effects of specific survey-taking behaviors on data quality. Three behaviors were found to have a noticeable impact: speeding, straightlining answers and failing to follow instructions.

Straightlining is a special case. If these results can teach us anything about questionnaire construction, it is to avoid listing a lot of alternatives with a grid full of check boxes for the answers. People find that boring. Many will straightline at least some of them and that can have a measurable effect on their other answers. (It suggests using things like Flash-based card sorting instead.)

Figure 1 shows the base for our measure of how fast the respondent completed the questionnaire. The median time had a high correlation ($r^2 = .92$) with the number of commercials the respondent recognized. That is because whenever they recognized a commercial they were asked additional questions about that commercial. That median time became their "norm." The tabs in Figure 5 show 3 percent

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Figure 1

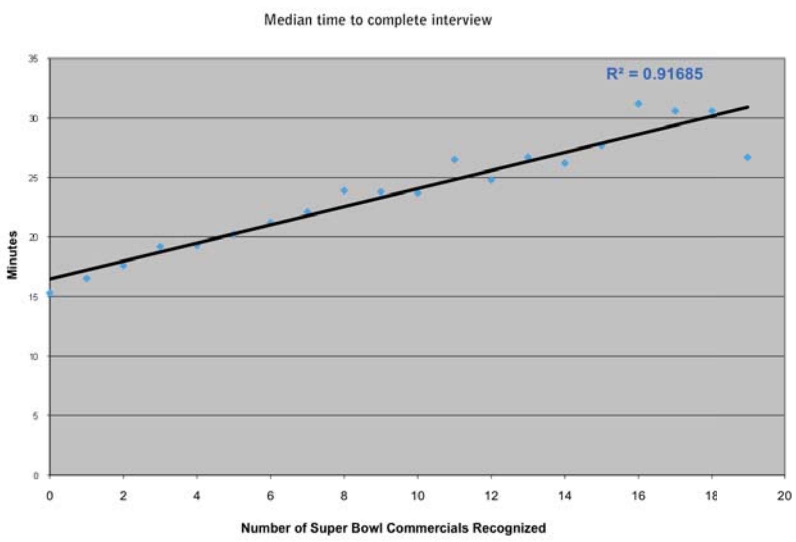
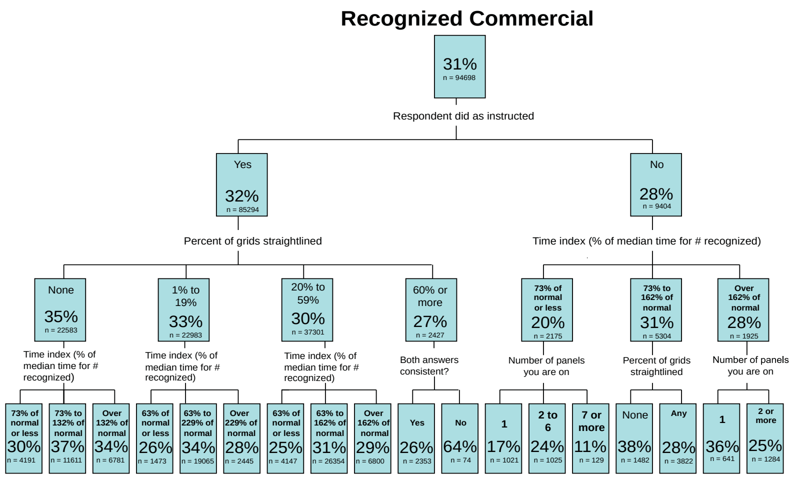


Figure 2

Combinations of "traps" and "conditions of concern" leading to the largest differences in performance scores for the 2008 Super Bowl Commercials



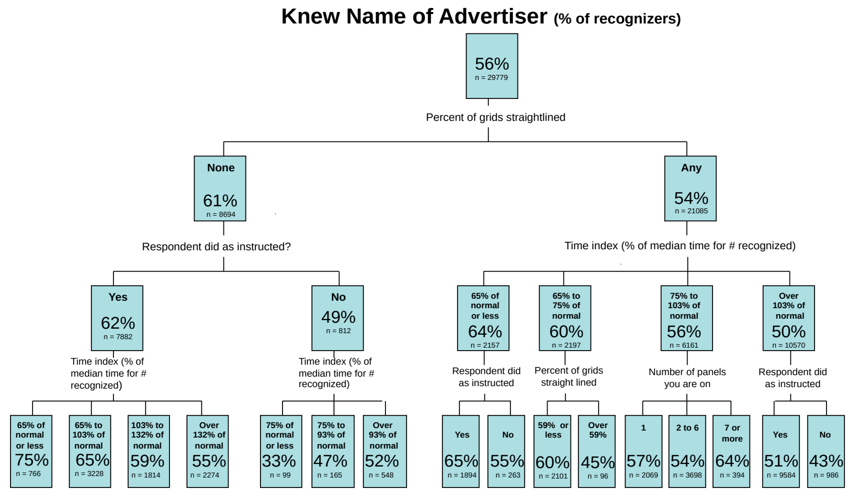
Measures that never had a substantial effect on these results: When did you last take an online survey? Did zip code and state match? Did respondent claim awareness of nonexistent brand?

finished their questionnaire in less than 50 percent of the time that was their norm. That 3 percent was the group that showed the most dramatic differences in ad performance scores.

There were some interesting directional differences. It is probably no surprise that these speeders said they recognized fewer commercials. But the interesting part is that they were more likely to come up with the correct name of the advertiser for the commercials they did recognize. This suggests speeders don't stop and agonize over commercials they were not sure of. They were about half as likely to check "Not sure, I may have" when answering our recognition questions. So it appears they tend to say they recognize commercials only when they are positive they have seen them before, and this is what leads to a higher percent getting the name of the advertiser correct.

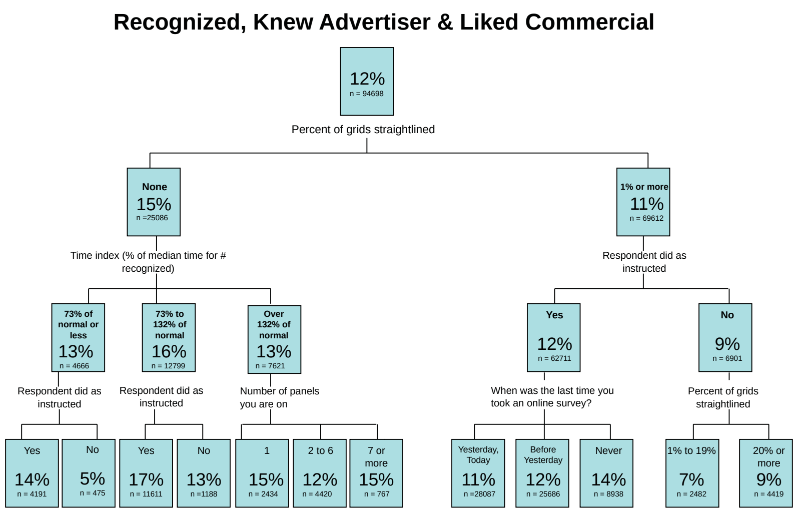
Figure 1 is included because it is the basis for a somewhat different approach to identifying speeders. The approach used in a frequently-cited ESOMAR paper "The Effects of Panel Recruitment and Management on Research Results - A Study Across 19 Online Panels" (Vonk, van Ossenbruggen and Willems, 2006) was to look at completion time without any adjustments. However, the authors noted that some respondents had a tendency to show less familiarity with ads to avoid follow-up questions. In their study, faster speeds caused respondents to be classified as "inattentive." They cited no evidence to back up the claim that the desire to avoid follow-up questions was actually the reason for people saying they were not familiar with ads. So we felt there was a chance they could be classifying respondents as

Figure 3



Measures that never had a substantial effect on these results: When did you last take an online survey? Did zip code and state match? Did respondent claim awareness of nonexistent brand?

Figure 4



Measures that never had a substantial effect on these results: Did zip code and state match? Did respondent claim awareness of nonexistent brand? Were both answers consistent?

inattentive just because they were honestly not familiar with the ads. Our new measure is designed to avoid that possibility.

Biggest differences

Figures 2, 3 and 4 use a tree-branching CHAID approach to show which of the eight factors accounted for the biggest differences in several measures of advertising impact. It is a process that tried all eight factors not only to make the initial split, but to keep splitting and re-splitting all of the resulting subgroups.

All of the charts show that this new "time index" was one of the top three factors accounting for differences in respondent answers. They also show that, after the samples have been segmented by these three factors (time index, straightlining and following instructions), CHAID proceeded to find additional splits that were statistically significant. We were blessed with enormous samples, so that is not surprising (5,155 respondents each reporting on 18 or 19 commercials gives the base you will see in Figure 2 of 94,698 cases). Although the additional splits may have been significant they were not very meaningful. They were often inconsistent in direction and magnitude. The top three appeared to account for virtually all of the meaningful differences.

Figures 5 and 6 show details on the amount of difference in six different ad performance scores, found at various levels of the eight quality measures. It shows the greatest differences in the first four recognition-based measures were on the first line of differences: the line showing the results for the 3 percent that finished the survey in less than half the normal time. This spreadsheet that shows the effect of each of the quality factors independent of the effect

Figure 5

AMOUNT OF DIFFERENCE FOUND

Among those "caught" by "traps"

[yellow] = larger declines   [light blue] = larger increases

	% of Total Sample	Recognized Commercial	Knew name of advertiser (% of recognizers)	Recognized Com'l & knew name (% of all)	Recog., knew name & liked (% of all)	Lift in Awareness	Lift in Buying Interest
Averages for all respondents / All commercials		31.4%	56.1%	17.7%	12.2%	4.0%	7.0%
(Below: How much different the score was from those with the most desirable characteristic.)							
Time to complete: (Norm = median time for number recognized)							
Less than 50% of norm	3%	-14.3%	7.3%	-6.8%	-4.5%	-0.9%	5.8%
50% to 62% of norm	8%	-7.1%	7.7%	-2.1%	-2.0%	0.6%	2.0%
63% to 133% of norm	59%	(base score)					
Over 133% of norm	30%	0.6%	-4.0%	-0.9%	-0.2%	-1.2%	1.0%
Percent of grids straight-lined							
60% or more	3%	-7.4%	-5.6%	-6.0%	-4.6%	0.8%	7.1%
20% - 59%	44%	-5.1%	-5.7%	-4.8%	-3.7%	-0.3%	-0.8%
1% - 19%	27%	-2.9%	-7.0%	-4.0%	-3.4%	0.3%	-1.7%
None	26%	(base score)					
Respondent did as instructed?							
No	10%	-4.1%	-9.5%	-4.9%	-3.3%	-2.4%	1.1%
Yes	90%	(base score)					

Figure 6

AMOUNT OF DIFFERENCE FOUND (Continued)

	% of Total Sample	Recognized Commercial	Knew name of advertiser (% of recognizers)	Recognized Com'l & knew name (% of all)	Recog., knew name & liked (% of all)	Lift in Awareness	Lift in Buying Interest
When was the last time you took an online survey?							
Yesterday, today	44%	-2.9%	-3.0%	-2.6%	-2.8%	0.5%	0.5%
Before yesterday	41%	-2.2%	-2.2%	-2.0%	-1.8%	1.7%	1.9%
Never	15%	(base score)					
Two answers consistent?							
Yes	99%	(base score)					
No	1%	2.0%	-12.2%	-2.9%	0.4%	-4.6%	4.0%
Did zip code and state match?							
Yes	99%	(base score)					
No	1%	-3.4%	4.5%	-0.7%	1.6%	4.1%	12.5%
Number of panels resp. is on (self declared)							
One	33%	(base score)					
2 to 6	59%	-0.6%	-1.0%	-0.7%	-0.9%	0.5%	0.3%
7 or more	8%	-2.8%	-0.8%	-1.9%	-1.5%	-0.1%	3.5%
Would buy nonexistent brand ?							
No/Not likely	92%	(base score)					
Might	8%	1.3%	-1.8%	0.2%	2.1%	0.2%	3.5%
Acutal Survey Experience (WaMu coding of panelist's history with SSI)							
Light	16%	(base score)					
Medium	11%	2.1%	5.2%	3.1%	-1.6%	3.6%	1.2%
High	39%	-0.6%	-1.2%	-0.6%	-0.5%	1.2%	0.9%
Veteran	27%	-3.1%	1.7%	-1.3%	1.0%	1.9%	-1.1%

of the others also shows the largest and most consistent differences were related to time, straightlining and following instructions. The remaining factors again tended to show smaller and less consistent differences.

The appropriate test for determining which of these differences are statistically significant, and which are not, is open to discussion in cases like this. After reviewing the options, we colored the cells where the ad performance scores differed by more than +/- three percentage points from the score for respondents in the category showing the fewest signs of suspicious behavior.

Suspicious quality

Figure 5 also shows the percent of the sample showing any of the signs of suspicious quality that resulted in differences in results was not particularly large. More specifically:

Finished in less than half the normal time: 3 percent
Straightlined 60 percent or more of the grids: 3 percent
Didn't follow an instruction to check "Disagree Slightly": 10 percent

Fifteen percent did at least one of these three things, but only 2 percent did two or more. This shows these measures did not function as traps that caught substantial numbers of respondents who were giving consistent and repeated signs of answering fraudulently. Most did only one of them. Since a respondent could do any of these inadvertently and without evil intent, we only removed the 2 percent who did two or more in our final tabulations of Super Bowl results.

Four categories

SSI coded all of its panelists into one of four categories to reflect their level of participation in past SSI surveys. It was done for a Washington Mutual study that showed those who take more surveys were less likely to show interest in new products. However, the study also showed they did not answer questions about product use or financial attitudes differently ("Sample Factors That Influence Data Quality," Gailey, Advertising Research Foundation, September 2008). Since our study had shown heavy responders did not answer differently, we were interested in exploring any differences between our self-reported approach and SSI's actual panel records. With the approval of Washington Mutual, SSI provided the same information for its panelists replying to our survey. The first thing we found was a lack of correlation between the two measures (self-reported vs. SSI records: r = .004). This wasn't too surprising. As shown in Figure 6, two-thirds of our respondents were members of more than one panel and this new data only showed what they did with one of those panels (SSI). Finally, the last category on Figure 6 shows the results. Our six measures of ad performance did not show any differences that were larger or more consistent based on these actual panel records than they did for the other five factors on Figure 6 that showed little or no consistent effect.

This was a Bruzzone Research/SSI project, but since both firms are represented on the Advertising Research Foundation's Online Research Quality Council we took advantage of that group's knowledge and expertise and asked them to review the questionnaire and the results it produced. We want to express our gratitude for the advice and counsel offered by members of that group. | Q

advertising research

The proof is in the pupil

Using eye-tracking to measure the effectiveness of TV commercials

By Mike Bartels

The application of eye-tracking technology to television research is basically a no-brainer. Watching TV relies entirely on eye movements, the measurement of which can only be obtained through eye-tracking. The ability of the television programmer to see exactly what the viewer sees provides insight into the effectiveness of a particular segment on a particular audience. You learn what they look at. You find out what they miss. Most importantly, you discover the root of their visual behavior, which content draws the eye and which content lets it float away.

