

# QUIRK'S

MARCH 2011

Marketing Research Review

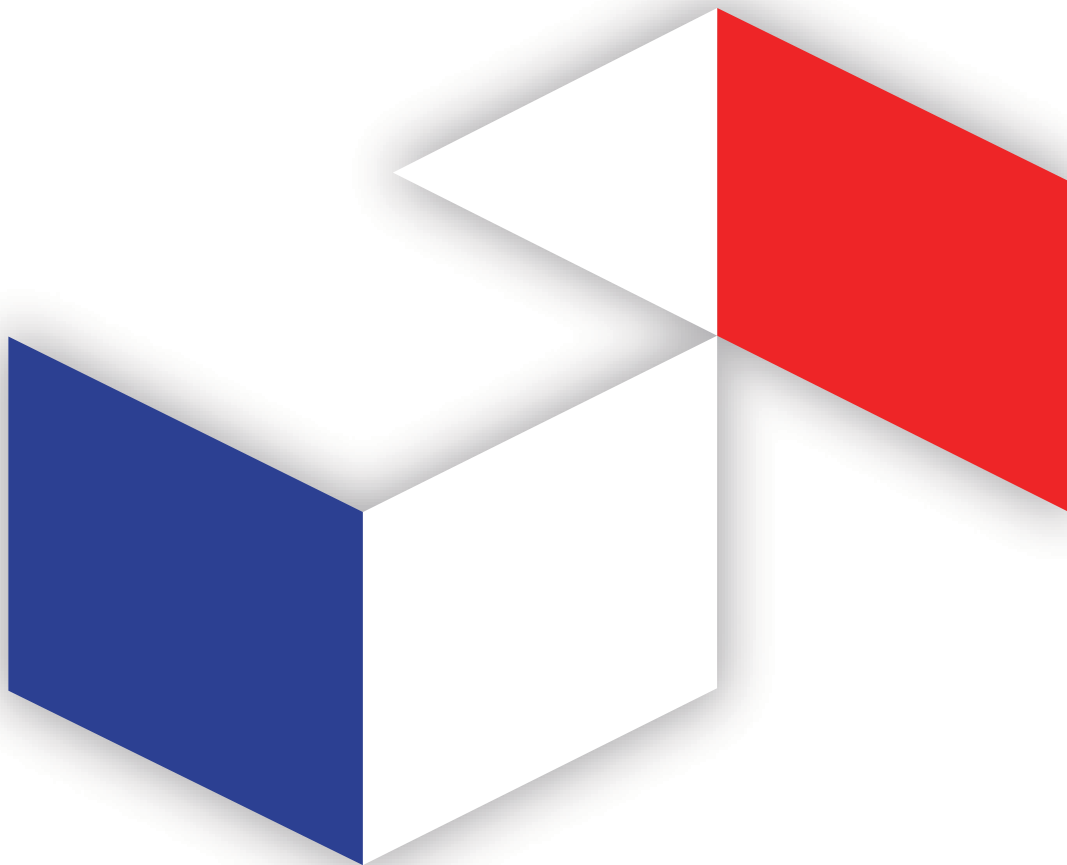
A guide to submitting  
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- > Condé Nast queries iPad users
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# in case you missed it...

news and notes on marketing and research



## Shoot the messenger: Celebrity endorsements the kiss of death for most ads

Let it be known: There is empirical proof that ads featuring a celebrity perform no better than ads without, and in many cases perform much worse. Unless, that is, you can get Oprah.

In a study from Los Angeles ad measurement firm Ace Metrix, 2,600 television ads were tested over the course of 2010 and fewer than 12 percent of ads using celebrities exceeded a 10 percent lift versus average industry norms. Nearly 20 percent of celebrity ads yielded negative lift scores in excess of 10 percent.

"This research proves unequivocally that, contrary to popular belief, the investment in a celebrity in TV advertising is very rarely worthwhile," said Peter Daboll, CEO of Ace Metrix. "It is the advertising message that creates the connection with the viewer in areas such as relevance, information and attention, and this remains the most important driver of ad effectiveness."

It should come as no surprise that the worst celebrity spokesperson of 2010 was Tiger Woods, led by his endorsement of Nike. Collectively, Woods' TV ads were 23 percent less effective than average, and Americans in general - regardless of gender or age - were equally unreceptive to his ads. Following in Woods' footsteps are Lance Armstrong's "No Emoticons" ad for Radio Shack, with a 28 percent negative lift; Kenny Mayne's "Good Segment" ad for Gillette, with a 28 percent negative lift; Dale Earnhardt Jr.'s "Coverage at the Right Price" ad for Nationwide Auto Insurance, with 27 percent negative lift; and Donald Trump's "Making Timmy a Mogul" ad for Macy's at 24 percent negative lift.

As the star of three of the top five celebrity ads, Oprah Winfrey proved that not all celebrities are created equal. Oprah's "Think You Can Text and Drive" ad for Liberty Mutual achieved a 34 percent lift; her "Matthew Wilhound Killed by Cell Phone User" ad for Progressive yielded a 24 percent lift; and her "Distracted Driving" ad for Progressive yielded a 22 percent lift. Ed Burns' "Ed Burns Swallows Camera" ad for iShares came in an No. 2 with a 28 percent lift, and Carl Weathers' "Bud Light Playbook" ad for Bud Light rounded out the top five with an 18 percent lift.

"What's important about Oprah's performance as a spokesperson was that each of her ads delivered a highly relevant message: don't text and drive. Her ads were not selling or pushing a particular product, but discussing a highly relevant and information-laden topic," said Daboll.

## Everyday necessities building a niche in online shopping

Consumers are well-accustomed to buying books and electronics online, and more and more are beginning to look to the Web for their everyday essentials like shampoo, diapers, detergent and paper towels. But while buying everyday basics online and having them shipped to your doorstep is a growing trend, the question is whether it's right for you. According to Gregory Karp's January 14 article "Home goods click with shoppers" in the *Chicago Tribune*, here's what newcomers to the trend need to know about the major players: Soap.com, Alice.com and Drugstore.com.

At all the major sites, shoppers will find the big-name brands in many sizes and varieties, including more selection of green and organic products, as well as small brands and less-popular varieties of popular product lines. Additionally, many sites have product reviews that might help make better buying decisions, and most sites track purchases to make it easy to reorder without rescouting the site.

Soap.com's main advantage is shipping speed with free overnight shipping to two-thirds of country with \$25 purchase. Soap.com also carries about 25,000 different products, compared with a typical drugstore that would carry maybe 5,000 to 10,000. Soap.com will accept clipped paper coupons from manufacturers that are sent in after placing an order, and the dollar amount is applied to the account for future orders.

Alice.com competes on price, allowing manufacturers to sell directly to consumers. The site also offers free shipping with a minimum of six items. Alice.com carries about 10,000 products and automatically applies coupons to your order, some that duplicate newspaper coupons and others that are unique to the site or the customer, based on buying history or demographic information.

Drugstore.com's main attractor is its product assortment. The site offers more than 60,000 products (SKUs). Drugstore.com also has a loyalty program that will automatically credit an account with 5 percent back on eligible products. Consumers rack up Drugstore.com dollars during a quarter and then have one month to use them.

## The uncertain implications of front-of-pack labeling

In an effort to curb the obesity epidemic and help Americans make healthier food choices, the FDA is examining the impact of front-of-pack (FOP) labeling for food and beverage packages. FOP labels, prominently showing the content of nutrients and other ingredients, are currently posted on the front of some - but not all - packaged goods. While FOP labeling has the potential to help shoppers make healthier choices, impact on sales of items with FOP labels is somewhat unpredictable. It might be that the cookie splurge isn't as bad as some might expect but the spaghetti noodles are a rude surprise.

The Institute of Medicine studied the various types of information currently available on front-of-pack and made an October 2010 recommendation to the FDA that calories, saturated fat, trans fat and sodium should be clearly displayed on the front of food and beverage packages. According to a study from HealthFocus International, a St. Petersburg, Fla., research company, 45 percent of shoppers in the U.S. agree. However, as it currently stands, the information varies from product to product, with some packages displaying symbols, while others show the actual levels of nutrients - making comparing one product to another confusing for shoppers.

According to shoppers, their top reason for using label information on food and beverage packages is to decide which products have too much of an ingredient they are trying to avoid. Namely calories, as that is the information most want to see clearly labeled.

Both better-for-you and indulgent categories could be impacted by FOP information. When shown packages with and without FOP labels, fewer shoppers said they would buy products like frozen pizza when it had the FOP label, while the purchase intent for some cookie brands actually went up. Purchase intent for pasta dropped with the FOP information. These unpredictable disparities indicate that impact could only be predicted on a product-by-product basis, not on food item groups as a whole.

Shoppers who are obese do not have a greater interest in FOP labeling than other shoppers. However, 60 percent of all shoppers do say that they believe FOP labeling will help them to eat more healthfully. Obese shoppers actually read labels less often than shoppers of normal weight (36 percent versus 55 percent) and admit to being less likely to pay attention to their diets (66 percent versus 87 percent).



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## Americans plan to dine out more, spend less

On the heels of a year of rock-bottom meal prices epitomized by the tiny tab for a Subway foot-long sandwich, 2011 likely will be marked by demands from U.S. diners for even lower check prices, further squeezing restaurateurs and food-service companies. Consumers say they expect to spend 5 percent less per meal at restaurants in 2011, resulting in an average total

existing customers. Despite the strong and growing importance of food quality among diners, the survey found that 43 percent are willing to trade down to less-expensive restaurants in order to save money.

Of consumers planning on dining out less in the next 12 months, most (54 percent) cite the need to save money as the primary reason for plans to cut back; however, the desire to eat healthier is a close second at 50 percent (also an increase of eight percentage points over the survey of March 2010).

Marketing channels and tactics are also a concern for restaurant companies moving forward. Despite movement over the past couple of years toward online marketing, only 20 percent of diners surveyed indicated that digital media influenced their dining-out decisions. For more information visit [www.alixpartners.com](http://www.alixpartners.com).

### Executives claim to value customer feedback; vast majority aren't using it

A growing number of consumers are turning to social media channels to share unsatisfactory service experiences but for the most part companies aren't listening. In fact, 94 percent of companies do not yet use social media channels to gather customer feedback, according to a survey conducted among executives by San Francisco research company MarketTools Inc.

Instead, the most common ways companies gather customer feedback are e-mail/online surveys (51 percent), formal phone surveys (28

percent) and informal phone calls (28 percent).

MarketTools' study also revealed a disparity in the way companies think and act in regard to customer satisfaction. Although 92 percent of respondents believe that satisfied customers are very important or extremely important to their company's bottom line, fewer than half (42 percent) solicit customer feedback on a continuous basis and more than one-fifth (22 percent) solicit feedback only once a year or not at all. In fact, 14 percent of executives surveyed said their companies don't solicit customer feedback.

Thirty-nine percent of executives surveyed said that their companies increased their focus on customer satisfaction in 2010 versus 2009, with 21 percent stating that they invested more in customer satisfaction-related products and services in 2010 versus 2009. Forty-six percent rate their company's performance on customer satisfaction in the top 10 percent when compared to their peer companies, and 93 percent rate themselves in the top 50 percent of peer companies. Still, more than half of all respondents (56 percent) said their companies do not have, or are not sure if their companies have, a formal voice-of-the-customer program. Nearly one-quarter (24 percent) said that they seldom or never use customer feedback to change a business process. For more information visit [www.markettools.com](http://www.markettools.com).

### Americans, Brits and Canadians warming up to the group-buying trend

The trend of group-buying is on the rise, as evidenced by the many Web sites that have followed Groupon's model. More than two-thirds of respondents in Canada (74 percent), the U.K. (64 percent) and the U.S. (61 percent) who have made a purchase



tab of \$12.90 per meal versus the \$13.60 spent per meal in the previous year, according to a study from Southfield, Mich., advisory firm AlixPartners.

In addition, 11 percent say they expect to spend just \$5 or less per meal in 2011 (up from 6 percent last year), while 60 percent plan to utilize coupons and other promotions to lower check prices.

On the bright side, diners are eating out more: 57 percent of consumers surveyed said they dined out at least once a week in the past 12 months, an eight-point increase over the response to the same question in AlixPartners' March 2010 survey. In the coming 12 months, 11 percent of consumers plan to increase their dining-out frequency, albeit spending less per meal.

