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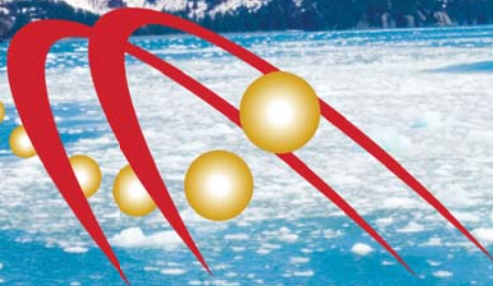
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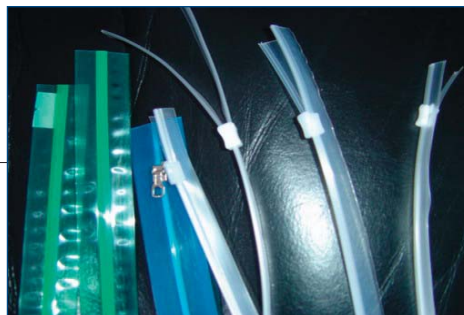
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in case you missed it...

news and notes on marketing and research



FDA serves notice on serving sizes

In an effort to combat the obesity epidemic in the U.S., the Food and Drug Administration (FDA) is encouraging manufacturers to print nutritional information, including calorie counts, on the front of food packages, according to William Neuman's February 5, 2010, article "One Bowl = 2 Servings. F.D.A. May Fix That," in *The New York Times*. And the information found on the front won't necessarily look like today's nutrition label: The calorie and nutritional information on many foods may be revised if portion sizes are increased to reflect a heavier population. Seeing how many calories are actually consumed - compared to what nutrition labels consider a serving - might give consumers a jolt when they reach for another handful of chips.



For cookies the serving size is generally one ounce, equal to two Double Stuf Oreos. For some chip brands, like Tostitos Hint of Lime, a serving size can be just six chips. For most children's breakfast cereals, a serving is three-quarters of a cup. Parents who glance at a box of Lucky Charms and see that it contains 110 calories per serving may not realize that their children are eating several times that amount each morning at breakfast. And if a "single-serving" bowl of Healthy Choice soup has two servings according to the nutrition label, can it really be called single-serving?

Standard serving sizes were created by the FDA in the early 1990s to help consumers compare the nutritional values of different products. Congress required that the serving sizes match what people actually ate, so the FDA evaluated data from surveys of Americans' eating habits taken in the 1970s and 1980s. Some nutritionists say those surveys may be suspect since people typically underestimate how much they eat, and there is general agreement that they are out of date.

Still, the solution is not as simple as merely bumping up the standard portions for some foods. Officials worry that doing so could send the wrong message. If the serving size for cookies rose to two ounces from one ounce, for instance, some consumers might think the government was telling them it was fine to eat more.

Battle of the bags: Walmart goes Ziploc-only

In the latest of a growing wave of brand consolidations, Walmart has eliminated Glad and Hefty bags from its food-storage shelves - leaving customers with only two options: Ziploc or Walmart's own private-label brand Great Value, according to Jack Neff's February 4, 2010, article "Walmart Food-Bag Consolidation Wipes Glad, Hefty From Shelves," for AdAge.com.

Walmart's effort to streamline brand assortments is prompting retailers and customers alike to question whether one name-brand and one private-label option is enough - especially at a time when brand loyalty is suffering in favor of the almighty dollar.

The decision to oust Glad and Hefty from Walmart's selection followed a shootout in a series of store tests that began in late 2009. The competition had high stakes, as Walmart makes up a third or more of the brands' annual sales. The clearest winner in the Walmart bag war - besides Great Value - was Ziploc, with mixed results for Glad and Hefty. In trash bags, Glad and Hefty retained their places on the shelves along with Ziploc, but Hefty's assortment was limited to its CinchSak line. Hefty's manufacturer, Pactiv Corp, has also agreed to take over all private-label manufacturing for Walmart's Great Value trash and food bags.

"If you look at the trash-bag category, you have to ask yourself, 'Is there really a need to have more than one brand and private label?'" said Bill Pecoriello, CEO of Consumer Edge Research, Stamford, Conn. "I think Walmart is going to make similar moves in some of the cleaning areas and then across the portfolio."

On a brighter note for Glad and Hefty, Walmart's assortment decisions aren't always permanent and are reviewed sometimes more than annually. In some lower-priority categories, Walmart is moving closer to practices of club and dollar stores, which often carry only one national brand - sometimes on a rotating basis - plus private label. That gives ousted brands a chance to win their space back while ratcheting up pressure for price and sales performance on all brands year-round.

Word choice matters: Americans support 'gays and lesbians' more than they do 'homosexuals'

Garbage man is to sanitation worker as gentleman's club is to strip joint as homosexual is to gay/lesbian? The American population might be more accepting of people who identify as gay or lesbian than they are of those who identify as homosexual, even though the difference between the two is in name only. A CBS News/New York Times poll found that the wording of the question is crucial when it comes to determining whether Americans support allowing gays to serve in the military, according to Kevin Hechtkopf's February 11, 2010, article "Support for Gays in the Military Depends on the Question," for CBS News.

In the poll, 59 percent say they support allowing "homosexuals" to serve in the U.S. military, including 34 percent who say they strongly favor that. Ten percent say they somewhat oppose it, and 19 percent say they strongly oppose it. That number changes drastically when the question is changed to ask whether Americans support "gay men and lesbians" serving in the military. When the question is phrased that way, 70 percent of Americans say they support gay men and lesbians serving in the military, including 19 percent who say they somewhat favor it. Seven percent somewhat oppose it, and 12 percent strongly oppose it. When it comes to whether Americans support allowing gays to serve openly, there is also a difference based on the term used. When referred to as homosexuals, 44 percent favor allowing them to serve openly. When referred to as "gay men and lesbians," the percentage rises to 58 percent.

No matter the term used, support for gays to serve in the military has risen since 1993, when the debate arose early in Bill Clinton's presidency. In 1993, 42 percent said they favored allowing homosexuals to serve, with 21 percent saying they strongly favored it, compared to 42 percent who opposed allowing them to serve (29 percent strongly). In 1993, 37 percent said they supported allowing homosexuals to serve openly and 56 percent opposed.



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From the
creators of
WinCross

African-Americans powerful, tech-savvy and diverse

The U.S. African-American population is expanding both in pure numbers and in buying power and has a sizeable influence on technological and media trends. However, African-Americans are not a monolithic group; instead, the black population can be better understood when broken down



into seven distinct groups defined by similar characteristics, including buying power and habits, media consumption, and influences, according to African-Americans Revealed, a study conducted by BET, Washington, D.C.

African-Americans in 2008 accounted for a 10 percent increase in population from 2008 vs. 2000, while African-American buying power increased more than 55 percent during the same period to \$913 billion. By the year 2013, black buying power is expected to reach \$1.2 trillion dollars, a 35 percent increase over 2008.

African-Americans Revealed indicates African-Americans are very tech-savvy, with roughly 31 percent of African-American discretionary spending dollars (\$39 billion) going toward the purchase of computers, cell phones and electronics – a proportionally-higher percentage when compared to non-African-Americans. African-Americans also spend more weekly

time online (18 hours) than watching television (15 hours). Further, 93 percent of African-Americans go online traditionally via their PCs, while 76 percent access the Web via their cell phones. Approximately 60 percent of African-Americans have downloaded music, a TV show, movie or ringtone in the previous month, while 50 percent regularly update and access a social networking account.

The segments of African-American respondents defined by the study include the following:

Strivers are mostly in their late-20s to early-40s and are adventurous, fashionable, social mavens and opinion leaders who have

their eyes on climbing the executive ladder. Conscious Sisters are selfless women that are spiritually connected and highly conscious of their culture.

Tech-Fluentials are digitally savvy and travel in globally-conscious circles. Bright Horizons are young adults in high school and college that are aware of all available technology and electronic gadgets. Inner-Circle Elites are working women rich in their cultural, ancestral and spiritual roots.

Urban Dreamers are young, urban adults who are social magnets and trendsetters focused on living life to the fullest. Survivors are a group of risk-taking teen and young adult males who are hustling to keep their existence in check. For more information visit www.bet.com.

Digital couponing growing at a nice clip

Coupon clipping in the U.S. is taking on a new image, as the aver-

age coupon user is becoming richer and smarter – and no longer clipping at all. In fact, despite common perceptions of avid coupon users, consumers who printed digital coupons in 2009 had an average household income of \$97,000, 23 percent higher than the average household income of about \$79,000. In addition, 34 percent of digital-coupon users in 2009 held a college degree, compared to 30 percent of newspaper-coupon users and 27 percent of the general population, according to Coupons.com, a Mountain View, Calif., couponing Web site.

During 2009 the growth rate of digital coupons outpaced the typical annual growth rate of freestanding insert (FSI) coupons by a factor of more than 10:1. Coupons.com annual data indicates that savings U.S. consumers obtained from digital coupons grew 170 percent in 2009, compared to a typical annual growth rate of 8-16 percent for FSI coupons. Printed savings from Coupons.com and the Coupons.com digital coupon network in 2009 exceeded \$858 million, a 170 percent increase from more than \$300 million in 2008. Key factors influencing the growth included increased consumer adoption of online printable, save-to-store loyalty card and mobile coupons and increased use of digital coupons by brand marketers.

A significant increase in the number of Americans using digital coupons drove their growth in savings. More than 45 million U.S. consumers used digital coupons in 2009, an 18.4 percent increase from 38 million in 2008. Roughly 20 percent of the U.S. population used digital coupons in 2009.

The top 10 digital-coupon categories for 2009 are ready-to-eat cereal, yogurt, sweet snacks, refrigerated dough, salty snacks,

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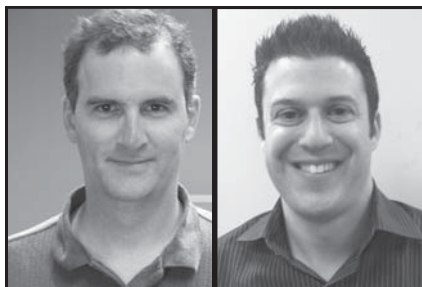
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names of note

Frank N. Magid, founder of Marion, Iowa, research company *Frank N. Magid Associates Inc.*, died on February 5, 2010, at age 78.

CRG Global Inc., an Ormond Beach, Fla., research company, has hired **Michael P. Cook** as president, consumer and sensory services (CSS/datatelligence).

Gongos Research, Auburn Hills, Mich., has named **Bob Yazbeck** vice president, community methodologies; **Sarah Corp** director, transportation and technology; and **Greg Heist** vice president, research innovation and technology.



Yazbeck

Berger

Vancouver, B.C., research company *Vision Critical* has appointed **Rob Berger** as senior vice president, U.S. sales, Springboard America. Berger will be based in Toronto.

SurveyWriter, a Chicago research technology company, has named **David Nager** vice president, client relations.

The Marketing Research Association, Glastonbury, Conn., has named COO **Kristen Darby** interim CEO.

Boulder, Colo., research company *Leisure Trends Group* has reorganized its management team, naming **Charlie Cooper** vice president and general manager; **Julia Day** vice president, sales and marketing; and **Bill Thomas**, vice president, information tech-

nology. President **Jim Spring** will assume the additional role of chief creative officer.

Jack Geiger has joined *Gilmore Research Group*, Seattle, as vice president, senior research consultant.



Geiger

Quilty

Chicago research company *Synovate* has named **Jim Quilty** vice president, travel and leisure, U.S.

Simon Wyld has been named vice president of London research company *BrainJuicer Group PLC*. Wyld will be based in Los Angeles. Additionally, **Alex Batchelor** has been named COO.

Cincinnati research company *MarketVision* has hired **Renu Dalal** as research director, health care and pharmaceutical.

Marc Ryan, senior vice president, chief research officer at Stamford, Conn., research company *InsightExpress*, has been appointed to the firm's executive committee.

Ipsos Loyalty, a New York research company, has appointed **Bruce Corner** as senior vice president. Corner will be based in Seattle.

Frank Lagana and **Salvatore D. Bruculeri** have joined *Quick Test/Heakin Research Inc.*, Jupiter, Fla., as manager.

Reston, Va., research company *comScore Inc.* has hired **Chris**

Nicotra as chief technology officer and **Daizo Nishitani** as vice president, sales, Japan. Nishitani will be based in Tokyo.

Universal Survey Center, a New York research company, has hired **Larry Schneider** as chief strategy officer; **Jeane Watley** as manager, client service; **Daniel Schiff** as project manager; and **Tansa Langley** as senior programmer.

Roger Green and Associates Inc., a New Hope, Pa., research company, has appointed **Colin DiBenedetto** as associate director, research.

Adam Jolley has been promoted to director, client services, of *EMI - Online Research Solutions*, Cincinnati.



Jolley

Foster

The Melior Group, a Philadelphia research company, has hired **Elisa Foster** as marketing coordinator.

San Francisco research company *MarketTools Inc.* has named **Lynn Christensen** chief development officer.

Lauren Lanzi has joined New York research company *LogicLab* as director, account management.

Travis Research Associates, Westlake Village, Calif., has hired **Gary Martin** as vice president.

Rochester, N.Y., research company

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product and service update

Online feedback solution aims to glean Visitor Insights

Keynote Systems, a San Mateo, Calif., online measurement company, has launched Keynote Visitor Insights, an on-demand service for real-time monitoring of Web site visitor feedback and interactions. Visitor Insights uses a combination of features designed to analyze the voice of the customer and feedback management market, with an integrated application for collecting visitor attitudes and behaviors. The solution aims to have Web site visitors voluntarily participate, provide feedback, answer questions and offer opinions while their navigation choices are associated to these responses.

Keynote Visitor Insights requires no site instrumentation, and visitors are presented with an invitation to participate. Data is securely hosted and available through a reporting portal. The online portal and monthly deliverables provide point-in-time and trending details and incorporate navigational analytics and commentary. Additionally, research analyst support is included to aid in setup and to compile monthly insight reports. Annual subscriptions are available for \$35,000. For more information visit www.keynote.com/ceux.

New application tracks video ad campaign Trends

Boston research company Visible Measures has introduced Trends, a Web-based application for benchmarking online video ad campaign and content performance. The Trends application aims to provide brand advertisers, agencies and movie studios with campaign performance metrics for industry-level and cross-campaign comparisons.

Trends is designed to perform industry-wide comparisons across hundreds of campaigns and a diverse range of effectiveness metrics, including total online viewership, comments, placements and demographic summaries.

Three online video performance data sets are available for Trends:

The Social Video Campaigns collection covers brand-driven online video ad campaigns and is designed to help media planners, researchers, creatives and other advertising professionals benchmark campaign effectiveness.

The Online Film Trailers collection covers online film trailer performance for both in-market and previously-released movies and has been developed to help movie studios and their agencies benchmark online film trailer performance.

The 2010 Super Bowl Ads collection covers online performance for Super Bowl ads. This collection is available for a limited time and is sourced from the company's 2010 Super Bowl Ads online video research study.

In addition to a paid version of the application, a free trial version is also available. For more information visit www.visiblemeasures.com/trends.

Pike Research offers Smart Grid service

Pike Research, Boulder, Colo., has debuted its Smart Grid advisory service, a subscription-based information tool intended to provide market intelligence and strategy insights for companies in the energy technology sector. The service covers grid automation, smart metering and energy management applications.

As part of its Smart Grid service, Pike Research's industry analysts offer market insights covering specific technology and business sectors as well as overall market conditions and trends. Research reports include an examination of business models, technology issues, policy and regulatory factors, the competitive landscape and market sizing, segmentation and forecasting. For more information visit www.pikeresearch.com.

SurveyGizmo debuts version 3.0

SurveyGizmo, a Boulder, Colo., research software company, has introduced SurveyGizmo 3.0, the latest version of its online survey and data collection and analysis tool intended to

help users create online surveys, polls, questionnaires, Web forms, quizzes and landing pages for marketing and customer service research. SurveyGizmo 3.0 features a drag-and-drop interface designed for faster survey-building; a dashboard and survey management interface; and a reporting module that includes deeper analysis, filtering and segmentation and customizable reports. Current SurveyGizmo customers will notice a new look and feel; a point-and-click interface for brand matching; and additional means for publishing and tracking surveys.

SurveyGizmo 3.0 has also increased support for multilingual surveys with enhanced UTF-8 support and a new Translations Management Console. SurveyGizmo 3.0 is designed to automatically detect the native language of a user's browser and serve the appropriate language version if provided by the designer. For more information visit www.surveygizmo.com.

Globalpark panel goes mobile

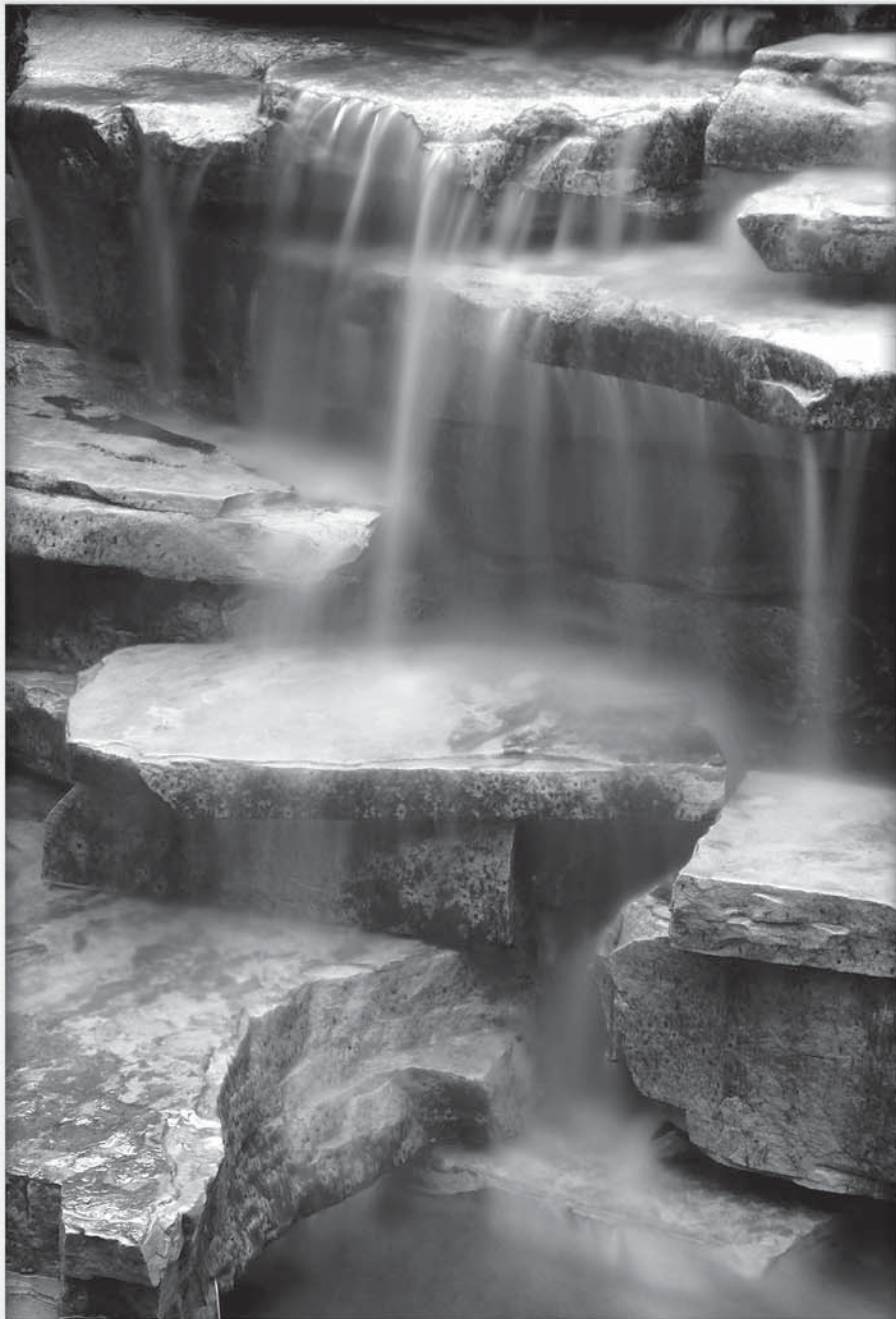
Cologne, Germany, research company Globalpark has debuted EFS Mobile Access, the company's first version of its mobile panel solution, built on Globalpark's enterprise feedback suite. The tool is designed to allow companies to give research participants and brand advocates access to their panel community account, incentives and questionnaires from their mobile phones with the goal of capturing respondents' opinions closer to the "moment of truth." Though commonly integrated with an online panel community (accessed from desktops with an Internet connection), the solution also makes it possible to run pure mobile panels without needing Web access. For more information visit www.globalpark.com.