One of the most fruitful areas of eye-tracking within the television industry has been advertising research. Every facet of a commercial - from the imagery to the logo to the brand name to the contact information - is important in expressing the specific message intended. Through eye-tracking the advertiser can determine how likely it is that the relevant features of an ad will be seen by their particular audience. Take a look at the GazeTrace in Figure 1. This example shows one participant viewing the final frame of a televised advertisement and demonstrates the capabilities of eye-tracking in this context. As you can see, the product shot is quickly seen, followed by the product name and finally the Web address. Notice that the upper branding is never seen by this person. By aggregating this kind of data across large samples, eye-tracking technology can be very effective in identifying trends in how an advertisement is viewed.

A bit more complex

However, as any advertiser will tell you, success cannot be gauged by simply calculating the visual attention allocated to features of an ad. In reality it is quite a bit more complex than that. Television commercials, although they reach an extremely large audience, face an uphill battle when it comes to engagement. This is because much of the 21st century television-watching world has developed an acute ability to tune out anything that breaks the continuity of a television program. The viewer senses that the commercial break is coming, identifies the requisite fade-to-black and then effectively turns off all conscious awareness of what is on the screen. Recent research conducted by our firm suggests that TV watchers remember less than a quarter of commercials viewed in a 30-minute

snapshot

The author discusses eye-tracking technology and the Index of Cognitive Activity as a method of obtaining unbiased physiological data to better understand how viewers absorb, and how well they like, various television advertisements.

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Figure 1 - The product shot is quickly seen, followed by the product name and the Web address. The upper branding is never seen.

segment, even if asked to recall them immediately after the segment ends. It's not that they don't see them; they just don't encode the information into memory, a kind of unintentional inattention. Consumer adaptations such as this, along with technological shortcuts that allow consumers to ignore, avoid or speed past commercials, make it uniquely difficult for a televised advertisement to break through to the audience.

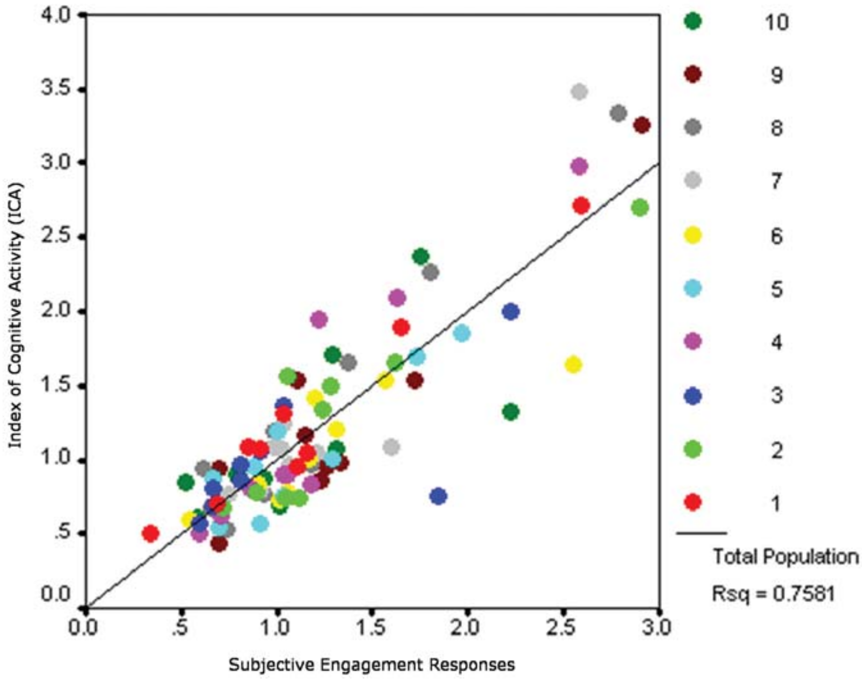
Still noticed

So what can be done to bolster the swiftly-eroding value of television advertising? Is it a lost cause? Should we all just forget about TV and go viral? Not so fast. The good news is that, even as the audience continually hones its skill at ignoring commercials, many spots are still noticed, remembered and even enjoyed. Some ads effectively use humor to compel people to pay attention; others provide a relevant message that cannot be ignored. The point is that even in this ad-weary culture some commercials still capture and hold viewer attention for long enough to make a successful pitch. So advertisers need not despair. The trick is to determine which ads are the most engaging, which ones hold onto the consciousness of the consumer and which ones really leave their mark on the average viewer despite the impulse to shut it out.

Extremely telling

Most people don't realize that there is more to eye-tracking than the recording of eye movements. Aside from fluttering about, our eyes have a multitude of other functions, voluntary and involuntary, that can be extremely telling in a research context. Your

Figure 2

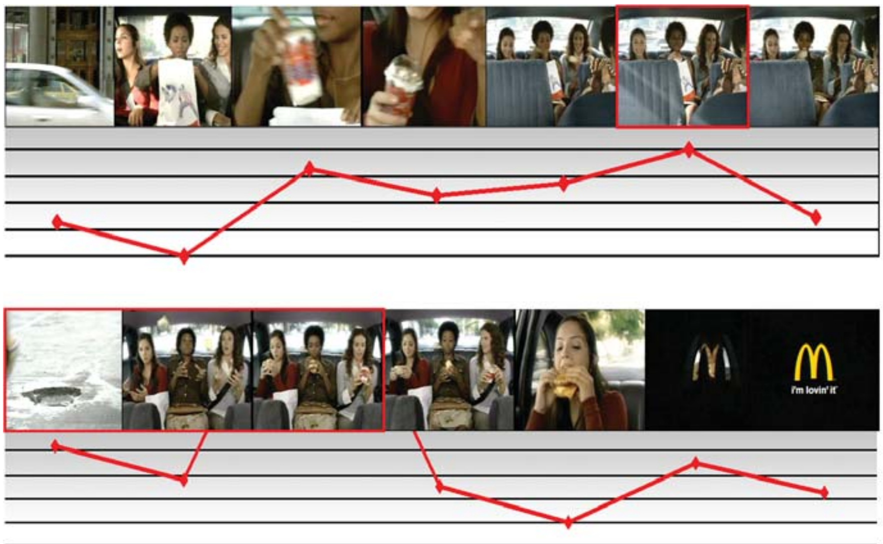


eyes blink, they diverge, they fixate, they close - each distinct behavior has a distinct origin, one that the trained researcher can meaningfully interpret.

Perhaps the most subtle and most powerful of these engagement-relevant eye functions is pupil dilation. Using advanced eye-tracking equipment, the pattern of pupil reflexes can be isolated and translated into a direct link to the inner workings of the brain. By measuring fluctuations in pupil diameter, we can determine precisely when a person is paying attention and when they have zoned out. Basically, it's a way to read brain activity without attaching electrodes to someone's head or placing them in a giant magnetic tube. This patented pupil-based metric is called the Index of Cognitive Activity (ICA).

When applied to the context of televised advertising, the ICA has been useful in demonstrating which commercials are engaging and which ones tend to be ignored. Take a look at Figure 2. It shows the correlation between subjective responses to questions of engagement (X-axis) and the ICA (Y-axis) on 10 television commercials (each color representing a different commercial). The correlation coefficient of r-sq. 758 is very high and suggests that viewers' responses to how engaged they were lined up nicely with the eye-tracking data. In other words, those who reported being interested in the commercials exhibited a higher rate of pupil fluctuation than those who reported not paying attention. Thus, in addition to

Figure 3 - Still-frames from an ad, at two-second intervals, showing the ICA engagement throughout the commercial.



being validated against other physiological and traditional engagement metrics, the ICA is in agreement with the viewers' own perceptions of their level of engagement.

But this raises an important question: if the ICA is so highly correlated with subjective engagement responses, can't we skip the eye-tracking and just ask people how engaging the commercial was? That would be the simple solution, but sadly not the most accurate one. The primary advantage that the ICA has over subjective responses and other traditional metrics is that it is based on an involuntary physiological reflex. This means that people's prejudices and confabulations are factored out. You don't have to worry about the bias of the Chevy owner who won't admit paying attention to the Ford commercial. You can forget about whether the vegan whom you tested is embarrassed to admit how into the triple-cheeseburger commercial she was. What you are getting with the ICA is the raw physiological engagement data. Which commercials most effectively held the attention of the audience? Which ones, based only on the behavior of the brain, are most likely to leave a lasting impression? The eye-tracker is oblivious to all of the confounding little preconceptions and untruths inherent in subjective research.

Broad and precise

Another advantage over traditional metrics is that the ICA can be utilized to meet both broad and precise research objectives.

Let's start with the broad. In addition to knowing which commercials are most engaging, it is often important for advertisers to know in which television programs they should place their commercials. Using the ICA, it is possible to establish which content most successfully engages the audience and holds that engagement through the commercial break.

In a recent study, we presented a set of commercials within television segments from four different channels. The specific ads shown within each channel segment were randomized so that it was not the commercial being tested but rather the programming surrounding it. Free and aided recall of the commercials embedded within each channel was compared to ICA data. The results were very interesting. Rankings of the four different channels based on ability to recall commercials and based on ICA data were identical (i.e., the channel associated with the most commercials recalled had the highest ICA and so on). In addition, the ICA provided a means of quantifying just how much more engaging one channel was than another. Using this metric, it was possible to determine not only which commercial was most engaging but which general type of programming gave a commercial the greatest chance to succeed.

On the other end of this broad programming research, the ICA is useful at a more precise level. Engagement does not occur in 30-minute chunks or even 30-second chunks. It is a highly dynamic phenomenon that is constantly shifting and refocusing, sometimes on a second-by-second level. For this reason, it is important to examine not only which commercials are most engaging overall but which individual scenes or frames within the commercial are most engaging. It does very little good to have the most amazing intro ever if the viewer has already completely tuned out by the end of the commercial when your company name is shown.

As an example, the image in Figure 3 shows still-frames from an advertisement at two-second intervals with a red line underneath rendering the rises and drops in ICA engagement throughout the commercial. It begins low and steadily increases as the main action occurs before finally settling again when the final branding screen appears. As you can see, even in this brief time interval there is a wide fluctuation of engagement. Certain scenes are highly interesting to viewers while others are less compelling. The important point here is that true engagement in a commercial is always changing, adapting from shot to shot, slipping away and then coming back. To say that it is fleeting and difficult to manage is an understatement. The good news is that now, through eye-tracking, it can at least be accurately measured, and measuring engagement is the first step in learning to harness it.

Removes guesswork

With the continued refinement of the ICA and other eye metrics, it is possible to accurately examine the specific areas of the screen that people are looking at and whether those screen areas are engaging the audience. In short, you are able to track not only the eye but also the mind of the viewer. As you might imagine, this removes much of the guesswork from research with television commercials and can provide a clearer picture of the effectiveness of the ad overall. | Q

Eye-tracking online

Enter article ID 20080406 at www.quirks.com/articles for a look at how eye-tracking is used in the Web usability world.

Quality in, quality out

The importance of data quality in advertising decision-making

By Ashley Grace
and Ron Conlin

A heated debate among marketers is whether marketing and advertising spending should be decreased during an economic downturn. Although the size of a marketing budget and the difficulty in accurately accounting for its effect on business makes it a tempting area to cut, research from past recessions has consistently shown this to be counterproductive.

A better perspective to take is that the recession itself offers marketing opportunities, as it often allows advertisers to negotiate lower ad rates and, with fewer competitors advertising, media clutter is reduced and share-of-voice increases - enabling hard-earned brand equity positions to be protected and market share to be won. However, this sort of success doesn't happen by chance - it is most often the result of a committed approach to ensuring marketing decisions are founded in quality consumer research.

The concept of quality has been the keyword in business for the last 25 years. The battle for customers during the '80s and '90s was often fought around reliability and durability - with concepts like those promoted by Juran and Deming and movements such as Six Sigma, lean and total quality management. Industries such as automotive have successfully focused on quality and the results have been dramatic. Given the huge new-product failure rate (estimated at 85 percent), and significant waste in advertising spending, it is time for the research community to drive new-product research quality, especially in these tough economic times.

snapshot

In these harsh economic times, advertisers must put an emphasis on quality, both in terms of seeking to obtain high-quality data and also in making sure that the ad research they conduct adheres to high quality standards. The article outlines one research company's multi-step guidelines for conducting quality-focused ad research.

The job won't be easy: critical marketing issues remain even as research budgets are being slashed. So how are researchers dealing with this? Research suppliers are citing a shift away from descriptive and predictive quantitative research to less-expensive exploratory qualitative research, often with the same research objectives in mind. Given the lack of projectability associated with qualitative research like focus groups, this is an alarming trend.

In addition, there are growing concerns about sampling methods. Probability sampling techniques were the norm with telephone random-digit dialing before do-not-call lists, caller ID and widespread use of answering machines. Now, with the dramatic emergence of

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Internet data collection, given huge reductions in cost, probability sampling has been thrown out the window by many. Today's reality of shrinking budgets causes researchers to focus on the cheapest sources of online samples, often giving little attention to the sample source's projectability.

Given the pressures associated with reduced budgets, it appears that the market research industry's efforts to drive quality, validity and reliability are headed in the wrong direction - and that is bad for business.

Maximize the return

It has never been more critical to maximize the return on every advertising dollar, yet relatively little has been published on how marketers can maximize marketing impact during a financial decline. Instead of accepting the cliché that half of their ad budget is wasted, many top marketers are ensuring that all media spending has a positive return by using a quality consumer research program. These positive returns come in the form of increased equity and sales volume and the capturing of share-of-market from competitors.

If one can truly remove the uncertainty of the notoriously un-measurable advertising expenditure, why hasn't marketing research been called upon more broadly to deliver this sort of quality decision-making guidance? Somewhere along the way, marketing research lost respect as a function and with it, a seat at the marketing decision-making table in many firms. In a push to reduce research budgets and to provide faster turnaround, clients forced research agencies to compromise quality, which, in essence, led to a false commoditization. In a quest to save money and time, marketers began to assume that research measures were comparable across agencies: as long as the data collection technique appeared on the surface to be the same, many believed that persuasion was persuasion, recall was recall, liking was liking, etc., regardless of the underlying processes employed.

Even some of world's most respected marketers aren't immune from the problem. Consider the following from Kim Dedeker, global consumer and market knowledge director at Procter & Gamble:

"There are many examples I could share of what can happen when research quality is compromised. Instead, I'd like to tell a story about the real pain for P&G. It's something that we've seen time and time again across businesses and across geographies. It's when we field a concept test that identifies a strong concept. Then our [consumer and market knowledge] manager recommends that the brand put resources behind it. The marketing, R&D and research teams all invest countless hours and make a huge investment in further developing the product and the copy. Then later, closer to launch, we field concept and use tests and get disappointing results. And rather than finding an issue with the product, we find that the concept was no good. We realize that the data we'd been basing our decisions on was flawed from the start. This is the part that is so hard for our brands and costly for our businesses. We have to find the data/insights that convey the true voice of our consumer to provide sound consulting to our businesses."