Promotions remain the most effective way to draw in new and

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# names of note

**Michael Antecol**, vice president of *TNS Canada* for Western Canada in Vancouver, B.C., died on December 29 at age 42.

**Amy A. Morris**, president and owner of *Focus Groups of Cleveland*, a Cleveland research company, died on December 10 at age 37.

Atlanta research company *CMI* has hired **Laurie Gaby** as project manager and **Juan Hernandez** as network administrator. *CMI* has also promoted **Mike Mabey** to vice president, client solutions; **Alisa Hamilton** to research manager; and **Angela Mattoon** to project manager.

**Katherine Figatner** has joined Cincinnati research company *MarketVision* as research manager,



Figatner

Pavelek

qualitative. *MarketVision* has also promoted **Kelly Pavelek** to research manager and **Chris Ratcliff** to senior vice president.



Ratcliff

Orpen

**Jake Orpen** has been named managing director of *Synovate South Africa*, Johannesburg.

*Campos Inc.*, a Pittsburgh research firm, has hired **Perri Stern** as vice

president, research services, qualitative; **Catherine Middlebrooks** as senior research manager; **Shelley Shaw** as manager, marketing, social media and community; and **BreAnn Decesere** as assistant project manager, field and fulfillment and online marketing associate. The company has also promoted **Barb Theobald** to executive vice president, research services, quantitative; **Amy Dubin** to executive vice president, client strategic services, marketing and administration; and **Russell Stammer** to senior research manager.

**Camille Nicita** has been named COO of *Gongos Research*, Auburn Hills, Mich.

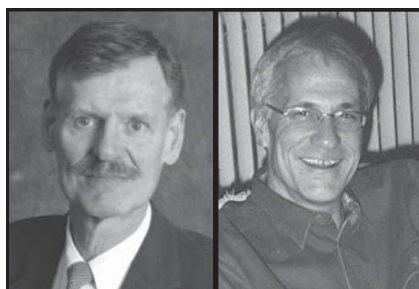


Nicita

Stapylton

*Hall & Partners*, a New York research company, has named **Mark Stapylton** managing partner.

*The Advertising Research Foundation*, New York, has hired **Horst Stipp** as executive vice president, global business strategy; and **Michael Heitner** as senior vice president, member value.



Stipp

Raebel

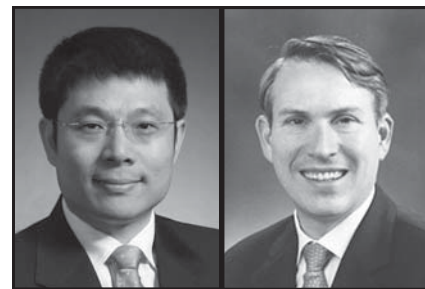
*Fieldwork Inc.*, a Chicago research company, has promoted **Stephen**

**R. Raebel** to president and **Megan Pollard** to president, *Fieldwork Chicago Downtown*.

*National Analysts Worldwide*, a Philadelphia research company, has hired **Ken Athaide** as vice president, communications, technology, media. He will be based in Atlanta.

Shelton, Conn., research company *Survey Sampling International* has hired **Christian Michael** as managing director, Germany.

Paris research company *Ipsos* has appointed a new management team in Asia-Pacific: **Lifeng Liu**, CEO,



Liu

Richardson

Asia-Pacific; **David Richardson**, managing director, Asia-Pacific; **Alick Zhou**, CEO, Greater China; **Helen Lee**, managing director, Greater China; **Rodrigo Toni**, CEO, Southeast Asia, and managing director, Singapore; and **Hugh Amoyal**, CEO, *Ipsos Australia*.

*The Pert Group*, a Bloomfield, Conn., research company, has made several appointments: **Tony Ducoli**, director, international development; **Nina Fougere**, account manager; and **Cheri Tabel**, senior marketing manager. Additionally, in the company's beverage division, **Eric Wolfeiler** has been named group director; **Adam Conley** senior account director; **Allison Donahue** account manager; and **Tony Szajna** account manager. The beverage division has also promoted **Alyse Polakowski** to account manager.

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# product and service update

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## Social Insight Connect created to give Facebook Fans a voice

Cologne, Germany, research company Globalpark has debuted Social Insight Connect, a solution designed to help organizations create value and brand insights from their Facebook fans. Going beyond social monitoring, Social Insight Connect aims to allow marketing and digital teams to create a private feedback channel within the Facebook environment to understand consumer needs and preferences; test and generate new products; and extend marketing reach using an at-the-ready audience. Participating Facebook fans provide feedback; engage in interactive forums; receive alerts for new projects; and redeem reward points without leaving the social networking site. For more information visit [www.globalpark.com](http://www.globalpark.com).

## Mobile app turns consumers into research Scouts

Chicago consulting firm gravitytank has introduced a mobile research application called dScout that aims to enable researchers and decision makers at organizations to learn from their customers; spot trends; and gather real-time feedback on consumer behaviors and desires. The application is designed to help market researchers capture human behavior as it occurs in virtually any context and also to build a community of consumers who actively share their perspectives in real-time from their mobile phones. Referred to as Scouts, participants share their experiences through snippets – a series of Twitter-like photos that include date, time, location and description – depicting their thoughts and behaviors in relation to a specific topic.

In addition to the mobile application, dScout features a Web interface that allows businesses to set study criteria; monitor Scout feedback; and analyze the cumulative data in a centralized location. Researchers can sort the data by topic, keywords,

location using mobile geo-tagging, timelines and more. It can be used in the U.S. as a standalone research methodology or in combination with traditional techniques and is best suited for researching consumer behavior regarding products and services, specific experiences, everyday routines and their motivations and inspirations. DScout is accessible for the iPhone and iPod Touch, and an application for Android is planned. For more information visit <http://gravitytank.com>.

## Principles of Marketing Research course gets with the trends

The University of Georgia, Athens, in conjunction with the Marketing Research Institute International (MRII), Athens, has introduced new trends curricula in its Principles of Marketing Research course. This addition is part of the overall course and is available to all who enroll. The four major themes in the 2011 course material are the changing structure of the industry highlighted by the dramatic reformulation of marketing research companies serving the industry; the increased interaction with competitive intelligence issues; the rise of social media, data mining and other new data collection methods which have led to new government regulations, especially in the privacy area; and the industry's response to issues about the quality of new data collection techniques. For more information visit [www.georgiacenter.uga.edu/pomr](http://www.georgiacenter.uga.edu/pomr).

## New network to ignite on- and offline media research

Stamford, Conn., research company InsightExpress has launched the Ignite Network, a series of partnerships with online panel companies intended to strategically aggregate several sample providers to offer sample access, new data integration capabilities and greater methodological rigor to online

advertising effectiveness and cross-media research.

The Ignite Network aims to revolutionize how online and offline media research is conducted with three significant benefits. First, respondents are sourced from the Ignite Network and recruited via e-mail, which provides greater control over sample criteria and frees publishers from using pop-up invites, resulting in an improved site experience. Second, the Ignite Network offers the ability to bridge attitudinal data with online behavioral data and offline conversion data. And last, the Ignite Network increases the data available for media analytics to provide an understanding of the impact of media.

The Ignite Network comprises over 10 million respondents. Enhanced privacy controls protect respondents while still giving clients the ability to match behavioral and offline conversion data at the respondent level.

One of the intended methodological benefits of the Ignite Network is the ability to survey respondents exposed to an online advertisement after a significant passage of time, in order to better understand issues like advertising decay. Due to prior limitations with cookie technology, this type of extended timeframe post-exposure research was previously impossible. For more information visit [www.insightexpress.com](http://www.insightexpress.com).

## USamp revamps SampleMarket panel platform

Encino, Calif., research company uSamp has unveiled the beta version of SampleMarket 2.0, the next generation of its panel access platform designed to offer real-time, self-service access to a U.S. panel of millions of respondents. The platform aims to serve as the next step in achieving fully-automated delivery of market research sample. SampleMarket 2.0 is

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## News notes

**Research International Greece**, Athens, has rebranded as **Millward Brown RI** after having joined New York research company Millward Brown in May 2010.

2010 marks the 25th anniversary for **Campos Inc.**, a Pittsburgh research company.

**The Advertising Research Foundation**, New York, celebrates its 75th anniversary in 2011.

**Dan Wiese Marketing Research**, Cedar Rapids, Iowa, celebrated its 25th anniversary in January 2011.

## Acquisitions/transactions

Horsham, Pa., research company **TNS** has acquired a majority stake in **Research and Marketing Services (RMS)**, Lagos, Nigeria, and Nairobi, Kenya, following a partnership formed in March 2010. The firm will operate as TNS RMS. The acquisition will add Nigeria, Senegal, Cameroon, Ivory Coast and Ghana to its existing African network.

**Global Marketing Services**, a King of Prussia, Pa., marketing firm, has acquired **ClearSaleing**, a Columbus, Ohio advertising analytics firm. ClearSaleing will operate as a wholly-owned subsidiary of Global Marketing Services. Terms of the transaction were not disclosed.

Portland, Ore., research company **Rentrak Corporation** has acquired Manhattan Beach, Calif., communications company **Media Salvation Inc.** The acquisition secures an additional studio to Rentrak's roster of entertainment clients for its Studio Revenue Share Essentials, Digital Download Essentials and Mobile Essentials services.

Port Washington, N.Y., research

company **The NPD Group** has signed an agreement to acquire Scottsdale, Ariz., research company **In-Stat LLC**.

**The GfK Group**, a Nuremberg, Germany, research company, has increased its stake from 40 percent to 60 percent in German research firms **SirValUse Consulting** and **nurago**.

Research software company **SurveyMonkey**, Portland, Ore., has acquired a 49.9 percent interest in privately-owned research software company **Clicktools**, Poole, U.K. Clicktools and SurveyMonkey will also form a partnership to provide joint customers cloud-based survey tools integrated with San Francisco software firm Salesforce CRM. Terms of the investment were not disclosed.

## Alliances/strategic partnerships

Research firms **The Futures Company**, Chapel Hill, N.C., and **TNS India**, New Delhi, have partnered to allow The Futures Company access to the TNS Consult team to support client work in India.

New York research company **LogicLab Inc.** has partnered with Boston research company **Compete** to provide its clients access to Compete's metrics from its LogicLab targetLab platform. The access is intended to give users more detailed information on traffic, audience and engagement metrics for media planning.

**GfK Custom Research North America**, New York, and Los Angeles research agency **Think Passenger Inc.** have entered into a joint venture to build private online communities.

## Awards/rankings

**Ladd Research Group**, Cincinnati,

has debuted an annual Ladd Research Group Scholarship of \$1,000 for junior-level university students interested in pursuing marketing research as a career. One scholarship will be awarded to the individual who demonstrates leadership in both academics and community service. The deadline for applications is March 21. To apply visit [www.laddresearchgroup.com](http://www.laddresearchgroup.com).

Kristin Luck, president of Fresno, Calif., research company **Decipher Inc.**, has been named to the *Portland Business Journal's* Forty Under 40 for 2011. Recipients of the award were chosen based on leadership in business, business recognition and community involvement. Luck is based in Decipher's Portland, Ore., office.

Atlanta professional services company **Creative Growth Group Inc.** has recognized Atlanta research company **CMI** as a 2010 Client Advisor Awards winner in the small client category for its work with Atlanta public relations firm Weaver Stephens Group in the areas of industry thought leadership development, media relations, speaker placements and marketing communications.

## New accounts/projects

Chicago research company **Synovate** and **Duke University**, Durham, N.C., have partnered to create the Duke/Synovate Shopper Insights Center for Leadership and Innovation. The center will focus on advancing research in shopper decision-making and how to create demand generation through the shopping experience.

**Accenture**, a Dublin, Ireland, consulting firm; Reston, Va., research company **comScore Inc.**; and Cincinnati research company

continued on p. 72

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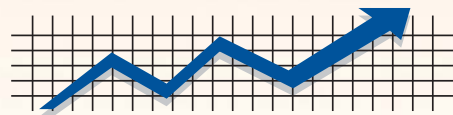
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**Data Quality  
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# For better pharma research, start with the business decision in mind

**W**ith the most recent and persistent consolidation cycle in the pharmaceutical industry, the role of the market research professional has become precarious. The need for quality market research endures, especially as large and small pharma companies scramble to find ways to develop valuable and effective life-modifying drugs. Yet timelines are shorter and demands are greater to produce actionable insights for line business partners, usually brand managers. Further, these brand managers are faced with myriad challenges and do not always share their business plans with their partners. So it is often unclear what decisions will be made with the research once the insights are obtained.