Briefly

Shelton, Conn., research software company Survey Sampling International (SSI) has enhanced its SSI-SNAP application. Improvements include updated

continued on p. 56

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The Fine Art of Marketing Research

News notes

The Marketing Research

Association, Glastonbury, Conn., has endorsed legislation in Minnesota that would make it legal for researchers to do exit polling near a voting place. Current Minnesota statute doesn't allow anyone "except an election official or an individual who is waiting to register or to vote." This bill would add to that exception, "or an individual who is conducting exit polling" and define exit polling as "approaching voters in a predetermined pattern as they leave the polling place after they have voted and asking voters to fill out an anonymous, written questionnaire."

The Minnesota Board of Pharmacy, Minneapolis, has revised the language of a frequently asked question (FAQ) to ensure that payments to Minnesota health care practitioners for participation in bona fide market and opinion research are not prohibited or restricted. **The Council of American Survey Research Organizations**, Port Jefferson, N.Y.; **the Marketing Research Association**, Glastonbury, Conn.; and **the Pharmaceutical Marketing Research Group**, Minneola, Fla., worked with the Board of Pharmacy and the Office of the Minnesota Attorney General to clarify language in a FAQ that had effectively shut down pharmaceutical market research in Minnesota. The Board of Pharmacy confirmed that the original FAQ, which addressed the Minnesota statute that prohibited pharma manufacturers' "gifts to practitioners," was never intended to prevent research companies from conducting research with health care practitioners on behalf of pharmaceutical clients.

New York firms **The Association of National Advertisers Television**

Calendar of Events has moved to page 94

Advertising Committee and **The Nielsen Company** have determined a potential path for providing individual commercial ratings, also referred to as brand-specific commercial ratings. Viewing of commercials is currently reported as the average of all commercial minutes viewed live or in playback during a particular television program.

Stormy Dean, former CFO and senior executive of **Infogroup**, an Omaha, Neb., research company, is suing Infogroup for approximately \$1.15 million for severance and bonuses he claims the company has refused to pay following his termination in October 2009, according to a lawsuit filed in Douglas County District Court.

Separately, Infogroup has eliminated 40 jobs as part of a companywide restructuring plan.

Mountain West Research Center, a Pocatello, Idaho, division of Orem, Utah, research company Western Wats, reported in February that it had begun temporary layoffs at its call center, citing the economic downturn as the cause.

Framingham, Mass., research company **Kadence International** has rebranded with a new logo, Web site, enhanced employee learning and development programs and updated promotional campaigns.

London research company **TNS Worldpanel** has rebranded as **Kantar Worldpanel**. Additionally, research companies **TNS Media** and **KMR Group** have been rebranded as **Kantar Media**. Kantar Media will be headquartered in Princeton, N.J.

2010 marks the 10th anniversary for **The University of**

Massachusetts Dartmouth Center for Marketing Research.

D3 Systems Inc., a Vienna, Va., research company, celebrated its 25th anniversary in February 2010.

Acquisitions/transactions

Cegedim Dendrite, the business unit of the London research company Cegedim Group, has acquired Irvine, Calif., research company **SK&A Information Services Inc.** SK&A will be branded as SK&A, A Cegedim Company, and will be integrated into Cegedim Dendrite's OneKey business unit. SK&A will maintain its current operations in Irvine.

Nuremberg, Germany, research company **The GfK Group** has purchased Newbury, England, research company **dmrkynetec** for an undisclosed amount. Dmrkynetec had already been partially owned by GfK since July 2008, when GfK bought 25 percent of dmrkynetec in a stock swap. The company will operate under the name GfK Kynetec and is online at www.gfk-kynetec.com. GfK Kynetec will maintain its staff and headquarters.

New York professional services company **Deloitte** has acquired **Pathfinder Solutions**, a Wrentham, Mass., research company, for an undisclosed amount.

The Brazilian Institute of Public Opinion and Statistics, Sao Paulo, Brazil, has acquired majority stake in **Zogby International**, a Utica, N.Y., research firm.

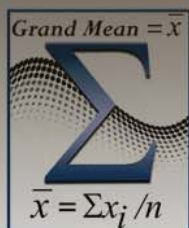
Reston, Va., research company **comScore Inc.** has acquired **ARSGroup**, an Evansville, Ind.,

continued on p. 57



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How big pharma is misusing qualitative marketing research

Over the past five years I have seen a disturbing trend in the pharmaceutical qualitative marketing research area. Because of increasing cost pressures, many larger pharma companies are not commissioning qualitative research appropriately. (They are still conducting qualitative research, albeit less often and on a smaller scale - but that is another issue entirely.)

The problem is that some companies are pushing qualitative research into one of two inappropriate and ineffective directions: using qualitative research as a substitute for quantitative or skipping qualitative in favor of quantitative research.

Most experienced researchers would agree that qualitative

research is not a substitute for quantitative research. Qualitative is limited in sample size and geographic distribution, so the findings are not quantifiable or projectable. However, qualitative uncovers and clarifies concepts, ideas and perceptions and provides direction. As stand-alone research, it can be used to explore, experiment and challenge new or existing ways of thinking.

Most experienced researchers would also agree that qualitative research should not be skipped or conducted in lieu of quantitative research. Designing a quantitative study requires a clear understanding of issues and nuances of a marketplace. Qualitative research determines the setting and direc-

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tion for follow-up quantitative research. If that background is not clearly established, a quantitative study may not produce meaningful or actionable findings.

Using qualitative research as a substitute for quantitative research has resulted in some companies making marketing decisions with inadequate data and a lack of geographic representation. Skipping qualitative altogether in favor of quantitative not only can leave gaps in understanding the landscape but may result in a study design based on a company's perceptions (or biases) instead of the customer's opinion.

The most painful outcome of this misuse is that these companies

snapshot

Qualitative shouldn't be substituted for quantitative, nor should it be overlooked in favor of quantitative. Yet, the author argues, that's just what some pharmaceutical firms are doing.

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will not realize what they have missed or lost until it is too late: the positioning does not make clinical sense to the physician audience; the messaging is more closely associated with another brand; or the DTC ad fails to address one of the target audience's key concerns.

More common misuse

Forgoing qualitative in favor of quantitative research seems to be the more common misuse. However, using qualitative research as a substitute for quantitative is likely to cause more damage and misunderstanding of the brand and market. If qualitative research is skipped and information gaps identified, then qualitative research can still be conducted to fill in the full market picture. This "after the fact" qualitative research is generally very focused as it addresses specific issues. However, by conducting quantitative before qualitative the broader landscape

of the issues can be lost. In other words, "You don't know what you don't know."

For example, conducting an online quantitative study can determine which concept to use for a promotional campaign. The results may clearly point to a concept to further develop but the whys and explanations are often missing. Understanding why a concept is preferred can be as useful as identifying which concept is preferred. If a company knows the whys, then the tactical details of the marketing plan are richer and consistent with the marketplace.


The far more dangerous misuse is conducting qualitative research as a substitute for quantitative. Sometimes a company does this by overanalyzing qualitative research findings or having too few respondents in total or by sample segment.

Qualitative research can be designed to secure detail but its findings are not projectable to the

universe. Generally, findings from qualitative research are directional and are reported as "all," "essentially all," "most," or "a few." They are not intended to secure specific quantitative or count data.

Providing direction

Qualitative research serves a distinct and vital role in marketing that can't be replaced. Think of it as providing guidance like a compass, north/south/east/west. It tells us which direction to move and, hopefully, why. Quantitative research provides the specific street directions to the road to success. Without the initial direction from qualitative research, the brand may end up on the right road in the wrong city. | Q

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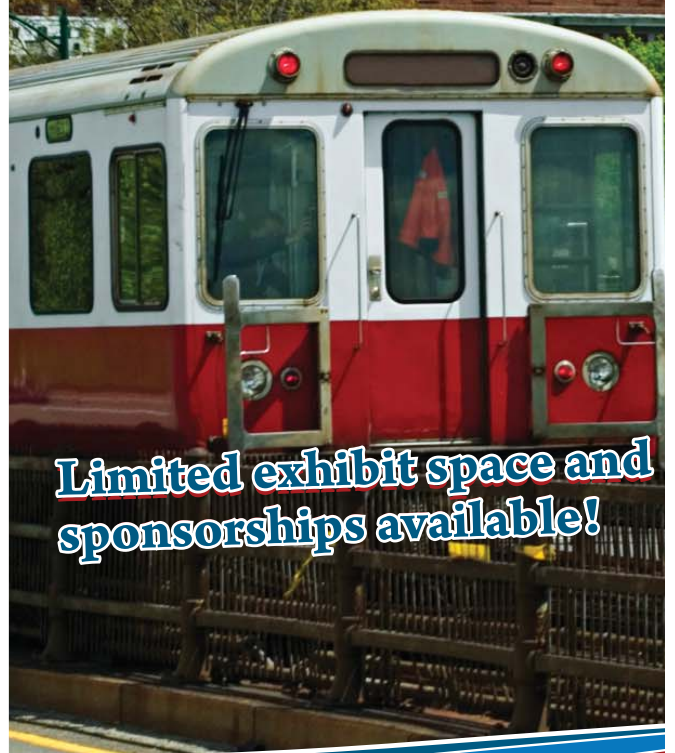
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Survey of researchers reveals concerns about benchmarking

Benchmarking results against the competition has clear benefits, from simply understanding where you rank to understanding how the competition achieves the success they do. Yet a survey of researchers indicates that many view benchmarks with skepticism. Understanding how to evaluate benchmarks, and when to question your results, is critical to making informed strategic and tactical decisions.

Why benchmark? As marketing researchers designing and undertaking custom quantitative projects, clients increasingly need to provide external context for their research results, particularly against benchmarking or normative data. For some industries, these comparisons are made easy by industry sur-

veys such as CAHPS (Consumer Assessment of Healthcare Providers and Systems), syndicated data sources or published survey results. Yet not all industries have such surveys, and in many cases existing benchmark data are not easily compared to a custom survey.

Our firm, TRC, sought to understand how researchers view benchmarking in an effort to provide some guidance on how to use it. We reached out via an online survey to 97 research buyers and users in the spring of 2009.

First, some background: all 97 are involved in market research at their organization; 83 have a designated market research function. They represent various industries but have the highest concentrations

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in insurance, utilities, high-tech, health care and financial services.

Nearly all have used benchmarking data in their current job. Most collected this data as part of a study they were conducting, for example, gathering competitive ratings alongside customer ratings in a satisfaction survey. Syndicated data or collecting data at a different point in time/through another vendor were also used by a majority (Figure 1).

How are researchers using this data? Over half (51) mentioned using it to provide context or comparative data against which to measure their own results. As one researcher put it, "Is 60 percent sat good? If other companies are at a

snapshot

While most researchers use benchmarking, many have questions about the best ways to do so, a survey found. The authors explore the survey findings and offer tips for more effective benchmarking.

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Figure 1: Sources of Benchmarking Data Used

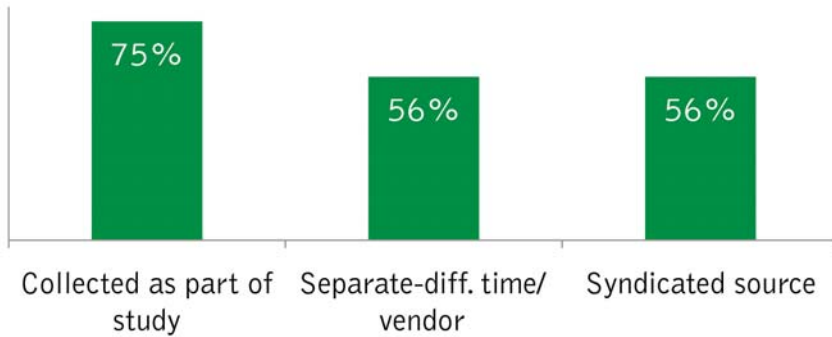
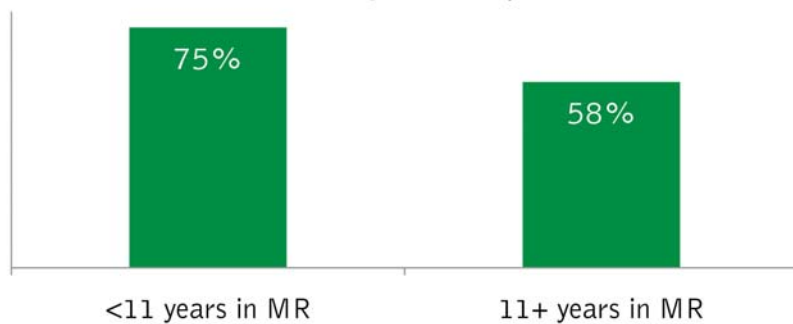


Figure 2: Confidence in Making Comparisons to External Benchmarking Data (top-3 box)



40 percent level, then absolutely. However, if the others are at 90 percent, not so much.”

Twenty said they use the data to help set strategic goals, allocate

resources or establish performance targets. Sixteen mention tracking changes or trends over time. There were several mentions of monitoring awareness (advertising, brand) and market forecasting as well.

Three researchers admitted they are benchmarking primarily because management or internal stakeholders demand it. With the stakes so high, are researchers sure they’re getting what they need?

We then asked researchers to focus specifically on benchmarking data collected outside the primary study (what we’ll call external benchmarking data). We asked them to rate both their understanding of how external benchmarking data are collected, managed and reported and their confidence in making comparisons to this type of data. We found something unexpected: The longer they’ve been in research, the less trust researchers have making comparisons to external benchmarking data (Figure 2).

Yet understanding of benchmark-

ing data does increase with tenure in the business. We would expect confidence to increase with understanding, but instead we become more critical – or more cynical.

So does that mean you shouldn’t trust external data sources? Of course not. But it does mean you should approach their use with caution.

What should you be mindful of in making benchmarking comparisons? According to our surveyed researchers, the foremost of these is questionnaire consistency (see Figure 3).

Having consistent scales or answer categories is the most important consideration regardless of tenure. Question wording is also critical to maintain comparability.

Data collection methodology is also highly relevant. Ensuring the same methodology is used (Web vs. phone, for example) was important to two-thirds of researchers. Field period – or making sure the timing overlaps – was less critical.

Great value

To the extent that these items are consistent between your data and the external data, there is no question that making these comparisons is of great value. But what are the ramifications if these items don’t align?

Question text, scale and response category differences can be difficult to overcome. We’ve had a lot of experience converting data collected with one scale to match a new scale. Making those comparisons becomes even trickier in combination with other differences such as question wording or data collection timing.

Also bear in mind how missing data (don’t know, not applicable, refused) are handled in both studies – scale conversion won’t overcome a fundamental difference in the way the data are reported.

Whenever possible, learn how your normative data are collected before you do your own data collection. This way you can match the question wording and scales to the normative data. Barring that, designate a subgroup of sample to administer the key questions to match the syndicated data.

If the screening or sampling

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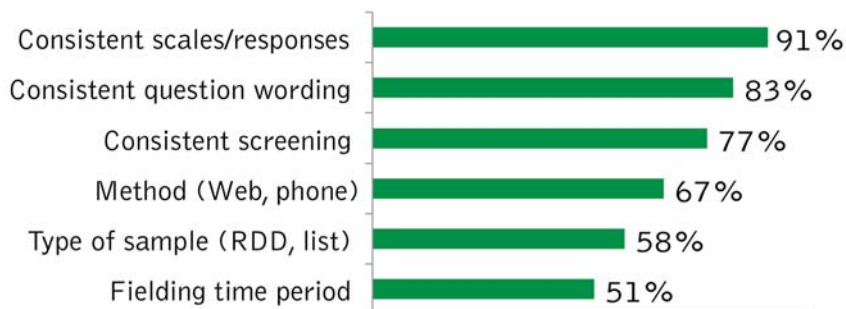
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Figure 3: Highly Important Factors in Benchmarking Comparisons (top-2 box)



criteria are different, there isn't a lot you can do to overcome those differences. But there are a few options to bring value:

The most important thing to do is to recognize whether differences exist. If you are comparing your product's buyers to buyers of the category in general, ask questions about how those buyers were screened: Recent buyers - how recent? First purchase or repeat only? Adult-only or adult and teen? U.S.-only or international?

Understand the universe to make informed decisions.

Next, consider filtering your own data to match that of the benchmarking data. Suppose you want to compare consumers in your footprint to normative data but the normative data was only collected in a sub-region of your footprint. Filter your own data to match. You won't get a total market view, but you will have comparative data for specific regions.

Similarly, if the provider of the

benchmarking data can cut their data in different ways, you may be able to filter their data to match your own.

Finally, other methodological disparities, such as field period timing, data collection methodology or sponsorship identification, also impact comparability of data sets. Our experience tells us that changing from non-identified to identified sponsor not only can increase survey response rate but also have a positive impact on the ratings. Competitive ratings collected with a blind or neutral sponsor can suffer in comparison. And asking competitor ratings only among your own customers can lead to a skewed view of the competitive landscape.

Analytic eye

So what's the bottom line? Dig into the methodology of the benchmarking data, and as much as you can, keep an analytic eye for discrepancies that can mar your comparisons. | Q

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Jess doesn't mind taking online surveys, but she hates being bothered by phone calls.

Rick likes the personal approach he gets from being part of his online community.

When travelling, Greg has time to do IT related surveys on his PDA.

Arnaldo wants to have an up-to-date account of the rewards he's earned taking surveys.

Anna uses surveys to express herself.

Dr. Doe doesn't mind taking surveys, but he can be hard to contact.

Caroline is interested in how her survey answers relate to other people's answers.

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Positive, Neutral or Negative?

How hybrid research allowed eBay users to give feedback on the feedback system

Since eBay's inception in the 1990s, its feedback system has been the primary means for the eBay community to police itself and ensure honest participation in the marketplace. The goal of the system was simple: encourage eBay users to evaluate transactions on the site for the benefit of the larger community.

eBay continually evaluates ways to improve the buying and selling experience and has made adjustments to the feedback system over the years to meet the changing needs of the marketplace. For example, as Figure 1 shows, eBay introduced "Detailed Seller Ratings," through which buyers evaluate sellers on various specific performance dimensions such as whether their item was described accurately. eBay also tests feedback elements before they go live on the site to understand buyer and seller sentiment and larger effects on the community. Despite recent tests and other changes, the fun-

- fundamental nature of the feedback system
- based on a positive, neutral or negative ratings and including feedback comments
- has remained relatively untouched.

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snapshot

To help online buyers and sellers alike, eBay teamed up with Invoke Solutions to provide a qual-quant approach to concept testing that would guide the updating of eBay's user feedback system.

In eBay's continuing goal to encourage buyers to effectively evaluate seller performance and for sellers to understand how to improve their selling practices, in 2008 eBay decided to take a fresh look at feedback methods and explore changes that would potentially warrant fundamental deviations from current practices. The primary goals behind the changes would remain the same: to continue to allow buyers to effectively evaluate seller performance and for sellers to effectively understand how to improve their selling practices.

Represent the journey

Based on foundational research conducted earlier, a storyboard (Figure 2) was created to represent the journey of an eBay buyer and an eBay seller under specific use cases for a newly-proposed feedback system. The concept storyboard resembled a typical comic book but with interactivity made possible

with Flash. With this storyboard, buyers and sellers would be able to get a primer on how the new system would address the central use cases of the feedback system:

- a buyer evaluating the trustworthiness of a seller;
- a buyer leaving feedback for a seller following a transaction;
- a case where the buyer feels that the item was misrepresented by the seller;
- a case where the item arrived late or damaged;
- a seller evaluating feedback from buyers to understand and address areas for improvement.

Having created storyboards to represent the current feedback system along with the new proposed concept, eBay sought to understand buyer and seller reaction to the process, answering questions such as: Does it address perceived

weaknesses of the existing feedback system? Does it introduce new problems? Would it have a negative impact on seller efficiency?

Concept testing with vision storyboards was important because it enabled rapid changes to the solution at an early concept stage, prior to design or engineering investment in high-fidelity user interface mock-ups or functional prototypes. While the temptation existed to skip the concept phase and proceed directly to creation of design mock-ups, project churn and the wasting of resources could have resulted.