Source: *Research Business Report* (October 2006)

P&G is not alone. Many top

marketers are now recognizing the sometimes painful adage that all that glitters isn't gold and are realizing that the business costs in dollars, time and lost opportunity far outweigh the investment in assaying research quality from the start. As Philip B. Crosby postulates in his book *Quality is Free - The Art of Making Quality Certain*, managing quality as a key driver of business success generally yields savings from eliminated rework - easily paying out directly for the cost of improved quality - and improves performance going forward due to reinforcing trust in existing systems and processes.

Industry focus

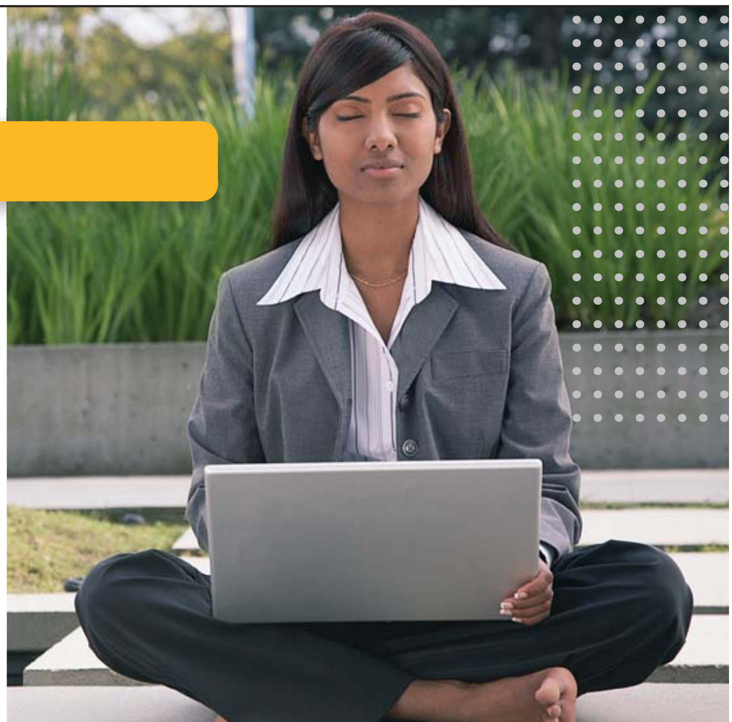
How can quality decision-making be assured while staying within budget? There is a lot of industry focus now on establishing "quality online research" standards - with firms like Capital One, Coca-Cola, Unilever, General Motors, Kraft, Bayer and P&G leading the way - and this is an important effort. However, before we talk about the quality of a particular fielding technique, it is of paramount importance to establish the basic fundamentals associated with having a quality research program.

As a guide to thinking about quality and as a reference for marketers, ARSgroup created an eight-part research quality checklist to provide marketers with an advantage as they begin to navigate difficult economic terrain in their advertising decision-making. While the application may vary, this checklist can be used to ensure a foundation is in place to deliver accurate marketing decision support, regardless of whether the data is collected online, in central location or via phone.

1. Objective: The business direction is not subject to personal opinion. Pre-testing historian Darrell Lucas has postulated: "Testing, in itself, is a reflection on the judgments of creative people. However, they are likely to be the first to endorse a test which confirms their own judgment." Marketers need to have decision criteria which clearly articulate the voice of the consumer and eliminate the effect of their personal opinion. To make this approach successful, the measurements, and the corresponding decisions, must focus on the consumer. As stated by John Philip Jones in *Getting It Right the First Time*, "The effectiveness of advertising suffers when decisions regarding copy strategy and execution are driven by advertiser/agency committees, politics and 'liking.'"

2. Relevant: Results address specific, pending actions. The metrics used in testing must be relevant to the objectives of the specific ad being tested. Some ads are meant to inform, others to remind and others to persuade. At times the advertiser is trying to increase consumption by current users. If the advertising measurement does not align with these specific business objectives, it will probably be of little use in the marketer's pending business actions. At the same time it is also important to recognize that the ultimate objective of advertising is a contribution to financial performance. Whatever the immediate objective, there is a need to link actions to financial performance.

3. Timely: Results are available before decisions are made. In this fast-paced consumer world, it is vital that advertising decision-making



tools are available to marketers when they need them. Pre-testing implies that measurements are taken before decisions need to be made. The data required must be available before the campaign is launched, not after. While "post" data may help marketers discern why a campaign or an ad failed or succeeded, it is much more cost-effective to spend the extra $20,000 before making a $100-million mistake.

4. Simple: Results are easy to adopt and act upon. Advertising research often brings with it a degree of complexity that makes the results difficult to understand and even harder to use. However, the best metrics have a clear interpretation related to business results. It should not require advanced statistical knowledge or a think-tank committee to make an advertising decision; marketers need simple decision-making tools that tell them with surety how to act in a given business situation. Simplicity is best achieved when key performance indicators can be directly tied to actual business performance - and when diagnostic results are empirically shown to improve the end outcome.

5. Reliable: Measurement results can be replicated. In their 1982 "Consensus Credo Representing the Views of Leading American Advertising Agencies," the PACT (positioning, advertising, copy testing) agencies asserted: "A copy testing system ... should yield the same results each time that the advertising is tested. ... Tests in which external variables are not held constant will probably yield unreliable results." In the 27 years since this statement was published, the rules of statistical measurement have not changed: the reliability of any measurement system should not be assumed but rather assessed and managed on an ongoing basis. Lesser reliability reduces the confidence in a measure because lower reliability, by definition, means lower sensitivity and greater error. While sampling variability imposes known limits on the reliability of all sampling-based measures, the presence of "other" error variance decreases reliability. To make sure that "other" error is minimal, reliability is determined by the difference between test results and later retests of the identical advertisement. Your testing provider should maintain a diligent and ongoing test-retest program to ensure that results are replicable over time and are as reliable as the laws of random sampling allow. And, they should openly publish these findings.

6. Sensitive: Representative consumers of appropriate sample sizes. The job of marketing research is to objectively translate the voice of the consumer into the language of business. To do this, the target consumer must be accessible via the collection technique utilized (phone, central location, online). For example, it is important to recognize that some demographic groups are more highly represented online and more likely to respond to requests to participate in online research. This makes it critical that there be a well-designed screening mechanism to assure a representative sample. Additionally, professional respondents must be eliminated from the sample to ensure an accurate representation of consumer behavior, and respondent representativeness must be balanced to account for known characteristics of target consumers.

Regarding sample size, a measurement system must be able to accurately detect meaningful business differences and must reflect the risk of the business decision (more risk, higher sample). As stated above, beyond pure size, the samples should use consumer respondents who have been recruited and qualified for research participation. A sensitive advertising measurement is one that is able to detect meaningful differences among alternative ads, allows for accurate projections of in-market results and ensures precise planning of media expenditures. Results obtained from low sample sizes should be interpreted with caution and used only for diagnosis.

7. Validated and calibrated: Proven to accurately predict business outcomes. Advertising research efforts should be targeted toward identifying valid measurements that predict advertising effects: awareness, share-of -market and consumption, among others. But it is not enough that the measurement is valid, it must be validated (i.e., proven through an ongoing validation program to measure what it purports to measure). There are many measures of intermediate marketing outcomes that need to be validated, but in the long term all of these outcomes need to be linked to and validated against financial performance. Like reliability and sensitivity, individual measures can be higher or lower in terms of validity. Higher validity makes for better decisions. On the other hand, a combination of moderate validity, moderate reliability and small sample size can make a measure so insensitive as to be useless.

ARSgroup has used the "current" post-market measurement technology to explore the relationship between advertising pre-market measurements and post-market sales results. The evidence from these tests, which has been audited by independent parties, suggests that quality measurements are capable of predicting sales effects with an accuracy rate of up to 90 percent. As brands and their corporations become increasingly global, measurements must account for differences across brands, conditions, cultures and regions. Yet, while methods may need to vary, the advertiser should be able to interpret the research results in such a way that their relationship to in-market results is universal. Global research standards ensure that a company's global marketing teams are all speaking the same measurement language.

8. Transparent: The system holds up to independent audits. Due to issues of client confidentiality and security, not all data collected by research agencies can be open to public scrutiny. However, clients should be able to get "inside the black box" to examine all raw and aggregated data collected for their brands as well as explore published blinded, cross-customer meta-analyses. Most importantly, the data should hold up to independent and unbiased third-party scrutiny and audits. The bottom line: Marketers should hold their research agencies accountable and demand to see the proof.

Not sexy

To most executives, the subject of quality in research is not sexy or strategically interesting but it is critical during this tough economic era and cannot be overlooked. Shareholders want smart, efficient expenditures from the companies in which they invest. Marketers want higher-order direction from their research agencies so they can do more with less. Research agencies want a strategic seat at the marketing decision table to solidify their client relationships.

The reality that quality research is the key to achieving all of these objectives is illustrated by Michael Harvey, global consumer planning and research director for Diageo: "So my message is clear to our [research] agencies ... until you can get the basics of conducting and analyzing a market research survey right, please don't ask us to trust your judgment on how we might resolve our business issues."

Advertising is always an important component of a marketing program. According to the article, "Making a Recession Work for You" featured in American Business Media, "When times are good, you should advertise; when times are bad, you must advertise." But do it smartly! It's 2009 and there are quality tools, technology and systems which can dramatically increase your overall marketing ROI and finally bury that crazy "half the money I spend on advertising is wasted" proverb. |Q concept evaluation research

Beyond the high-low game

Add some strategy to your concept evaluation process

By Kevin Dona

There is certainly no shortage of new product ideas coming from marketing and marketing research departments. With more new products being launched each year, how can you ensure that you are selecting the right ideas to develop and not missing your next big opportunity?

Concept evaluation can help, but when it comes to concept evaluation, sometimes the science can obscure the art. While research tools in the industry have advanced, interpretation has often regressed.

Norms and databases have become more commonplace in marketing research. Though databases can be powerful, they frequently are used inappropriately for selecting concepts for development. The general practice has become: high scores win, low scores lose. But is this the best interpretation?

An experiment was conducted to attempt to answer this question. Respondent and validation databases were explored to determine success rates for products tested, launched and tracked in-market. The key performance measures examined were: purchase intent (top and top-two box), liking, value, uniqueness, believability and need.

In Figure 1 we can see that concepts which have four key performance measures in the top two quintiles translate to performance at a 70 percent market success rate. Does that mean the "high-low" game works? There are three immediate observations that we can make:

snapshot

Assessing the prospects of a new product concept takes more than a cookie-cutter approach. Each concept requires its own set of strategies for how it will be presented to consumers in testing and a careful analysis of how the new idea fits corporate and brand objectives.

• There is no single key measure (including purchase intent) that determines success. Rather, it's a combination of measures.

• There is little chance of failure with strong overall performance versus the database - making it exceptional at mitigating risk.

• The high-low game can lead to missed opportunities (successes where overall performance was moderate to low).

Missed opportunities

Roughly two-thirds of missed opportunities fall into the following three categories: overpriced initiatives (i.e., price was holding other

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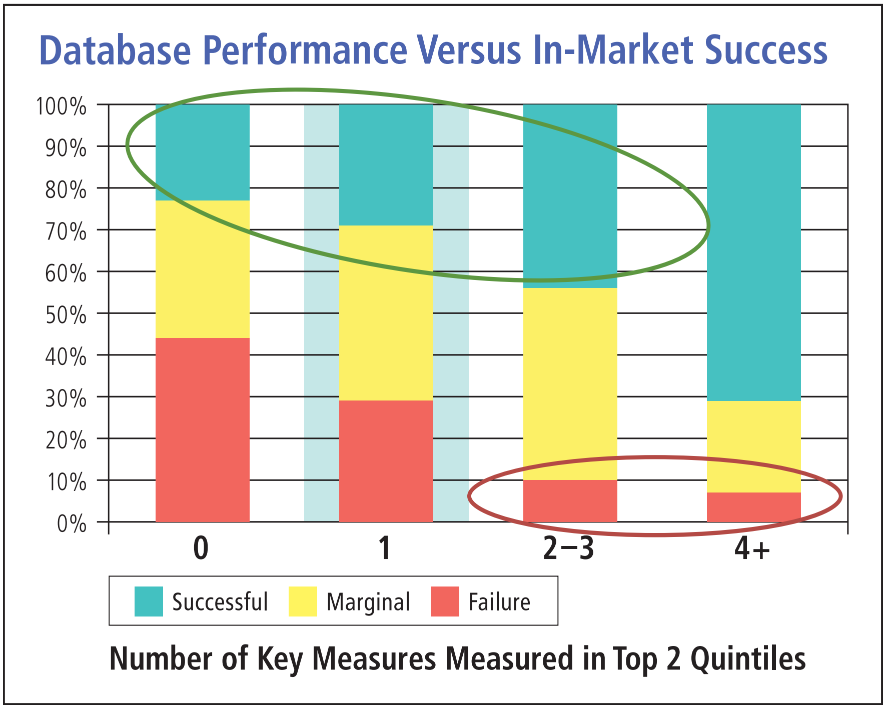
Figure 1



scores down); niche- or targeted-appeal initiatives; breakthrough ideas.

Some of the common myths in database interpretation are:

- "Databases miss niche opportunities or cannot adequately assess breakthrough ideas."
- "Only [insert a certain type of consumer] will get it."
- "People have to experience it."
- "It's too futuristic."

However, the tool itself is not to blame. The problem resides in the interpretation of the data rather than the presented results. After all, a database is merely a collection of information. Interpreting the information is the job of the marketing researcher.

If playing the high-low game, it is true that these opportunities may be overlooked. However, niche and breakthrough ideas are identifiable prior to launch, if you know how to look for them.

Some classic profiles of niche ideas or ideas before their time in consumer testing research:

- Niche- or targeted-appeal concepts tend to have low broad appeal (top two box) but moderate to strong commitment (top-box appeal). Liking and need also tend to be lower but uniqueness may be high.
- Breakthrough ideas tend to have lower purchase intent and need but strong liking and uniqueness.

While many of the key performance measures are expected to be low for these initiatives, they should not be confused with weak ideas. In other words: poor results should not be dismissed as niche or breakthrough. Many of these profiles or archetypes exist in database interpretation: luxury, me-too and underpriced, to name just a few.

To best put this idea into practical terms, let's look at Figure 2. As you can see, broad appeal and value are weak for New Product X but the proposition is generally well-liked and very unique. Faced with this information, would your organization pursue this idea?

Would this answer change if you knew that New Product X was a plasma TV, before the technology gained mass appeal and acceptance?

The true power of the database lies in analyzing these archetypes, versus simply looking to see if the idea scores well. While approaching database interpretation in an analytical manner does prove to be more effective when evaluating concepts, it is still not complete in providing a full assessment of a concept's potential.

Better or worse

Even with proper concept evaluation some propositions may perform better or worse than expected in-market. Why?

The preceding discussion assumes that the concept evaluated represents the in-market execution of that concept. Often, concept evaluation and execution are considered separately. And, other corporate, category or marketing factors are not included in the evaluation of the entire proposition.

Each product is unique and so is each product's strategy or process. Hence, the stimuli, or how the idea is served to the customer, should be tailored to the specific buy-sell dynamics expected. For example, if a product will lack advertising but face a great deal of cross-comparison at point-of-sale, an 8x11 concept board is inappropriate. Alternatively, if a category is shopped infrequently or if comparison shopping is expected, a competitive set is a must-have.