The challenge then, is to develop

a strategic alliance between the market research function and the business partner making the business decision. In order to establish this partnership we need to start from the end and ask, “What decisions will be made with the outcome of the research?”

Working backwards like this requires a thoughtful discussion with the line partner and a strong consideration of the business needs. When we start with the decisions, we are better able to determine the necessary market research inputs to generate the desired insights that will inform the strategy. In addition, this sets the scope and limitations of the research design. It also allows the researcher to better manage timelines, leaving room for

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synthesizing insights with previously-conducted research and filling in potential information gaps from secondary sources.

By contrast, when the researcher starts with a simple request, without the decision included in the forethought, there can be a disconnect between the insights generated and the business decisions needing to be made.

For example an in-licensing opportunity might be presented for research to garner insights into a target product profile in a disease area of high unmet need. The emphases of the research are the scientific end points from clinical trials. However, no consideration is given to the potential third-party reimbursement hurdles the product may have relative to other

## snapshot

**By talking with brand managers and other line partners at the outset, pharmaceutical researchers can define the project’s business goals and increase the quality of the information gathered.**

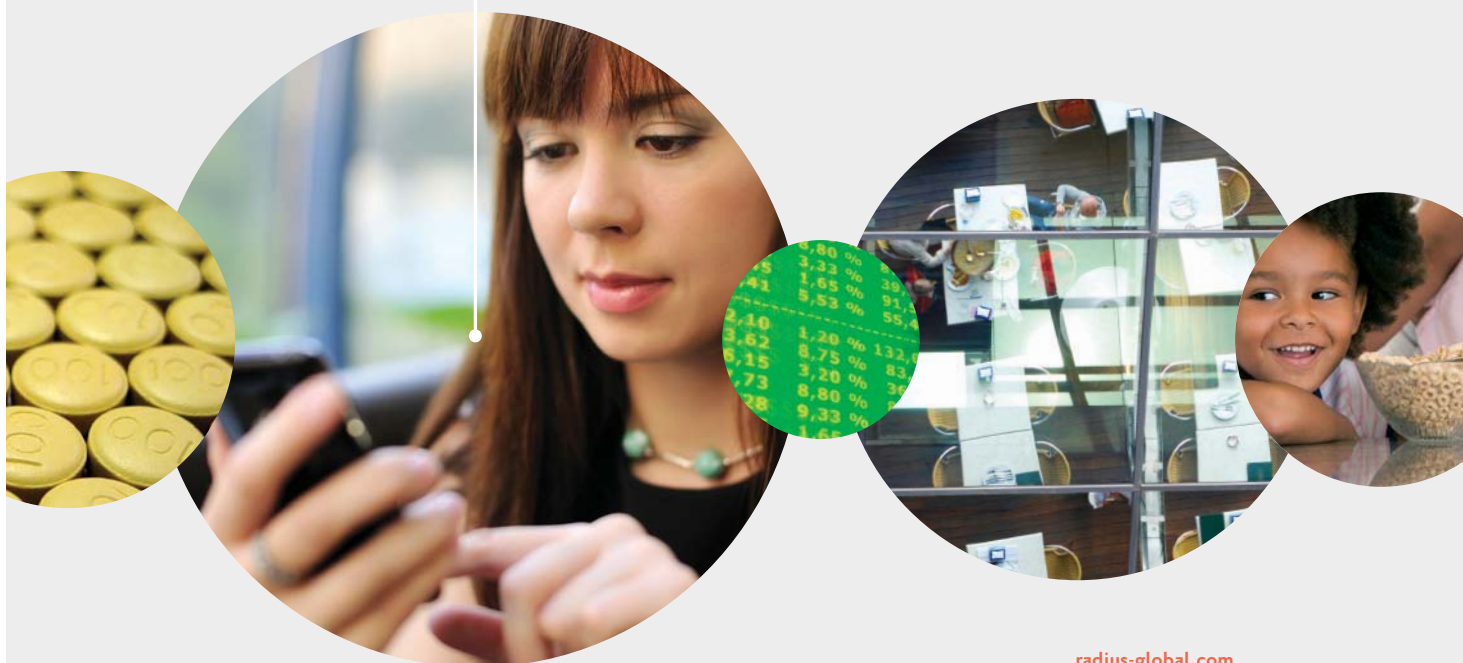
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cheaper products used off-label in the same category. Payers (HMOs, Medicare, etc.) are therefore not considered as part of the market research. Moreover, the clinical data of competing therapies presented to physicians may not be believable given the personal clinical experience of physicians.

Another example is conducting quantitative market research in emerging economies where multiple methodologies may be required to reach a desired sample size. Using multiple methodologies inherently biases the data collection process and may introduce anomalies in the data. Usually the insights garnered from this research are difficult to interpret and the projects may be best served by conducting a qualitative market research study instead.

Typically the business questions in these emerging economies follow very similar forms as in developed health care systems. Yet, critical pieces may be missing from the equation, like the effects of an underdeveloped distribution channel

on physician and patient access or price manipulation by a distributor that cuts into the bottom line. Or even more serious are counterfeit products that find their way into the distribution channel. These phony products result in poor patient outcomes and adverse events that discourage physician prescribing and patient compliance. Taking these and other market realities into consideration when developing the research process can result in a richer overall context for the business decision-making.

### Deeper answers are needed

What a brand manager thinks s/he needs may actually require a different research outcome that will help make a decision about a brand or a competitor. Usually, deeper answers are needed to provide a fuller picture of market events that help drive decision-making.

Probing a brand manager, as a customer might be probed in market research, usually results in improved research design and outcomes.

Fruitful areas for digging deeper with the brand manager are usually related to the customer experience. For example, asking them to consider issues and opportunities related to the patient's journey, from symptoms and diagnosis through treatment follow-up, can provide for an added understanding of various touchpoints of value creation. Similar results can come from asking about the physician mind-set and experience with a particular disease state as well as other related disease states that may influence general physician behavior. This is especially useful when physicians use their general experience in one disease area to treat a rare disease.

Restating the business question also gives a chance to decide on who should be included in the research. For instance should we include caregivers, patients, nurses, office managers or pharmacists? And, it helps with identifying an underlying business concern that was not immediately apparent in the initial market research request. Probing identifies gaps between the core business question for the research and how the business question fits in with the overall strategy of the brand.

### Lack of tailored insights

When the business question is not clearly defined upfront, the team cannot collectively analyze the outcomes of the research and the business decision suffers from the lack of tailored insights. The underlying unknowns driving the business go unanswered and the key findings needed to drive strategic decision-making are lost to the surface question or request initially made by the line partner.

Whenever possible all market research activity should be designed and geared toward a business decision that the marketer must make to grow the business. When market researchers ask their partners the right and necessary questions they get a better understanding of the key drivers that move the business and the underlying assumptions that may or may not need to be questioned during the execution of the research. | Q



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# How not to write a survey in the 21st century

Take a questionnaire written last week and place it side by side with one written 20, 30 years ago. Chances are they will look identical – same logic; same skip patterns; same batteries and scales; same limitations – even though today’s questionnaire is most likely being programmed on the Web, with all the new question formats and controls Web surveys offer. Yet the resulting data are often appropriate for nothing more than crosstabs, just like 30 years ago.

Back in the day, quantitative market research meant crosstab decks with 20-point banners. Back in the day, that was rocket science, state-of-the-art, leading-edge. I wrote those surveys (and analyzed their data) with suspender-snapping pride. Problem is, we are no longer back in the day.

Back in the day, corporate mainframes didn’t have the computing power of today’s smallest laptops. Marketing scientists and other brainiacs have had the last 30 years to develop new analytic techniques to take advantage of all this computing power. These new and not-so-new-anymore methodologies are designed to eliminate many of the biases and inaccuracies of traditional surveys. They deliver answers to questions we didn’t even dare ask “back in the day.”

But the analytics are just the engine. They need fuel to run. And they need high-octane fuel to run at their optimum. Antiquated survey designs yield very low-octane fuel. They keep these high-powered engines from blowing past the competition and hitting that checkered

*Editor’s note: Paul Richard McCullough is president of Macro Consulting Inc., a Scotts Valley, Calif., research firm. He can be reached at 831-454-8927 or at richard@macroinc.com. To view this article online, enter article ID 20110302 at quirks.com/articles. This article is an expanded version of an installment of the Beg To Differ column which the author wrote for the spring 2010 issue of Marketing Research under the title of “Bring Your Survey Design Out of the Dark Ages.”*

flag first. Bad survey design turns your Ferrari into a Model T. And it happens every day.

There are three main problem areas in old-school surveys: missing data, collinearity and direct questions. All of these problem areas can be corrected in the survey design, even if you’re designing a paper-and-pencil survey, if you understand what types of data modern analytic techniques need.

## Missing data

Missing data in survey data sets are epidemic. Don’t-knows and skip pat-

## snapshot

Technology has advanced exponentially in the past three decades but our questionnaire-writing skills have not, the author argues. He cites three problems that must be avoided: missing data, collinearity and direct questions.



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terns are the primary culprits here. Generally speaking, both are entirely unnecessary. And both are devastating to advanced analytics.

Many advanced models do not handle missing data very well. Yes, we can attempt to do full-information data imputation and, yes, that is a much better way than mean substitution to address missing data values. But no data imputation technique or any other analytic fudge factor will be as accurate as simply asking everyone the question in the first place. Most questions can be reworded so that skip patterns and don't-knows are not necessary.

The only other alternative is to exclude large segments of your sample because you don't have data for them. This is fine (okay, perhaps tolerable) for crosstabs but when using powerful statistical models to determine big questions – such as “Why do they buy?” – it's important to keep all the sample you can. Not only do you need sample for statistical precision, you want to answer the big questions for everybody, not just for the tiny fraction that accidentally qualified for every skip in the survey.

For example: We've been doing it this way for so long, the logic seems natural:

Q: Do you own any products by Brand X?  
If yes, continue  
If no, skip next question

Next Q: Please rate this brand on a scale from 1 to 10 where 1 means this statement does not describe Brand X at all and 10 means this statement describes Brand X completely. You may use any number between 1 and 10.

If you feel you don't know enough about Brand X to give it a rating on a particular statement, you can check DON'T KNOW.

Oh, where to begin? Well, let's start with the obvious. Why skip non-owners? We're excluding potentially valuable bits of information by not collecting this data on non-buyers. Oftentimes the client will say they are only interested in how owners rate their brand. But it doesn't really cost any more to skip the skip and ask everyone. Then if you learn something the about non-owners that will help you convert them into owners, who's going to complain?

Occasionally, you may have

to change the question wording slightly. So instead of saying, “How would you rate the quality of the Brand X product you own?” you might say, “How would you rate Brand X on quality?”

A slightly less obvious variation on this theme is:

Q: Are you familiar with Brand X?  
If yes, continue  
If no, skip next question

Next Q: Please rate this brand on a scale from 1 to 10 where 1 means this statement does not describe Brand X at all and 10 means this statement describes Brand X completely. You may use any number between 1 and 10.

If you feel you don't know enough about Brand X to give it a rating on a particular statement, you can check DON'T KNOW.

Now, most researchers will tell you that you can't expect a respondent to rate a brand s/he isn't familiar with. Here's my first problem with that thinking: If you've screened properly so that you are talking to potential and actual buyers of the category, then in the real world, those people will be making purchase decisions about your brand based on the perceptions and beliefs they currently hold, regardless of whether or not they consider themselves familiar with your brand.

In other words, if they are category buyers (or potential buyers), their opinions of you will affect your bottom line, regardless of how well informed they are about your brand. Market research should reflect reality as closely as possible. And poorly- or even incorrectly-informed potential customers are part of reality. Let's measure them. Let's model them. Let's find out why people are (and are not) buying our brand.

My second problem with the above alleged logic is self-assessed familiarity. Some people are insecure. They don't want to commit unless they are certain. With the very best of intentions, they want to provide accurate answers. If they aren't dead sure that Brand X is worthy of an 8 on high-quality, some of them will err on the side of caution and check DON'T KNOW.

Even worse, some people are polite. Faced with the grim prospect of telling some anonymous data ana-

lyst that his/her client's brand falls far short on the “all natural ingredients” scale, they rationalize that they haven't eaten Brand X enough to be really sure (they haven't eaten it because they believe it falls far short on the “all natural ingredients” scale) and so they convince themselves the correct answer is DON'T KNOW.