Many concept testing options were considered but there were important weaknesses associated with each:

- Focus groups can be susceptible to group-think or bias associated with dominant personalities in the room.
- One-on-one interviews are impractical when input is sought from a



Figure 1

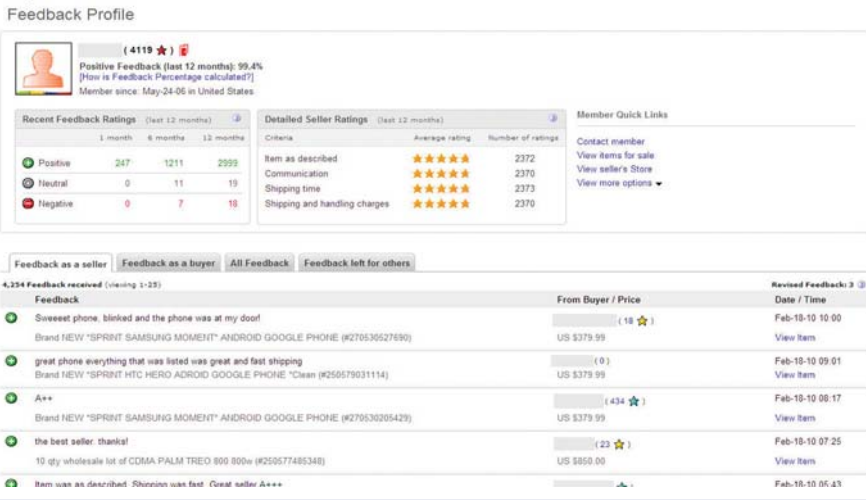
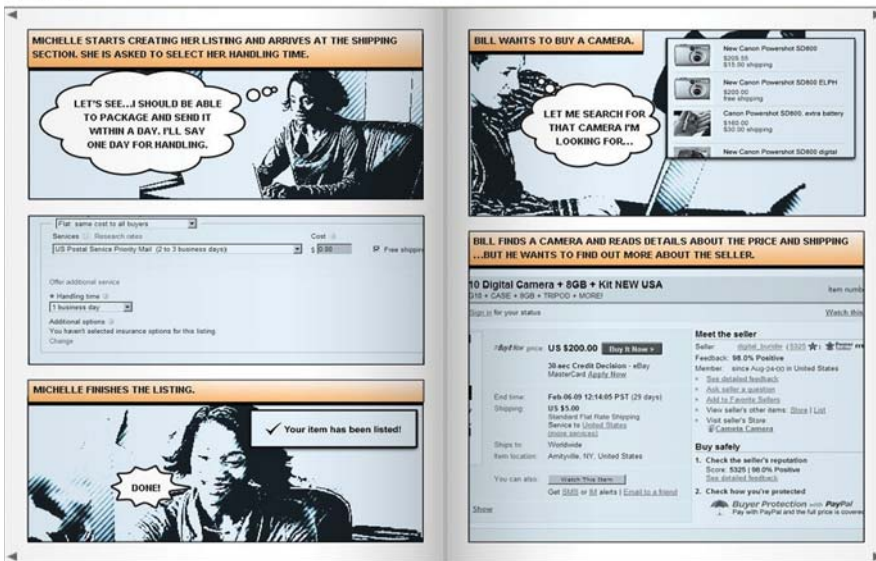


Figure 2



EBay employed a Flash-based, comic book-style storyboard to present specific use cases for buyers and sellers under the proposed feedback system.

representative sample of the user population.

- Surveys would require a tremendous time and attention commitment

among respondents to provide feedback on all areas of interest and would not allow real-time consumption of user feedback or follow-up

questioning by key stakeholders.

Optimal research solution

EBay determined that the optimal research solution was a hybrid qualitative-quantitative approach that allowed real-time consumption of data and deep-dive follow-up questioning with highly-engaged participants. To meet its research objectives, eBay collaborated with Invoke Solutions, a Stamford, Conn., research firm.

The Invoke platform (Figure 3) offered a hybrid research environment that blended an online survey with a discussion group. It also allowed real-time data analysis and on-the-fly follow-up questioning. EBay felt that the Invoke platform would provide the insights necessary to motivate future product improvements as well as garner support for the solution among stakeholders.

Expose the concept

EBay conducted research using the Invoke platform and exposed the concept to 140 eBay buyers and 180 eBay sellers in respective 90-minute live-moderated sessions. Participants logged into the Invoke platform remotely at a specified day and time to experience the concept storyboard and associated questioning. Participants could spend quality time (15 minutes) with the new concept storyboard on an individual basis. Unlike traditional focus groups, buyers and sellers were not privy to each other's opinions (except where desired), avoiding the possibility of bias.

Specifically, participants were first shown the storyboard that represented the current system to refresh their memory of the details and to expose

Simplify Complexity

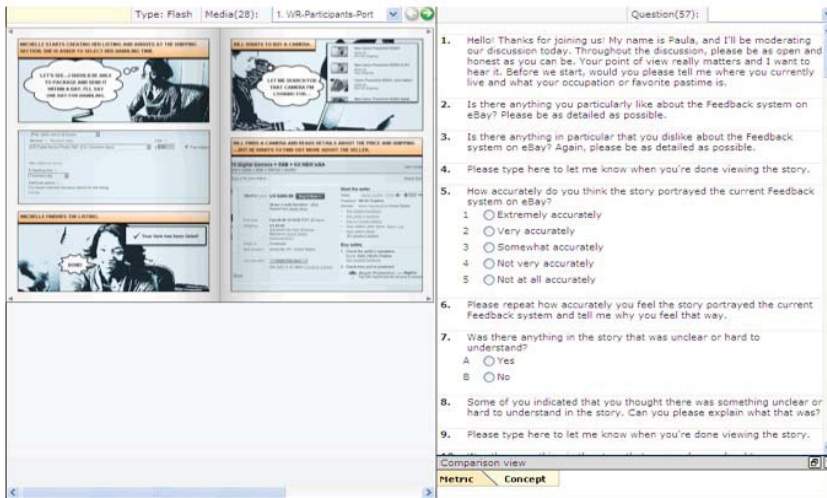
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Figure 3



The hybrid research environment blended an online survey with a discussion group, allowing for real-time data analysis and follow-up questioning.

some issues revealed in prior research. They were then presented with the new concept storyboard and asked various questions comparing the proposed system to the current one. Following

initial broad evaluation questions about the new concept, targeted questions were asked about specific aspects or use cases associated with the concept. Additional unplanned follow-up

probe questions were also asked to dive deeper into participant responses (both quantitative [Figure 4] and qualitative [Figure 5]).

The goals of the investigation were twofold: gauge participant reaction to the concept overall as well as specific fundamental changes to the existing system; and understand areas for improvement for the next concept iteration.

Revealed specific issues

Evaluation of the new concept storyboard suggested broad support for the initiative but also revealed specific issues of concern for each user population. This research was then followed by an additional round of concept testing to ensure that the discovered issues had been addressed prior to further design and engineering investment. Based on the first round of testing, changes were made to the concept storyboard, including:

- elimination or simplification of sub-optimal solutions;
- introduction of new targeted solu-



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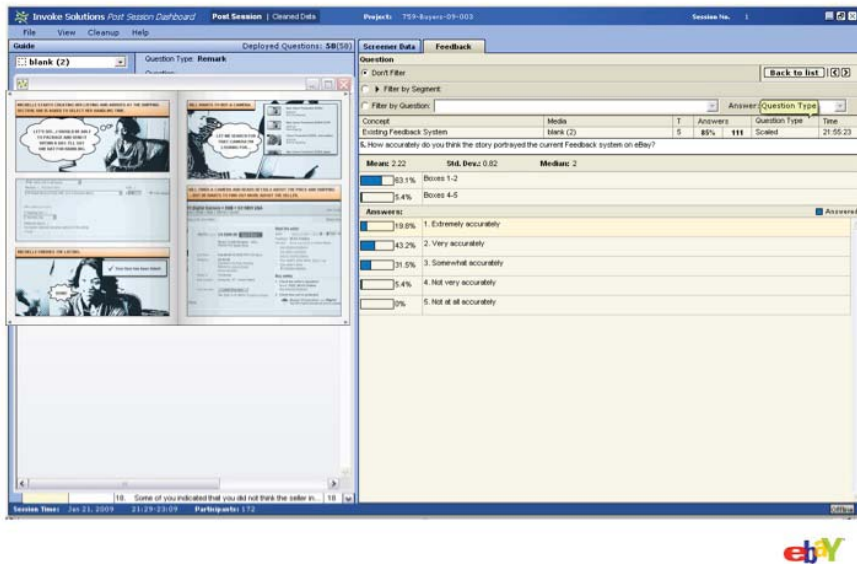
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Figure 4



EBay drew from follow-up questions in both quantitative...

- tions to address unsolved problems;
- a more in-depth rationale behind changes to the feedback system; and
- greater detail regarding proposed solutions in the original concept storyboard (to allow for more

stringent stress-testing).

The second round of concept testing provided valuable information pertinent not only to the concept but to the broader effort involved in

implementing such changes to the marketplace. For example, it reinforced the importance of adequately explaining the rationale behind changes to certain long-standing elements of the feedback system. (While the first round of testing suggested a lack of feasibility for certain changes, we found that providing a more detailed rationale behind such changes in the second round mitigated user concerns.)

We also realized that it was not possible to address every user concern. We discovered through more in-depth investigation that users disagreed with certain aspects of the proposed concept despite what we considered to be compelling rationales and solutions. This knowledge will allow eBay to focus appropriately on such issues when rolling out these changes to the community in terms of public relations, community outreach efforts and site messaging.

Together, the two rounds of concept testing provided the necessary insights to move forward with investigation of specific user interface design flows. As with the concept testing, iterative design research will be

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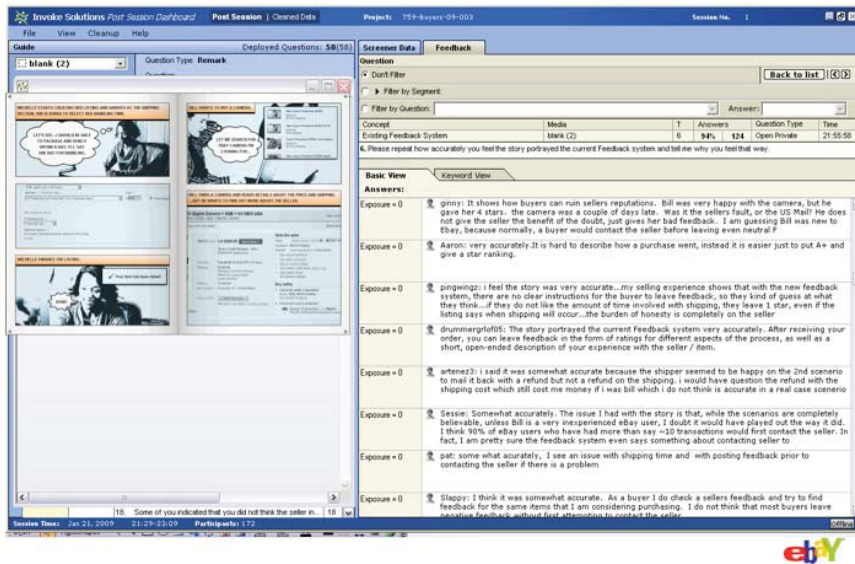
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Figure 5



...and qualitative form to understand changes and improvements to make in the next iteration.

conducted to ensure the optimal user interaction and experience.

Garner support

In addition to providing valuable insight regarding buyer and seller reac-

tion to a newly-proposed feedback system and how the concept might be improved, the real-time hybrid research approach also helped garner support for the initiative among key product managers. Product manage-

ment executives attended a 90-minute session and came away more fully appreciating the value of the research and the central ways in which the concept could improve the eBay user experience. Plus, they realized areas for improvement that could drive future iteration of the process.

Additional benefits of the research approach included: deep customer involvement early in the product development process; cost- and time-savings over traditional methods; rich verbatims for better understanding of the data; no group-think or participant bias; rapid insight generation and follow-up; and an easily replicated process.

Yield tremendous benefits

Testing concepts early and iteratively in the product development life cycle (prior to implementation) can yield tremendous benefits that improve the likelihood of product success. The research methods described here provided eBay with a real-time qualitative-quantitative online platform that is playing a key role as eBay evaluates new methods of feedback. | Q

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Taking the long view

Is a longitudinal approach the secret to measuring an ad's ROI?

In these challenging economic times, CEOs are scrutinizing every expense, looking for ways to cut costs and improve the bottom line. Not surprisingly, the advertising budget is often targeted. In this environment, it is critical that the marketer be able to justify the value of advertising – to provide solid information on the impact that the advertising is having on the brand and what the result would be if the advertising budget were eliminated.

While it seems like a straightforward question – What are we getting for those millions of dollars of advertising spending? – advertising researchers have struggled for decades with how to provide satisfactory answers. Up until as late as the 1990s, many advertising agencies managed to convince their clients that it simply could not be done. There were too many other things going on in-market, advertising worked in often subtle ways, and – well, just trust us, sales would be much worse if you weren't spending all that money on advertising.

Clearly, those arguments weren't going to hold up forever; today's environment requires tangible justification for the advertising investment. However, advertisers are still struggling with how to actually answer the question: "What is our advertising actually doing for the brand?"

Why is it so difficult to quantify the ROI of advertising? There are several reasons:

- Advertising is only one of a multitude of factors that affect sales; merely tracking in-market changes in brand measures during periods of advertising often provides an inaccurate (or just plain wrong!) picture of the effectiveness of advertising.
- Consumers, when asked, are usually unable to tell us whether they were impacted by advertising; this renders any straightforward survey questions on the impact of advertising nearly useless.
- To further confuse the issue, consumers are more likely to engage with advertising for products that they already buy – causing a serious chicken-or-egg problem with any analysis that attempts to deduce advertising impact by comparing – after the fact – the behavior of those who've seen advertising with those who have not.

The traditional tracking study – in which brand measures such as awareness and perceptions are tracked over



By Jeri M. Smith

snapshot

The author argues that interviewing the same consumers before a new ad campaign is launched and again after the campaign has been in-market for a period of time is an effective way to isolate the in-market impact of advertising.

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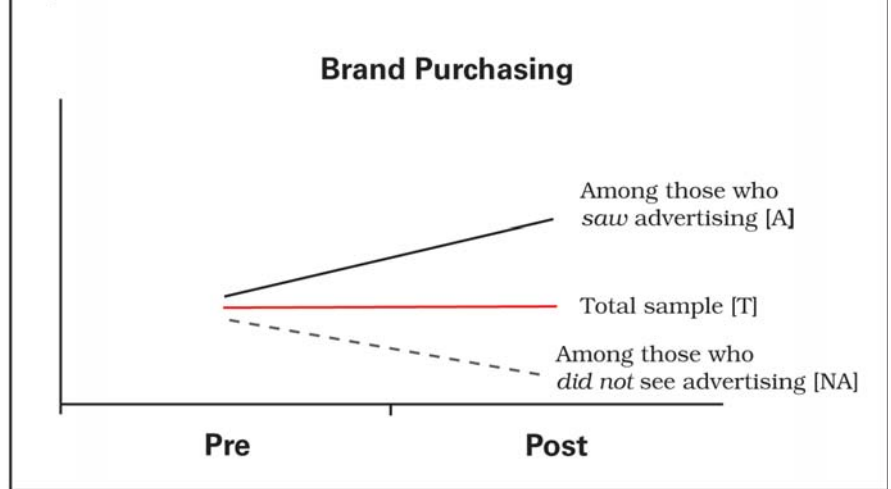
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Figure 1



time among matched samples of the target audience – has proven to be a relatively insensitive tool for isolating the effect of advertising on a brand. Often, these studies find little or no movement in brand metrics on a pre/post-advertising basis, leading the advertiser to wonder if advertising really is a total waste of money.

Continuous tracking studies, which attempt to correlate periods of high advertising pressure with changes in brand awareness and perceptions, appear on the face to provide more sensitivity to advertising's impact. However, in practice, this type of analysis can – at best – usually only identify positive relationships between advertising spending and brand awareness. Rarely is this correlational approach able to detect relationships between advertising and measures that are actually closer to sales – brand purchasing, future purchase intentions or even brand perceptions.

Longitudinal design

In our experience, the best way to actually isolate the in-market impact of advertising is through the use of the longitudinal design. The longitudinal, or panel, design involves interviewing the same people at two points in time – typically before a new campaign (or series of executions) is launched, and again later, after the campaign has been in-market for some period of time. Isolating the impact of the advertising on a brand entails comparing changes in brand measures (e.g., awareness, perceptions, purchasing/usage) among those who

have seen brand advertising during the period versus those who have not.

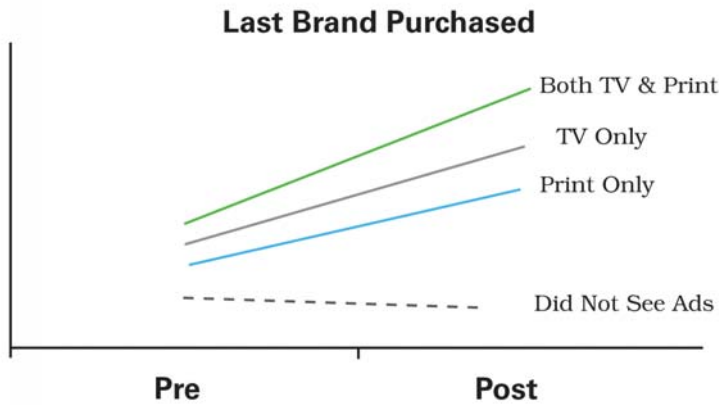
In Figure 1, reported brand purchasing was relatively unchanged on an overall basis before and after the ad campaign had run for a six-month period [T]. A tracking study, which measures pre/post change, would have concluded that the advertising wasn't working. The advertiser would have been left to wonder what to do:

- Should the budget be cut, based on apparent lack of return on investment?
- Should the campaign be replaced with a different one that might be more effective?

With the longitudinal design, the advertiser would have learned that the advertising was indeed quite effective among those who actually saw and engaged with the campaign in-market; among this group [A], brand purchasing was up significantly versus the downward trends in purchasing that were occurring among those without advertising awareness [NA]. This campaign was not a candidate for elimination or replacement – it was a candidate for a greater investment, in order to expand on the positive effects that it was having.

To effectively isolate the impact of an advertising campaign using the longitudinal design, it is first necessary to determine who has seen the advertising and who has not. Our approach to this challenge has been to adopt, adapt and refine techniques first developed based on the PARM

Figure 2



Campaign Impact: The advertising generated significant purchasing that would not have otherwise occurred. Impact was strongest among those aware of ads in both TV and print.

studies conducted by the Advertising Research Foundation a number of years ago. Today, we are able to determine, with accuracy, which specific ad executions each respondent in our research has seen/heard and stored in their long term memories; these measurement methods can be equally accurate for TV, radio, online advertising and the static visual media such as magazine, newspaper, FSIs, point of sale displays and outdoor ads.

Once we can categorize each respondent in our panel according to what advertising they have seen, the longitudinal design analysis can provide definitive measures of the actual in-market impact of advertising.

In contrast to traditional or continuous tracking, the longitudinal design:

1. Provides information on the impact of not advertising.

Because the longitudinal method tracks changes among people who saw advertising and people who didn't, it provides a means of answering the question: What would have happened if we hadn't advertised?

While conventional wisdom holds that the health of a brand will begin to deteriorate without advertising, the only way to test this theory using traditional methods is to conduct test/control market studies in which advertising is reduced or withheld from selected markets.

With the longitudinal design,

this is unnecessary. As in the above example, analysis of changes in brand metrics among those who have not seen advertising over a period of time provides a clear answer to this question, and also serves as the baseline against which advertising impact is judged. Insights gained from this

method are valuable in justifying continued advertising investment, based on calculating the ROI of advertising versus what would have happened without advertising.

In fact, there are many cases in which brands that are experiencing little to no sales growth actually have effective advertising; in these cases, to withhold advertising would be severely detrimental.

2. Controls for other marketplace dynamics.

The longitudinal analytic method also provides an internal control for seasonality, severe weather patterns and economic conditions that affect category/brand sales, and so on, since the baseline measures of change among those who did not see advertising reflect these marketplace dynamics.