Furthermore, the awareness process for breakthrough ideas or new-to-the-world categories usually happens in diffused stages and via varied sources. Consumers are not likely to invest without a strong understanding of how the product works. Therefore, the goal of stimuli should be to get individuals to the level of education they will have at the time of purchase. In other words, the concept evaluated should represent its in-market execution.

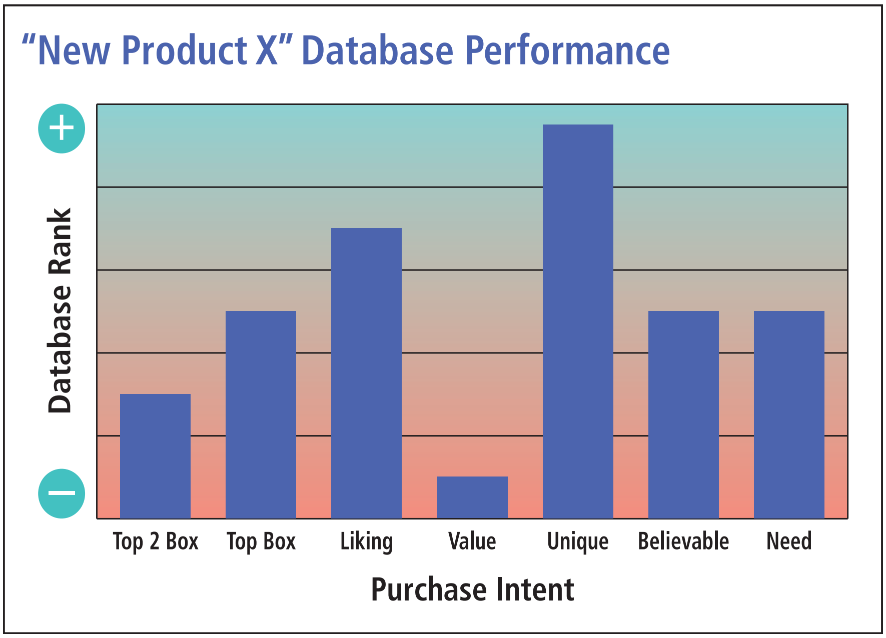
Considered separately

Often, concept evaluation and execution are considered separately. For example, a typical new product development cycle may follow these steps:

- develop ideas;
- screen for winning concepts;
- develop winning concepts;
- develop strategy/marketing plans;
- launch product/service.

In product development flows such as these, the marketing-plan

Figure 2



elements are often not considered until just prior to launch. However, how can the concept evaluated represent the in-market execution of that concept if the execution of the idea has not been considered? Ultimately to the consumer, the concept is what is executed not what was evaluated. This seems fairly straightforward, but far too often the idea is developed and then under-executed in market. After all, is a concept still a concept if no one actually hears it?

Under-executing ideas is not the only problem. For breakthrough ideas, "going mass" too quickly can be just as troublesome. Building consumer acceptance takes time, and high early spending generally results in a low ROI. As a result, companies often cut support prior to the takeoff point (three-to-five-year mark), which ultimately leads to the product never taking off. For niche concepts, issues can arise from pursuing an unreachable target. You can also over-execute against a niche opportunity. The potential size of the business should guide the support.

How well you spend

It is not about how much you spend behind an initiative but how well you spend against the initiative. This starts with having the right strategy and selecting the concept which best meets that objective, which then dictates the right support.

A revised new product development cycle, therefore, might look like this:

- develop strategy;
- develop ideas;
- screen for "right" concepts;

Figure 3

Product Database Performance

Purchase Intent	−	← Database Rank →			+
Top 2 Box			P1 – 36	P2 – 41	
Top Box			P1 – 11		P2 – 17
Liking				P2 – 41	P1 – 4.6
Value	P1 – 2.8			P2 – 3.5	
Unique					P1 – 4.5 P2 – 4.4
Believability					P1 – 48 P2 – 50
Need		P2 – 52			P1 – 67

Figure 4

Product Scorecard

	Product #1	Product #2
Early Years (1–3) Penetration Potential	★★	★★★
Early Years (1–3) Revenue Potential	★★★	★★
Annuity/Long Term Potential*	★★★★	★★★
Audience Potential (Awareness Advantage)	★★★★	★
Target-ability (Awareness Advantage)	★★★★★	★★
Competitive Advantage	★★	★★★★
"Sell Itself" Potential (Product Level Dynamics)	★★★★★	★★★
Pull Potential (of Marketing Communication)	★★★★	★★★

- develop "right" concepts;
- finalize market plans;
- launch product/service.

Successful launches start with the strategy that is right for you. To do this well, it is important to go beyond the search for categorical white space. It is also necessary to think about both corporate and brand objectives. Once the objective is clear and you have your ideas, screen for the right concepts and avoid the high-low game. Then, develop those concepts which fit the overall strategy and finalize marketing plans. Throughout the process, one must keep the overall strategy in mind and consider other factors that may affect the attractiveness of an initiative. This may appear to be a daunting task if you have a large number of concepts.

Developing a scorecard greatly assists in the aforementioned process. This approach encompasses both the database analysis (concept opportunity) and a scorecard analysis (business opportunity), which can be measured with a combination of survey data and market examination.

The scorecard encompasses such things as: audience potential; market structure; annuity or long-term potential; logistics or payback tolerance; competitive advantage; targetability; communications clarity; and sales potential.

Many of these dimensions are informed by research alongside the traditional metrics. Which of the products in Figure 3 would you pursue, Product 1 or Product 2? What if you knew the information presented in Figure 4?

While Product 1 is somewhat limited by its high price, Product 2 calls for consumers to adopt an entirely new behavior. It will likely garner limited awareness without significant support - due to its store location - and is not as attractive long-term.

As you may well know, many of these elements would make it into internal discussions about which product to pursue. However, incorporating appropriate measures in the consumer research and empirically evaluating these measures provides for a more concrete and complete analysis. This process also allows for and encourages early evaluation of these important dimensions before time is wasted pursuing a concept with limited real-world potential. Conversely, it can help to identify potential hits that merely need additional fine-tuning.

Next big hit

Time has seen concept evaluation become more of a science than an art. Unfortunately, the rigidity that has come with it ensures that companies will continue to miss potentially lucrative ideas. However, with the right process in place and strategic (archetypes and scorecards) versus absolute (high-low game) concept evaluation, your odds of finding the next big hit will increase dramatically. | Q

Ground your concept

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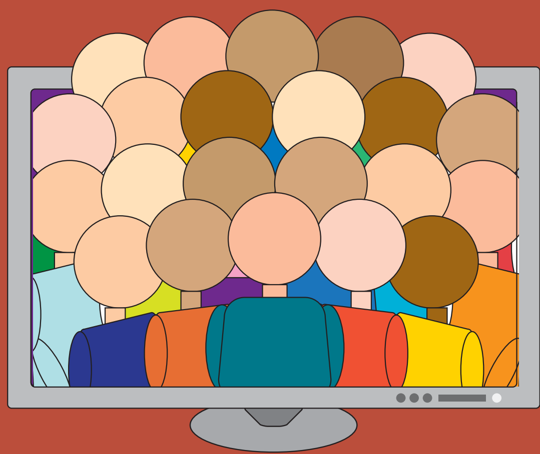

"The Devil Is in the Data"

Online panels have made a swift ascent from their early days as little more than electronic versions of traditional mail panels to their current form as a vibrant, vital way to reach and research consumer segments of all shapes and sizes.

They enjoyed a brief period of time as the answer to clients' long-uttered demand for research that was better, faster and cheaper. Response rates were outstanding, the data was eventually deemed valid and seemingly every research company began touting their panel wares. But as the method has matured, questions have arisen about panelist identities (are they who they say they are?), problem-respondent types (speeders, cheaters, etc.), data quality (where did you get your sample?) and other issues.

The industry has shown an admirable interest in investigating these topics, with the aim of developing a set of panel research best practices. In that spirit, the following white paper from DMS Research Inc., Lewisville, Texas, explores a research-on-research study which drew samples from a number of providers and examined how pervasive certain respondent types were within the samples.

We hope you enjoy it and find the contents thought-provoking and worthwhile.

Steve Quirk
Publisher

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The Devil Is in the Data

A Respondent Classification Analysis Comparing the Best and Worst Survey Respondents

Background

Starting in 2007 and continuing through 2008, DMS conducted a comprehensive research-on-research initiative, initially focusing on understanding the similarities and differences among multiple respondent surveying methodologies, including online panels, river (or real-time) samples, and RDD CATI interviewing.

The earliest phase of this research addressed key issues including respondent profiles, past and recent survey history, survey-taking motivations and earnings, in-survey behavior and data quality, and overall proximity to benchmarks based on the overall US population. The findings provided a clear understanding of the differences and similarities among respondent groups based on sampling methodologies and clarified how these differences might influence the research design and conclusions resulting from the use of a particular online sample.

Subsequent phases of this research focused on differences among specific sample types, with one phase concentrating on comparing eight different panel samples to each other, and another comparing five river or real-time samples. This research underscored the differences in quality among providers and uncovered how recruiting and sourcing biases can have an impact on data quality.

This final phase of the research combined the thousands of interviews collected over nine months to look at the data as a whole and segment respondents not based on their sampling methodology, but instead by their overall respondent quality. In this phase, we studied the different types of respondents that make up a typical data set and identified the characteristics of the best and worst respondents. A further consideration was to isolate the worst respondents and determine their impact on the quality of the data. Finally, we sought to understand how best to identify and remove those respondents who contribute to poor data quality.

Thus, the goal of this phase of the research was to call out the worst respondent – the devil in the data – whose presence in the data is known, but not always to what extent, and whose impact is not always quantified. This alone impacts the data quality because it is not always clear how pervasive it is, and researchers are often unclear how to identify the worst responders and uncertain what level of imperfection is permissible without affecting quality results.

Research Design

Interviews were completed in three phases between December 2007 and August 2008. A total of 6,700+ responses to the survey were received. The research utilized the following sample sources:

- DMS River Sample (using DMS proprietary Opinion Place River Sample®)
- DMS Panel Sample (using DMS proprietary SurveySpree® panelists)
- "Real-time" samples from four competing sample providers
- Panel sample from eight competing sample providers
- CATI interviews (RDD)

Between 300 and 400 responses were collected for each sample source and statistical significance was tested at the 95% confidence level. With the exception of two river cells which were known to skew toward younger respondents, quotas were set to control for gender, age, income, and ethnicity, and were used to ensure that each sample source included in the original sample comparison resembled each other demographically and reflected the overall US population (according to US census estimates).

Precautions were taken at every step to ensure that the research was as unbiased, clear and objective as possible. In addition to surveying multiple different external river and panel samples, the sources of which were unknown to us, we also outsourced the data collection, coding, tabulation, and statistical analysis to further ensure objectivity of results.

The research questionnaire included the following key sections:

- Respondent profile: we surveyed respondents across demographic categories, attitudinal statements, product ownership, and a broad range of other topics.
- Respondent survey history: we measured the level and frequency of previous participation in market research, membership in research panels, and estimated survey earnings to understand how respondents from different sampling methodologies contribute to the overall body of online market research.
- Respondent survey behavior: we utilized standard data quality measures such as "data traps," internal consistency, low incidence questions, survey completion times and open-ended responses to determine if the response quality of one respondent group outshines that of another. We also probed for motivations/detractions from joining panels, as well as motivations for participating in online surveys, to understand what moves respondents to accept a survey or panel invitation and if there is any underlying response bias.
- Benchmarks: we surveyed respondents from each sample source on a range of benchmark measures – from product ownership to presidential voting – to establish proximity to the overall population.

Research Results

Unlike previous phases of this research, which focused on the differences and similarities among multiple respondent sampling methodologies, this phase of the research combined all of the respondents into one dataset to determine respondent quality segments and examine trends among the best and worst respondents.

Respondents were segmented into quality groups based on their responses to several quality measures that were either included directly in the survey as survey questions or captured indirectly in the survey meta-data. They included:

- Speed. The survey covered a wide range of topics, included more than 35 questions, and took the average respondent roughly 17 minutes to complete. Respondents who completed the survey in under 9 minutes were flagged for speeding through the survey.
- Straight-lining. The survey included two long grid-format questions; one was a 10-part grid, the other, a 16-part grid. Respondents found to have given the same value to each question (row) of the grid were flagged for straight-lining.
- Internal Consistency. The survey included three questions to test respondents' internal consistency, that is, their ability to provide an answer to one question that did not contradict their answer to the same or similar question asked later in the survey. These included:
  - Kids in household - respondents were asked first in the interview screener and later in the closing demographics to report the number of children under 18 who lived in their household. Respondents who did not provide the same response to both questions were flagged for consistency.
  - Item inconsistency (1) – respondents were asked two questions regarding their attitudes toward brand and price (Price is more important to me than brand names / Brand names are more important to me than Price). Respondents who agreed with both statements and respondents who disagreed with both statements were considered "inconsistent" responders. (Respondents who gave a Neutral value of "4" to either question were not considered inconsistent.)
  - Item inconsistency (2) – respondents were also asked about their attitude toward their standard of living (I am perfectly happy with my standard of living / I'm not really happy with my standard of living). Again, respondents who gave both statements a positive or negative agreement rating were flagged for inconsistency.

- Open-Ended Response. This data flag captured the percent of respondents who provided a nonsubstantive response (such as "nothing" or "I don't know," etc.) to the open-ended question "What made you decide to take this survey today?"
- Trick Question. The first phase of this research employed a traditional data trap asking respondents to mark their place in the survey by selecting "3" on a 7-point scale grid-format question with multiple attributes. This trap was reworked in later phases to be clearer for respondents, where respondents were instead instructed to select "strongly disagree" on one attribute within a 13-part grid question. Respondents who did not comply with either instruction were flagged for failing the trap.

A simple segmentation of the overall data set based on these flags yielded the following four respondent quality groups:

- Ideal Respondents – these respondents have no data quality flags and make up an impressive 29%

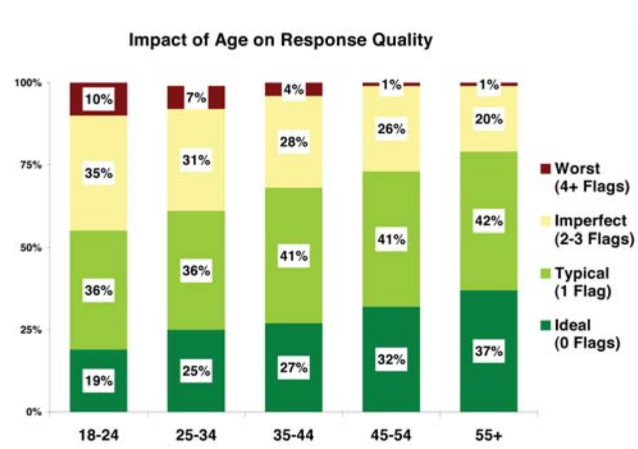
of the overall data sample. Demographically, Ideal Respondents tend to skew older and female, but are most alike in their response consistency and conscientious survey taking, including overall proximity to benchmarks, lack of patterned responses, thoughtful responses to open-ended questions, and careful attention throughout the survey.