Even respondents who are truly unfamiliar with your brand will have some perceptions and beliefs, even if they have never heard of your brand before. The brand name itself will convey something. These impressions may not even be conscious – they may be registered deep in the subconscious – but they are there. And until they get more familiar, those impressions, however faint, however far above or below the consciousness waterline, will determine whether they buy your brand or not.

All these respondents are making purchase decisions on whatever beliefs and perceptions they do have, whether they're accurate, whether they're based on firsthand experience, whether they're faint whispers in the back of their minds. Let's collect data about reality so we can uncover ways to change it. Note: how to measure subconscious brand perceptions is the subject of another, as yet unwritten, article. It's “beyond the scope” and all that.

Remember, you can always exclude the non-owners or the self-assessed unfamiliar when running crosstabs. Collecting more data doesn't hurt you; not collecting huge chunks of data does.

We're trying to collect data that reflect reality, not a rationalized abstraction of reality. Don't give them the option of saying DON'T KNOW. Make them answer the question!

### **Collinearity**

Any two questions that are highly correlated contain essentially the same information. That is, they are wasting survey real estate. Test virtually any survey data set and you'll find collinearity of epidemic proportions – 100 questions with the information value of 10, if you're lucky.

Item correlation is not inherently evil (like missing values, for exam-

ple; that's always evil). Measurement theory tells us that if we ask a question four different ways and then construct a latent variable based on the four original questions, we will have a more stable, more accurate measure of the underlying theme than any one of the four original questions. So correlation itself is not necessarily bad.

What's bad comes in two flavors:

- Most importantly, correlation that is an artifact of the survey design, rather than inherent statement content, is bad. Really bad, like pushing your little brother down the stairs. You should never do that.
- It's also bad to have those four original questions that are highly correlated and not construct a latent factor. But this is only slightly bad, like putting a whoopee cushion under your little bro's chair at breakfast.

Let's go back to our earlier example. It will illustrate how we often shoot ourselves in the foot writing batteries (or push our brother down the stairs).

Next Q: Please rate this brand on a scale from 1 to 10 where 1 means this statement does not describe Brand X at all and 10 means this statement describes Brand X completely. You may use any number between 1 and 10.

If you feel you don't know enough about Brand X to give it a rating on a particular statement, you can check DON'T KNOW.

**TRUST**

- Is a brand I can trust
- Has a good reputation
- Is reliable
- Been recommended by others

**CARING**

- Cares about me and my needs
- Helps me feel safe and secure
- Helps me feel confident I've bought what I need
- Helps me with guarantees for the "if" in life

**PRICE**

- Offers products that are a good value for the money
- Has products that fit my budget
- Is not expensive

There are three ways the above battery commits the first (and most important) flavor of bad: 1) adjacency,

2) subtitles and 3) polarity.

Grouping similar items is logical for the survey writer but biasing for the survey taker. By grouping items that appear similar, we're telling the respondent we think they are similar (and they should, too). Correlations will be higher if similar items are adjacent than if they are randomly distributed throughout the battery. A simple solution: Don't place similar items next to each other.

If you take a typical questionnaire and run simple correlations on

adjacent items, I'm sure you would find, as I have, a surprising degree of collinearity, even among items that are not similar. The only obvious relationship is often simply their proximity on the page. Adjacency creates collinearity.

Now, I know that subtitles may seem like an obvious no-no to many of you. But I've seen quite a few batteries over the years where the survey writer actually put in subtitles in his/her quest to build sufficient item collinearity to render the battery virtually



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useless. If adjacency is bad, subtitles are even badder. No subtitles, please.

Polarity is just making all the statements either positive or negative, usually positive. Respondents get in the habit of using a limited part of the scale, typically the higher end (but this varies by culture). By mixing up positive and negative statements, respondents tend to take a little longer to complete the battery because they have to read more carefully, consider each item on its own merits. They have to use a much larger range of the battery scale. Artifact correlations should decrease.

The whoopee cushion flavor of bad (not constructing a latent factor) is bad for a couple reasons: 1) analytic misinformation and 2) inefficiency.

Analytic misinformation can happen a couple ways that I can think of; there may be others. A common practice when determining importance is to take simple pairwise correlations between items and the desired outcome or behavior (e.g., purchase interest). If four items are all highly correlated with each other, their correlations with the desired outcome will likely be similar. All four items may find their way to the top of the list as the most important four items in the survey. The problem is, all four items, because of their mutual correlation, are likely to be measuring the same underlying theme. It's double-counting, or in this example, quadruple-counting.

Interpreting these results can be tricky. If I show four items, all related to product quality, as highly correlated with purchase intent and I show two items related to price equally highly correlated with purchase intent, it is a common and natural error to assume that product quality is more important than price, because there are twice as many quality items as price items in the top 10. In fact, all these data show are that we wrote four items about product quality and we wrote two about price. Analytic misinformation. Not good.

Back in the day, I thought I was hot stuff for building a simple ordinary least squares (OLS) regression model to determine advertising impact on sales. And, in a sense, I

was. But there is a danger, particularly today with easy-to-use software, to make an error that leads to an incorrect conclusion. It was true back in the day and it is still true today: Regression models with highly correlated predictor variables are unstable, leading to potentially wildly inaccurate coefficient estimates – so inaccurate that the sign (positive or negative) on a coefficient can actually be reversed. That is, your model can say your coefficient positively drives purchase interest when the exact opposite is true. Analytic misinformation. Still not good.

Inefficiency is easier to explain. If you write four questions that all measure the same thing, more or less, and you don't construct a latent factor that combines the information content of the four questions, then you've essentially spent four times the time and effort collecting one data point than you should have. And that means there were other data points you didn't have time to collect.

If you're going to ask the same question a dozen different ways, don't justify your fuzzy thinking by claiming to be thorough. Either combine them into a superior variable or admit you're not thorough, you're lazy. Writing good questionnaires is like writing good presentations. It takes more time to write a short one than a long one.

### **Direct questions**

Did you buy that sports car because you want to attract women (Yes/No)? Did you buy my product because of the ad you just saw (Yes/No)? You can bury these types of questions in a check-all-that-apply battery (or whatever else) but you're just putting a dress on a pig. Respondents will answer any question you ask them. But they won't necessarily answer truthfully. Sometimes they don't know. Sometimes they don't want you to know. Advanced analytics can ferret out the truth that respondents may not want or may not be able to share. But you have to ask the questions differently.

The indirect approach is conceptually simple. Ask respondents their attitudes, beliefs and perceptions. Ask

them some measure of the desired behavior. That might be recent past behaviors such as purchase, visiting a Web site, making a donation. It could be a claimed likelihood measure such as purchase intent. In general, the more concrete the better. Actual behavior is always going to be more useful than claimed behavior. But we don't always have actual behavior data available.

Either way, indirectly deriving importance involves modeling respondent characteristics such as attitudes, beliefs and perceptions as predictor variables with some desired outcome, such as product purchase, as the dependent. There are a variety of ways to attempt this but in its simplest form, at least for the purposes of illustration, think of an OLS regression model. That will give you the idea. In practice it can get a little more complicated.

But the outcome is always the same: those respondent characteristics such as his/her attitudes, beliefs and perceptions that best explain the variance in the dependent variable are more important than those that do not.

Ask a male respondent how important the Playboy channel is to his decision to buy the premium package from his cable company and you're likely to get very low importance scores. This was even more true when we did mall interviews with college coeds as interviewers.

But conduct a choice-based conjoint analysis and you might find a different answer entirely. Why? Choice-based conjoint derives the importance of the Playboy channel by analyzing the pattern of responses across a wide range of programming options. It's indirect. The respondent isn't aware (and neither is that coed administering the interview) that his answers will ultimately reveal his true motivations.

When it comes to advanced analytics, direct questions have another, albeit less common, downside. As predictor variables in a model, they're useless. Typically, advanced analytics involves modeling the data set to determine what drives some behavior. There are lots of other questions to ask, but this is the big one. Asking

respondents how important certain features are to their purchase decision is a direct way to get at the same answers the model is trying to uncover indirectly. The problem is it is very difficult to put importance data into a causal model and make any sense of it. Suppose I put brand imagery ratings in a model and I conclude that the higher a respondent rates Car Brand X on crash safety, the likelier the respondent is to buy the car. In other words, perceptions of Car Brand X crash safety drives purchase intent. But what if I didn't rate Car Brand X on crash safety but I rated the importance of crash safety in general? Even if I believed the data (which I wouldn't - this guy wants to attract women), how do I interpret that? The more importance a respondent places on crash safety, the likelier he is to buy the car? Really? Even if he thinks the car is flimsy as a cardboard box?

Why would anyone want to cram the square peg that is stated importance data in the round hole of a causal model, you ask? I'm not really sure. But I have been asked to do so on numerous occasions.

I think the process goes something like this: a researcher is awarded a project and writes a questionnaire the same way s/he always does; s/he copies and pastes from the last study. Importance batteries are standard fare. Then after the fact, just about the time rigor mortis is beginning to take over the data set, someone says, typically in desperation, "We haven't got a story yet. Let's build a driver analysis model." And what data do we have to put in said model? Yeah, stated importance. And, of course, running a model with no theoretical justification just about always gives you some spurious correlations to scratch your head over.

### Miscellaneous other

I haven't yet addressed monadic scales. They don't fit neatly into my three problem categories of missing values, collinearity and direct questions. But they are a mainstay of questionnaire design and they have to go.

There is sufficient high-quality literature on the problems with monadic scales to make the debate officially over. Monadic scales are

almost useless. There are typically three main issues that must be addressed: minimal variance across items, i.e., flat responses (huge problem); brand halo (largely ignored, but that doesn't make it go away); scale usage bias (also ignored).

Resulting data are typically non-discriminating, highly correlated and potentially misleading. With high collinearity, derived importance scores may actually have reversed signs, leading to absurd conclusions (e.g., lower quality increases purchase interest [see

collinearity section above]).

The solution is to avoid monadic scales entirely if at all possible. Max-diff is probably the best alternative in most situations. There are some limitations with max-diff that currently make it difficult to apply to brand imagery measurement but there is work currently being done in that area. Without getting into the gritty details, if you want to apply max-diff to multiple items, like several brands, you could look into dual-response max-diff, the latest innovation in



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max-diff scaling, or some data fusion techniques. Both hold some promise here.

If your scaling needs involve just one item, such as an importance battery, max-diff is definitely the way to go.

### Frustration has been growing

Although my frustration at being asked (repeatedly) to administer CPR to data sets postmortem has been growing for many years, this article was inspired by just one recent questionnaire. It was not different from but representative of generally well-regarded survey design. It was a typical survey written by smart, experienced researchers.

I'm sure that I have only discussed the tip of the iceberg and that there are numerous other egregious errors that need to be identified and removed from modern-day questionnaire design that I haven't mentioned or yet discovered. If I reviewed a dozen past surveys I'm sure I'd have a longer article.

I bet you can think of other

questions you've run across that create biased or misleading results simply because of the way the question was written.

For example, one problem question that I discovered in my muse survey didn't fit any of the three categories I listed above. It is a very common question type, too. It was a "check three" question. In this case, it was an importance question, i.e., "Check the three most important attributes when deciding to..."

Imagine this scenario: For simplicity, half our sample all feels the same way (no heterogeneity within that half). And how they feel is there are four important attributes that influence their decision to do whatever it is the client wanted them to do. One attribute (the same one, Attribute D) always gets left out in the "check three" question. This half all makes the desired decision (e.g., they bought the product, subscribed to the service, called the 800-number, visited the Web site, etc.). The other half picks all of the attributes with equal likelihood and

never makes the desired decision.

Let's look at the correlations. At least half the respondents who checked Attribute A made the decision the client wanted. Almost all the respondents who did not check Attribute A did not. Same for Attributes B and C. High degree of positive correlation between Attributes A, B and C with the desired decision. What about Attribute D? All respondents who checked Attribute D did not make the desired decision. At least half the respondents who did not check Attribute D did make the desired decision. High degree of negative correlation, even though Attribute D is, in fact, highly correlated with the desired decision. By limiting the number of attributes to be checked, we created the opportunity for a spurious negative correlation. I saw this negative correlation in a real data set.

Solution? Well, by now you know how I feel about direct importance questions and monadic scales. It is preferable, in my opinion, to collect the appropriate data and build a causal model, deriving importance based on the correlations between attitudes, beliefs, perceptions and the desired behavior. But if you must, use max-diff. Don't use "check three."