3. Controls for selective perception.

Most advertising is subject to selective perception - that is, those who already prefer or otherwise are more highly engaged with a brand will



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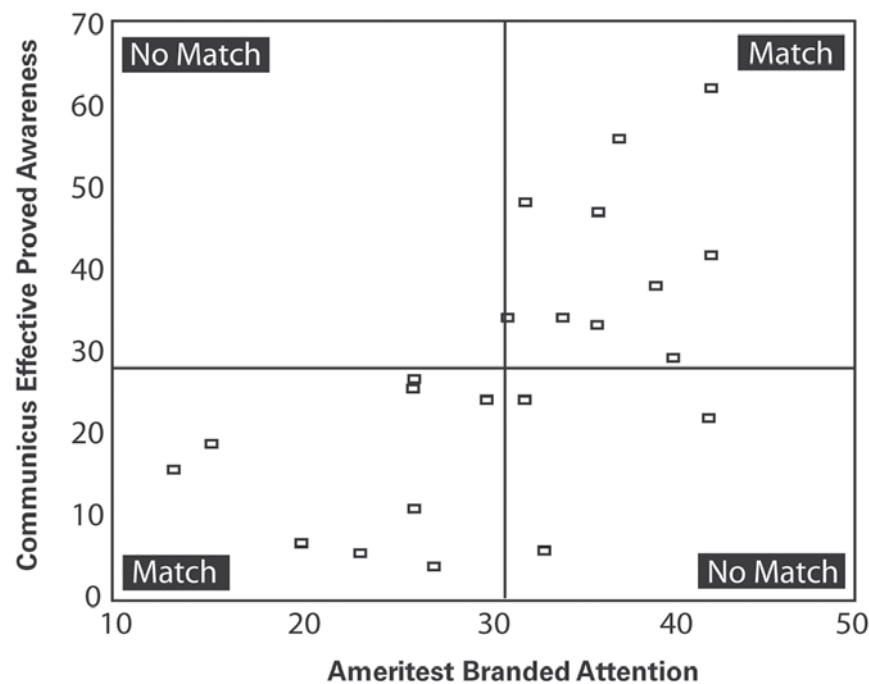
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Figure 3



be more likely to engage with the advertising for that brand. This fact renders post-advertising comparisons of brand metrics among those who saw ads versus those who didn't useless. If 50 percent of those who saw advertising prefer the brand versus 25 percent who didn't see the advertising is this because the advertising doubled preference or because those who prefer the brand were more likely to engage with the advertising than those who don't prefer the brand?

The only way to control for this is to measure brand attitudes among a sample of the target audience before advertising exposure occurs and then go back to the same people to see how advertising has changed them.

4. Isolates the impact of each medium within a multimedia campaign.

The longitudinal design, when implemented in conjunction with ad awareness/engagement measures, enables analysis of the changes in brand metrics that were produced by each medium and media combination within a multimedia campaign.

Because we can determine which sample members have seen each medium – alone and in combination with other media – we can compare changes in perceptions and behavior based on, for example, having seen TV commercials versus magazine ads versus online advertising (see Figure 2).

Not only is this level of analysis useful in identifying the contributions of each medium to campaign impact, but it can also play a critical role in guiding media reallocation strategies that result in an improvement in the overall return on investment of the campaign.

For example, an advertiser might find that it costs three times as much to achieve advertising awareness within the context of a particular campaign by using TV than by running magazine ads. However, if the TV is four times as persuasive as the print among those who have seen it, TV generates better ROI than print. Other factors that come into play, and that are part of the longitudinal multimedia analysis, include the extent to which each medium achieves impact among those not reached by the other media, synergies across media, etc.

5. Isolates the impact of non-traditional media.

Using the longitudinal design, measures can be developed that isolate the impact of non-traditional media within the context of integrated/360° campaigns. Non-traditional elements whose contributions can be quantified with the longitudinal design include online ads, Web sites, YouTube videos, product placements, advertorials, point-of-sale displays/events, sponsorships and more.

The performance of each campaign element is evaluated in terms of: engagement achieved; brand linkage; communications of brand messages; persuasive impact; synergistic interactions with other communications elements; and cost efficiency in relation to other communications elements.

Using this approach, advertisers can understand how all elements within a complex communications program are working.

6. Diagnoses effectiveness of message communications.

Thus far, the discussion has focused on the ability of the longitudinal design to isolate the impact of advertising campaigns on consumer behaviors such as brand purchasing. The longitudinal analysis can also provide insights into the extent to which the advertising is producing an impact on consumer perceptions of the brand.

For example, an advertiser may find that a new breakfast cereal campaign targeting moms is successfully building perceptions on “provides nutrition I can believe in.” However, if consumer behavior is not also being impacted, the advertiser may need to take a closer look on the motivational value of this message.

In another case, an advertiser might find that the new TV campaign is successfully building brand affinity (“for people like me”), but the accompanying radio commercials are not. Then, the task is to identify the reasons for this difference, and to build more personal affinity into the radio executions.

Predict strong performance

Advertisers frequently copy-test individual commercials and ads prior to

in-market launch in order to identify those that will produce strong performance. Of course, the assumption is that the copy-test results will actually predict in-market performance.

Since our in-market research design starts by measuring the awareness, brand linkage and communications achieved by each ad execution within a multimedia campaign, it can generate insights on the extent to which the outcomes predicted by copy tests actually come to pass in-market.

For TV commercials, we have reviewed approximately 85 individual TV executions that were pretested using one of the major copy testing systems, then run (without revisions) in-market and subjected to the in-market longitudinal design advertising evaluation system.

Based on these data, the copy testing system that has produced the strongest predictive accuracy is the clutter recall method, as administered by Ameritest. Among the Ameritest cases subjected to this analysis, the predictive accuracy was 95 percent, with the system providing correct diagnostics (e.g., identifying strengths/weaknesses on specific performance dimensions such as attention and branding) in all of these cases (Figure 3).

The next-closest method in predictive accuracy was the day-after-recall method, which picked the winners/losers with 80 percent accuracy. However, in approximately half of these cases, this method failed to provide the specific diagnostic information that would have been helpful in identifying opportunities for improvement.

The Ameritest print testing method has also achieved predictive accuracy based on correlations with our actual in-market performance measures. (We do not, however, have sufficient print copy testing data from other providers to report on the accuracy of other systems.)

Of course, other variables do come into play in-market. For example, a commercial that airs within the context of a complete, multimedia campaign may perform better in-market than one that is introduced in isolation, without other, synergistic communications elements.

On this basis, we encourage

advertisers who desire the best ROI for their advertising to:

- Copy test their new creative, using a system that is both as predictive as possible and that provides accurate diagnostic feedback (to generate insights into how to improve the tested, and future, executions).
- Utilize a longitudinal in-market advertising evaluation system, to identify how the entire campaign and the individual campaign elements are contributing to brand behavior and perceptions in-market.
- Take advantage of the learning environment produced by this combination of advertising research systems to continually get smarter about how advertising works for your brand.

Number of factors

A properly designed and implemented longitudinal design study must take into consideration a number of factors, including panel size and selection, design factors to insure against sensitizing respondents in the

pre-wave interview, timing between phases and the special analytic methods required for proper interpretation of longitudinal data.

However, with the right practices in place, the longitudinal design can provide advertisers with better answers to the question: "What is my advertising campaign doing for my brand?"

The longitudinal design, by tracking the changes that occur among those who have seen your advertising versus those who have not, insures that the research is sensitive to the changes produced by advertising, while not mis-attributing to advertising changes that were actually caused by other factors.

The results of a longitudinal design study identify the contribution of each medium within a multimedia or fully-integrated 360° campaign, and help the advertiser to optimize the ad budget across media. On this basis, the longitudinal design can provide both a means of calculating the ROI of advertising and in-depth information to optimize future campaigns. | Q



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The fundamental things apply here, too

What *Casablanca* can teach us about conducting more effective ad research

Advertising creatives are inherently skeptical about the claims of researchers that they can measure what's important in good creative work. To be sure, most creatives will admit it may be possible to measure the surface meaning of an ad – the message communication – because that's the part that's easy for an audience to play back in words. But a good story well-told, a good performance well-acted, a good film well-made – all of these do their real work below the surface meaning of things. That's where the magic really happens. But 50 years of traditional copy testing has taught an unfortunate lesson to the creative community: research cannot quantify the deeper, emotional content of great creative work.

For that reason, creatives have turned to peer review to validate the quality of their work, so that award shows count for more than research metrics in the eyes of the people who actually create ads. Their position is that the aesthetic judgment of an experienced creative director cannot be replicated with audience research data.

We put this assumption to the test by comparing in detail the way a master storyteller analyzes a Hollywood masterpiece with the emotional engagement metrics produced by the online Ameritest pre-testing system. Using the same visual diagnostics that Ameritest uses to test television commercials, we conducted research on the famous bazaar scene from the classic film *Casablanca*. We wanted to answer the question, “Does our quantitative research data support the creative theory of screenwriting master Robert McKee?”

The author of the best-selling book *Story: Substance, Structure, Style and The Principles of Screenwriting*, McKee is a respected lecturer whose former students' accomplishments are unmatched: they have won 32 Academy Awards, 168 Emmy Awards, 21 Writers Guild of America Awards, 17 Directors Guild of America Awards and even a Pulitzer Prize for writing.

Casablanca is generally ranked as one of the top five greatest films of all time. From a research standpoint it is a good subject because even though the movie is famous, as an older black-and-white film it is relatively easy to find modern audiences who have not actually seen the movie.

Interesting experiment

In *Story*, McKee provides a beat-by-beat analysis of several key scenes from *Casablanca*, including one of the



By Charles Young
and Amy Shea

snapshot

By analyzing the emotional beats of a pivotal scene from *Casablanca*, the author explores how a similar approach to ad testing can help researchers improve their relationships with advertising creatives.

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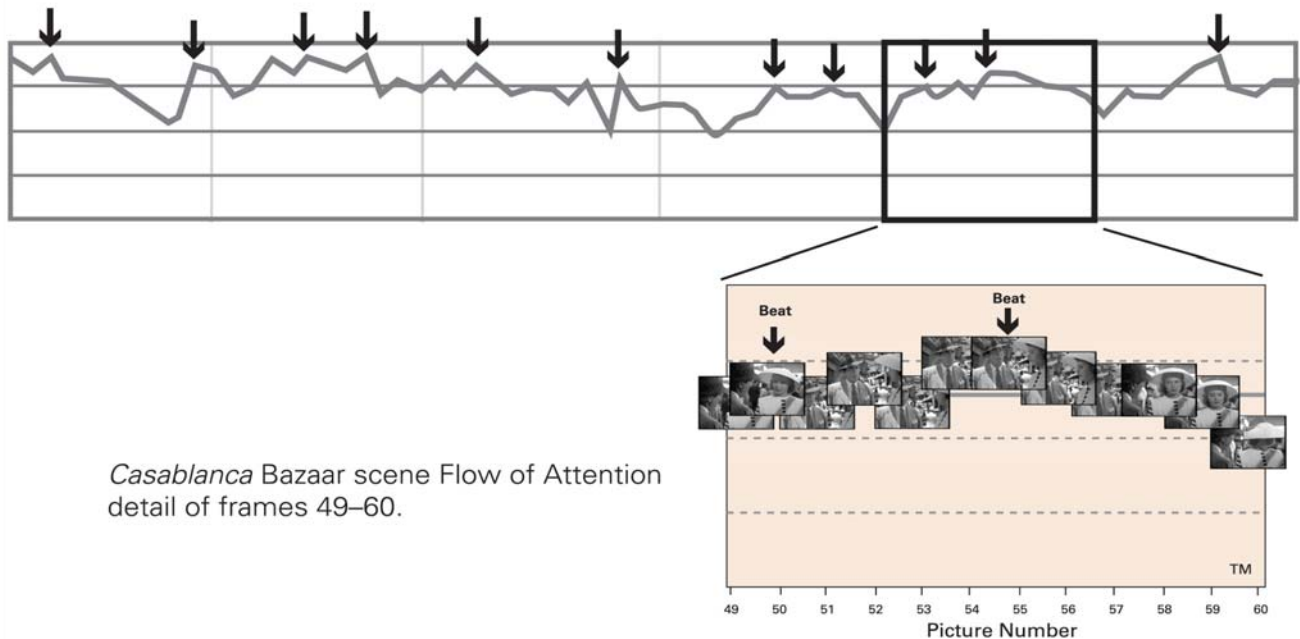
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Figure 1

Excerpt from the Flow of Attention

The Picture Sorts identified eleven visual beats in the Bazaar scene from *Casablanca*.



major turning points of the movie, the bazaar scene. Serendipitously, McKee's published theory of the movie provides us with the makings of an interesting experiment.

From a scientific standpoint, this in-depth interpretation of the film by a screenwriting expert gives us a theoretical prediction of how, from a creative perspective, the audience is expected to respond moment-by-moment to what is going on in the bazaar scene. Empirically, we could put McKee's theory to the test by measuring actual reactions to the film among an audience of first-time viewers.

Five steps

In his deconstruction of the bazaar scene, McKee takes us through five steps of critical analysis:

1. Define the conflict driving the emotional content of the scene.
2. Note the opening emotional value of the scene.
3. Break the scene into beats, which McKee describes as the fundamental units of film structure.
4. Note the closing emotional value

and compare to the opening value.

5. Survey the beats and locate the turning point of the scene.

Importantly, these same five steps of critical thinking can be applied to the analysis of television commercials, Web videos or other types of ad film.

The first step, defining the conflict, is key to understanding how film works as a storytelling medium, for without conflict there can be no story. For the bazaar scene, Rick (Humphrey Bogart) initiates and drives the scene. Despite inner conflict over the pain he has suffered since Ilsa (Ingrid Bergman) abandoned him in Paris, and the anger he suppresses at seeing her with another man, Rick's desire is clear: to win Ilsa back!

The source of conflict is equally clear: Ilsa. Her feelings are very complex and clouded by mixed emotions of guilt, regret and duty. She loves Rick passionately and would take him back if she could, but for reasons only she knows, she can't. Caught between irreconcilable needs, Ilsa's desire can be phrased as "To keep her affair with Rick in the past and move on with her life." Although entangled with inner conflicts, their

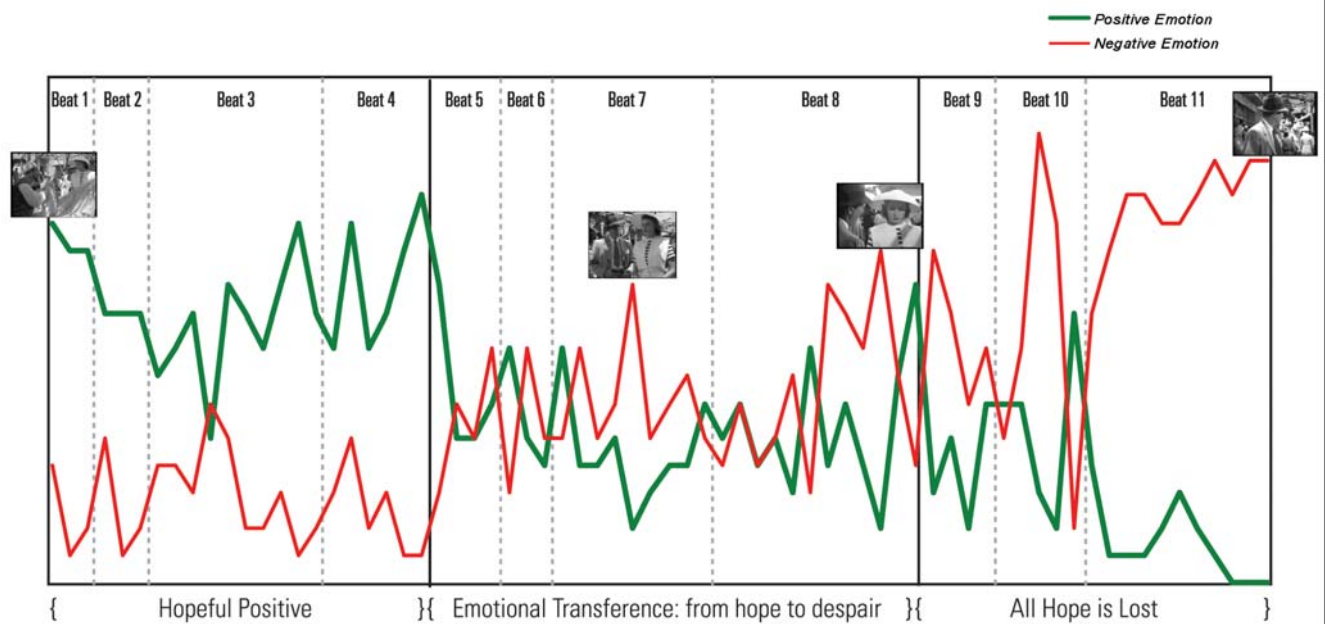
desires are thus in direct opposition.

As a second step in analysis, we identify the underlying emotional value at stake in the opening of the scene, the emotional keynote upon which this part of the story plays. For this scene, love is the governing value. In the preceding scene, Rick's insulting behavior toward Ilsa turned the value toward the negative, yet the bazaar scene opens on a positive note because the audience and Rick see a ray of hope. In the previous scenes Ilsa has been addressed as "Miss Ilsa Lund," a single woman. Rick hopes to change that.

The third step in analysis involves breaking the scene down into beats. McKee deconstructs the bazaar scene into 11 beats. Just as in music, the rhythmic structure of film is essential for the audience to make sense of information that is presented. The beats drive our expectations, create anticipation and cue the moments when we should pay close attention to what is going on. The back-and-forth of the dialogue and the body language between the two characters in the scene carries the audience forward emotionally as new information is revealed that gives us new insights into what is really going on in the story.

Figure 2

Ameritest Flow of Emotion from the Bazaar scene in *Casablanca*.



Ameritest data are a strong fit with Robert McKee’s theory with how emotions turn from positive to negative in the Bazaar scene.

This brings us to the fourth step in our analysis, in which we note the closing emotional value of the scene and compare it to the opening value. While the scene opens on a hopeful, positive note, it closes on a darkly negative note. Rick’s hopes have been crushed as Ilsa makes clear that she doesn’t love him now and implies that she never did. She has revealed that she was secretly married to Victor Laslo so that her affair with Rick in Paris was a sham. These are darker depths than Rick could have imagined.

The purpose of this fourth step of analysis is to determine the emotional movement that has taken place from the beginning to the end of a scene – that’s the “motion” in emotion. In theory, the movement can be from positive to negative, from negative to positive, or even from a negative to a double negative. What is important is understanding what has changed emotionally from the beginning to the end of the scene, since that is the net emotional content communicated by the film.

This change in emotion is the essence of storytelling. As McKee points out, if there is a scene in a movie where the emotions are the

same at the end of a scene as at the beginning, the scene doesn’t belong in the movie, since nothing has happened from an emotional standpoint. It should be edited out. This focus on emotional movement is what distinguishes the storytelling form of advertising from other forms of advertising presentations, in which the sequence of emotions may simply be one positive after another, though certainly the negative-to-positive is a time-tested approach for advertising and one we have analyzed repeatedly in our years of research.

The last or fifth step in the analysis is to survey the beats and locate the turning point of the story. As we see in McKee’s analysis, the action and reaction pattern between the characters builds a rapid progression of beats in this scene. In emotional intensity, each exchange tops the previous beat, placing their love in greater and greater risk, demanding more and more willpower of each person and demanding the capacity to take painful, even cruel actions while at the same time remaining in cool control. At the end of the eighth beat, a gap opens between what the audi-

ence expects to happen and what does happen. Audience emotions begin to turn decidedly negative as Ilsa goes on to crush Rick by revealing her secret. Until this moment, Rick has hopes of winning her over, but with this turning point, his hope is shattered.