- Typical Respondents – these respondents have one data quality flag and make up the single largest group of survey respondents with 41% of the overall data sample. Like Ideal Respondents, Typical Respondents are characterized by data that is in line with benchmarks and other evidence of careful survey taking (such as a low data trap failure rate, higher than average levels of internal consistency, and "sensible" or predictable responses to attitudinal questions).

  While they are not "perfect," their one error is easily forgiven as their responses mirror those of Ideal Respondents: there is essentially low to no difference between Ideal and Typical respondents. For this reason, these respondents, along with Ideal respondents, make up the group hereafter called the "Best Respondents" and comprise the 70% of the sample whose responses can be trusted to be accurate and of the highest quality.
- Imperfect Respondents – these respondents have two to three data flags and make up a significant 27% of the overall sample. They tend to skew slightly younger and more male, and unlike the Best Respondents, who have in common a high level of consistency in their responses, the Imperfect Respondents are often inconsistent. At times, their responses are close to benchmarks and in line with average, while at other times, their responses appear to be outliers. Thus, while not always impacting overall data quality, these respondents can be inattentive and inaccurate, they are more prone to speeding through the survey, and tend to fatigue earlier than the Best Respondents.
- Worst Respondents – with four or more data quality flags, the Worst Respondents make up the smallest part of the data set. And these data flags – most often speeding, inconsistency, and straight-lining, contribute to data quality that is beyond suspect: it's toxic. The Worst Respondents' responses are often "off the charts," with responses rarely comparable with benchmarks, higher than average rates of product ownership (even on low-incidence items such as hybrid cars), and contradicting responses to attitudinal questions.

The good news is that the Worst Respondents make up a very small part of the data – only 4% of the overall sample.

The bad news, simply put, is that you can't trust anything the Worst Respondents say. Speeding and straight-lining are incredibly pervasive among this group, at 73% and 40%, respectively, and likely earn the Worst Respondents enough other quality flags to place them in the Worst Respondent group. When reflecting on the Worst Respondents' impact on data quality, it is most disconcerting that they have failure rates as high as 80% on internal consistency questions, meaning that these respondents give contradictory answers to similar questions, or respond similarly to opposing questions. It is no surprise that the Worst Respondents are rarely in line with benchmarks, or that they give relatively improbable responses to simple questions (52% report that they own a laptop but 57% agree that "It would be fine with me if I never used a computer again").



The question then becomes not if or how often these devils sin, but whether they can be saved.

Profile

Unfortunately, the Worst Respondents seem to be, at least on the surface, some of the research community's most sought after respondents: younger males are disproportionately represented in the Imperfect and Worst Responder groups.

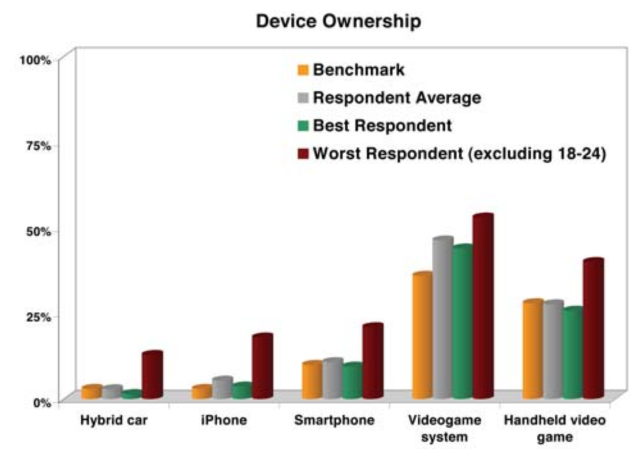
However, we know from the data that the Worst Respondents do not always provide accurate or truthful information. While it is easily plausible that young males could race through a survey, committing multiple data quality infractions along the way, it is also possible for a respondent to pretend to be in a low-incidence group to qualify for a survey. Anecdotal data from this research and information from other research into data quality suggests that both scenarios (inattentiveness and fraud) are possible.

Age and gender aren't the only demographic skews among the worst respondent groups:

- Income may also be a factor, as respondents with household incomes less than $25K are overrepre-

sented in both the Worst and Imperfect Respondent groups, even when removing the youngest (and presumably least affluent) respondents. By contrast, the Best Respondents have a representative distribution of incomes.
- There are some differences by race, as non-white respondents are overrepresented in the Worst and Imperfect Respondent groups.
- And finally, respondents with children in the household are overrepresented in the Worst Respondent group.

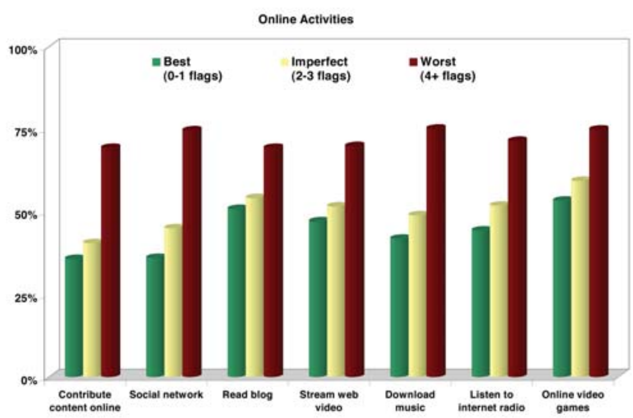
That several of the most coveted, hardest to attract demographic groups also turn out to be among the worst respondents suggests that it is extremely important to independently validate respondent details to



ensure that, as far as information is verifiable, respondents are actually who they say they are.

Impact

One of the biggest effects we see with the Worst Respondents is their tendency to over-state things



– from product ownership, to online activities, to agreement with attitudinal statements. It's their contradictions and improbable responses (25% own hybrids?) that begin to plant the doubt that anything they say can be trusted.

One example is product ownership.

The Worst Respondents overstate product ownership on items ranging from phones to hybrid cars. Even when dropping the youngest respondents (who may arguably have higher rates of ownership of the latest technology gadgets like iPhones and video games), the Worst Respondents still state device ownership rates that are significantly higher than the Best Respondent group and more importantly, the benchmark (based on industry data).

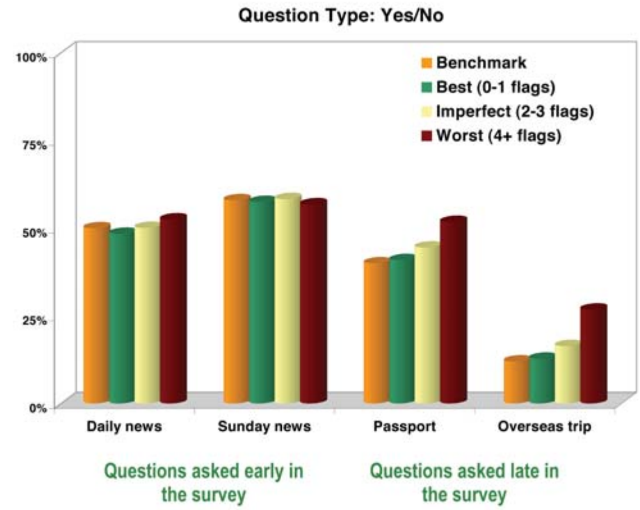
The Worst Respondents also raise doubts with higher than average participation in online activities. Due to their inaccuracy in other areas of the survey, it is difficult to say whether increased participation in online activities is a predictor of poor respondent quality, or whether the Worst Respondents are just over-reporting participation in online activities.

We could, however, theorize that if these Worst Respondents are in fact doing all of these sophisticated activities (such as social networking, blogging, downloading music, streaming video) to a greater extent than other Respondent groups, then the typical online interview must seem quite boring compared to the other content they consume. Much of today's Internet strives to engage all viewers but particularly the younger and sophisticated audience to visit more often and consume more content; and yet, when respondents visit research sites to complete an interview, they often see an interview environment not much different than that they would see on paper.

One possible impact on overall data quality is that product penetration is overstated and demand for services may not be as high as it appears to be. Because of their inconsistent answers to other questions, and in some cases their improbably high ownership of low-incidence products, it is likely that at least some of this data is inaccurate.

On the other hand, if respondents who are the most engaged with the most sophisticated content the web has to offer are also the internet survey's worst respondents then there is an opportunity (obligation) to create an environment equally as engaging for them to take surveys.

The Worst Respondents are also prone to satisficing, though in this survey that seems to be the result of straight-lining or their tendency to pick the first option available. Top box satisfaction with their cable / satellite television provider among those with four or more data flags is 53.9%, compared to 41% for the average and the Best Respondents. The Worst Respondents also under-report dissatisfaction (5% for respondents with four or more data flags vs. 14% for respondents with 0-1 data flags).

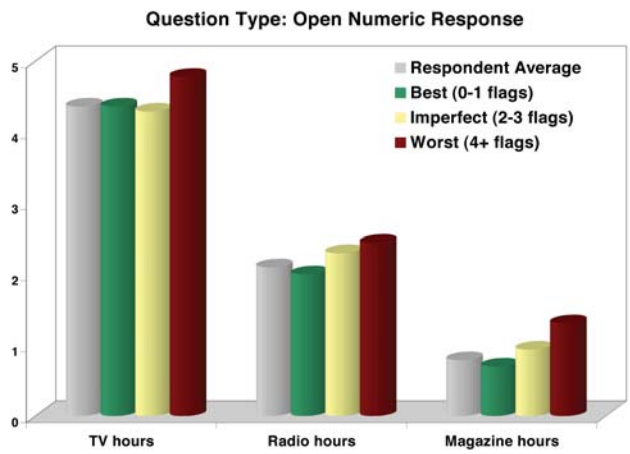


Behavior

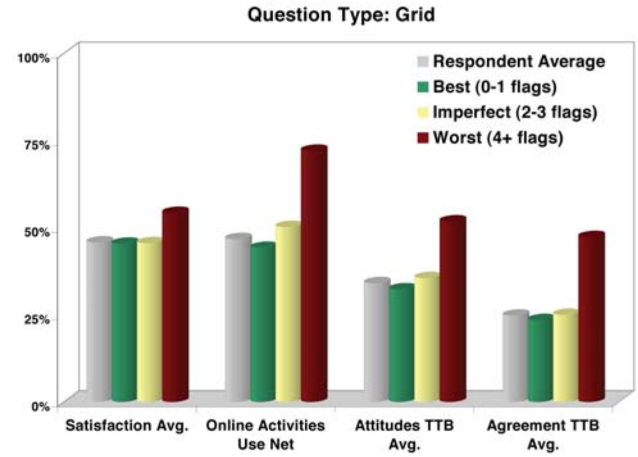
The survey data and respondent groups were analyzed by question type to determine whether the Imperfect or Worst Respondents performed better or worse depending on the relative complexity of the question (as well as its position in the survey), and more importantly, whether any of their data could be salvaged.

On the whole, the Worst Respondents' survey behavior seems to be almost equally bad, regardless of the relative ease or complexity of the survey question.

On several "Yes/No" format questions placed very early in the survey, the Worst and Imperfect respondents' responses are in line with average, raising hope



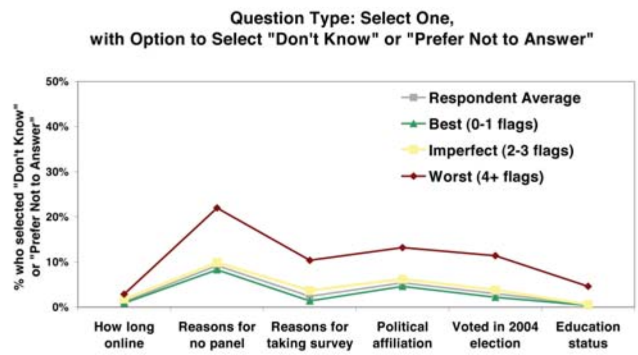
that the Worst Respondents might be less troublesome on simple question formats. However, on several similar questions later in the survey, fatigue seems to be setting in, as both the Imperfect and Worst respondent groups start to stray from the benchmarks, to varying degrees: Imperfect Respondents are up to 37% higher than the benchmark, while the Worst Respondents are almost double the benchmark on the question of whether they



have traveled overseas in the last year.

On open numeric response questions asked early in the survey (shown in the chart to the right), the Worst respondents are outliers, posting numbers 10% to 66% higher than the respondent average. Imperfect respondents are at least within acceptable proximity to the majority. On open numeric response questions asked later in the survey (including estimated earnings from market research), several of the Worst Respondents posted outlandish numbers ($10,000+), making their average earnings numbers exponentially higher than the best and average respondent.

While grid questions can be difficult for even the most conscientious respondents, they are almost wasted on the Worst Respondents, given the quality of data that comes out of them. Grid format questions are



where straight-lining and patterned responses come into play, and where the Worst Respondents are so far outside of the normal range of responses that it is difficult to believe that their responses are an accurate reflection of their satisfaction, frequency of use, beliefs, or attitudes. Though it is possible to set a simple data trap or warning to catch the straight-liners, based on the behavior of the Worst Respondents, it's difficult to believe that even a simple data trap would cause the Worst Respondents to respond to these questions more carefully. However, while the Worst Respondents seem more and more like outliers as grid length and survey time increase, the Imperfect Respondents are still within an acceptable range, with a greater use of the scale than the Worst Respondents, better scores on the grid-format consistency questions, and "sanity check" passes (such as low agreement that they could live without a computer).

When they're not giving bad data, they're giving no data.

It's clear that the Worst Respondents take shortcuts throughout the survey, from speeding to straight-lining to providing careless responses on open-ended questions. Thus it is not surprising that on any questions where they had the opportunity to respond "don't know" or "prefer not to answer," the Worst Respondents were quicker than others to take that opportunity. In fact, the Worst Respondents refused the opportunity to answer some questions six times as often as the Best Respondents. Though overall refusal rates are relatively low even among the Worst Respondents, this behavior, combined with their repeated tendency to provide inaccurate or improbable data, reinforces that their entire data set is suspect and should be discarded.

Remove and Discard

Because it is their behavior rather than any specific set of characteristics that brands them as the Worst Respondents, it is difficult to implement what would be the ideal solution to address bad respondents – successfully screening them out of the survey entirely before the survey even starts. Thus, one option for dealing with the Worst Respondents and improving overall data quality is to identify the Worst Respondents post–survey based on specific behaviors and then remove their responses entirely from the data set.

The obvious goal of the data cleansing process is to strike the right balance of eliminating bad respondents while keeping good respondents. Accomplishing this is a function of selecting the right questions on which to base the decision while allowing some level of forgiveness for respondents who make honest mistakes. The number of quality flags to apply is critical: too many, and we risk muddying up the survey with multiple quality traps; too few, and we risk not catching and removing enough potentially toxic respondents. Selecting the right questions is also a consideration: researchers have been using traps and data quality measures for some time to improve the quality of the data set, but it's important to exercise caution in how and which of these we apply, as some traps and tricks can trip up even acceptable respondents.

An analysis of the sample by the eight data quality flags used in the survey determined that there are several flags that, when used in combination with each other, can effectively remove the worst respondents

	% of Total Sample	% of Worst Respondents	% of Acceptable Respondents
Inconsistent on Kids in HH	11%	37%	10%
Time less than 9 minutes	17%	73%	15%
No thoughtful response on open end	4%	26%	3%
Did not select "Strongly Disagree"	20%	85%	17%
Inconsistent on Standard of Living	22%	80%	19%
Inconsistent on Brand/Price	42%	84%	41%
Straight-lined 13-part grid	2%	40%	1%
Straight-lined 18-part grid	2%	44%	1%

without losing too many acceptable respondents.