### Understand how the data will be used

Modern marketing science offers us the chance to see a little more clearly, dig a little deeper, forecast a little more accurately. In some cases, it's not a little. It's a lot. We have to understand, however, how the data will be used prior to writing the questionnaire so we can collect data appropriate for the subsequent analysis.

Even without fully understanding the analytic plan, following these simple guidelines will vastly improve the quality of your data and subsequent analysis: avoid missing values by eliminating skip patterns and don't-knows; prevent collinearity by mixing things up (item order, polarity, etc.); derive importances - don't ask directly; and avoid monadic scales whenever possible (it's not always possible just yet). | Q



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# A prescription for publication

## How to submit patient or physician attitudinal survey data to medical journals

**F**or the most part, qualitative or quantitative market research is, understandably, confidential and proprietary. However, it is becoming increasingly common for pharmaceutical and health care companies to express an interest in publishing a patient

or physician attitudinal survey in a peer-reviewed journal. Provided that the survey is formulated with a high degree of scientific merit and presented with objectivity, this type of publication offers valuable information for health care providers and a credible citation for marketers.

In this context, this article will furnish practical guidance on the design, execution and analysis of patient, health care provider or general-public surveys appropriate for journal publication; and provide insight into the publication process.

The commentary is based on a consolidation of the authors' collective experiences in designing and implementing market research,

coauthoring research articles and reviews and successfully publishing surveys in peer-reviewed journals.

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### snapshot

The authors provide guidance for submitting patient, health care provider or general-public survey data to peer-reviewed medical journals. Scientific merit, objectivity and transparency are key.

## Commit early

One of the most important aspects of publishing survey findings relates to the scope and types of questions asked. To enhance the likelihood of journal acceptance, it is prudent to commit to a publication early in the questionnaire development process rather than deciding to publish after the survey is completed. In this way, the survey questions can be focused on issues of contemporary clinical or scientific importance and oriented toward awareness, attitudes, knowledge, behaviors and treatment practices. Questions of a more product-specific nature can be partitioned in a separate section of the survey that is pre-specified as proprietary or confidential. Industry standard procedures should be followed to ensure the absence of bias in the wording of questions and in the order or position of questions in the questionnaire.

Examples of topics that may

interest peer-review journals are summarized in Table 1.

These examples are based, in part, on successfully published surveys in which Synovate Healthcare or Redfern Strategic participated either in the design and execution<sup>1-3</sup> or in the facilitation of publication.<sup>4-6</sup>

It is critical that the author(s) of the article provide input on all aspects of the survey from the onset (Figure 1) and meet the requirements for authorship espoused by the International Committee of Medical Journal Editors.<sup>7</sup> If necessary, the author(s) should also obtain approval from their institutional review board to conduct the survey.

## Require a thorough accounting

Another pivotal aspect of survey methodology relevant to publication is the method used to select survey participants randomly once the population of interest (general public,

patients, health care providers, etc.) has been defined. Journals typically require a thorough accounting of the flow of participants through each stage of the survey (ideally presented in the form of a consort diagram) and should include the total number of participants who were initially approached, the number of screened participants who were disqualified from taking the survey and the reasons for disqualification, and finally, the proportion of screened participants who completed the survey.

Specific details on the manner of random selection are essential to bolster confidence in the survey findings and ensure that the survey sample is either a true reflection of the population universe or that screening criteria are purposefully over-recruiting in order to emphasize a population of particular interest (e.g., a particular disease subtype).

An article based on a multina-





Table 1: Topics (by Survey Population of Interest) That May Be Suitable For Journal Publication

Survey Population	Appropriate Topics
Health Care Provider	<ul style="list-style-type: none"> <li>• Attitudes towards disease management                             <ul style="list-style-type: none"> <li>- Comfort level in treating</li> <li>- Self-perceived knowledge</li> </ul> </li> <li>• Patient-health care provider dynamic                             <ul style="list-style-type: none"> <li>- Discussion topics</li> <li>- Fostering communication</li> <li>- Patient expectations</li> </ul> </li> <li>• Characteristics of the treatment process                             <ul style="list-style-type: none"> <li>- Patient evaluation</li> <li>- Patterns, approaches, adherence to treatment guidelines</li> <li>- Factors impacting therapy decisions</li> <li>- Influence of specialty on treatment practices, goal-setting and evaluation of treatment progress</li> </ul> </li> <li>• Insurance coverage or reimbursement issues</li> <li>• Opinions on controversial areas (e.g., stem-cell research)</li> <li>• Regulation of medical care</li> </ul>
Patients	<ul style="list-style-type: none"> <li>• Concerns about the disease state                             <ul style="list-style-type: none"> <li>- Information-seeking behavior</li> <li>- Actions taken</li> <li>- Previous treatment experiences</li> </ul> </li> <li>• Clinical manifestations, including symptom type and severity</li> <li>• Disease impact on daily living, quality of life, psychological profile</li> <li>• Barriers to and driving forces behind a healthcare consultation                             <ul style="list-style-type: none"> <li>- Comfort level in seeking advice</li> <li>- Reasons for putting off an office visit</li> <li>- Issues triggering a consultation</li> </ul> </li> <li>• Treatment expectations and experiences                             <ul style="list-style-type: none"> <li>- Therapies received and outcome</li> <li>- Satisfaction/dissatisfaction with office visit</li> <li>- Interest in new therapies</li> <li>- Compliance with therapy</li> </ul> </li> <li>• Attitudes toward health and general lifestyle</li> </ul>
General Public	<ul style="list-style-type: none"> <li>• Awareness and knowledge about a specific disease                             <ul style="list-style-type: none"> <li>- Causes of a particular disease</li> <li>- Factors influencing disease acquisition</li> <li>- Signs/symptoms perceived or feared</li> <li>- Variations among countries or socioeconomic groups</li> </ul> </li> <li>• Disease experience, including treatments received and therapeutic outcome</li> </ul>

- Any incentives offered to encourage participation in the survey (e.g., gifts or cash, enrolment in sweepstakes and prize drawings).

Journals will also typically require evidence that the survey has been appropriately tested in pilot studies with actual respondents to ensure that questions are easily understood and interpreted similarly among respondents (Figure 1). Appropriate validation is also necessary to make sure that the survey measures what it is intended to measure and shows a high level of internal reliability (consistent results across similar, related items).

In addition, it should be kept in mind that the validity of any global survey is strongly impacted by local translations of the specific terms of interest; this is especially important in some regions such as Latin America, where substantial diversity exists in both culture and language. A complete description of the translation process is required and should encompass the use of native professional translators to convert the questionnaire and back-check the translations to ensure quality control.

tional, general-public survey, for example, should adequately describe a number of methodological issues:

- The basis for random selection of participants for telephone (e.g., random-digit dialing) or face-to-face interviews or from in-house panels.
- Weighting methods used to balance results to known universe

parameters (e.g., age, race, gender and education).

- Clustering techniques whereby major cities or regions are segmented into several zones and participants are randomly chosen within a zone.
- The rationale for country selection.
- The impact (if any) on survey execution of local customs/sensibilities and the availability of and access to telecommunication services.

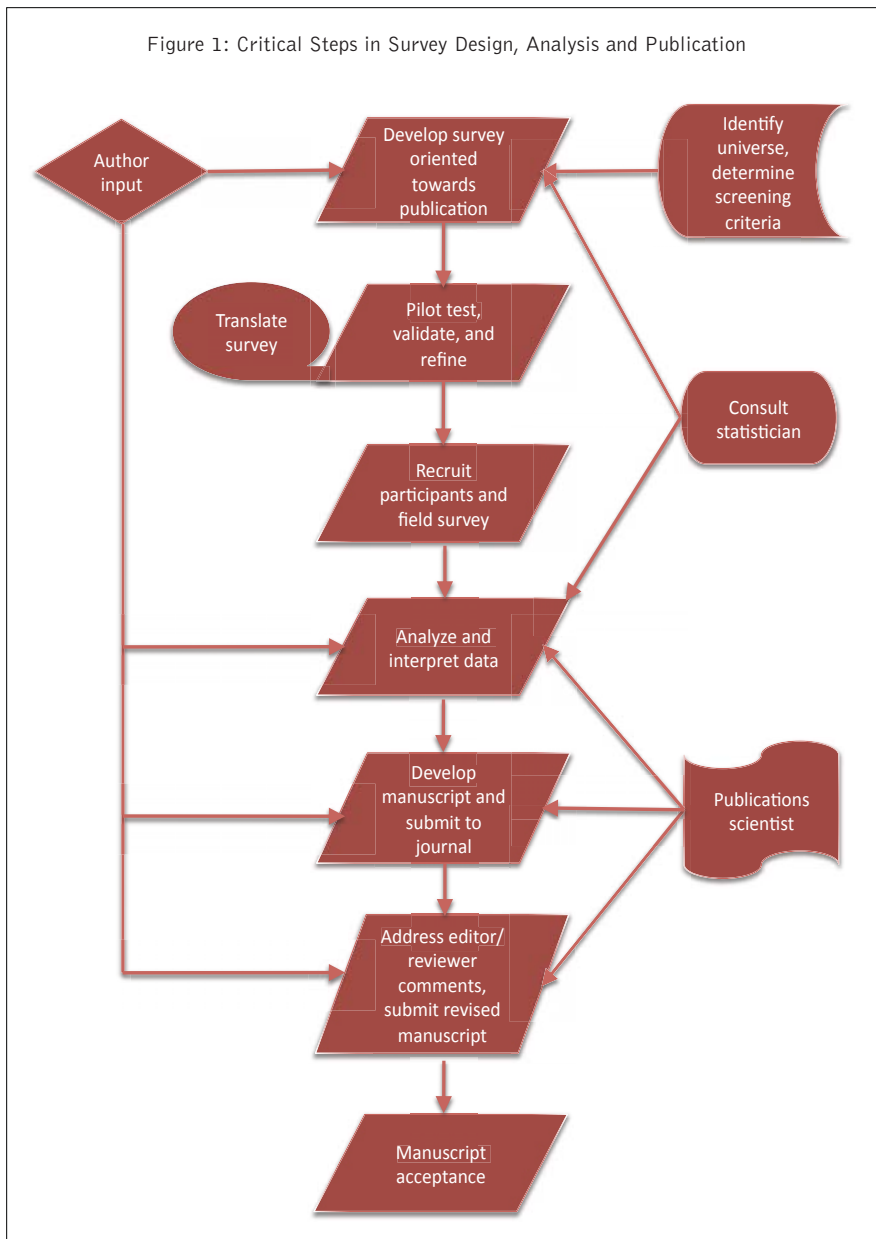
### Solid statistical foundation

It is essential to apply sound statistical principles to determine the number of respondents to participate in the survey. This is an extremely important consideration in the early stages of planning, and journals will expect to see that the survey is grounded on a solid statistical foundation rather than influenced solely by budgetary or other issues. The sample size should

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Figure 1: Critical Steps in Survey Design, Analysis and Publication



error calculation.

Finally, it is important to provide details of any weighting methods that are employed to generalize survey results to the respective populations as well as description of safeguards to ensure data integrity and accuracy (e.g., removal of fraudulent or duplicate respondents, etc.).

### Can help streamline

Partnering with a publications scientist with journal experience can help streamline all stages of the manuscript development process. This includes, for example, selecting an appropriate journal, researching the topic, facilitating manuscript development and communicating with consultants and journal editors.

It is unusual for a survey of any type to be accepted by a top-tier journal (*The Journal of the American Medical Association*, *The New England Journal of Medicine*, *The Lancet*, etc.), unless, of course, the survey is co-sponsored by a major medical organization affiliated with the journal. Consequently, submission to a second-tier journal may be a more realistic approach. Depending on the focus of the survey and the population studied, the article can be submitted to a specialist journal (e.g., a gerontology- or pediatric-oriented journal for a survey involving the elderly or children) or to a journal catering to a more general medical audience.

Choosing a target journal is a critical consideration and is influenced by a number of issues:

- the quality, relevance and clinical significance of the survey findings in relation to the journal readership and mission statement;
- the desired time frame for publication; and
- the journal's circulation and impact factor.

If there is any uncertainty about the potential interest of a journal in the survey manuscript, it is appropriate to write to the editor (prior to submitting for consideration of publication) briefly describing the purpose of the survey and explaining why the study findings may be of interest to journal readers. Early feedback

be large enough to allow accurate conclusions (especially if analysis of subgroups is involved) but not too large that cost effectiveness is negatively impacted.