Online interviews

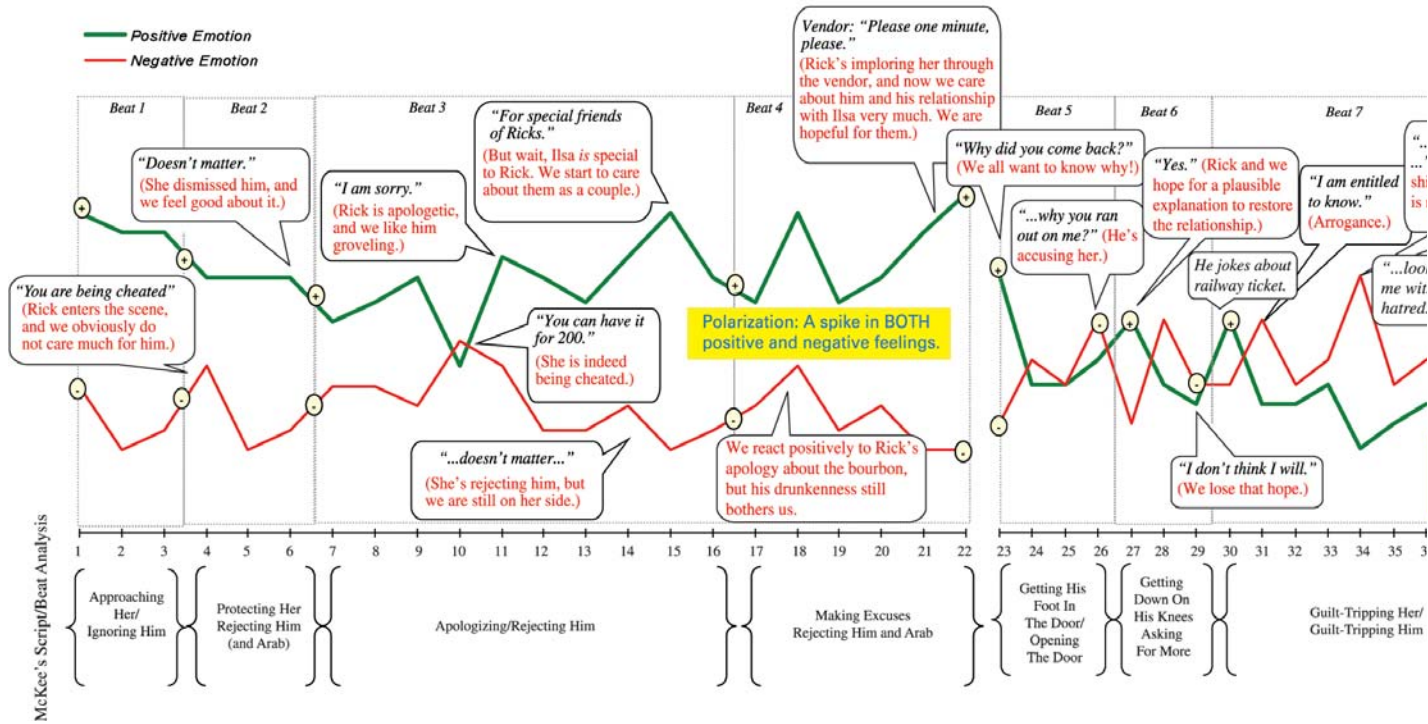
To test McKee’s analysis and his moment-by-moment predictions of how the audience is expected to respond emotionally, we conducted online interviews with a sample of 100 general-population adult respondents who had not previously seen the movie. (The respondents were shown the movie in a theater setting and re-interviewed online.) To measure the audience’s emotional responses, we used two of our standard pre-testing diagnostic tools, the Flow of Attention and the Flow of Emotion.

The Flow of Attention graph, part of which is shown in Figure 1, is constructed by having respondents sort pictures from the film based on whether they remember seeing that image in the film. It is a researcher’s tool for measuring and visualizing the beat of a scene or sequence from the

Figure 3

Beat-by-beat analysis of Bazaar scene from *Casablanca*

The Flow of Emotion graph shows that the moment-by-moment emotional response of



point of view of what stands out in the attention of the audience. What we found in our research is that the 11 beats identified by McKee correspond quite well with the 11 peak moments identified by our method.

The Flow of Attention is a measure of pre-conscious filtering or selective perception, which is a process driven by unconscious emotions. In taking the sample of visuals from *Casablanca* for our research, you might note that, at first glance, many of the pictures look similar. But on closer inspection you will see that the differences can be quite subtle, reflecting the difference of a raised eyebrow, a sideways glance, a curled lip. It turns out that the unconscious mind is quite fast and accurate in reading the non-verbal emotions expressed by our faces. And this simple picture-sorting tool can measure them and reveal the rhythmic structure of how the brain takes in visual information.

The beats of film structure described by McKee, therefore, should be thought of not just in terms of the snappy dialogue but also the visual exchanges signaling the emotions in the movie. In the case of the bazaar

scene, the visual beat of the film is well-synchronized with the beat of the dialogue so that we can identify 11 beats in the scene either way.

Our second picture sort, the Flow of Emotion graph, is a tool for visualizing the positive and negative feelings that the audience becomes conscious of as they watch the movie. It is constructed by having respondents sort the set of images they remember from the movie a second time, on a positive-to-negative scale of the feelings that they had while they were watching each moment in the movie.

Dramatic energy

It is from the creative tension between positive and negative emotions that dramatic energy or conflict arises.

In Figure 2 we see the overall emotional structure of the bazaar scene, which reflects the dramatic design of the scene. Both positive and negative emotions are present throughout, as shown by the two colored lines in the graph, illustrating the emotional tension from the beginning to the end of the scene.

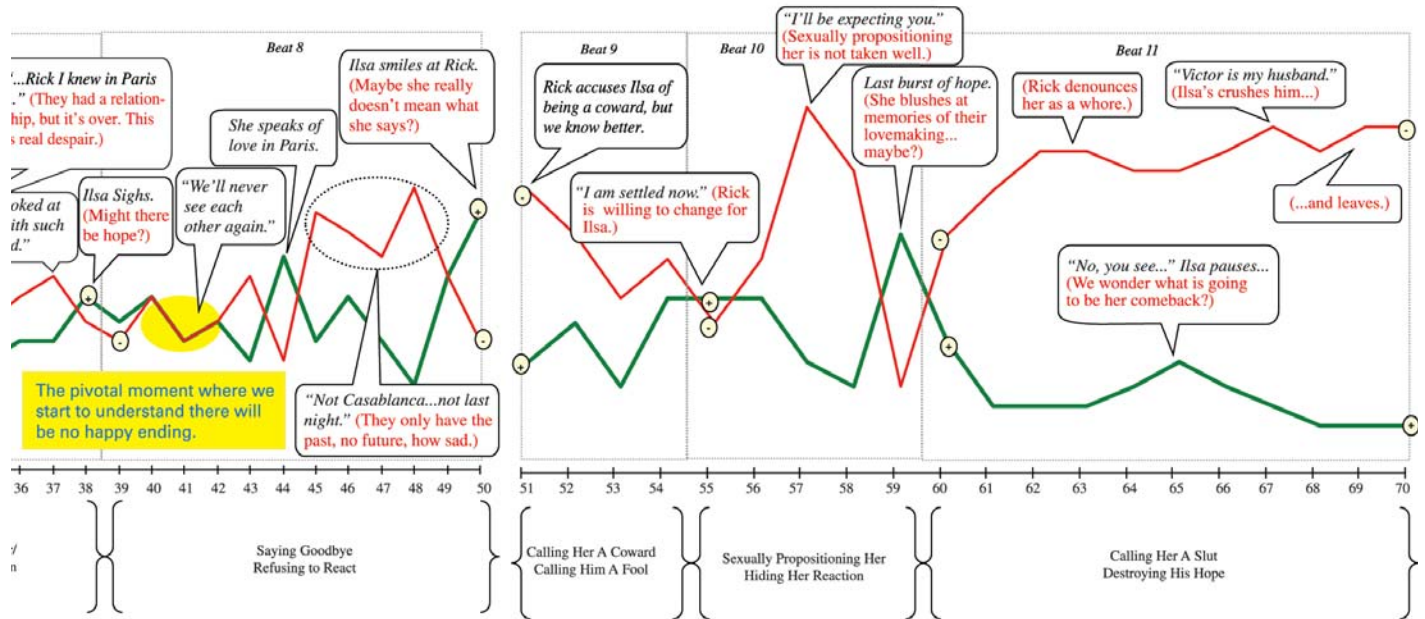
In the first four beats of the scene, positive emotions are domi-

nant, reflecting the hopeful, positive expectations the audience has about what is going to happen. Then in the middle four beats, tension increases so that positive and negative emotions are nearly equal as tension builds toward a climactic moment. At this stage audience feelings are undergoing what scientists would call a phase transition from one emotion state to another. Then, on the eighth beat of the scene, when the definitive statement is made by Ilsa to Rick (that they'll never get together), audience feelings shift decidedly to the negative as this mid-act climax ends the movie on the dark note that all hope for Rick's love is lost.

If we zoom in on the Flow of Emotion in Figure 3, we can see even more detail by looking at McKee's analysis juxtaposed with the research data. In this chart we can look at the text of the dialogue and, parenthetically, the interpretation of the subtext of what is really going on.

At the beginning of the encounter between Ilsa and Rick at the vendor's stall we the audience are siding with Ilsa: last night and Rick's awful behavior are fresh in our minds and

of the movie audience fits the predictions of the writer Robert McKee.



we are looking forward to seeing him grovel and apologize. However, during the initial phase of the interaction, with the help of the vendor (who acts as a mirror of Rick's intentions) we come to realize that Ilsa and Rick are truly, genuinely in love. We realize there is much more going on than what we see on the surface. We begin to care about them as a couple and are hopeful for a positive outcome of this encounter: he'll apologize, she'll accept his apology and they will live happily ever after.

Thus, we begin to be very emotionally engaged with the scene, reacting strongly to their every glance, word and movement. This is a moment of emotional transference, where our initial feelings are changed by the characters' words and actions. Then there comes a moment of truth – an emotional pivot in beat eight – where Ilsa states that they will never see each other again.

This is when our overall emotional response to the story changes from being mostly positive, with occasional bursts of negativity, to being overwhelmingly negative. We feel strongly for both the characters

and for their relationship and are very sad that there will be no happily-ever-after for Rick and Ilsa as a couple.

Correspond nicely

With this analysis, we can now see how well theory and experiment fit together. All five stages of McKee's method of analysis can be verified with research data. The structural beat of the film, the intensity and emotional touchpoints and the turning point of the scene that McKee described all correspond nicely with what the research measures.

McKee offers his method of analysis to other writers as a way of making explicit something they do intuitively, so they can go back after the creative heat of the first draft is over and edit their work, polishing it to make it better. These concepts help define what experienced creatives mean when they say a piece of work "feels right." That right feeling also represents a prediction that the audience will respond to the finished work the way the creative intends.

As we can see in the case of McKee's analysis, his prediction of how an audience would respond to the bazaar scene was right on. This is good

news for researchers, because it also means we have direct evidence that we can measure something that truly relates to how creatives view their work.

Our strongest hope for this research is that it chips away at the walls that confrontational, rational-based pass/fail advertising research systems have built among the creative community as it has sought – rightfully so – to protect its work.

Research is not going away, nor should it. As Robert McKee himself makes clear in his workshops around the world, creativity is not done in a vacuum and ultimately must work out in the world, with an audience. When it comes to advertising, this is even more so. As procurement pressures mount, and ROI remains the mantra at brands around the world, creatives will find their truest research allies are those who conduct brand and advertising research that respects the emotional element so critical to the creative process.

As McKee himself exclaimed upon seeing the research on one of his most beloved films, it is indeed "beautiful" when science and art can come together to support, not destroy, the creative process. | Q

Reach them where they are

Firms are going multi-platform to get their messages out to multicultural youth

The digital space is fast becoming a rich channel for reaching any number of markets - unless, according to conventional wisdom, you're targeting the African-American and Hispanic markets. While it's clear that the Web is increasingly accessible and is frequently utilized by the general population, doubts remain among those seeking to connect with African-American and Hispanic consumers over the prevalence of these groups online.

When it comes to minority youth, however, it's time those doubts were dispelled.

It turns out that the Internet is not only a playground well-populated by ethnic young people, but it has the potential to become the only game in town, according to C&R Research's 2009 YouthBeat, an ongoing study of over 13,000 kids (aged 6 to 9), tweens (10 to 12) and teens (13 to 18). And when it comes to technology in general, African-American and Hispanic youth are increasingly taking advantage of tools and techniques that both feed their need to connect and network with others while also allowing them to express their individuality.

According to YouthBeat, African-Americans and Hispanics of all ages are keeping pace with their Caucasian counterparts when it comes to Internet usage. In fact, African-American and Hispanic youth surpass them when it comes to going online on an everyday basis. About two-thirds of Hispanic (66 percent) and African-American (65 percent) youth are online at least three to five times per day, compared to 62 percent for Caucasian youth.

Contrary to popular belief, Internet use among Hispanic and African-American youth is relatively consistent with Internet use among the population overall. For example, ethnic youth's Internet usage is on par with or even higher than their Caucasian counterparts during weekdays. African-American and Caucasian youth were online at about the same rate (91 percent each), while slightly more Hispanic youth (92 percent) were online during the week. We know that Caucasian households are more

likely to own computers than those of ethnic youth, which leads us to believe that increased Internet usage among these ethnic groups may be due to expanded access to computers in schools or public libraries.

Consistent with this hypothesis, the data show that Hispanic and African-American youth visit Web sites slightly less frequently than Caucasian youth on weekends. While 93 percent of Caucasians report using the Internet on weekends, just 83 percent of Hispanic youth and 88 percent



By Amy Henry

snapshot

Using examples from brands like Hot Pockets, McDonald's and Dr. Pepper, the author shows how some marketers are seizing on Web- and mobile-based methods to target Hispanic and African-American youths.

Editor's note: Amy Henry is vice president of youth insights at C&R Research, Chicago. She can be reached at amyh@crresearch.com. To view this article online, enter article ID 20100406 at quirks.com/articles.



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of African-American youth said that they go online. Therefore, it's important for marketers to recognize that Web sites are attracting young visitors both during the school week and on weekends, although ethnic youth may not be online as often as their Caucasian peers when school is out.

Tap into their potential

Marketers who are paying attention to these trends are fashioning campaigns that tap into their potential. For example, when marketers at Nestlé wanted to convince Hispanic youth that their Hot Pockets product was a better choice versus homemade leftovers (a staple in many Hispanic homes), they took their message of convenient food just for tweens and teens to online destinations that they would truly think of as their own.

To attract this group, Nestlé tested a campaign with the theme "Eat What You Want. Hot Pockets" that took full advantage of the Internet. The company created a two-minute, *Scream*-like parody trailer, "Cuidado con los leftovers" ("Beware of the

leftovers"), which was posted on YouTube (<http://www.youtube.com/watch?v=AQB4Wq1kyaM>) and Facebook to capture their attention in a place where they were most likely to be. The spot, focusing on the "horror" of leftovers, continued to run on what will ultimately be a dedicated Web site (www.cuidadoconlosleftovers.com). To complement and expand its reach, Nestlé will conduct a national rollout later this year.

Ethnic youth are not only well-represented online but they also visit different sites than Caucasian youth. African-American and Hispanic youth visit a wider variety of Web sites - outpacing Caucasians in 14 of 20 categories - especially those that allow them to stay connected to and current on the world around them. Ethnic youth visit music, magazine, celebrity and gossip sites that let them stay on top of pop culture more often than their Caucasian peers. But they also visit news, weather and financial sites that keep them up to date and informed more frequently than Caucasian youth.

Social networking sites are favored

by both Hispanic and African-American youth, showing that the Internet is truly a way that they build and maintain their connections with peers. Hispanic and African-American youth (45 percent for both groups) mentioned social networking sites like Facebook and MySpace more frequently than Caucasian youth (35 percent) as destinations on the Internet.

And companies that want to be part of their consideration set are taking advantage of this knowledge. McDonald's, for example, maintains a Facebook page that has 1.7 million fans and a corporate Twitter presence with more than 17,000 followers. Similarly, Verizon is on Facebook (850,000 fans) as well as Twitter (6,100 followers). With big brands like these taking a leadership role, more and more marketers are likely to use social media to bolster their reach with Hispanic and African-American youth.

Nearly indispensable

Because connection is so important to these groups, it's not surprising that their cell phones - along with

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other digital technology that put friends and family at their fingertips – are nearly indispensable.

In fact, a higher percentage of Hispanics (68 percent) and African-Americans (69 percent) have their own cell phones, versus 54 percent of the Caucasians who participated in the YouthBeat survey. These groups are also more likely than their Caucasian counterparts – by a 10 percent margin – to use their cell phones on their way home from school, to text and receive e-mail, to game and to take pictures.

But Hispanic and African-American cell phone use is not distinguished by what they do on their phones. They are also more likely to use cell phones to say something about themselves. For example, they're more likely to have customized ringtones than their Caucasian counterparts, and more likely to assign their friends and family members signature sounds.

Programs that don't choose

Given the wealth of online channels and technologies, smart marketers are increasingly developing programs that don't choose between online and cell-phone marketing, but that integrate them. Dr. Pepper, for one, boosted its sales to Hispanic youth by a reported 10 percent via a multifaceted campaign that depended heavily on Web interactivity. A theme song by hot fusion performer CuCu Diamantes serves as a centerpiece, which immediately signals to Hispanic youth that Dr. Pepper acknowledges and celebrates the Hispanic experience.

The campaign Web site offers an official video of her performance, downloads, commercials and contests, and ups the interactivity by giving visitors a chance to remix the song. They are also invited to download ringtones based on the song. And to bring the virtual world back to the real world, Dr. Pepper also sponsors a mobile music tour across the country, with the schedule and photos from previous stops adding fodder for the site.

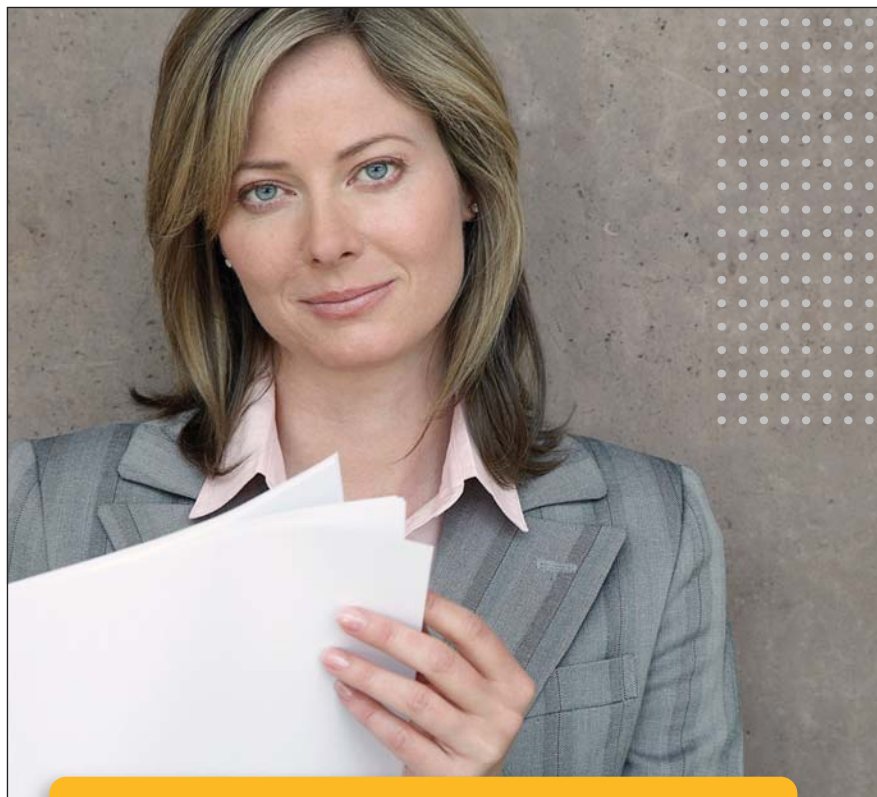
Valuable lesson

These examples teach marketers a valuable lesson: being online to reach African-American and Hispanic youth is not an option, it's a mandate. In fact, counter to conventional

wisdom, the Internet is not a place where ethnic youth are underrepresented, but rather a place where you're most likely to find them.

And because these young African-American and Hispanic consumers are exploring so many sites, it's critical to be in the right places with an authentic presence. Marketers who want to reach these groups online need to develop fresh and timely messages and applications that break through the clutter.

When you're creating online experiences for these groups, it's imperative to speak to their need for connection and self-expression. Look for ways to help them share and simultaneously show off that they're in-the-know. And finally, don't ignore the power of cell-phone marketing. Now and in the future, recognize that these connected kids, tweens and teens are as likely to have their eyes on a text as they are on a TV. | Q



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A profitable course of study

How to boost your multicultural intelligence

In his best-selling book, *Emotional Intelligence: Why It Can Matter More Than IQ*, Daniel Goldman argues that it is emotional intelligence – factors such as self-awareness, altruism, personal motivation, empathy and the ability to love and be loved – that determines success in life. I would propose that in the New America, another type of intelligence, multicultural intelligence, or MQ, is what will separate the winners from the losers.

We've found that companies, like people, have an MQ, and we've developed a battery of questions to measure it:

- What percentage of your employees owns a passport and has visited a foreign country in the last three years?
- What percentage of your management team is non-white or gay?
- How many speak a language in addition to English?
- Does your company offer diversity training?
- Do you have a multicultural advertising agency?

In the New America, the most successful businesses are the ones who do their homework and have a clearly articulated multicultural strategy. They identify a multicultural segment – be it Hispanic, African-American, Asian or LGBT – as a strategic priority and get the people in their organization to rally around the cause.

A few years ago, I was involved in a project sponsored by the Coca-Cola Retailing Research Council, a group of supermarket executives who commission a study each year to benefit the supermarket industry. My company was hired to identify best practices: What the most successful supermarkets were doing to attract and retain Hispanic, African-American and Asian-American customers.

In collaboration with Terry Soto, of About Marketing Solutions, our partner on this project, we came up with six. I recall that the first – “Think like your ethnic consumers so you can serve them better” – was the most powerful and far-reaching, applicable to any marketer in any field.