A consistency pair within a grid question is one good way to test respondents' attentiveness, but the key is for the concept to be simple enough to follow that a careful survey taker would not be confused by it.

Consider, for example the following consistency pair:

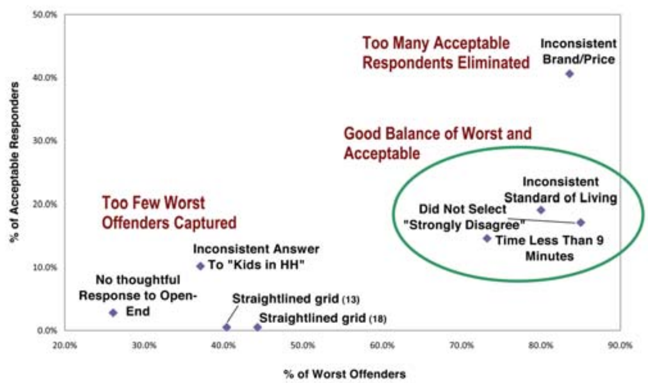
"Price is more important to me than brand names."

"Brand names are more important to me than price."

While the "brand/price" consistency question captures a very high number of the Worst Respondents (84%), it also captures 41% of the acceptable respondents. It is clear that even careful survey takers can be confused by long and involved attitudinal or belief statements like this, especially at the end of the survey. On the other hand, a simpler consistency pair involving agreement with attitudinal statements about their standard of living captured an impressive 80% of the Worst Respondents while only tripping up 17% of the acceptable respondents:

"I am perfectly happy with my standard of living."

"I am not really happy with my standard of living."



The "trick" question (to ensure data validity, please select "strongly disagree" for this row) is good, but cannot be used in isolation, as it is especially confusing for first time or casual survey takers who are not as familiar with survey instructions.

Getting rid of the most egregious speeders is also a simple but effective way to identify and eliminate the worst responders, but it must be used in combination with the other quality tools to ensure that it doesn't unfairly snag those who are actually just familiar enough with research to be able to complete surveys more quickly than average.

If the best balance is to remove the worst respondents, screening for and eliminating respondents with two of those three flags would remove 92% of the Worst Respondents and only 6% of the acceptable respondents for an estimated total of 10% of the sample.

If 10% seems too much, screening for and eliminating respondents with all of the three above would successfully remove half of the Worst Respondents and only .2% of the acceptable respondents, for a total of only 2.2% of the sample.

Conclusions

After evaluating over 6,700 interviews from an incredibly long and complex survey and then using a combination of eight data flags to determine respondent quality segments, it is inspiring to see that most respondents are inherently good. The largest part of the sample (70%) had one data quality flag or less over the course of 40 questions. Another group of respondents had two to three data flags, but their proximity to benchmarks and consistent responses suggest that they are for the most part engaged with the survey process and trying to provide genuine and truthful responses.

Unfortunately, a small percent of the sample (4%) is inherently bad. The Worst Respondents' behaviors seem to compound each other (speeding and straight-lining lead to inconsistency and failing traps), though their issues seem to be beyond what simple error checking could catch. They fail to provide quality data on almost every level – they deviate from benchmarks, they rate satisfaction and product use more than 100% higher than the average, they refuse to answer questions at up to six times the rate of the average respondent, and their high levels of failure on trick questions and consistency pairs suggest that they do not read or answer survey questions carefully enough to accept that ANY of their responses are accurate or true. In short, their data is toxic to the quality of the overall data set and as much as possible should be removed.

Going forward, we suggest the following quality guidelines:

- Make the survey environment more engaging. While the Worst Respondents are beyond repair, there are other respondents in our surveys that do provide accurate information, even if they make more than an acceptable amount of mistakes. These respondents can fatigue earlier in the survey than the most attentive respondents, and can get tripped up on long grids with complex or confusing statements or beliefs that they must evaluate.
- Use a more selective data cleansing process (post survey) that relies on a combination of triggers. We know that using one flag injudiciously can just as easily punish an acceptable respondent who makes an innocent mistake as the worst offender who makes many mistakes, but also that most surveys don't have the time or ability to include eight data traps to capture only the worst offenders. But using two or three select data quality flags can greatly improve the odds of removing only the worst respondents without punishing everyone else, and as one of these is not even a question, it's a manageable number to insist on including in each survey.
  - Speed
  - Well-worded and easy to understand "trick question"
  - Well-worded and easy to understand consistency pair
  - Don't know / refusals
- Be prepared to discard 2 to 5% of your sample. Researchers must be prepared to remove a small percentage of the data set in order to improve the overall data quality.

Suggestions for Further Research

As a result of this research initiative, we know more about the worst responders than we ever have. However, respondents are evolutionary and data quality is a continuum, meaning that as research changes and participants learn, what we should look for will change. DMS will continue to analyze respondents using similar and new techniques. Additionally, we plan to do more work on combining Optimus (computer identification) and Idology (personal identity validation) to weed out the liars up front and remove them, and then see what types of people are typically removed. Once undesirable participants are identified and declined, we will continue to examine what it means for hard-to-reach respondent segments in terms of feasibility and how people respond to being "caught." Additionally, we will conduct research among hard-to-reach respondent segments, such as young males or ethnic groups, that cannot be validated, and compare them to those that can be validated. The plan is to determine if there are any differences in quality among the two groups to prove whether certain demographic groups are inherently worse respondents or actually liars attempting to get into the survey by saying they are part of age, gender and ethnicity of quota groups that are more likely to qualify.

For further information on this and other research on river respondents, please contact:
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all balances), the Credit Worthy are most interested in providing for retirement (38 percent). This number has increased by 11 percent from pre- to post-crisis. Of those who are Credit-On-The-Edge, 47 percent want to pay off their debt, and this number has increased by 25 percent over the past year. For more information visit www.target-researchgroup.com.

Big spenders want a tailored ad experience

Thirty-nine percent of consumers overall are more likely to click on an ad if it is personalized, while that number rises to 58 percent among those who shop online at least several times a month, according to research from ChoiceStream, a Cambridge, Mass., research agency. The survey finds that the bigger the spender, the greater the interest in personalized ads. Half of those spending more than $250 online over the past six months indicate that they are more willing to click on ads that are personalized, compared to only 32 percent of the smallest spenders.

Consumers are surprisingly savvy about online advertising in terms of its effect on their behavior. Seventy percent of consumers admit that their purchase decisions are at least sometimes influenced by having seen an ad for an item, and a smaller percent of consumers admit that they are influenced by brand advertising as well, with 39 percent admitting that they are more likely to buy from vendors or retailers that they have seen advertised than from unrecognized sources. In both cases, the bigger the spender, the more likely he or she is to admit to being influenced by advertising.

A full 60 percent of shoppers are aware that retailers use information about their online shopping behavior to target advertising to them.

Additional findings include: 78 percent of consumers are interested in receiving personalized ad content, namely in music, books and DVDs; 71 percent of the consumers believe that personalization would improve their experience in social networking by introducing them to other members with similar interests and preferences; 72 percent are interested in personalized advertising distributed through their television; 73 percent are interested in online distribution of personalized advertising; 35 percent are interested in personalization on their mobile device; and 45 percent of consumers reported receiving personalized recommendations that were a poor match based on their tastes and interests in 2008. For more information visit www.choicestream.com.

WOM rampant among loyalty reward members

Sixty-eight percent of word-of-mouth (WOM) champions in customer loyalty reward programs will recommend a program sponsor's brand within one year. Generally speaking, consumers who are loyalty reward program members are far more likely to be WOM champions for their favorite brands than non-members, and the more active their program participation, the more likely they are to exhibit WOM behavior, according to The New Champion Customers: Measuring Word-of-Mouth Activity Among Reward Program Members, a study from Colloquy, a Cincinnati research company.

Reward program members are 70 percent more likely to be WOM champions (defined as customers who are actively recommending a product, service or brand) than the general population. Fifty-five percent of reward program members are self-described WOM champions, but only 32 percent of non-reward program members are self-described WOM champions. Actively-participating reward program members are over three times more likely to be WOM champions, and reward program members who have redeemed for experiential rewards are 30 percent more likely to be WOM champions than those who have redeemed for discounts.

Colloquy also examined the motivations of WOM champions, asking why they engaged in WOM activity regarding their favorite products and brands and what categories of offers and information they were most likely to pass along to others within their networks. The top five motivations of WOM champions were to tell manufacturers what I think (73 percent); to get smart about products/services (68 percent); to be the first to discover new items (68 percent); to get free product samples (63 percent) and to share my opinion with others (61 percent). For more information visit www.colloquy.com.

Age is the greatest determinant of online banking

Among individuals who are active online, 80 percent are now enrolled in their bank's online service, and the proportion is much higher among online users age 18-34 (89 percent) than among those 55+ (71 percent), according to a survey from Morpace, a Farmington Hills, Mich., research company.

"No other demographic variable - including income, gender, marital status or ethnicity – is as predictive of participation in online banking as is age," says Tim Taylor, vice president, financial services practice, at Morpace. "While the fact that younger online users are more likely than older individuals to use online banking is to be expected, it's the extremely high level of online banking penetration among younger online users which is so noteworthy. It's conceivable that close to 100 percent saturation may be achieved eventually in the younger demographic. That has large implications for banks as they consider investments in physical assets versus virtual ones."

The biggest barrier to becoming an online banking customer revolves around identity theft and security of account information - concerns expressed by 47 percent of those age 18-34 and 57 percent or more of those 55+. "As banks try to draw more customers online, particularly those in older demographics, special attention must be given to security concerns," Taylor says. For more information visit www.morpace.com.

Product and Service Update

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100,000+ panel members to provide online surveys for qualitative health care research. Each member belongs to at least one of 170 different health and wellness communities. For more information visit www.inspireopinions.com.

The NPD Group, a Port Washington, N.Y., research company, has released weekly e-commerce point-of-sale data for consumer technology categories. NPD's Ecommerce Weekly Tracking Service is designed to be used in conjunction with NPD's Weekly Tracking Service, which tracks brick-and-mortar retail sales.

The Ecommerce Weekly Tracking Service collects data from 15 e-commerce retailers, both Vendor.com and PurePlay.com, and is available for 100+ consumer technology categories. With this information retailers and manufacturers can measure industry, category, brand, model and feature-level sales and trends. For more information visit www.npd.com.

New York research company Ziment has debuted COMPOUNDZ, a software tool for decision modeling designed to allow pharmaceutical companies to measure likely uptake of a wide variety of possible new products within the limits of the due diligence process. COMPOUNDZ couples back-end operations with constraints on the complexity of the products to be tested, enabling Ziment to bring decision models (complete with market simulators and outputs) to bear upon decisions pharmaceutical companies make. For more information visit www.ziment.com.

Maponics LLC, a Norwich, Vt., software company, has announced the beta release of the Maponics Spatial API Neighborhood Data to selected existing customers, allowing Maponics to deliver its entire neighborhood dataset via an application programming interface, including all neighborhood boundaries. The database covers 60,000+ neighborhoods in 2,300+ U.S. and Canadian cities and is intended for businesses looking to manage spatial data. For more information visit www.maponics.com.

J.D. Power and Associates, a Westlake Village, Calif., automotive research company, has introduced its Vehicle Launch Index, which provides automakers with information quantifying how well new vehicle models perform during their launch years and examines factors that include turn rate, credit quality, residual factor, dealer gross profit, vehicle price and incentive spend. Performance is measured against industry and segment benchmarks on a monthly basis. The index includes all vehicle launches in the U.S. since 2007 and is tracking current and future vehicle launches. For more information visit www.jdpower.com.

Valient Automotive, a division of Valient Solutions, a New York research firm, has launched iDealer-Poll.com, an automotive dealer panel designed to bring automotive dealer insights to the global automotive community. The panel was created based on the market research needs of OEM vehicle manufacturers, OE and aftermarket parts suppliers, financial institutions and dealer support software companies. For more information visit www.valientsolutions.com/automotive.html.

Research International, Chicago, has launched MicroTest Nouveau, a simulated test market system, which aims to deliver sales predictions within consumer packaged goods and incorporate social media trends (such as word-of-mouth). MicroTest Nouveau uses a micro-model approach to commercial forecasting. Consumer choice is examined at an individual level and then aggregated, to allow clients to understand the subtleties of consumer choice, while still delivering the big-picture forecast. For more information visit www.research-int.com.

Cincinnati research company AcuPOLL has announced a new service for testing critical elements of a new product launch. The Total Offer test is designed to examine the effectiveness of concept, product, packaging, advertising and promotion testing in a single phase. The test screens product positioning, advertising mediums, packaging design and introductory promotions as they relate to a new product launch. For more information visit www.acupoll.com.

Lux Research, Boston, has launched a new blog, Lux Populi: The Lux Research Analyst Blog, designed to examine energy and environmental topics of global concern. Information on the blog will include input from Lux analysts, who conduct approximately 2,000 primary interviews each year and visit commercial, academic and government facilities in over 15 countries, and also include secondary research, namely quantitative models and peer review. For more information visit www.luxresearchinc.com.

Saskatoon, Saskatchewan, research company Itracks has upgraded its bulletin board focus group software. The upgrade offers additional languages (bringing the total to 20) and user interface enhancements for both moderators and respondents. For more information visit www.itracks.com.

Portland, Ore., research company Revelation has added threaded group discussion features to its qualitative platform Revelation Project. The update is designed to allow researchers to mix group discussion with media blog and diary activities and use Revelation Project QDS for blog and diary exercises, as well as bulletin board focus group projects. For more information visit www.revelationglobal.com.

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defenses. The Media Audit further agreed that, until the expiration of all three Arbitron U.S. patents, they would not make, use, sell, offer for sale, test, demonstrate, distribute or otherwise engage in activities that potentially infringe the three valid and enforceable Arbitron U.S. patents. The settlement agreement by The Media Audit applies to any systems, methods, devices or the like, including but not limited to the Smart Cell Phone developed by Ipsos and previously marketed by The Media Audit in the U.S.

On January 13, 2009, Arbitron and Ipsos reached a settlement agreement dismissing Arbitron's patent infringement lawsuit without prejudice against Ipsos. As a result, Ipsos agreed to immediately suspend any and all efforts in the U.S. related to commercialization, testing and/or marketing a portable electronics measurement system with regard to any and all forms of media until at least January 13, 2012.

Finally, Arbitron is expanding its in-person PPM training program designed to reach out to young African-American and Hispanic respondents in Arbitron PPM panels. Dubbed Feet on the Street, the program is scheduled to have bilingual Arbitron representatives knocking on the doors of newly-recruited Hispanics and African-Americans age 18-34 in the top 10 PPM markets by the end of April 2009. The program's goal: to reach out to African-American and Hispanic respondents, age 18-34, who have not developed good carry habits within the first eight days of their time on a PPM panel. If the in-tab rate during those first eight days is below a pre-set threshold, a Feet on the Street representative will attempt to schedule the in-person visit for a time that is within the first 28 days of the respondent's tenure in the panel. The targeted panelist will be offered a gift card for agreeing to and keeping the appointment and a bonus for improved performance over the next four weeks after the visit. The Arbitron representative can also provide a travel charger, accessories or even decorative skins for the PPM itself. The trainer can also highlight the My Meter and Me Web site that allows respondents to track their compliance hours and their bonus points every day.