The calculation of survey sample size for a population-based survey should take into account:

- the prevalence of the variable of interest;
- the desired confidence level (the level of uncertainty tolerate - typically 95 percent) and margin of error (typically 5 percent); and
- the expected response distribution.

A majority of surveys utilize nothing more than simple descriptive statistics (means, ranges, standard deviations, etc.) to aid interpretation.

However, the absence of formal statistical analysis substantially weakens the survey findings and ultimately jeopardizes publication acceptance. Most journals expect some kind of statistical testing appropriate for the type of data being analyzed (categorical, continuous, ordinal, etc.). Typically, journals also require a statement regarding the margin of error. However, it is important to note that it is not statistically valid to provide a margin of error for a survey in its entirety. Margin of error applies only to a specific question and is impacted not only by sample size and confidence interval but also by questionnaire structure. Consultation with a statistician is highly recommended to select the most appropriate type of analysis and provide input on the margin of

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from the editor on the suitability of the article will save considerable time by excluding journals that are only vaguely or definitely not interested in publishing the article.

The article should discuss the survey findings in the context of existing medical or scientific literature and emphasize the clinical significance and implications of the results. In addition, it is appropriate to present any limitations of the survey that may potentially impact interpretation.

The acknowledgement section of the article must include a full disclosure of the contribution of the author(s) and other individuals who were involved in the conception, design, analysis, interpretation and writing of the survey. In addition, it should clearly delineate any financial support for the research and manuscript development.

The final step in the publication process is addressing editors' and reviewers' comments. Unless the article is completely rejected by the journal, the chance of publication is very good provided the comments can be adequately addressed. The skill in this process is knowing when to make the requested changes and when to push back without jeopardizing acceptance. It is not necessary to make every change requested but it is important to provide a sound rationale why specific changes are inappropriate, impractical or impossible to accommodate.

### Valuable and citable resource

Peer-reviewed publication of patient, health care provider or general-public survey data creates a valuable and citable resource for health care providers. However, in the current climate of increasing regulatory and legal scrutiny, it is advisable that surveys destined for publication are prospectively designed and based on an amalgam of scientific merit, integrity and transparency.

The keys to successfully publishing a peer-reviewed journal article based on survey findings include the following:

- Commit to a publication early in the questionnaire development process and obtain author(s) input on all aspects of the survey from

the onset.

- Focus survey questions on issues of contemporary clinical or scientific importance.
- Apply sound statistical principles to determine sample size and analyze results.
- Choose an experienced publications scientist to streamline manuscript development and submission.
- Present the survey findings with objectivity and discuss in the context of existing medical or scientific literature, emphasizing the clinical significance of the results.
- Fully disclose the contribution of all individuals involved in the survey and clearly delineate any financial support for the research and manuscript development. | Q

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# What's having the most impact?

## The synergistic effects of product characteristics and promotional mix

Marketing strategists such as Kolossa (1997), Porter (1988), Smith (1991), and Thompson, Strickland and Gambel (2007) tell us that business success is related to the nature of our product, the competitive environment and the promotional leverage managers can generate. However, previous research on marketing-mix variables that effect pharmaceutical sales has used only a few predictors at a time. Every pharmaceutical product manager can benefit from knowing about drivers and barriers to sales in order to optimize the marketing mix. An integrated promotional strategy combined with effective allocation of marketing resources, given the competitive matrix, may help to overcome barriers to sales.

Research has tended to take a micro approach to increasing sales of pharmaceuticals. Groves, Sketris and Tett (2003) have examined samples, Neslin (2001) examined the ROI of detailing and more recently Lyles (2002), Parker and Pettijohn (2003), as well as Wittink (2002) and Wosinska, M. (2005) have examined the economics of advertising directly to consumers. All of these efforts are narrowly focused and do not include the rich variety of variables that may contribute to both the increase and the decrease of pharmaceutical sales.

The study chronicled in this article was undertaken to show the relative contribution to pharmaceutical sales from three types of multi-variate marketing factors including product characteristics, competitive

matrix and promotional mix. It is an attempt to use a rich variety of variables to see which factors contribute most to increase or decrease pharmaceutical sales.

### Hypotheses

#### *Product characteristics*

Drug development and marketing strategy are directed at having products with characteristics that encourage adoption, trial and use and, hence, high sales. For example, lifestyle drugs may sell more than non-lifestyle drugs because the patient needs to take the drug regularly for an extended period. (An example of this effect would be oral contraceptives.) Likewise, chronic drugs, such as statins to lower cholesterol, may sell more

### snapshot

This article takes a macro-multivariate approach to measuring three types of marketing-mix variables for pharmaceutical products, including five product characteristics, four competitive matrix characteristics and five promotional-mix characteristics and their impact on pharmaceutical sales dollars.



By Michael Latta

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than acute drugs because of loyal consumers and regular and lifelong administration. Similarly, drugs that treat specific symptoms such as allergy medications may sell more than non-symptomatic drugs because patients need the treatment with these drugs to relieve acute symptoms. Drugs with more than one indication - such as ACE inhibitors indicated for high blood pressure, diabetes and congestive heart failure - may also sell more because each indication allows the company to

target additional markets. Similar to number of indications, FDA rating is favorable for sales because if a drug such as a cancer medication is given a high priority in the approval process by the FDA, it may appear to be innovative or more efficacious to doctors and patients, leading to early adoption. Finally, drugs that have been in the market longer, such as hormone replacement therapies, without becoming obsolete may sell more because of a more established position and more loyal customers.

**H1: Product characteristics will have a positive impact on sales.**

**Competitive matrix**

The competitive matrix is more complex than product characteristics in terms of effects on sales and includes such variables as order of entry. Later entry may be expected to have a negative impact on drug sales because drugs launched earlier into a category will likely have established a good position and have loyal customers. Doctors and patients tend to recognize the first brand as the gold standard. The number of drugs in a category may also have a negative impact on sales because if there are many drugs, the competition will be fierce and market share for each brand will decrease. Finally, the number of drugs a company has in its portfolio should provide a stronger market position and generate more sales.

**H2: Overall, the competitive matrix will have a negative effect on sales.**

**Promotional mix**

Promotional mix has been studied more in pharmaceutical sales than any of the three sets of variables. For example, the first promotional study done in pharmaceutical marketing was done in 1954 and it looked at the effects of medical journal ads, detailing by sales representatives, providing physicians with peer-reviewed journal articles, and sampling (Rogers, 1962). Here, we will look at the amount of money expended on hospital and physician office detailing. Office detailing has a positive impact on sales because it can not only promote the doctors' understanding of the drugs but also enhance their friendship with the reps and their trust in the brands and the companies.

Likewise, hospital detailing can increase drug sales because hospital detailing not only increases the doctors' understanding of the drugs but it also enhances exposure to soon-to-be-practicing physicians who are completing their internships. Developing relationships with physicians during their internship may lead to a lifetime of use of a specific brand.

In addition to detailing, samples can increase drug sales by giving phy-

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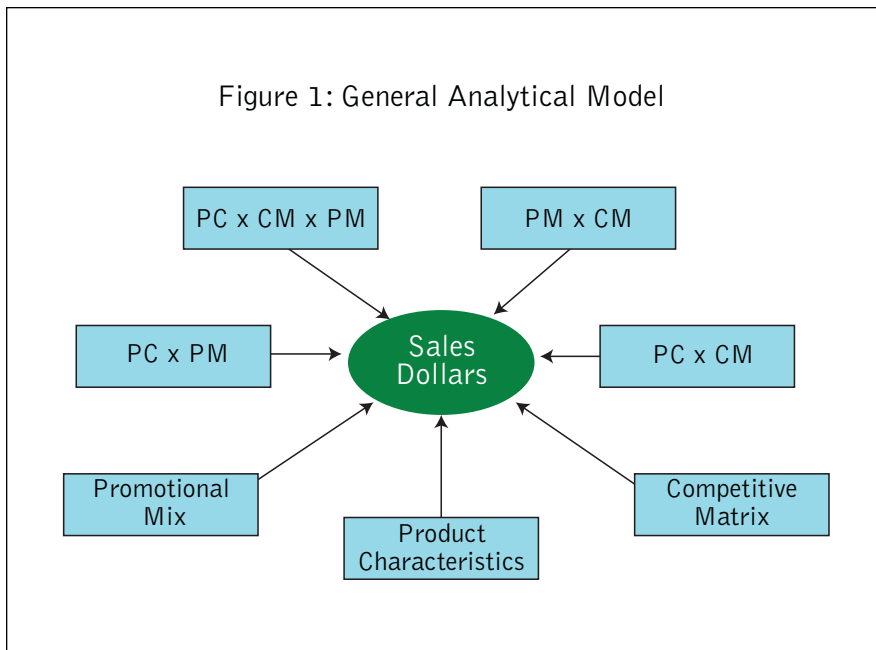


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Figure 1: General Analytical Model



sicians and patients no-cost experience with drugs, encouraging trial and adoption. More recently, direct-to-consumer (DTC) advertising has been found to increase drug sales. DTC many times raises public awareness of new drugs and prompts patients to ask for them by name in a physician office visit. In addition, DTC can foster a positive brand image among the public and can remind the doctors to write a prescription and help prevent substitution of a generic or other product at the pharmacy. Finally, advertising in professional journals may have a positive impact on sales because it reaches the physician regularly, helps them understand a new product and reminds them to write prescriptions.

**H3: Promotional mix will have a positive effect on sales.**

In addition, these single marketing factors may have synergistic or interaction effects. A product with good characteristics, in a competitive situation that is not too severe, when heavily promoted will have higher sales than a product not meeting these conditions.

**H4: Product characteristics and promotional mix will interact to have a positive effect on sales.**

**Method**

Both secondary and primary data were collected for 103 top

products from 2001. (Please see the online version of this article for the complete list.) Some of these products have gone generic (Claritin), some have been taken

off the market (Vioxx) and some have been acquired by other companies (Sustiva) since the data set was created. However, the relationships explored in this research are not affected by these events.

Secondary data were provided by IMS (IMS Health, 2004a). Primary data were also collected from five clinical pharmacists who were asked to classify each drug according to three types: lifestyle, chronic, treating symptoms. The pharmacists' classifications were collected in a Delphi approach and resulted in consensus assignments of each drug to these three product characteristics. Finally, a variable for size of company portfolio was created from the secondary data. The data were coded, entered into SPSS and checked for errors. The data file represented the three categories of independent variables presented below along with their range of values.

	Mean	Standard Deviation
Number of Indications	1.81	1.307
FDA Rating	.22	.411
Lifestyle Drug	.18	.390
Chronic Treatment	.54	.501
Relieves Symptoms	.67	.473

Product Characteristics Variable	Correlation (r) and Probability (p)	FDA Rating	Lifestyle Drug	Chronic Treatment	Relieves Symptoms
Number of Indications	r = .053 p = .592				
FDA Rating	r = .131 p = .187	1			
Lifestyle Drug	r = -.218 p = .027		1		
Chronic Treatment	r = -.353 p = .000			1	

Product Characteristics Variable	Factor Loadings
Lifestyle Drug	-.520
Chronic Medication	.758
Symptomatic Disease	-.651
Number of Indications	.223
FDA Rating	.629

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	Mean	Standard Deviation
Number of Months In Market	81.44	96.424
Number of Drugs In Class	42.09	60.005
Order of Entry	28.09	48.574
Company Portfolio	7.54	5.787

Competitive Mix Variable	Correlation (r) and Probability (p)	Number of Drugs In Class	Order of Entry	Company Portfolio
Number of Months In Market	r =	-.024	-.177	-.019
	p =	.811	.073	.847
Number of Drugs In Class	r =	1	.906	-.222
	p =		.000	.024
Order of Entry	r =		1	-.197
	p =			.047

Competitive Mix Variable	Factor Loadings
Company Portfolio	-.392
Number of Months In Market	-.183
Number of Drugs In Class	.950
Order of Entry	.960
FDA Rating	.629

### Product characteristics

The number of indications claimed (1-8)  
 Priority FDA rating (22 priority)  
 Lifestyle drug (19 were)  
 Chronic condition (56 were)  
 Symptom relief (69 were)

### Competitive matrix

Order of entry (1-19)  
 Number of months since launch (4-695)  
 Number of competitive drugs in the class (1-244)  
 Size of company portfolio (1-18)

### Promotional mix

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

The general analytical framework can be represented as follows in equation form and diagram form. For analysis purposes, sales dollars (rang-

ing from \$3.3 million to \$4.7 billion) can be predicted by the three classes of predictor variables and their three two-way interactions, and their single three-way interaction.