We found that the best retailers were the ones who shopped the market. They went to stores that specialize in ethnic consumers to see what they were doing right. They got a feel for the stores – how they were laid out, what products and brands they carried, and how those

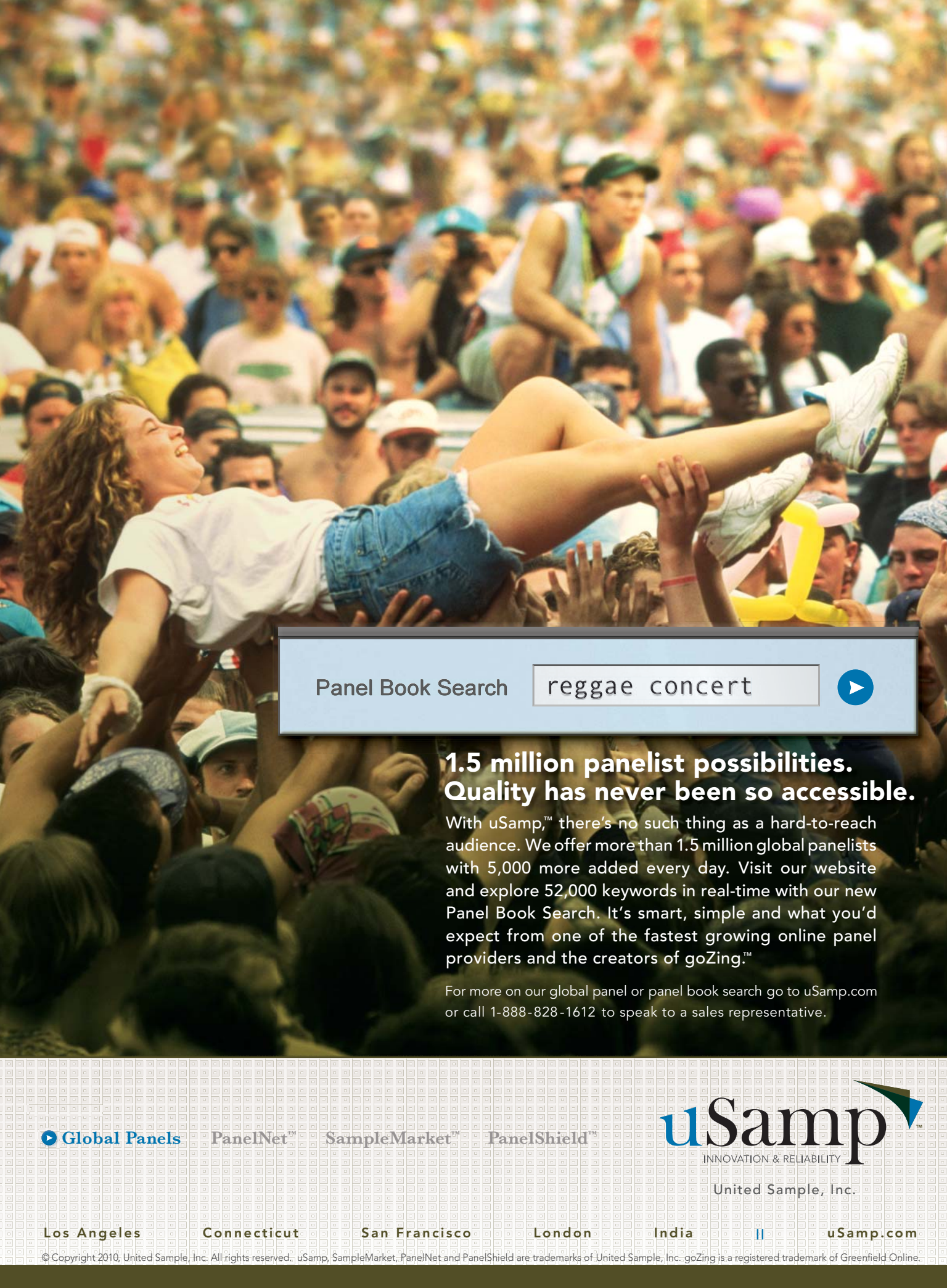


By David R. Morse

*Editor's note: David R. Morse is president and CEO of New American Dimensions, a Los Angeles research firm. He can be reached at 310-670-7889 or at dmorse@newamericandimensions.com. This article is adapted from his book *Multicultural Intelligence: Eight Make-or-Break Rules for Marketing to Race, Ethnicity and Sexual Orientation*, published by Paramount Market Publishing Inc. (www.paramountbooks.com). To view this article online, enter article ID 20100407 at quirks.com/articles.*

snapshot

David Morse offers several ways - many of them free - for firms to increase their knowledge of and familiarity with the needs and buying habits of multicultural consumers.



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were priced. When it came to gathering information, they were like sponges. They interviewed distributors, wholesalers and manufacturers, most of whom are normally generous when it comes to sharing information; it is vested self-interest.

The best retailers had a simple approach to information-gathering. They obsessively talked to consumers - on the street, in their stores and in focus groups. They endeavored to answer such questions as:

- What is important and unimportant to this consumer?
- What are their unmet needs?
- Where are they currently shopping? If they're not shopping at my store, why not?
- Where do they get information when it comes to making purchase decisions?
- What brands are they currently using? Why these brands? Why not others?
- How do they feel about my store? Does it deliver on things that are important to them? Where am I missing the boat?
- Are my products at the right price point for this consumer?
- What would it take for them to shop at my store?

Requires a commitment

Ultimately, the most successful retailers are those who realize that developing a relationship with multicultural consumers requires a commitment of time, money and other resources. But the real key to marketing success with any consumer group is to have a genuine interest in the customers, what their needs are and how your company might fill those needs. Multicultural consumers are no different.

Good market research can do so much more than prevent costly mistakes. It can help you identify needs that your consumers have - unmet needs that your company might be able to meet. And good research does not always mean telephone surveys or using focus group facilities. We've done research in bars and barbershops, on buses and basketball courts, and inside people's bathrooms and bedrooms. For the latter,

we pay high incentives. The reason is basic. The better you understand someone, the better you can market to him or her. And if they're different than you, the more likely you are to make mistakes and to have your communications misread.

Now, I conduct market research for a living, and I do believe that hiring a firm like mine - notice I didn't say my firm - can be an important step toward fully understanding your multicultural consumers. But in many cases companies can boost their MQs by taking advantage of the many free information resources that are out there. Such as:

- U.S. Census - www.census.gov
- Consumer Expenditure Survey - www.bls.gov/cex
- Current Population Survey - www.census.gov/cps
- Pew Hispanic Center - <http://pewhispanic.org>
- Lewis Mumford Center for Comparative Urban and Regional Research - www.albany.edu/mumford
- Selig Center for Economic Growth - www.terry.uga.edu/selig

Let's start with the U.S. Census. Unlike surveys, which are based on statistical samples, the Census is an actual counting of everyone in the country, including citizens, non-citizen legal residents, long-term visitors and illegal aliens. It has even begun to include estimates of people who might not normally be counted, such as homeless and migratory people.

The Census tracks race, Hispanic origin, country of birth, income, educational levels, language use and a slew of other variables down to very small geographical groupings called census blocks (there were eight million census blocks in the 2000 census).

In addition to offering a number of relevant publications, some other marketing uses of census data are to:

- Measure the size of ethnic markets from national to local and sub-local.
- Identify top markets for a given ethnic group.
- Understand what percentage of a multicultural market, say Hispanics, is foreign-born.

- Determine which areas of a city or state might represent opportunities, based on the demographics of residents.
- Develop weighted sampling plans for market research studies.
- Explore how your target group has changed over time.
- See projections of the U.S. population, by ethnicity, through the year 2100.

The Census tracks race and Hispanic origin separately, since in the eyes of the Census, Hispanics are not a race. The Census does not track religion or sexual orientation because the constitutional mandate for a census does not include these categories.

However, if you are interested in the LGBT market, the Census does track unmarried partners; and if they happen to be of the same sex, then it can be safely assumed that the couple is gay or lesbian. The 2000 Census showed that nearly a million people fell into this category. It's a flawed, gross underrepresentation of the gay population since not all gays are in partnered relationships. In fact, some studies have shown that it severely undercounts the number of gays who are partners, despite the efforts of LGBT activists to get them to check the box - but it does give a good proxy and is useful for understanding areas with a high concentration of gays.

A couple of other useful governmental sources of information are the Consumer Expenditure Survey and the Current Population Survey. The Consumer Expenditure Survey is conducted by the United States Department of Labor and administered by the Census Bureau. It consists of two surveys, an interview and a diary survey, which provide in-depth information on how Americans of different ethnic groups spend their money.

The Current Population Survey is a national, monthly survey of 60,000 households, conducted by the Census Bureau for the Bureau of Labor Statistics, which uses the report to estimate the number of unemployed people in the United States. I like it because it's an easy tool to query,

and is the only governmental source I know of that provides visibility to the third-generation, since it asks the birth country of one's father and mother. If you're interested in what percentage of, for instance, the Asian population is first-, second- or third-generation, this is the place to look.

A great source of free information on the Hispanic population is the Pew Hispanic Center, a non-partisan research organization that conducts frequent studies on a range of topics including demography, economics, education, identity, immigration, labor, remittances and politics. Additionally, The Center regularly conducts public opinion surveys on social and public policy issues relating to Latinos. Its 2002 National Survey of Latinos is one of the best Hispanic studies I've seen, ever, and it's available online for downloading.

In addition to professional journals, many of which can be found online, we can all benefit from the writings of academics who are under the yoke of the adage, "Publish or perish." There's a ton of research

coming out of America's universities on the subject of multicultural marketing. For instance, the Lewis Mumford Center for Comparative Urban and Regional Research is a good source for information on assimilation and the emerging second generation. The University of Georgia's Selig Center for Economic Growth is the definitive resource for information about purchasing power and the multicultural economy.

Once you've exhausted the free information available, you might want to consider subscribing to syndicated studies. Both ACNielsen and Information Resources Inc. have consumer panels of African-American and Hispanic consumers. These are valuable sources to obtain detailed information on what consumers are buying, where they buy it and how much they're paying. They also have data that provide details of what gets scanned at the checkout counter in stores located in heavily Hispanic or African-American neighborhoods.

In terms of top-notch survey data, both Simmons Market

Research and Scarborough Research offer a Hispanic study, a gay and lesbian study, as well as significant reads of African-Americans in their general market survey.

Data is harder to come by for Asian-American consumers. The fact that they skew foreign-born and speak myriad languages has, unfortunately, been an obstacle for researchers. New America Media does do a study with a substantial in-language sample for Asians and a focus on media. In 2004, Arbitron began to survey Chinese radio listeners in New York and Los Angeles. As the Asian-American population continues to grow, and as marketers get increasingly savvy about this burgeoning market, the amount of available information will grow as well.

Sorely needed

Another step toward an improved MQ is diversity training. To many white Americans, the very word "diversity" is enough to conjure up images of quotas, time-wasting training programs and a tyrannical

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political correctness.

That diversity training can go too far does not detract from the reality that it is sorely needed in today's business world. The problem, in my opinion, is that too many people put it into the category of being the right thing to do and ignore the fact that it is also the smart thing to do.

Examples of costly corporate mishaps, due to a lack of diversity awareness, are many. In 2005, Macy's East agreed to pay New York State \$600,000 to settle a racial profiling suit. According to the complaint, African-American and Latino shoppers were routinely followed, questioned, and searched by security guards. Suits against JCPenney and Dillard's were also filed that year. That June, retailer Abercrombie & Fitch agreed to pay \$40 million for focusing its employee recruitment on white fraternities and sororities, relegating minority applicants to back-of-the-store jobs.

In 2007, *Time* did a story called "Employee Diversity Training Doesn't Work." In it, the magazine cited a study by Frank Dobbin of Harvard, Alexandra Kalev of the University of California, Berkeley, and Erin Kelly of the University of Minnesota, which found no real change in the number of minority managers after companies began diversity training. In the words of Dobbin, "Companies have spent millions of dollars a year on these programs without actually knowing 'Are these efforts worth it?' In the case of diversity training, the answer is no."

What the study found was that when diversity programs had teeth, when people were held accountable for results, the results were more substantial. The article cited an example from General Electric under former CEO Jack Welch, the ultimate no-nonsense manager, who implemented a diversity strategy that included appointing a chief diversity officer, Deborah Elam. The results were impressive, and by 2005, the percentage of women and minorities making up the ranks of senior management increased dramatically. According to Elam, "Training just to train is not enough. You've got to have accountability at the top."

One company that found signifi-

cant value from diversity training was Denny's. It hired a diversity guru and spent millions on its diversity initiative. Unfortunately, this was a result of a PR fiasco in 1994 after one of its restaurants asked a group of African-American Secret Service agents to pay for their meal in advance. Denny's paid \$54 million after being hit with two class-action lawsuits filed by more than 250,000 customers.

According to *Essence* magazine, within a year, all but one of the senior executives was gone, and the mostly white, male board of directors was

The six best practices in ethnic marketing and merchandising:

1. Think like your ethnic consumers so you can serve them better.
2. Define your ethnic merchandising look and organize to execute it.
3. Tailor your offering to appeal to your ethnic customers.
4. Create a culture that enhances the store experience and connects with the community.
5. Recruit and retain a diverse staff to help you successfully serve your target customers.
6. Develop a marketing plan to communicate value at all points of customer contact.

overhauled. The company began diversity training and an analysis every three months of who was hired, fired and promoted to ensure that discrimination was not rearing its ugly head. Results of the study were presented to the board of directors and the NAACP. Importantly, the diversity initiative is tied to Denny's rewards-and-recognition program.

In consumer studies, African-Americans tend to rank "respect" as second only to price in terms of importance. Given the reality of race in the marketplace, it's easy to see why. Denny's is proof that good intentions coupled with effective action can lead to results. In 1996, a third of African-Americans gave Denny's a positive rating for respectful service; today, they estimate that

number to be around 80 percent.

Diversity training can be extremely effective in helping companies uncover discrimination of a more subtle variety that might be handicapping their best efforts.

A large financial institution asked my company to run some focus groups among its Asian-American employees to find out why so many of them were leaving, despite the fact that they represented an inordinately high number of new hires. When we interviewed some Asian-Americans who had not left the company, they resoundingly expressed what Jane Hyun calls "The Bamboo Ceiling," the fact that Asian-Americans are pathetically underrepresented in the ranks of management. When we interviewed white members of the company's management, several expressed their conception that Asians were much better "number crunchers" than managers. Clearly, this attitude was being conveyed, if not verbally, then in terms of the low promotion rate.

In cases like this, it's usually not a case of intentional discrimination. Rather, it's a misreading of cultural cues. Asian-Americans are often taught from the time they are young to keep their noses to the grindstone, be humble and not blow their own horns. Non-Asians, by contrast, learn to be aggressive, to speak up on their own behalf and that the squeaky wheel gets the grease.

Acquire the knowledge

No matter your MQ, it can always be improved. Conducting market research, walking stores, talking to customers, absorbing what academics and other researchers have to offer and diversity training are all means to acquire the knowledge and wisdom that will increase your understanding.

It's something that has never been a high priority for Americans. Rather, the image of the "ugly American" doing business abroad with limited cultural sensitivity and even less language ability has been the norm. That will all change soon. For in the New America, MQ will not only be required of those engaged in international affairs, it will be required of all of us. | Q



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Consumers cutting back on the small things to save money

Where economic recovery is concerned, are Americans behaving as if they believe things are getting better? When it comes to small things people can do each day to save money, consumers are still acting cautiously. For example, almost two-thirds of U.S. adults say they have purchased more generic brands in the past six months to save money, while an additional 12 percent say they have considered doing so, according to Rochester, N.Y., research company Harris Interactive.

Besides buying private-label items, almost half of U.S. adults say they are brown-bagging lunch instead of purchasing it, with 8 percent having considered doing so; 39 percent are going to the hairdresser/barber/stylist less often and 8 percent have considered doing so; 34 percent have switched to refillable water bottles instead of purchasing bottles of water, while 10 percent have considered doing so; 22 percent say they have cut down on dry cleaning; and 21 percent have reduced purchasing coffee in the morning.

The media has also taken a hit. Thirty-three percent have cancelled one or more magazine subscriptions; 19 percent have can-

celled a newspaper subscription; and 22 percent have cancelled or cut back on cable television service, with an additional 20 percent having considered doing so. The only thing a majority of U.S. adults say they have neither done nor considered doing is changing or cancelling their cell phone service (52 percent), and only 15 percent have done so.

There are also some generational differences in what people are doing to save money. Generation X (those ages 34-45) is more likely to brown-bag lunch (56 percent) and cut back on hair styling (43 percent). Matures (those 65+) are more likely to cancel a magazine subscription (45 percent). Echo Boomers (those ages 18-33) are more likely to cancel their landline service and only use their cell phone (20 percent) and to carpool or use mass transit (26 percent). For more information visit www.harrisinteractive.com.

Wegmans named Americans' favorite over goliath grocers

Wegmans and Costco are the No. 1 grocery retailers as ranked by U.S. consumers, and data shows it has more than a little to do with service and quality - not just convenience - according to research from Market Force Information Inc., a Louisville, Colo., research company. Wegmans was the consumer favorite in the supermarket category, and Costco ranked highest in the mass grocer category.

When respondents were asked to select their single favorite from a list of the country's 118 top grocery supermarkets, Kroger received the highest number of votes from consumers across the country. This initially placed Kroger atop the list with 11 percent of the votes (followed by Publix and Safeway with 8 percent and 7 percent, respectively), but not all retailers are created equal. While Kroger has almost 2,500 stores in North America, Wegmans - with just 75 stores - has less than one-thirtieth that number. Yet Wegmans scored 3 percent of the total votes for favorite supermarket. When the

number of store locations was factored in, Wegmans moved to the top ranking position with a 9 percent score, followed by ShopRite (5 percent) score, and Albertsons and Whole Foods (4 percent each). Wegmans' top score was reinforced by the answers to follow-up questions that asked consumers about the characteristics they appreciated most about these leading supermarkets, such as high-quality produce, courteous staff, cleanliness and inviting atmosphere.

When looking at mass grocers such as Walmart, Sam's Club, Target and Costco, Market Force found similar results. While Walmart garnered the highest number of total votes, with 42 percent of the total, its store count must also be factored in. When re-indexed based on the number of stores, Costco took the lead. Like Wegmans, that lead is substantiated based on the consumer ranking of mass grocers against the attributes they care about most. Costco scored highest on 12 of 16 attributes, and tied for first for the remaining four. For more information visit www.marketforce.com.

TV trumps online, radio and print mediums for ad campaign impact

Are television ads more impactful and memorable than their radio, online and print counterparts? Data from Innerscope Research Inc., Boston, on behalf of the Television Bureau of Canada (TVB), Toronto, suggests that may very well be the case. Innerscope's biometric and eye tracking study revealed television spots were more effective at generating high emotional engagement and aided next-day recall than online video, online display, radio and newspaper. The study observed 100 male and female participants ages 18-49 as they experienced ads within each of these media environments.

Results showed that television ads delivered three times more high emotional engagement and three times higher aided next-day recall than radio ads; 1.8 times more high emotional engagement and 1.4

times higher aided next-day recall than online video ads; five times higher aided next-day recall than online display ads; and 5.5 times more total emotional engagement and comparable aided next-day recall than newspaper ads.

TV ads were viewed within a 30-minute episode of *Two and a Half Men*; radio ads were heard while listening to 15 minutes of Toronto's CHUM FM during a virtual drive; online ads were viewed while surfing msn.ca for 15 minutes; and newspaper ads were viewed while reading the *Vancouver Sun's* Life section for 30 minutes. For more information visit www.innerscope.com.

Americans going green, paying a premium for it

Even in the midst of our Great Recession consumers haven't entirely abandoned their efforts to be environmentally-conscious, even if that means paying a few more dollars for the greater good. Many consumers are still willing to pay more for a variety of green products, and 90 percent of respondents have incorporated some level of greenness into their daily lives, according to Burlington, Mass., research company Burst Media.

Few (8.8 percent) are 100-percent green, and most are aspirationally-green - having incorporated a few green behaviors into their daily life. To help lead green lives, respondents cite the Internet as the best source of information on green products and practices.

Consumers are willing to pay a premium for products they know are made out of green or environmentally-friendly, organic materials. Not surprisingly, aspirationally-green and 100-percent-green consumers are the most willing to pay a premium. The aspirationally-green consumers are most willing to pay a premium for food and household products they know to be green, including produce (66.6 percent), juices and other bottled drinks (61.1 percent), household cleaners (59.2 percent), laundry detergents (58.7 percent) and packaged food (58.2 percent). Meanwhile, among the 100-percent-green respondents, over 80 percent are willing to pay a premium for all product categories, including food, garden/landscaping supplies (84.4 percent), home improvement supplies (84 percent), bedding (83.3 percent) and health and beauty products (82 percent).