Facebook, Palo Alto, Calif., has pulled its polling tool after less than two years. The tool allowed anyone to create a poll, paying according to the number of responses sought and the time in which they were needed. Polls could be targeted at the site's users based on age, sex, location or profile and were limited to single questions with up to five multiple-choice answers. Facebook did not give specific reasons for removing the tool but is advising users to turn to one of the other polling applications available on the site.

Chicago research company **Synovate** has closed a call center in Miami, with 88 employees losing their jobs (86 interviewers, a full-time supervisor and a full-time human resources coordinator). Synovate will keep a small team of seven employees at another location in Miami.

TNS Custom Research Inc., Horsham, Pa., has closed its Indiana, Pa., call center, laying off 128 people.

Atlanta research company **CMI** has rebranded itself with the tagline "Research that drives results." To support the rebranding, CMI launched an updated Web site (www.cmiresearch.com) and created new marketing materials.

Polaris Marketing Research Inc., Atlanta, has redesigned its Web site (www.polarismr.com) to introduce SurveyTrac, a new service designed to provide survey assistance and interactive reporting.

Acquisitions/transactions

GMO-Research, a division of GMO Internet Group, Tokyo, has acquired **Japan Market Intelligence** (JMI), Tokyo. JMI's team will continue to operate as a separate business unit.

WPP, a London research group, has acquired **Red Dot Square Solutions**, a Milton Keynes, U.K., research company. Red Dot Square will operate within Kantar, WPP's global insight, information and consultancy division.

Alliances/strategic partnerships

Leo J. Shapiro & Associates, a Chicago research company, has partnered with **Schafer Condon Carter**, a Chicago marketing agency, to capture consumer behavior via a national monthly survey of consumers focusing on top-of-mind market trends and influencing factors.

Peanut Labs, a San Francisco research company, and **DMS Research**, Lewisville, Texas, have combined their recruiting strengths to create an online sample. The two companies will combine their existing data-quality products in hopes to improve validation.

J.D. Power and Associates, a Westlake Village, Calif., research company, has formed an agreement with **Compete**, a Boston division of New York research company **TNS,** to jointly develop products based on information gathered regarding the online automotive shopping and buying process.

Association/organization news

The Marketing Research Association (MRA), Glastonbury, Conn., has called on the White House to swiftly appoint a new director of the U.S. Bureau of the Census. In order to ensure a complete and accurate decennial census, MRA feels that the Census Bureau needs an experienced director to assume immediate responsibility.

MDLinx, a Washington, D.C., panel company, has been accepted as a member to CASRO, the

Council of American Survey Research Organizations, Port Jefferson, N.Y.

New accounts/projects

PPL Electric Utilities, Allentown, Pa., has selected Vancouver, B.C., research company **Vision Critical** to create a custom online panel to study what's important to electric customers in a changing energy market.

C-nario, a Tel Aviv, Israel digital signage company, has selected Tampa, Fla., research company **TruMedia Technologies**' iCapture audience measurement system and iCapture PROM for C-nario customers. ICapture is designed to analyze face images of people watching out-of-home displays, using sensors, providing viewing data for digital displays and screens. Viewers' face images are analyzed to generate information such as audience counts, individual exposure times as well as gender and age group demographics.

New York research company **Arbitron Inc.** has announced it will increase the sample target for cell-phone-only households in all Portable People Meter (PPM) markets to 15 percent by year-end 2010. In an interim step, the current target of 7.5 percent will be raised to 12.5 percent in PPM markets by year-end 2009. For the New York PPM radio ratings service, Arbitron has committed to increasing the cell-phone-only sample target to 15 percent by July 2010.

Separately, **Pamal Broadcasting**, Latham, N.Y., has signed a multi-year agreement with Arbitron for Arbitron's custom survey area reports for Hudson Valley, N.Y. Hudson Valley will be surveyed twice a year with the enhanced version of Arbitron's seven-day diary.

Green Mountain Power, a Colchester, Vt., utilities company, has signed a small utility enterprise license agreement (ELA) with Redlands, Calif., geographic mapping software company **ESRI**. By the agreement, Green Mountain Power is assured unlimited deployments to desktop, server and mobile devices of ESRI's ArcGIS platform; maintenance and support for products; staff training; and passes to the ESRI International User Conference.

Additionally, **Chesapeake Energy Corporation** (CE), Oklahoma City, has also signed an ELA with ESRI for ESRI's geographic information system software. As part of its agreement, CE has opted to include the ESRI Enterprise Advantage Program.

Research Now, London, has signed a partnership agreement with San Francisco research company **Peanut Labs** to implement Peanut Labs' Optimus digital fingerprinting solution, which serves to block respondents from entering the same survey on multiple occasions. The program will be integrated and applied across all Research Now projects.

Separately, **Sample Answers**, a Middlesex, U.K., research company, has signed an exclusive agreement with Peanut Labs to be the U.K. resellers of Sample 3.0, an online sampling methodology.

New companies/new divisions/relocations/expansions

ESRI, a Redlands, Calif., geographic mapping software company, has moved its Johnstown, Pa., satellite office to 1407 Eisenhower Boulevard, Suite 200, Johnstown, Pa. The office relocated to better accommodate its team of 14 ESRI project managers and software developers.

Research Now, London, has opened a new office in Auckland, New Zealand. Martin Tomlinson will serve in the new office as client development manager.

Cincinnati research company **Burke, Inc.** has acquired a seven-acre property in downtown Cincinnati, which will become the future site of its new corporate headquarters. To prepare the site for occupancy, the firm plans to spend $10 million on improving and renovating the property, which was formerly owned by Automatic Data Processing. Earliest projections for moving to the new location are June 2010.

Focuscope Inc., a Chicago research company, has opened a branch office in Oak Brook, Ill.

Pitney Bowes, a Stamford, Conn., document management company has formed **Pitney Bowes Insight**, a new business unit composed of Pitney Bowes MapInfo and Group 1 Software. The new division is designed to help market its data analysis services and combine local and communication intelligence with predictive analytics for firms needing a more complete view of their customers.

Double Helix, a London research consultancy, has opened a division to conduct strategic pricing, reimbursement and market access studies. The team will be led by Andrew (Drew) Baker.

Jerry Arbittier, former president of **All Global Ltd.**, a New York research company, has launched a new health care data collection company, **SurveyHealthCare**, also based in New York. The company will provide access to over 700,000 health care professionals.

Research company earnings/financial news

Ipsos, Paris, posted fiscal year 2008 revenues of 979.3 million euros, an increase of 5.6 percent compared with 2007, and organic growth of 7.8 percent. Currency effects had a negative impact of 5.9 percent. In spite of a less-favorable final quarter (6.6 percent organic growth), Ipsos grew at a more rapid pace than its market (which expanded by an estimated 5 percent in 2008).

A breakdown by geographic area shows further growth in developing countries, steady growth in Western Europe and moderate growth in North America and Japan.

Separately, Ipsos announced a corporate gift totaling $10,000 to be donated to the North American branches of three global charitable organizations. Its donation is to be shared among Doctors Without Borders, World Vision and the World Wildlife Fund. The gift is in conjunction with the company's client holiday greeting program.

InfoGroup Inc., Omaha, Neb., announced unaudited financial results for the fourth quarter and full fiscal year ended December 31, 2008. During the fourth quarter of 2008, infoGroup delivered revenue of $178.1 million, compared to $185.8 million for the same period in 2007, representing a decline of 4 percent. InfoGroup's operating income for the fourth quarter of 2008 was $9.2 million, compared to income of $24.7 million in the fourth quarter of 2007. InfoGroup's earnings per share for the fourth quarter of 2008 was $0.03 versus earnings per share of $0.20 in the fourth quarter of 2007.

Revenue for the full year was $738.3 million, an increase of 7 percent over fiscal year 2007. Revenue for the fiscal year 2007 included $9.9 million for the Naviant settlement and $13.3 million for revenue associated with the First Data Resources license agreement, which was not renewed in 2008. Excluding these items, growth for the year was 1 percent. InfoGroup's operating income was $25.3 million, compared to $86.5 million in 2007. The company recorded $34.3 million in nonrecurring charges; these charges included $10.7 million in severance payments primarily to the former CEO of the company. InfoGroup's earnings per share was $0.08 as compared to $0.73 in 2007.

Clarabridge, Reston, Va., tripled revenue in 2008 and is experiencing growth across the board, particularly in the retail, consumer goods and hospitality sectors. Wal-Mart, Walgreens, Choice Hotels and other major corporations signed agreements with the company in the fourth quarter of 2008.

Harris Interactive, Rochester, N.Y., announced its financial results for the second quarter of fiscal 2009. Second-quarter results include revenue of $50.7 million, compared with $62.7 million for the same prior-year period, and operating loss of $(45.9) million, compared with operating income of $3.4 million for the same prior-year period. Operating loss for the quarter included $46.1 million in charges, specifically $3.9 million for severance related to U.S. headcount reductions and separation payments to former executives, $0.9 million related to leased-space reductions, $1.1 million for performance improvement consultant fees, and $40.3 million for goodwill impairment. Second-quarter net loss was $(65.6) million, or $(1.23) per share, compared with net income of $2 million, or $0.04 per share, for the same prior-year period.

IMS Health, Norwalk, Conn., announced fourth-quarter 2008 net income of $98.5 million and diluted earnings per share of $0.54, compared with net income of $18 million and earnings per share of $0.09 in the fourth quarter of 2007. After adjusting for a 2007 restructuring charge and certain other items, net income on a non-GAAP basis for the fourth quarter of 2008 rose 9 percent and earnings per share on a non-GAAP basis was up 16 percent year over year. Total revenue for the fourth quarter of 2008 was $580.9 million, a 4 percent decrease from the fourth quarter of 2007.

For full-year 2008, net income was $311.3 million and earnings per share was $1.70, up 33 percent and 44 percent, respectively. After adjusting for certain items, net income on a non-GAAP basis grew 2 percent and earnings per share on a non-GAAP basis rose 11 percent for the year. Revenue for the 2008 full year was $2,329.5 million, up 6 percent from 2007. Operating income for 2008 was $498.3 million, compared with $393.3 million in the year-earlier period, up 27 percent

Research Now, London, released audited preliminary results for the year ended October 31, 2008. Highlights include: group revenues of £41.2 million, up 60 percent (2007: £25.8 million); underlying revenue growth of 40 percent; operating profit of £6.3 million (2007: £2.3 million), with margins increased to 15.3 percent; profit before tax of £5.7 million, up from £0.3 million in 2007; basic earnings per share of 21.8p (2007: 3.2p loss per share); adjusted basic earnings per share of 23.9p, an increase of 100.8 percent (2007: 11.9p); and free cash flow of £6.5 million after 2007's £0.4 million outflow.

National Research Corporation, Lincoln, Neb., has announced results for the fourth quarter and year-end 2008. Revenue for the quarter ended December 31, 2008, was $12.2 million, compared to $10.8 million for the same quarter in 2007. Net income for the quarter ended December 31, 2008, was $1.9 million compared to $1.1 million for the fourth quarter 2007.

Revenue for the year ended December 31, 2008, was $51 million, compared to $48.9 million for the same period in 2007. Net income for 2008 was $7.4 million, compared to $6.8 million for 2007. Year-end 2008 performance resulted in $1.11 per basic and $1.09 per diluted earnings per share, compared to 2007 performance of $1.00 per basic and $.98 per diluted earnings per share.

Nunwood, Leeds, U.K., has taken on $5 million worth of new business in 2008, representing a 62 percent growth over 2007. The increase includes commissions from Wyeth Nutrition, Mullen and DeLaval. The agency is recruiting in response to its continued growth, doubling the revenues of its London office and be tripling the size of its U.S. operation in New York in 2009.

BuzzBack Market Research, New York, has announced results for 2008. Sales were up 35 percent over one year ago, with increases in profits as the company saw a global expansion of its business.

Kadence, London, has had a positive start to its 2008-09 financial year, reporting revenue of $7.8 million in the six months to December 2008, a 40 percent increase on the same period last year. Strongest growth came from developing markets in Asia-Pacific, where the group's Malaysian and Indonesian offices increased revenues by 183 percent and 205 percent, respectively.

BrainJuicer Group PLC, London, released a pre-close trading statement for the financial year ended December 31, 2008. Highlights include: reported revenues of over £9 million (an increase of over 40 percent); operating profit up by 45 percent to over £1.2 million; and client increase from 115 to 140. 2008 also saw the company increase its geographic expansion, opening an office in Switzerland and signing a strategic licensing agreement in Australia.

Acxiom Corporation, Little Rock, Ark., announced financial results for the third quarter of its 2009 fiscal year ended December 31, 2008. Acxiom reported revenue of $321.1 million, compared to $350.8 million in the third quarter 2007 and loss from operations of $8.6 million, compared to income from operations of $97.4 million in the third quarter last year. Loss from operations for the current quarter included unusual loss items of $43.2 million. The prior-year quarter included $63.5 million of unusual gain items. Loss per diluted share was $0.15, compared to earnings per diluted share of $0.69 in the third quarter of fiscal 2008. Excluding the impact of unusual items, earnings per diluted share would be $0.21 in the current period and $0.20 in the prior-year period. Operating cash flow was $78.9 million, compared to $122.3 million in the third quarter 2007. Operating cash flow for the prior-year quarter includes the proceeds of a $65 million payment received as a result of the termination of the agreement to acquire Acxiom.

During the quarter, the company completed the acquisition of Quinetix LLC, a Rochester, N.Y., research company, for a purchase price of $2.7 million.

SPSS Inc., Chicago, announced financial results for its fourth quarter and year ended December 31, 2008. Operating margin for the 2008 fourth quarter was 15 percent, and revenues were $74.1 million, down 7 percent from $79.6 million in the same quarter of 2007. Net income was $7.9 million, a 21 percent decline from $10 million in the same period in 2007. Diluted earnings per share reported for the quarter was $0.41, down 18 percent from earnings per share of $0.50 for the fourth quarter 2007. For the 2008 fourth quarter, operating income was $11.5 million, or 15 percent of total revenues, compared with $14.7 million, or 18 percent of total revenues, in the same quarter of 2007. Charges for share-based compensation were $0.06 and $0.07 per share in the fourth quarter of 2008 and 2007, respectively.

For 2008, total revenues were $302.9 million, up 4 percent from $291 million in 2007. Net income was $36 million, up 7 percent from $33.7 million in 2007, with earnings per share of $1.88, a 14 percent increase from $1.65 in the prior year. Operating income for 2008 decreased 1 percent to $49 million, or 16 percent of total revenues, from $49.5 million, or 17 percent of total revenues, in 2007. Charges for share-based compensation were $0.26 and $0.23 per share in 2008 and 2007, respectively.

Names of Note

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Chime Communications, a London research company, has hired **Paul Tredwell** as chief executive, research and engagement.