Sales Dollars = Product Characteristics + Competitive Matrix + Promotional Mix + (Product Characteristics x Competitive Matrix) + (Product Characteristics x Promotional Mix) + (Competitive Matrix x Promotional Mix) + (Product Characteristics x Competitive Matrix x Promotional Mix)

### Model specification

When we have multiple correlated measures of a construct, such as five product characteristics, multicollinearity is likely to occur. Furthermore, with 14 correlated independent variables, multiple regression to analyze the predictors of sales dollars involves an over-specified model multicollinearity plus over-specification can present serious problems in multiple regression analysis since it tends to inflate the error term in statistical tests yielding too many significant

effects. Factor analysis is a method of reducing a large number of correlated measures of constructs such as 14 measures in three marketing categories. It offers a way to find a single composite variable representing the unique contribution of each individual measure to the three marketing categories. The first factor in a principle components analysis is typically the most reliable representative of the latent or hidden variable underlying the marketing category and can be expressed as a single number for each product. Hence, three principle components analyses were done with the five product characteristics, four competitive matrix and five promotional mix variables used separately to produce a single composite factor representing the variable set.

## Results

### Factor analysis of variable sets

Each variable set was factor-analyzed using principle components and factor scores were generated for each of the 103 drugs for use in stepwise multiple regression analysis.

### Product characteristics

The descriptive statistics correlations, and factor loadings for the analysis of the five variables defining product characteristics appear in Tables 1, 2 and 3.

The first principle component of the product characteristics variables accounted for 34.3 percent of the common variance.

### Competitive matrix

The descriptive statistics, correlations and factor loadings for the analysis of the four variables defining competitive matrix appear in Tables 4, 5 and 6.

The first principle component of the competitive matrix variables accounted for 50.3 percent of the common variance.

### Promotional mix

The descriptive statistics, correlations and factor loadings for the analysis of the five variables defining promotional mix appear in Tables 7, 8 and 9.

Table 7: Descriptive Statistics for Promotional Mix Variables		
Promotional Mix Variables	Mean	Standard Deviation
Sample Dollars	\$56,631,910.45	\$59,604,435.342
Office Detailing Dollars	\$23,364,847.22	\$20,141,153.936
Hospital Detailing Dollars	\$4,399,555.56	\$4,796,997.343
DTC Advertising Dollars	\$21,760,990.29	\$29,781,210.559
Journal Ad Dollars	\$2,824,213.11	\$2,308,275.670

Table 8: Correlations Among Promotional Mix Variables					
Promotion Mix Variable	Correlation (r) and Probability (p)	Office Detailing Dollars	Hospital Detailing Dollars	DTC Advertising Dollars	Journal Ad Dollars
Sample Dollars	r =	.795	.701	.593	.538
	p =	.000	.000	.000	.000
Office Detailing Dollars	r =	1	.887	.560	.529
	p =		.000	.000	.000
Hospital Detailing Dollars	r =		1	.568	.563
	p =			.000	.000
DTC Advertising Dollars	r =			1	.291
	p =				.003

Table 9: Factor Loading Matrix for Promotional Mix Variables	
Promotion Mix Variable	Factor Loadings
Sales Dollars	.793
Sample Dollars	.908
Office Detailing Dollars	.902
Hospital Detailing Dollars	.867
DTC Advertising Dollars	.731
Journal Ad Dollars	.677

The first principle component of the promotional mix variables accounted for 66.9 percent of the common variance.

Relationships among the predictor variables were explored via correlation analysis presented in Table 10.

A stepwise multiple regression was performed with sales dollars as the dependent variable and seven independent variables comprised of the predictor variables above as specified in the general analytic framework.

**Model summary**

Because of the significant correlations among the factor score predictor variables and their interaction terms, stepwise multiple regression was the method of

choice to determine the unique value of each predictor in predicting sales dollars. The stepwise regression model yielded an r-square of .668 that was significant overall (p<.0001). The significant predictors of sales dollars were product characteristics (standardized)  $\beta = .155$ , p<.060), promotional mix (standardized)  $\beta = .695$ , p<.0001), and the interaction of these two factors (standardized)  $\beta = .279$ , p<.032).

The final model can be expressed as:

$$\text{Sales Dollars} = \text{Constant} + \text{Product Characteristics} + \text{Promotional Mix} + (\text{Product Characteristics} \times \text{Competitive Matrix}) + \text{Promotional Mix} + \text{Error}$$

$$\text{Sales Dollars} = \$513,000,000 + (\$129,000,000 \times \text{Product Characteristics Factor Score}) + (\$582,000,000 \times \text{Promotional Mix Factor Score}) + (\$211,000,000 \times \text{Product Characteristics Factor Score} \times \text{Promotional Mix Factor Score}) + \text{Error}$$

Hypothesis 1 stated that product characteristics will have a positive impact on sales. This hypothesis was supported in that a unit increase in the product characteristics factor score resulted in an increase in sales of \$1.29 million. Not surprisingly, better products produce more sales.

Hypothesis 2 stated that the

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Table 10: Correlations Among Predictor Variables

Predictor Variables	Correlation (r) and Probability (p)						
		CM	PM	PCxCM	PCxPM	CMxPM	PCxCMxPM
Product Characteristics (PC)	r =	-.356	.304	-.027	.020	-.024	-.301
	p =	.000	.002	.788	.841	.813	.002
Competitive Matrix (CM)	r =	1.000	-.225	-.568	-.016	-.408	.458
	p =		.023	.000	.872	.000	.000
Promotional Mix (PM)	r =		1.000	-.017	.643	-.484	-.627
	p =			.863	.000	.000	.000
PCxCM	r =			1.000	-.165	.477	-.545
	p =				.095	.000	.000
PCxPM	r =				1.000	-.660	-.486
	p =					.000	.000
CMxPM	r =					1.000	.008
	p =						.936

competitive matrix will have a negative effect on sales. This hypothesis was not supported since the competitive matrix factor scores had no significant relationship to sales. This lack of effect may be due

to this predictor variable having a significant correlation with all of the other predictor variables with the exception of the three-way interaction term.

Hypothesis 3 stated that pro-

motional mix will have a positive effect on sales. Like product characteristics, this hypothesis was supported in that a unit increase in promotional mix factor scores produced an increase in sales of \$5.82 million, a much stronger effect when compared to product characteristics.

Hypothesis 4 stated that product characteristics and promotional mix will interact to have a positive effect on sales. This hypothesis was supported in the analysis and yielded an increase in sales of \$2.11 million, suggesting that when promotional resources are applied to products with good characteristics, sales increase over and above that due to the product itself, but not over and above the effects due to promotional mix itself.

### Discussion

Research on the promotion of pharmaceuticals began in 1954 with the Columbia University drug diffusion study of tetracycline (Rogers, 1962). This field



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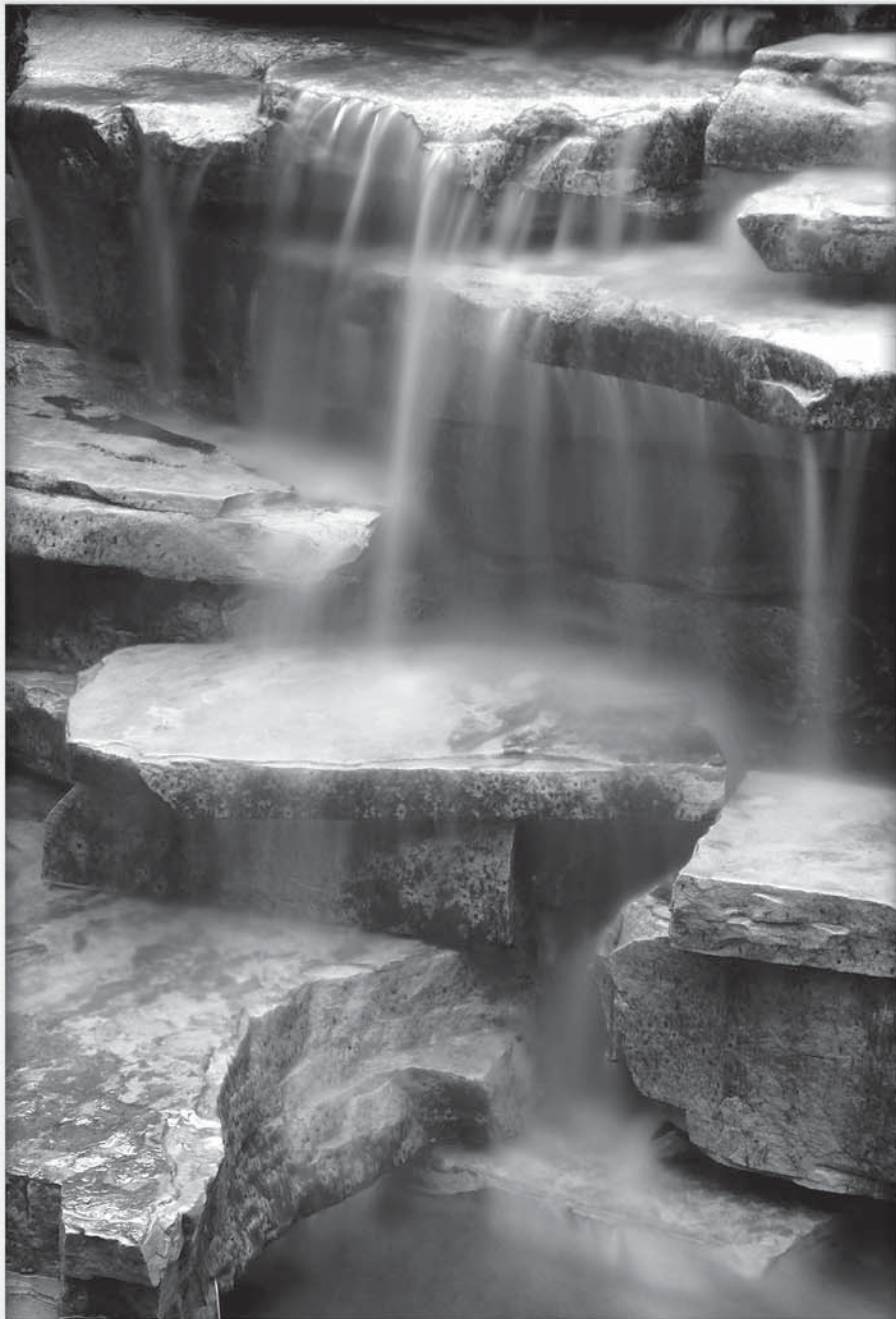
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study, sponsored by Pfizer, was done among 125 general practitioners, internists and pediatricians in Bloomington, Galesburg, Peoria and Quincy, Ill. An additional 128 physicians who were colleagues of these physicians were included as members of the social system. The results indicated that medical journal ads, detailing by sales representatives, providing physicians with peer-reviewed journal articles, and sampling created awareness and knowledge of prod-

uct attributes and benefits among members of the medical community but were insufficient to persuade the average physician to adopt tetracycline.

The results here suggest that additional promotional mix resources such as DTC advertising and hospital detailing may have had a positive effect in getting tetracycline adopted. Future analysis on recently-launched products may provide a better understanding of how much leverage there is in

product characteristics and promotion mix factors. The current macro results suggest there is considerable leverage in having both factors in place simultaneously. Future research in this area could include such variables as distribution, pricing, brand image/equity, presence of generic competition, and packaging. Although these variables are deemed important, little research has been done to understand their effects on sales in context with the classes of variables studied here. | Q

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# New medium, new needs?

## Conducting consumer research on the iPad

Without question, the iPad and other touchscreen tablet and smart mobile devices have rapidly changed the consumer tech landscape. These new market entries are impacting how we communicate, spend downtime and consume media. For the publishing industry, the iPad and other devices like it offer an opportunity to experiment with delivering highly-produced content in a new way, seemingly unbounded by the confines of ink and paper.

However, as with any new product launch, understanding both physical use examples and the mental modes of users is critical to assess their needs and deliver a desirable and profitable product. The common research inquiries still apply: Who are the users? What are their expectations? Do they like the product? But research professionals may wonder if the shift in consumer landscape changes the way we ask these questions.

Based on our multifaceted exploration of iPad usage among early adopters we recommend that researchers consider a new five-point checklist, which we will explore in this article, when studying consumers within this environment.