More than one-third of respondents cite the Internet as the best source of information on green products and practices, followed by television (18.4 percent), friends and family (9.2 percent), newspapers (7.1 percent), magazines (6.5 percent) and books (4.6 percent). While men search for information on alternative energy and green technologies, women look for healthy recipes, recycling, simple living and natural remedies.

More than half of all respondents believe to some extent advertising claims that promote a product as green or environ-

mentally-friendly. However, one-quarter do not believe the claims or find them confusing or misleading and one out of 10 respondents say they never believe green claims made in an advertisement. Two-thirds of aspirationally-green respondents believe green claims in advertising, compared to 58.2 percent of 100-percent-green respondents and 32.3 percent of respondents who are not green at all. Interestingly, women in all key age segments are more likely than men to purchase a product that is advertised as being green or environmentally-friendly. However, men still lead women for being completely green, 12.1 percent vs. 5.3 percent, respectively.

Interestingly, there is a distinct difference in the motivation to go green between aspirational greens and those self-identified as 100 percent green. While aspirational greens clearly point to working for a better environment (61.3 percent) as the reason for incorporating green behaviors into their daily lives, only 38.1 percent of 100 percent greens point to this cause. Among 100-percent-green respondents, reasons include living a better quality of life (36.6 percent), good for the community (35.4 percent), desire to make a difference (32.9 percent) and setting an example for others to follow (31.5 percent). Among this segment, being green identifies a lifestyle rather than personal activity. For more information visit www.burstmedia.com.

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Product and Service Update

continued from p. 14

demographic information, providing number of households, age, income and race/ethnicity by geographic breakdowns; mobile/wireless sample in 12 countries; and fielding efficiencies designed to remove duplicate numbers across projects, purge business numbers and identify disconnects quickly. SSI-SNAP is a do-it-yourself desktop interface that communicates directly with SSI's production system to allow users to build and order customized telephone samples and receive delivery within 24 hours. For more information visit www.surveysampling.com.

Denver research company iModerate Research Technologies has expanded its global language capabilities to allow online qualitative discussions in any dialect. This capability applies to Research>iMpackt, iModerate's hybrid solution, and Optimum!nsight, its qualitative solution. For more information visit www.imoderate.com.

The online research platform of KN Dimestore, a Menlo Park, Calif., research company, has enabled campaign measurement surveys in online videostreams, either as overlays or as part of the pre- or post-roll. KN Dimestore's solution is designed to offer surveys that do not interrupt the video experience or require respondents to go to a third-party site; allow clients to control the timing, placement and look and feel of surveys; and provide results in real time. For more information visit www.knowledgenetworks.com/dimestore.

Stamford, Conn., research company InsightExpress has released its Mobile InsightNorms report through fourth-quarter 2009, including a comparison of mobile media types and verticals and benchmarked to the impact of online advertising. InsightExpress compared the two using its InsightNorms database and 100+ mobile ad effectiveness campaigns. For more information visit www.insightexpress.com.

Leeds, U.K., research firm McCallum Layton has launched an online research and insight management solution comprised of three elements: e-equal, e-quant and The Hub. E-equal is designed to provide a variety of online qualitative research techniques, including focus groups, bulletin boards and Web communities. E-quant is intended to handle Web-based and e-mail-based surveys and provide online data analysis tools and reporting. The Hub is the agency's insight management portal through which clients can access their projects from anywhere via a secure login. For more information visit www.mccallum-layton.co.uk.

First Insight, a Pittsburgh research company, has released an updated version of Virtual Customer Viewpoint (VCV), a solution designed for merchants and designers to improve product selections, forecast future item sales, assess price points and evaluate the strength and applicability of attributes of particular products. VCV uses online consumer activities and conversations to help in deciding what to sell, where, how and to whom. For more information visit www.firstinsight.com.

Iconoculture, a Minneapolis research company, has launched SocialIQ, a social media analysis tool intended to provide access to consumer conversations on a series of topics including economic and health care issues; demographic cohorts; and overarching industry trends. For more information visit www.iconoculture.com.

MDLinx, a Washington, D.C., research company, has launched a monthly omnibus offering for international pharmaceutical market research. The offering includes eight products including oncology (Oncobus), rheumatology (Rheumbus), psychiatry (Psychbus), neurology (Neurobus), endocrinology (Endobus), cardiology (Cardiobus), infectious disease (IDbus) and general medicine (GPbus). For more information visit www.mdlinx.com.

Experian Simmons, a New York research company, has launched Experian Simmons DataStream, a service designed to deliver weekly insights into consumer trends, enabling advertisers, agencies and media companies to monitor market conditions, evaluate advertising effectiveness and demonstrate marketing accountability. For more information visit www.smr.com.

Opinion Research Corporation, Princeton, N.J., has introduced the option of a cell phone enhancement to its traditional twice-weekly CARAVAN telephone omnibus landline sample. For more information visit www.opinionresearch.com.

London research company Populus has launched an online omnibus with analysis included for £295 per question. For more information visit www.populus.com.

Horsham, Pa., research company TNS has partnered with Compete, its sister research company in Boston, to launch Web Performance Optimiser (WPO), a Web evaluation service designed to identify areas of a brand's Web site that are underperforming and recommend how a company can enhance a Web site for optimal performance. WPO combines the Web site evaluation capabilities of TNS WebEval with the Web analytics of Compete and examines the accessibility, usability and performance of a site against competitors. For more information visit www.tns.com.

New York research and trends tracking company EPM Communications Inc. has released the 2009 Retail Business Market Research Handbook. The Handbook includes year-end market data, discussions of trends, current business activities, a review of the financial performance of market leaders, an assessment of holiday and back-to-school shopping, approaches to enhance the consumer shopping experience and information aimed at market development in various consumer sectors. It is available for \$385. For more information visit www.epmcom.com.

Research Industry News

continued from p. 16

research company in an all-cash transaction. Upon completion, ARSgroup will be renamed **comScore ARS**.

Paris research company **Ipsos** has acquired Los Angeles research company **OTX**.

Alliances/strategic partnerships

Better Business Bureau (BBB), Arlington, Va., and Westlake Village, Calif., research company **J.D. Power and Associates** have entered into an online content sharing agreement designed to help consumers research and identify trustworthy businesses including car dealers, insurance agents, builders and movers. Visitors to BBB's Web site will have access to J.D. Power's Power Circle Ratings, a system based on the opinions of consumers who have actually used or owned the product or service being rated.

Waltham, Mass., research company **Mzinga** and **Opinion Research Corporation**, a Princeton, N.J., research company, have partnered to deliver online community research solutions using Mzinga's OmniSocial platform and ORC's customer and employee engagement research solutions.

Hispanic broadcasting network **Telemundo**, Miami, has established a polling partnership with Paris research company **Ipsos**. Ipsos-Telemundo Poll is intended to help monitor Hispanics' opinions and attitudes.

Association/organization news

The Marketing Research Association (MRA), Glastonbury, Conn., has named COO **Kristen Darby** interim CEO.

Additionally, the MRA has introduced new Web seminar services designed to help MRA members reach new clients and connect with existing clients in a Webinar format.

Finally, the MRA has partnered with research companies **KL**

Communications, Red Bank, N.J., and **iTracks**, Saskatoon, Saskatchewan, to launch its CEO Special Interest Group, an interactive discussion and networking forum for C-level executives.

Tom H.C. Anderson of **Anderson Analytics**, Stamford, Conn., and several research colleagues have established the **Foundation for Transparency in Offshoring** (FTO), an organization created to shed light on the risks of data offshoring. FTO also offers online self-certification modeled after the EU's Safe Harbor Compliance Framework. A research supplier may self-certify its offshoring practices by activity, country and provider relationship. FTO is online at www.offshoringtransparency.org.

Awards/rankings

EasyInsites, a Surrey, U.K., research company, was named to London business support company **Smarta.com**'s inaugural Smarta 100, a list of the U.K.'s smartest small businesses.

Vancouver, B.C., research company Vision Critical's **Angus Reid Forum** has scored top marks in the Grand Mean Project, a global quality measurement initiative conducted by East Islip, N.Y., research company **Mktg, Inc.**

New accounts/projects

Copenhagen, Denmark, research company **iMotions** has chosen Santiago, Chile, research company **EyeOnMedia** to serve as the reseller for iMotion's eye tracking software Attention Tool in Chile, Peru, Ecuador, Argentina and Columbia.

Laithwaites Wine, a Berkshire, U.K., wine distributor, has appointed **Leapfrog Research and Planning Ltd.**, Berkshire, U.K., to evaluate how customers and prospects perceive the wine merchant. Leapfrog's qualitative program includes ethnographic evening home visits to wine drinkers and group discussions.

New York researcher **The Nielsen Company** signed **Black Crow Media**, a Daytona Beach, Fla., broadcasting company, to its radio ratings service. The agreement includes three Black Crow stations in Huntsville, Ala.

Watertown, Mass., research company **Cymfony** has selected Kantar-affiliated research companies **Millward Brown**, Naperville, Ill., and **Dynamic Logic**, New York, to integrate social media discussions into Cymfony's marketing solutions.

Maponics, a Norwich, Vt., software company, has been chosen by the Real Estate Division of **Lender Processing Services Inc.** (LPS), Jacksonville, Fla., to provide neighborhood and zip code boundary data required to enable local searching of LPS property databases.

MTV Networks (MTVN), New York, has selected San Francisco research company **Quantcast** to offer advertisers audience targeting capabilities on sites in MTVN's domestic online portfolio.

Vancouver, B.C., research company **Techneos'** SODA Mobile Access Platform has been adopted by the **Schroeder Institute for Tobacco Research and Policy**, Washington, D.C., to power a study examining the effectiveness of mobile phone support for the D.C. Tobacco Quitline.

Long and Foster Real Estate Inc., Chantilly, Va., has selected Ann Arbor, Mich., research company **ForeSee Results** to implement a customer service measurement tool.

New companies/new divisions/relocations/expansions

London research company **ORC International** has opened an office in Edinburgh, Scotland. Diarmid Hearn will lead the office.

Six European online research agencies - **Multiscope**, **mo'web Research**, **M3 Research**, **Panelbase.net**, **Directpanel**

Research and **SWG** - have partnered to form **Panelteam**, a Netherlands research company that operates across 15 European countries and has eight local offices.

Research industry veterans Andrew Irving and Dorothy Chang have launched **Andrew Irving Market Research** (AIMR), London.

Nottingham, U.K., research company **Experian** has expanded its marketing services portfolio of products and services into Korea.

London research company **E-Tabs** has announced the launch of its New Zealand office in June 2010.

Quick Test/Heakin Research Inc., Jupiter, Fla., has opened a QuickView-Queens Center mall location in Elmhurst, N.Y.

Research industry veteran Scott MacLean has launched **Nulink Analytics**, a Brighton, Australia, quantitative research consultancy.

Resolution Research, Denver, has moved its headquarters to 490 South Santa Fe Dr., Unit E. Phone numbers, e-mail and Web site addresses have not changed.

Vancouver, B.C., research company **Vision Critical** has relocated its London office to Boston House, 63-64 New Broad St.

Research company earnings/financial news

The Nielsen Company, New

York, announced its financial results for the year ended December 31, 2009. Reported revenues were \$4,808 million, flat with the reported revenues for year prior. Excluding the impact of currency fluctuations, revenues for the year increased 4 percent. Reported operating income was \$116 million, compared to operating income of \$421 million for 2008.

IMS Health, Norwalk, Conn., announced fourth-quarter 2009 revenue of \$599.2 million, up 3 percent year-over-year, compared with \$580.9 million in fourth-quarter 2008. Net income for the 2009 fourth quarter was \$71.5 million, and diluted earnings per share (EPS) was \$0.39, compared with net income of \$98.5 million and EPS of \$0.54 in the year-earlier period. Operating income in the fourth quarter of 2009 was \$106.3 million, compared with \$126.6 million in operating income in fourth-quarter 2008.

For the 2009 full year, revenues were \$2,189.7 million, down 6 percent or 4 percent constant dollar, compared with revenues of \$2,329.5 million in 2008. Net income for 2009 was \$258.5 million, and diluted EPS was \$1.42, compared with net income of \$311.3 million and EPS of \$1.70 the year earlier. Operating income for was \$270.9 million, compared with \$498.3 million in 2008.

Harris Interactive, Rochester, N.Y., announced

financial results for the second quarter of fiscal year 2010. Total revenue was \$44.6 million, compared with \$50.7 million for the prior-year period. Operating income was \$0.6 million, compared with an operating loss of \$(45.9) million for 2008. Net income was \$1.3 million, compared with a net loss of \$(65.6) million for the prior-year period.

Arbitron Inc., Columbia, Md., announced results for the fourth quarter and year ended December 31, 2009. Net income for fourth-quarter 2009 was \$12.6 million, compared with \$3.4 million for fourth-quarter 2008. Revenue for the fourth quarter of 2009 was \$101.5 million, an increase of 8.5 percent over revenue of \$93.6 million during the fourth quarter of 2008.

Net income for the full year 2009 increased 13.4 percent to \$42.2 million, compared with \$37.2 million in 2008. Revenue was \$385 million, an increase of 4.4 percent over revenue of \$368.8 million for the same period in 2008.

Clarabridge, Reston, Va., announced a 50 percent year-over-year revenue growth for 2009.

Vovici, Dulles, Va., achieved a 2009 30 percent software-as-a-service revenue increase over 2008.

MarketTools Inc., San Francisco, announced that 2009 was a record year for cash flow and EBITDA.

ForeSee Results, Ann Arbor, Mich., reported a 32 percent revenue increase in 2009.

Vision Critical, Vancouver, B.C., announced a 2009 revenue increase of 50 percent over the previous year, making it the most successful year in company history.

Revelation, Portland, Ore., reported a 240 percent growth in sales in 2009 over the previous year.



Names of Note

continued from p. 12

Harris Interactive has hired **Jeni Lee Chapman** as executive vice president, global brand and communication consulting.

Paris research company *Ipsos* has appointed **Yannick Carriou** as managing director, France.

Nicole Ndoumbe-Myers has been appointed head of *Ipsos-ASI* for Ipsos South Africa, a Randburg, South Africa research company, and the sub-Saharan region.

Medimix International, a Miami research company, has appointed **Joao Saraiva** as managing director, Europe, Middle East and Africa. Saraiva will be based in London.

Sandy Casey has joined Stockholm, Sweden, research company *Cint* to lead the global

panel operations and recruitment. Casey will be based in California. Additionally, *Cint's* U.K. office has named **Clare McHatten** associate director; **Richard Thornton** director, global sales; and **Valérie Lejeune** project management services leader.

AlphaDetail, a San Mateo, Calif., research company, has appointed **Rishi Varma** president and CEO.

Jack Breeden has joined Denver research company *iModerate* as vice president, business development.

Milwaukee research company *Market Probe Inc.* has appointed **Roger Thomas** as managing director, Asia-Pacific operations, and **Saji Kumar** senior vice president, Asia-Pacific operations. Both Thomas and Kumar will be based in Singapore.

Alex Grist has joined *eDigital-Research*, Hampshire, U.K., as

research manager, commercial. The company has also promoted **Kat Hounsell** to associate director, technology and media; **Steve Brockway** to associate director, retail; **Lloyd Viney** to associate director, commercial; and **Duncan Grist** to associate director, technical.

Marc Papanicola has been appointed managing director of *Synovate France*, a Paris research company.

Los Angeles research company *OTX* has hired **Betsy Rella** as senior vice president, client development.

New York researcher *The Nielsen Company* has appointed **Amit Adarkar** as vice president, Nielsen BASES. Adarkar will be based in Mumbai, India.

Jean Fasching has joined the business development team of Atlanta research company *CMI*. Fasching will be based in Minnesota.

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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.

2010

Telephone Facilities Directory



The 2010 Directory of Telephone Interviewing Facilities was compiled by sending listing forms to firms we identified as having permanent telephone interviewing facilities. This year's directory lists nearly 700 firms, arranged geographically. In addition to the company's vital information, we've included a line of codes showing the number of interviewing stations, the number of stations that use computer-aided interviewing (CATI), and the number of stations that can be monitored on-site and off-site.

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

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

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

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18-14-18-0
(See advertisement p. 83)



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100-100-100-100

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Greg Surovcik, President
25-25-25-25



Survey Technology & Research

Survey Technology & Research Center (STR)

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James Lee, President
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Sharon Santangelo, Field Director
40-40-40-40

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Miina Rafinski
25-25-25-25
(See advertisement p. 50)

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Montgomeryville, PA
Ph. 215-822-6220
bogrzek@reckner.com
www.reckner.com
Barbara Ogrizek, Director
10-10-10-10

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(See advertisement inside front cover)

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Daniel Schmitt, VP Sales & Marketing
30-30-30-30

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Kevin Edwards, Project Manager
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23-23-23-23

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Rick Nagele, President
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12-0-12-12

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96-96-96-96

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Jordan Davidson, Marketing Coordinator
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Rick Owen, President
45-45-45-45

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18-0-18-0
(See advertisement inside front cover)

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Fay Parker, President
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Dan Kessler, President
96-96-96-96

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 David D. Galloway, VP of Client Services
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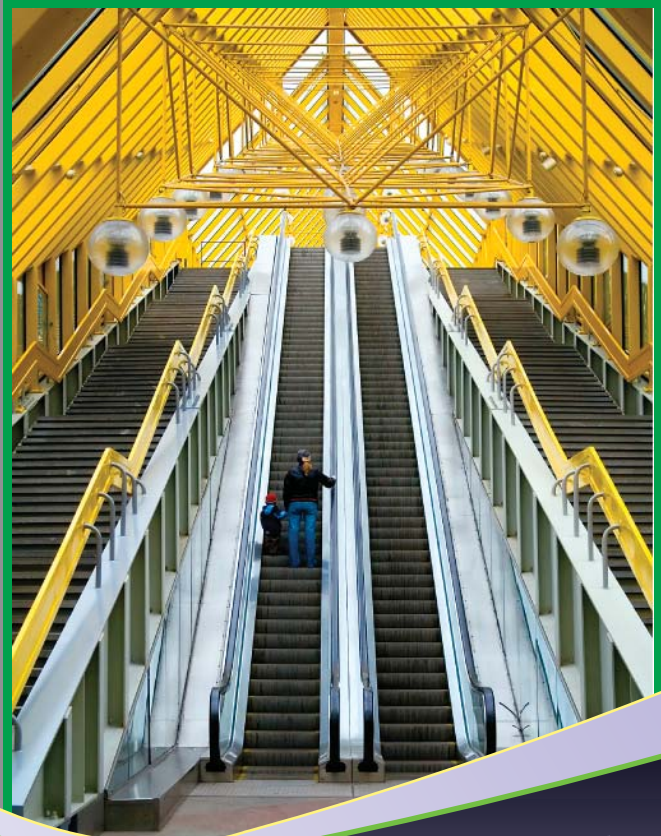


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Jerry C. Lindsley, President
25-25-25-25

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Nanci A. Glassman, President
14-10-14-14



Issues and Answers Network, Inc.

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17-0-17-0

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Cathy Peda, Vice President
65-65-65-65

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120-120-120-120

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mail@robinson-research.com
www.robinson-research.com
William D. Robinson, President
30-30-30-30

Strategic Research Associates

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johnr@strategicresearch.net
www.strategicresearch.net
Dean Moorehouse, President
10-10-10-0

Yakima**InfoTek Research Group, Inc.**

Yakima, WA
Ph. 509-248-8219
tregg@infotekresearch.com
www.infotekresearch.com
Tregg Farmer, President
20-20-20-0

West Virginia**Charleston****McMillion Research Service**

Charleston, WV
Ph. 304-343-9650
jmace@mcmillionresearch.com
www.mcmillionresearch.com
Gary or Sandy McMillion, Owners
135-135-135-135

The McMillion Companies provide 30 years of experience across all phases of data collection and technology. McMillion Research provides 135 CATI stations for consumer- and business-side data collection. Our online panel, Mindfield Online, uses the latest proprietary software integration for the best panel and programming experience available. Breakthrough health care research combines a multimethod approach to physician and patient surveys. Our Web development team provides stunning data collection tools to give not only the respondent but your clientele the most advanced means of data collection. (See advertisement pp. 6-7)

Wisconsin**Green Bay/Appleton****Leede Research Group, Inc.**

Manitowoc, WI
Ph. 920-482-1417
Jim@Leede.com
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Jim DeZeeuw, Vice President
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The Martec Group - Green Bay

TMG Field Research
Green Bay, WI
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linda.segersin@martecgroup.com
www.martecgreenbay.com
Linda Segersin, General Manager
38-38-38-0

Matousek & Associates, Inc.