MDLinx, a Washington, D.C., panel company, has added **Jim Anderson** and **Reg Jones** to its market research team.

Rochester, N.Y., research company *Harris Interactive* has hired **James MacAonghus** as research director, technology, media and telecoms; and **Lucia Juliano** as sector head, products. Both will be based out of Harris Interactive's U.K. office.

Itracks, a Saskatoon, Saskatchewan, research company, has named **Annette Abell** and **Frank Forney** corporate account executive.

Hansa|GCR, a Portland, Ore., research company, has hired **Soumya Roy** as executive vice president, brand and customer practice. Roy has also joined the senior management team as chief consulting officer. He will be based in New York.

NeuroFocus, a Berkeley, Calif., research company, has named **John Polich** director, global NeuroLab operations.

B2B International, a London research company, has hired **Tang Yu Xian** as a research executive in its Beijing office.

Aisling Murphy has been named senior research manager, qualitative research, of *Angus Reid Strategies*, a Vancouver, B.C., research company.

Karen Swords has been named director, quantitative research, of *The Research Partnership*, London.

Cognicient, a London research agency, has hired **Shannon McGuire** as an outside consultant to assist with sales development for its North America operations. Cognicient has also promoted **Siobhán Treacy** to director, client services.

questions you should ask when...

selecting a telephone facility

The basics

Is the facility able to scale appropriately between small and large projects? What kind of contact services are provided? Do you have inbound and outbound calling capabilities? Do you provide additional contact capabilities (e.g., Web, mail, e-mail, etc.) for multimode research? Do you have international/multilingual reach?

The staff

What are the required qualifications for interviewers? How are interviewers trained and what ongoing training is provided? What is the supervisor-to-interviewer ratio? What percentage of interviewer completes is monitored?

Available technology

Does the telephone research facility have clear remote-monitoring capabilities to adequately monitor projects as they first go into the field? What ability will I have to do live monitoring of active interviews? Can you record interviews? If so, how would I receive the recordings? How do you handle states where two-party consent is required? Do you have cost-saving technologies like interactive voice response and predictive dialing? Do you provide online real-time reporting capabilities on survey data? Does the CATI software ensure that no data or sample is stored on the local interviewer computer in the call center? Does the CATI software provide separation of data for each project dialed? Does each project have its own database?

Standard operating procedures

How are interviewers incentivized? What times do you normally dial business and consumer studies? How do you oversee interviewer dialings/completes? How are cell phone numbers handled, if at all?

Quality control

What are your quality-control procedures? Is there a secure on-site server? If so, how often is it backed up? How do you keep track of monitorings and validations? What percentage of phone calls is actively monitored for quality? How is the quality of a phone call measured and reported? What metrics are used? Do interviewers read verbatim or are they allowed to paraphrase if a respondent does not understand the question?

Your deliverables

During and after the telephone interviews, what are the deliverables? What time are my reports ready each day and how do I receive them?

Special thanks to Thoroughbred Research Group, Louisville, Ky.; Western Wats, Orem, Utah; and DataPrompt International, Chicago, for providing input on the questions.

2009

Telephone Facilities Directory

>>>

The 2009 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

Alabama

Birmingham

Connections, Inc.
Birmingham, AL
Ph. 205-879-1255
jmj1connect@mindspring.com
Rebecca V. Watson, President
32-14-32-0

Graham & Associates, Inc.
Birmingham, AL
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ceanes@grahammktres.com
http://www.grahammktres.com
Cindy Eanes, Vice President
40-30-40-20

New South Research
Birmingham, AL
Ph. 205-443-5350 or 800-289-7335
spearce@newsouthresearch.com
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Jim Jager, President
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Mobile

Research Strategies, Inc.
Mobile, AL
Ph. 251-660-2910 or 504-522-2115
rsincorp@bellsouth.net
http://www.researchstrategiesinc.com
Patricia Rhinehart, Vice President
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Arizona

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The Analytical Group, Inc.
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(See advertisement on p. 43)

Arizona Market Research Services (Br.)
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azmktres@att.net
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BRC Field & Focus Services
Phoenix, AZ
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info@brc-field.com
http://www.brc-field.com
Earl de Berge, Research Director
32-32-32-32

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 per cent 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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ycave@ccrsurveys.com
http://www.ccrsurveys.com
Yvette Cave, Branch Manager
30-30-30-10
(See advertisement on p. 40)

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Ray Opstad, General Manager
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Friedman Marketing Services (Br.)
Consumer Opinion Center
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Michael Englehart, President
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Precision Research Inc.
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(See advertisement on inside front cover)

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answers@westgroupresearch.com
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Tucson

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Arkansas

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Little Rock

Market Strategies International
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Market Strategies International is a solutions-oriented market research firm which operates four state-of-the-art call centers. These centers process large sample files and report data across targeted markets. Specifically, thousands of consumers are called monthly to measure customer satisfaction and identify market trends. Market Strategies is a global industry leader that provides integrated research findings using multi-modal approaches and comprehensive consultative services. We use sophisticated analytics to maximize quantitative and qualitative data insights.

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Interviewing Service of America

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Nicandro Juarez, President
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Jon Canapary, Exec. Vice President
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Colorado

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200-200-200-200
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http://www.QResearchSolutions.com
Greg Kotovos, Dir. of Business Development
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Tricia Kerins, Director, Field Services
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Arun Vishwanath, Research Consultant
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Susan R. Adelman, President
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Andrea Waller, President
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Sherrie Aycock, Co-Owner
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Chris Cage, National Marketing Manager
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Kim Sharp
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(See advertisement on p. 13)

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Randall Thaman
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Karen Cunningham, Field Director
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(See advertisement on p. 24)

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Mark Iott, Principal
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Lester Harman
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Susan Phillippe
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Paul Neal, Principal
25-25-25-25
(See advertisement on p. 15)

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rolesky@trsurvey.com
Robin Olesky
200-200-200-200

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Ph. 412-431-7020
tim@pghmail.com
Tim Marshall, President
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Customer Contact, Inc. (CCI)
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Tim Marshall, President
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Kevin Edwards, Project Manager
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State College

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Rick Owen, President
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Dan Kessler, President
96-96-96-96

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David McDonald, Sales/Marketing Dir.
50-50-50-50

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(See advertisement on p. 95)

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17-0-17-0
(See advertisement on p. 86)

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65-65-65-65

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Don Morgan
34-28-24-24

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32-32-32-32

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Green Bay/Appleton

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Jim DeZeeuw, Vice President
35-35-35-35

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23-23-23-0

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Bob Chua, CEO
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Codes - (e.g. 25-10-25-10)

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

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Elemental Data Collection provides a full range of field services including: CATI interviewing, online surveys, elite B2B, remote monitoring, multilingual capabilities, mail/data entry, coding and tabulation services. We are an independently-owned and -operated company. As your research partner, we ensure high-quality data and fast, responsive service at affordable prices. Working with you to ensure your success…it's in our nature!

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Opinion Search Inc. has 275 CATI stations across our two state-of-the-art call centers, offering CATI, online and mixed method surveying. For online, we have a proprietary Canadian panel, can source targeted or international sample, or we can use your lists. We have focus group facilities in Canada and conduct database, random and list recruiting. We're truly a one-stop shop, offering sampling, coding and cross-tabulation as well. Our dataCAP allows clients to monitor the progress of their CATI, online and recruit data collection via a secure Internet portal live as it's collected.
(See advertisement on p. 23)

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Consumer Contact is a leader in customer satisfaction and loyalty tracking, conducting over 1 million customer satisfaction interviews a year. We are driven by a passion for data quality based on 38 years of experience. Consumer Contact has the well-earned reputation as being the data collection partner who can handle the largest, most complex research projects. We have 450 CATI stations across five Canadian-based call centers. Our innovative reporting tools include question-based Digital Voice Recording that allows us to record, monitor and play back our CATI interviews at the question level.

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Located in the heart of downtown Toronto, Consumer Vision has been providing qualitative and quantitative field management services for more than a decade to clients across Canada and the United States. We operate 7 state-of-the-art focus group facilities and our own in-house recruiting and quantitative telephone survey centre. We have Canada's largest recruiting database for capturing those tough to reach consumers and professionals in sectors spanning packaged goods and financial services to more difficult to reach small business people, physicians and health care professionals.

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Opinion Search Inc. has 275 CATI stations across our two state-of-the-art call centers, offering CATI, online and mixed method surveying. For online, we have a proprietary Canadian panel, can source targeted or international sample, or we can use your lists. We have focus group facilities in Canada and conduct database, random and list recruiting. We're truly a one-stop-shop, offering sampling, coding and cross-tabulation as well. Our dataCAP allows clients to monitor the progress of their CATI, online and recruit data collection via a secure Internet portal live as it's collected.
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Marcom-China offers quantitative and qualitative research and fieldwork services to clients since 1999. Analysis methods includes multivariate technique, focus group projective technique, and advanced tabulations with rim weighting. With our wholly owned Marcom-HongKong.com, we offer CATI and Web-based interview services in China, Hong Kong, Taiwan, Korea and Japanese using native speakers. All CATI stations have broadband internet connection with VPN technology for uninterrupted online interviews using client's portal. Marcom is particularly strong in B2B C-level interviews using telephone/CATI.

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Since 1999, Marcom has delivered quantitative, qualitative and fieldwork research services across China and East Asia. Along with our parent company Marcom-China, we offer CATI and Web-based interview services across China, Hong Kong, Taiwan, Korea and Japan using experienced, native speakers. All CATI stations are equipped with VPN technology to guarantee uninterrupted online interviews using our client's portals. Marcom is particularly strong in B2B C-level interviews using telephone/CATI.

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index of advertisers

trade talk

By Joseph Rydholm
Quirk's editor

How the strong retailers are surviving

Even before the advent of our current economic woes, a correction in the retailing industry seemed inevitable. From clothing to general merchandise, electronics to furniture, too many similar-seeming outlets were offering the same goods at roughly the same prices in the same way. But with an economy in overdrive and consumers feeling flush thanks to rising home values, there seemed to be enough business to go around for almost everyone.

No longer. Some firms, such as Circuit City, have ceased to exist while the vast majority of others are faced with the task of reevaluating nearly everything they do.

A select few have been able to chart a different course. A report by Kurt Salmon Associates, a New York-based management consulting firm, details how companies such as Apple, Recreational Equipment Inc. (REI), Trader Joe's and Aeropostale have created product and service offerings that resonate with consumers and have also oriented their internal processes to better respond to shifts in consumer demands and market realities.

"Competing on a Unique Offering and Distinctive Experience: The Rise of Act Vertical Retailers" explores how these firms marry a clear retail and brand strategy with competence in seven core capabilities:

- use of market research to identify emerging customer needs;
- product design and development that balances creativity and commercial appeal;
- consumer testing that shapes the offerings and customer experiences;
- sourcing relationships that accelerate manufacturing but also delay key product decisions until the most advantageous time;
- assortment, allocation and replenish ment that rapidly shifts products to places of greatest demand and maximized pricing;
- design and execution of an engaging and consistent brand experience across all channels;
- marketing that communicates the brand promise across all channels and showcases how the retailer's offering and experiences enhance customers' lifestyles.

Less tolerant

Beyond the down economy, the study says the main driver of the retailing shakeout is a shift in the historic relationship between retailers and customers over the past decade. Aware that there are abundant sources from which to buy products, consumers are less tolerant of bad shopping experiences and can more easily avoid them by using the Web to determine where they should and shouldn't shop – whether or not they make the purchase online. Thus, as the report says, "Today's consumers demand much more of the retailers they choose to deal with: products they can't get anywhere else, the ability to shape those products to meet their needs, more product information and much different ways of interacting with the retailer, i.e., the customer's retail experience. Retailers that ignore this shift risk sliding into irrelevance with obsolete models."

Do research differently

Of course, the best way to stay in touch with customers, determine their needs and wants and understand how to forge a bond with them is through marketing research. Though just doing the research isn't enough, says Cari Bunch, a partner at Kurt Salmon Associates who co-led the research study and report. "Part of the research side of this is that we need to do research differently and use different types of research, so that that information becomes part of the decision process from beginning to end. The traditional research will still be very supportive but we have to find new ways to connect the research findings and quantification into processes in new ways," she says.

Bunch isn't advocating for one type of research over another - qualitative and quantitative both have their places. The key is for the researchers and analysts to help their internal clients make sense of the information. "So many merchants get the research data and then don't do anything with it, or they come up with all of the excuses why it's wrong. Or they look at it and say it's conflicting: 'This group loves it and this group hates it so I just have to go with my gut' and they just discount the interpretation."

Not all of the research has to be of the formal, organized type, Bunch says. "The first thing companies need to do is go talk to their customers. Work the registers, go to a store, help a customer find something on a shelf. Get connected to them in a way that you haven't before."

Grassroots level

While it's key to have buy-in from those in the C-suite to get a company more customer- and innovation-focused, Bunch cites examples where departments within client firms have started the effort at the grassroots level. "I have seen functional areas in organizations that believe the company needs to be operating in a more customer-focused way, such as the store and channel teams, bring some of these tactics and concepts into their daily process and then to the executive team and that sometimes starts the momentum. It can't change completely without the sponsorship across the organization but there are absolutely things you can do within areas to elevate the thinking."

Again, offering guidance on how to interpret and take action on the information is critical. "Just handing that information over to someone isn't going to help support change. The missing piece is understanding what the processes are to add insights to the information and help the company turn great data into great decisions."

Readers can request a full copy of the report by e-mailing actvertical@kurtsalmon.com. | Q

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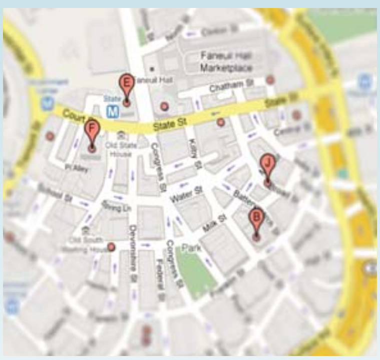

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cover-to-cover

Facts, figures and insights from this month's issue

> Scientific research conducted between November 2008 and January 2009 on 500 people from over 25 countries may have opened the door to new product development and commercialization based on a perception of taste being directly linked to color and shape preferences. *(page 6)*

> The market for kosher food is strong and growing in the U.S. Sales of kosher foods totaled $12.5 billion in 2008, a 64 percent increase since 2003. *(page 8)*

> If the message isn't credible, if it doesn't conform to the brand's (or cause's or platform's) truth, it's meaningless. The audience needs to believe who is saying it (e.g., the brand's voice), what is being said and how it's being said. *(page 30)*

> It is probably no surprise that these speeders said they recognized fewer commercials. But the interesting part is that they were more likely to come up with the correct name of the advertiser for the commercials they did recognize. This suggests speeders don't stop and agonize over commercials they were not sure of. *(page 34)*

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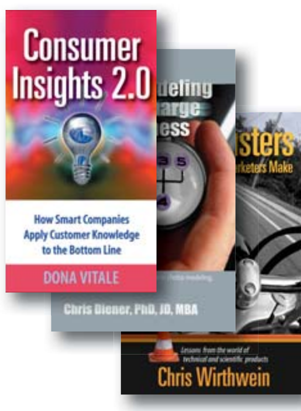

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