(formerly Wisconsin Research, Inc.)
Green Bay, WI
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tamatousek@aol.com
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Terri Matousek
15-15-15-0

Madison**Chamberlain Research Consultants, Inc.**

Madison, WI
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Jpicard@crwis.com
www.chamberlainresearch.com
Jim Picard, Dir. of Strategic Development
80-80-80-80

GKA Research, Inc.

Madison, WI
Ph. 608-231-2250 or 800-205-7145
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Milwaukee**Advantage Research, Inc.**

Germantown, WI
Ph. 262-502-7000 or 877-477-7001
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The Dieringer Research Group, Inc.

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sales@thedrg.com
www.thedrg.com/quirks
Darrell Beneker, Director, Research Operations
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Lein/Spiegelhoff, Inc.

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info@lein-spiegelhoff.com
www.lein-spiegelhoff.com
Chuck Spiegelhoff, President
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Management Decisions, Inc.

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Lesla Bunce, President
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Market Probe, Inc.

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Mazur/Zachow, Inc.

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Michele Conway, President
15-0-0-0

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

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

International

Argentina

Fine Research S.R.L.

Buenos Aires
Argentina
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field-la@fine-research.com
www.fine-research.com
Diego Casaravilla, Director
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Rosenthal Research - Argentina Branch

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Jan Flechsigs, Director
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New Focus Research - Adelaide

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Jennie Folland, Field Manager
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Bob Chua, CEO
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Adam Di Paula, Sr. Vice President
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Manitoba

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Fabio Espsito, President
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Nova Scotia

Halifax

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Andrew O'Brien
400-400-400-400

Call-Us Info, Inc.

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Gregg Stickeler, SVP, Client Services
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Ontario

London

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www.marketstrategies.com
Tim Wirtz
108-108-108-108

Ottawa



... it's in our nature

Elemental Data Collection, Inc.

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info@elementaldci.com
www.elementaldci.com
Colin Kiviaho, Partner
70-70-70-70

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!



Opinion Search Inc.

Ottawa, ON
Canada
Ph. 800-363-4229 or 613-230-9109
info@opinionsearch.com
www.opinionsearch.com
Janette Niwa, V.P. Client Services
145-145-145-145

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 crosstabulation 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 p. 46)

Toronto

Acrobat Research

Mississauga, ON
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info@acrobat-research.com
www.acrobat-research.com
Tim Sinke
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BBM Analytics

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dpeirce@bbm.ca
www.bbmanalytics.ca
Diane Peirce
250-250-250-250

Canadian Viewpoint, Inc.

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Ph. 905-770-1770 or 888-770-1770
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Consumer Contact

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info@consumercontact.com
www.consumercontact.com
Gord Ripley, Vice President Client Services
450-450-450-450

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 nearly 40 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.



Consumer Vision Ltd.

Toronto, ON
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info@consumervision.ca
http://www.consumervision.ca
Kristi Turnbull, Vice-President
62-0-62-0

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 seven state-of-the-art focus group facilities and our own in-house recruiting and quantitative telephone survey center. 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.

Forum Research, Inc.

Access Research Inc.
Toronto, ON
Canada
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lbozinoff@forumresearch.com
www.forumresearch.com
Lorne Bozinoff, President
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Hay Research International

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www.hayresearch.com
50-50-50-50

IFOP North America

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www.ifop.com
John Ball, COO
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Karom Group of Companies

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karom@karomgroup.com
www.karomgroup.com
10-10-10-10

Market Probe Canada

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Ph. 416-487-4144
canada@marketprobe.com
www.marketprobe.com
Gordon Kidd, Director of Operations
135-135-135-135

Metroline Research Group, Inc.

Kitchener, ON
Canada
Ph. 800-827-0676 or 519-584-7700
info@metroline.ca
www.metroline.ca
Dave Kains, CMRP, Partner
20-10-10-0

Millward Brown Canada

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james.conrad@ca.millwardbrown.com
www.millwardbrown.com
Todd Gillam
250-250-250-250

National Response

Toronto, ON
Canada
Ph. 416-422-2204
info@nationalresponse.ca
www.nationalresponse.ca
Hugh Olley, Manager Field Ops.
50-50-50-50

R.I.S. Christie - The Data Collection Company

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generalinfo@rischristie.com
www.rischristie.com
Olga Friedlander, President
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Research House, Inc.

Toronto, ON
Canada
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info@research-house.ca
www.research-house.ca
190-123-190-123

Telepoll Canada Inc.

Toronto, ON
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Ph. 416-977-0608 x222
cschmakies@telepoll.net
www.telepoll.net
Christine Schmakies
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Walker Information Canada

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solutions@walkerinfo.com
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136-136-136-136

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Quebec

Montreal

Ad Hoc Research

Montreal, QC
Canada
Ph. 514-937-4040 x175 or 877-937-4040
reservation@adhoc-research.com
www.adhoc-research.com
Amelie Baillargeon, Field Director
65-65-65-65

CROP inc.

Montreal, QC
Canada
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info@crop.ca
www.crop.ca
70-70-70-70

**Opinion Search Inc. (Br.)**

Montreal, QC
Canada
Ph. 800-363-4229 or 514-288-0199
info@opinionsearch.com
www.opinionsearch.com
Steve McDonald, National Field Director
130-130-130-130

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 crosstabulation as well. Our data-CAP 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 p. 46)

Saskatchewan

Saskatoon

Insightrix Research Services

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Canada
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sales@insightrix.com
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Corrin Harper
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Chile

Fine Research The LatAm Field Company

7850-137 Santiago
Chile
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field-la@fine-research.com
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China

(See also Hong Kong)

Marcom-China.com Company Ltd.

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Jenny Zhang
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Colombia

Centro Nacional de Consultoria

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YanHaas

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Colombia
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www.yanhaas.com
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Denmark

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Berent Aps

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175-175-175-175

Effience 3

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Chloe Vignon, Int'l Research Manager
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paulette@focusworldint.com
www.focusworldinternational.com
Paulette Eichenholtz, President
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GMV Conseil

75011 Paris
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gmv-conseil@gmv-conseil.fr
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Eric Fournier, Managing Director
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La Maison Du Test

Montreuil
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info@lamaisondutest.com
www.lamaisondutest.com
Malmanche Christophe, General Manager
16-16-16-0

MV2 Conseil

92120 Montrouge, Paris
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Christian de Balincourt, Director
510-510-510-510

Germany

abs Marktforschung

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89079 Ulm
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hallo@abs-marktforschung.de
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80-80-80-80

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Elfriede Meyer-Roennau
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CSI International
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Germany
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www.csi-international.de
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CSI International is an independent specialist for centralized worldwide data collection services covering almost all markets, industries and audiences. CSI International owns telephone labs with 85 CATI stations. Native-speaking agents are conducting qualitative and quantitative interviews in 17 languages and 102 countries.

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Medien-und Marketingforschung GmbH
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Thomas Pauschert, Managing Director
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Schmiedl Marktforschung is an independent market research institute. Our Berlin and Munich test studios offer quantitative and qualitative market research and CATI facilities. (See advertisement p. 35)

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Paul Lee, Executive Director
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KC Wong
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India

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sales@colwell-salmon.com
www.colwell-salmon.com
Durga Das
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Cross-Tab Marketing Services (Br.)
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Ashwin Mittal
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Cross-Tab provides a full range of market research and analytics solutions to global clients. Our suite of services takes care of all operational and project management aspects of the market research business while our clients focus on research design, insights generation and consulting. Our services include: research operations management; data collection (online, CATI, panel and India fieldwork); market research process outsourcing (survey programming, data processing, reports and presentations, panel and field management) and extension teams (data analytics, secondary research, quality checks).

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Ankur Aggarwal, Director Client Services
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Codes - (e.g. 25-10-25-10)

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RNB Research: Fieldwork Specialist for Asia

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Millward Brown Lansdowne

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Featured Event



Infosurv will host a Webinar, themed “Tapping ‘The Wisdom of the Crowds’ to Predict the Future: Prediction Markets for Concept Testing,” on May 6 at 1 p.m. EDT. Jared Heyman, founder and president of Infosurv Inc., will present and introduce iCE – the world’s first prediction market designed specifically for concept testing that allows respondents to win real-world cash based upon their investing prowess. For more information and to register, visit www.infosurv.com/webinar.

ESOMAR will hold its annual Asia-Pacific conference on **April 25-27** in Bangkok, Thailand. For more information visit www.esomar.org.

The NorthWest Chapter of the MRA will hold its spring education conference, themed “Pairing the Perfect Vintage: Cultivating Partnerships in Market Research,” on **April 30** at the Silverado Resort in Napa Valley, Calif. For more information visit www.northwestmra.org/napa.

IIR will hold a conference focused on innovation and collaboration on **May 3-5** at the Boston World Trade Center and Seaport Hotel in Boston. For more information visit www.iirusa.com/feiusa.

IIR will hold a conference on youth and family marketing on **May 10-12** at the Hotel Sax Chicago in Chicago. In tandem with the youth and family marketing conference, IIR will hold an event, themed “The Life Stage Marketing Summit,” on the same dates at the same location. For more information visit www.iirusa.com/family or www.iirusa.com/lifestage.

Vovici will hold its Vision 2010

conference on **May 10-12** at the Reston Hyatt in Reston, Va. For more information visit <http://vision2010.vovici.com>.

The Business Intelligence Group will hold its annual BIG Conference, themed “Back to Black? Prospects for B2B Research,” on **May 12-14** at the Marriott St. Pierre in Chepstow, South Wales, U.K. For more information visit www.bigconference.org.

The AAPOR will host its annual conference on **May 13-16** at the Marriott Downtown Chicago in Chicago. For more information visit www.aapor.org.

The Pharmaceutical Business Intelligence and Research Group will hold its annual AGM conference on **May 16-19** in Naples, Fla. For more information visit www.pbirg.com.

Mature Marketing and Research LLC will sponsor a workshop, themed “Marketing to Boomers and Beyond – How To Build Your Business With The Mature Consumer,” on **May 14** at the Marriott Hotel in New York. For more information visit www.beyondboomers.com/workshop.html.

The QRCA and the Association for Qualitative Research will hold a conference on qualitative research, themed “Inspiration in Action,” on **May 19-21** in Prague, Czech Republic. For more information visit www.inspirationinaction2010.org.

ESOMAR will hold its annual Latin America conference on **May 23-25** in Cartagena, Colombia. For more information visit www.esomar.org/latam.

Research Magazine will hold a conference on social research on **May 26** in London. For more information visit www.research-live.com.

Together SKIM and Sawtooth Software will hold the annual European soft-

ware conference on **May 26-28** in Cologne, Germany. For more information visit www.skimgroup.com/skim-event-2010.

The Mystery Shopping Providers Association will hold its annual Europe conference on **May 27-29** in Istanbul, Turkey. For more information visit www.mysteryshop.org.

CASRO will hold its annual technology conference on **May 28-29** at the Millennium Broadway Hotel in New York. For more information visit www.casro.org.

The Life Insurance and Market Research Association will hold a marketing and research conference on **June 2-4** at Disney’s Yacht Club Resort in Orlando, Fla. For more information visit www.limra.com.

The Southern African Marketing Research Association will hold its annual conference on **June 3-4** at the Mount Grace Country House and Spa in Magaliesburg, South Africa. For more information visit www.samra.co.za.

The Marketing Research Association will hold its 2010 annual conference on **June 9-11** in Boston. For more information visit www.mra-net.org.

The ARF will hold a conference, themed “Audience Measurement 5.0,” on **June 15-16** at The New York Marriott Marquis Hotel in New York. For more information visit www.thearf.org/assets/am-5.

Gartner will hold its customer relationship management summit on **June 28-30** at Century Plaza in Los Angeles. For more information visit www.gartner.com.

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.

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A sharp analysis of analytics

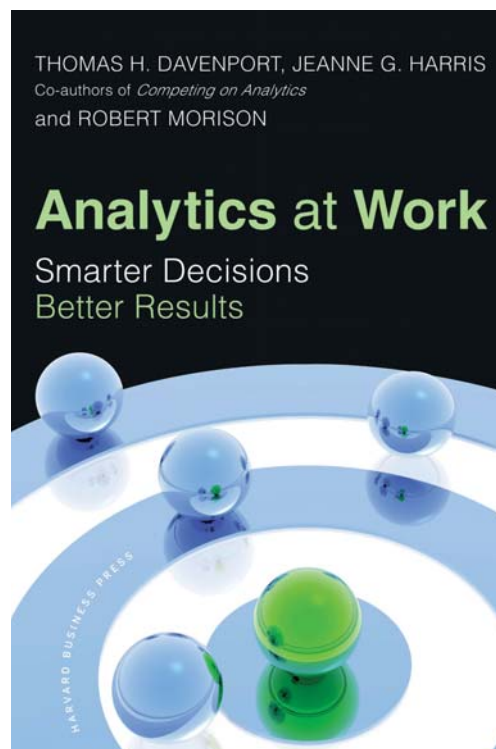
An ingredient that's sometimes missing from otherwise-worthwhile business books is the "how," as in, how to do what the author or authors say it is you should be doing. The writers of the new book *Analytics at Work* seem to have understood this fact well and have filled their book with solid, actionable advice.

Authors Thomas H. Davenport and Jeanne G. Harris have written (this time with the help of Robert Morison) a follow-up of sorts to their 2007 book *Competing on Analytics*. This newest effort arose from a feeling that they had missed a large audience with the first book: firms who wanted to add more analysis to their day-to-day approach but who didn't want to build their companies or value propositions around analysis.

Much of interest

Analytics are spoken of in necessarily broad terms and the analysis of marketing research data is but one small part of the whole data picture presented in the book, but researchers will certainly find much of interest here.

(The book's list of typical logic errors in decision-making will sound



very familiar to researchers: not asking the right questions; making incorrect assumptions and failing to test them; using analytics to justify what you want to do [gaming or rigging the model/data] instead of letting the facts guide you to the right answer; failing to take

the time to understand all the alternatives or interpret the data correctly.)

Despite the 30,000-foot view, the authors do a great job of elaborating on their observations with real-world examples from a range of entities, from unexpected ones like the Royal Shakespeare Company to data-loving stalwarts like Best Buy and Nike. They write in an engaging style, acknowledging the potential dryness of the subject matter while explaining complex concepts in clear, digestible prose.

Examining the role

They spend the first half of the book examining the role of data and data analysis within organizations, using the acronym DELTA to describe the factors necessary for success in putting analytics to work: D for accessible, high-quality data; E for an enterprise orientation; L for analytical leadership; T for strategic targets; and A for analysts.

The "Targets" chapter, for example, looks at the whole notion of what should be tracked and analyzed and how to determine what to track and analyze, given your internal capabili-

ties, your needs and your industry's data-use practices.

In "Analysts" they examine the qualities of those who are analytics-minded, looking at everyone from actor Will Smith to a Best Buy district manager, and discuss how to motivate, organize and manage analysts within a firm.

They also explore the assessment of your organization's status as an information-gathering entity, laying out the five-stage model of progress, which readers of *Competing on Analytics* may recall, and talking about the factors required to move from stage to stage.

Later chapters outline analytical process nirvana, seven sticking points to embedding analytics into business processes (and how to overcome them) and tips on building the business appetite for analytics, satisfying that appetite and encouraging a healthy analytical diet across an organization. The helpful "Keep in Mind..." sections that close many of the chapters are good reference points for how to put each chapter's insights into practice.

Best road map

It's not exactly a step-by-step approach (each industry likely warrants its own book of specific techniques and examples) but for the employee who wants to start doing his or her part to move an organization toward a focus on analysis, this is certainly the best road map I've come across.

And in fact, after acknowledging they're guilty of a previous level of over-attention to the role and impact that the CEO can have on increasing a company's use of analytics, the authors argue that the drive toward greater use of analytics doesn't only have to come from the top. A data-loving CEO doesn't hurt, of course, but much can be done by those who are below C-level to champion the use of analytics.

To show what can be accomplished by CEOs and non-CEO types, they look at four case studies of analytical leaders at different levels within their respective organizations - the head of an analytical department; the head of a business function; a business-unit head and entrepreneur; and a CEO/president team - and also detail the specific behaviors of analytical leaders (set a hands-on example; sign up for results, etc.).

Non-violent data revolution

Obviously organizational differences and variables are great, and no one book can answer all questions specific to each reader's unique situation. But there is enough here, such as in the enterprise chapter, which contains broad steps to take if you are a "lonely proponent of analytics" within your firm and wish to start a non-violent data revolution, to get you started on the path of better data analysis.

With the book's singular focus, the authors' acknowledgements that analysis isn't everything and that analytics can be wrong, etc., are welcome. They proselytize, to be sure, but with the admission that an analysis of any kind is only as good as the skills of those doing the analyzing and the quality of the decisions and actions that result from it. Reading this book should help you improve your chops in each of those areas. | Q

Analytics at Work: Smarter Decisions, Better Results (240 pages; \$29.95), by Thomas H. Davenport, Jeanne G. Harris, Robert Morison, is published by Harvard Business Press (<http://hbr.org/books>).

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Coming in the May issue...

Research's ROI

Drawing from his ongoing studies with client-side practitioners, Brett Hagins discusses methods of exploring the ROI of marketing research..

Concept development tips

Read George Ciardi's insights on how to move down the path to effective concept development and improve the odds of new-product success.

before you go...

online and offline

News about Quirk's and quirks.com

Help Quirk's reach researchers

Quirk's delivers numerous resources to market researchers at no charge, and we want to continue that effort as we roll out new magazine and Web site enhancements. To continue our services, however, it is vital that we reach a highly-qualified and -targeted audience, so we invite you, our readers, to link to quirks.com in your e-newsletters, Web sites and other marketing research resources you might have. By helping promote Quirk's, you help continue our mission of promoting the use, understanding and value of marketing research.



Quirk's jazzes up event and directory listings

A few months ago, Quirk's launched its multimedia directory, and now we've enhanced our online event and directory listings to include video as well!

These video additions could

include interviews of previous event attendees; product software demos; virtual tours of focus group facilities or footage of a moderator in action - all without having to leave the quirks.com Web site. If you would like to include video to your event or directory listing, contact Alice Davies at alice@quirks.com or Emily Goon at emily@quirks.com, respectively.

Narrowing your article search just got easier

In this information age, the biggest struggle in finding useful information is narrowing down the scope of results to find what you're really looking for. With close to 3,000 articles in our archive, we make this process simpler by categorizing all articles - and we've added 20+ new categories to provide even more specific results. New article categories include: brand share studies, concept development, customer loyalty, data crosstabulation, focus group moderator training, low-incidence screening, online survey design/analysis, testimonial interviewing, translation/interpreting services and more! To search Quirk's article archive, visit www.quirks.com/articles.



cover-to-cover

Facts, figures and insights from this month's issue



Roughly 20 percent of the U.S. population used digital coupons in 2009. The top 10 digital-coupon categories for 2009 are ready-to-eat cereal, yogurt, sweet snacks, refrigerated dough, salty snacks, quick-service restaurant/casual dining, nutritional snacks, entertainment, condiments and pizza. (page 10)



Just as in music, the rhythmic structure of film is essential for the audience to make sense of information that is presented over time. The beats drive our expectations, create anticipation and cue the moments when we should pay close attention to what is going on. (page 40)



Being online to reach African-American and Hispanic youth is not an option, it's a mandate. In fact, counter to conventional wisdom, the Internet is not a place where ethnic youth are underrepresented, but rather a place where you're most likely to find them. (page 47)



Good research does not always mean telephone surveys or using focus group facilities. We've done research in bars and barbershops, on buses and basketball courts, and inside people's bathrooms and bedrooms. For the latter, we pay high incentives. The reason is basic. The better you understand someone, the better you can market to him or her. (page 50)



Enter to win!

An all-access pass to The Market Research Event - a \$3,990 value

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- > Confirmed keynotes include: Chris Anderson, *Free: The Future of A Radical Price*; Jonah Lehrer, *How We Decide*; and Richard Thaler, *Nudge*
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Didn't win the contest but still want to attend? Mention priority code QUIRKSNEWS to receive a 20 percent discount.

To enter, send an e-mail to contest@quirks.com with your complete contact information. Please include "TMRE Contest" in the subject line. Deadline to enter is April 30, 2010. The winner will be selected at random and announced in the June issue of *Quirk's*.

Congratulations to February's winner, Katie Lechner of Gap Inc., San Francisco, Calif. February's prize was up to 5,000 completed interviews from Greenfield Online/Toluna.



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