### Measurement was underdeveloped

Condé Nast was the first magazine publisher to bring to market iPad digital magazine “replicas” of the monthly print issue via applications available on Apple’s iTunes store. At the time the iPad launched, app measurement was underdeveloped and inadequate for determining the success of our digital publications – making primary research necessary. Our study included both qualitative and quantitative work to generate insight on the audience reading Condé Nast digital magazines available on the iPad; to understand how users are incorporating the device and available content into their lifestyle; and to uncover perceptions of the editorial content and advertising in this new environment. Four Condé Nast digital magazines were studied over a series of months immediately post-device launch: *GQ*, *Vanity Fair*, *Wired* and *Glamour*.

The qualitative research phase ran from May through August 2010 and comprised 70 in-depth interviews (IDIs) with iPad owners in New York City, Los Angeles and Boston who had some previous familiarity with the magazine titles being studied. Interview participants were instructed to download various magazine apps on their devices prior to coming to their interview session. In their one-on-one chats, users were led through

### snapshot

Researchers at Condé Nast draw from a study of four magazines to offer a five-point checklist for conducting research with and about iPad users.



By Rachel Swanson  
and Scott McDonald

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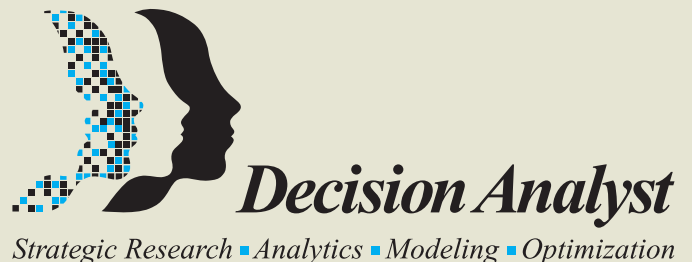
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Figure 1: Reader Demographics by Title

	GQ		Vanity Fair		Wired		Glamour	
	print	iPad	print	iPad	print	iPad	print	iPad
% Male	75%	98%	23%	60%	72%	94%	7%	9%
% Female	25%	2%	77%	40%	28%	6%	93%	91%
Average Age	37	36	43	46	39	39	38	36
Average HHI	\$92,800	\$118,000	\$96,500	\$154,000	\$103,100	\$111,000	\$82,700	\$112,000

Print data source: GfK MRI Fall 2010 Report, 2010. GfK MRI. All rights reserved.

usability tasks, probed on their media consumption habits and asked to compare and contrast articles, photo spreads and advertising on the iPad versus the relevant print edition.

For the quantitative phase, an in-app survey was included in the digital issues of the aforementioned titles over several months during the second half of 2010. A creative ad unit conforming to each title's branding style and tone was developed and inserted at various positions in the digital magazine experience - to be perceived by consumers as a "page" of the magazine. Embedded within the ad unit was a redirect link to a 10-question Web-based survey. Tapping the creative ad unit called this survey into the magazine app's in-app browser, providing users with a seamless experience of getting from edit and advertising content to the survey. Questions included basic user demographics, relationship to the print publication being evaluated and satisfaction with the digital issue experience. After answering the survey, users returned to the same place in the issue. Over 6,000 responses were collected.

### Encountered some challenges

As a result of using both qualitative and quantitative techniques over a series of months, our research findings were rich and able to direct various internal stakeholders on how to continue optimizing our digital magazine products. However, we encountered some challenges during execution which may be worth considering when determining your own company's in-tablet research approach.

#### 1. Don't miss out on an opportunity to determine the audience.

It would have been easy for Condé Nast to assume that anyone reading our publications on the iPad fit the same demographic profile as a print reader and subsequently omit these questions from our in-app survey. But

research indicated this is not the case. Our survey data showed that *Wired's* iPad reader gender skew, age and income was quite similar to the print audience. However for *GQ*, *Vanity Fair* and *Glamour*, iPad readers tend to be more male and more affluent than the print reader base.

Similarly, in the IDI recruit, we asked demographics without using those questions as screening criteria for qualified recruits in order to get a clean read on the early adopter iPad audience for each brand. Keeping an open recruit and having survey data which matched the profile of participants we'd seen from "behind the mirror" during the interview gave our team more confidence in the audience assessment of who reads each digital title. These data are now considered the benchmark in lieu of underdeveloped syndicated solutions.

#### 2. Spend some time with your tech team to learn about your company's app development process and their relationship with Apple.

Every company has a unique process and guidelines to follow when developing or working with apps before anything gets sent to Apple. Apple then reviews and quality-checks all app content and functionality in-depth prior to pushing apps live on the iTunes app store. In our case, it was critical that not only the creative ad unit invitation be finalized but the actual survey program be fully functional before beginning the Apple review process. The last thing our team wanted was for the survey to prevent the digital magazine from launching on time. If your company is interested in executing an in-app intercept of some sort, start out by asking what's possible and what's not. Also be clear on timelines for both internal and external approval processes, especially if you have an "app live date" in mind. Armed with this information, you'll be more effective

in selecting a research vendor who can provide the right solution.

#### 3. Consider any in-app intercepting as a test of the methodology and set expectations accordingly.

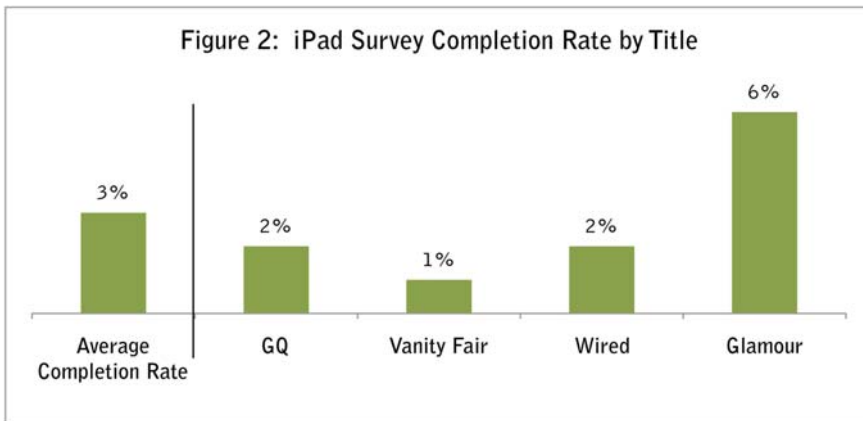
The iPad is too new to make generalizations about consumer responsiveness to survey research, so both internal and client stakeholders should be aware that benchmarks or standards don't quite exist. Since the Condé Nast digital magazine apps do not use an ad server and push notifications were not approved for a survey invitation, our interception technique of hard-coding the invite as a page of the digital magazine was the only option - albeit one that had never been executed before. Thus, we were careful to avoid providing stakeholders with a guarantee of number of completes expected. As it turned out, survey completion rates across three of the four magazines were tested were comparable, thus giving us a baseline range of expectation for number of respondents as a function of average monthly app downloads.

This completion rate is better than what we sometimes see from our print subscriber databases and Web site intercepts but not as strong as on our opt-in panel lists. Time will tell whether this benchmark holds.

#### 4. Don't assume a mobile survey solution works best on the iPad.

As found in our IDIs, consumers tend to approach accessing content on the iPad in a "lean-back" fashion. That is, the iPad's larger size allows for more considered engagement with what's being presented on-screen than on a phone's smaller screen. When requesting RFPs for our in-app survey, most research vendors were adamant about using their "mobile" survey platform and drastically limiting the number of questions we could ask (usually to around 10). This was especially recommended as our magazine apps on the iPhone also included the survey invitation. During field, we found tap-through to our survey on the iPhone to be virtually non-existent and behavioral metrics for time spent per issue on the iPad during the survey period to average two to three times higher than time spent

Figure 2: iPad Survey Completion Rate by Title



on the iPhone. This indicated that it was unlikely digital magazine readers on the iPad would have found fault with a slightly longer survey after all. While mobile-specific survey solutions might be buzzworthy and appropriate in some instances, make sure to work with a research vendor that offers great survey software and user experience regardless of access device.

#### 5. Invite research participants to be a part of your ongoing app development and optimization.

Including a respondent information

form with an opt-in to be contacted for more research on the iPad is critical. Since Apple does not currently share transaction data or device identification numbers on who purchases Condé Nast publications' digital issues, we are unable to match readers of a digital magazine on the iPad to their subscription of the same magazine in our traditional consumer database. It's something the industry's working on furiously but in the meantime including an opt-in for re-contact is a win-win: It allows us to manually update our database files

with digital purchasers and execute marketing plans and it makes users feel like they're part of the development process, helping to define the new media landscape. Having brand advocates weigh in on product extensions ensures you won't alienate the core, and collecting this opt-in within the new environment adds a layer of relevance to your sample when studying tech products in the future.

#### A good foundation

The tablet's place in the lives of consumers is still in its infancy. Companies like Condé Nast who are studying this fascinating time are staying flexible and learning as they go, not only about the consumers and their relationship to the device but about how the research industry may change as a result. These guidelines we've compiled as a by-product of achieving our learning goals will hopefully provide others with a good foundation from which to start testing and developing new methodologies in this rapidly evolving time as well. | Q



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# Don't talk to me about engagement

## Advertising effectiveness: what it is, what it isn't and can it be reflected by one number?

**F**requent and readily available data on ad effectiveness is relatively new, which means we are in some uncharted waters. In my role as a research analyst at a media company, I've worked closely with many designers, agencies, sales reps, business owners, marketing directors and others over the last few years. The company I work for has collected a lot of valuable information and I've learned a great deal from my experiences in sharing information with these different points of contact (good and bad). The one thing I can say is, advertising's much bigger than one ad effectiveness number and one number will not be the answer. But I can understand the desire to find it. In this article I want to touch on this desire for one number, some factors to consider when it comes to evaluating advertising, some factors we may want to leave out, and, lastly, some potential one-number methods.

### Are we asking the right questions?

We now have a number of different research tools at our disposal to help measure ad recall, "ad engagement" and response in the newspaper business. We use the services of Sweden-based Research and Analysis of Media (RAM) at our newspaper *The Virginian-Pilot*. These sources typically measure 15 or more factors deemed important to advertisers. Who came up with these? Who knows? The bigger question may just be, "Are we asking the right questions?" Let's leave this for another article.

As we push closer to being able to show a potential return on investment (the Holy Grail in the media world) we may actually be losing sight of some basic tenets of advertising. When it comes down to it, perhaps no one has summarized the ad business better than Rosser Reeves. This mid-century advertising icon once said: "You know, only advertising men hold seminars and judge advertising. The public doesn't hold seminars and judge advertising. The public either acts or it doesn't act."

I can dump a heap of analysis and research that tells a business why its ad is the greatest thing since sliced bread or is complete trash, but

they, the advertisers, ultimately know what's working and what isn't. Where research and analysis can best serve the advertiser is helping to determine why ads are more or less effective.

For too many years the creative world has been rewarding design and not necessarily results, while the scientific world has been ignoring design's impact and impor-



By Adam S. Cook

### snapshot

A research analyst chronicles his quest to find a simple and flexible way to measure and define advertising effectiveness.

*Editor's note: Adam S. Cook is senior market research analyst at Pilot Media Inc., Norfolk, Va. He can be reached at 757-446-2664 or at adam.cook@pilotonline.com. To view this article online, enter article ID 20110306 at [quirks.com/articles](http://quirks.com/articles).*



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Figure 1

## Formula for Outcome-Based Ad Effectiveness Index (OB-AEI)

To give context to the outcome-based ad effectiveness percentages, use the index formula provided below. The “Comparative Set” can be another ad, the average for the advertiser, the average for the advertiser’s competitive set or the same across different media.

$$\left[ \left( \frac{\text{The Ad}}{\% \text{ Ad Recall}} \right) \div \left( \frac{\text{Comparative Set}}{\% \text{ Ad Recall}} \right) \right] \times 100$$

x % Desired Outcome\*

\*In RAM this percentage is of those that recalled seeing the ad

tance. The reality is, advertising effectiveness is both art and science. Blasphemy, right? We need to get the beret-wearing “artEEsts” and pocket protector-wearing researchers to sit at the same table to work on achieving what’s most important: results! That starts by defining the word “effective.”

There are too many factors to account for an ad’s true effectiveness and thus they may never truly be measurable. Weather, product quality, locations and pricing offers are only a few of an exhaustive list of things that can impact results. Even if we were able to factor these in, there’s one nearly unpredictable factor that can not be measured: the consumer. How is it that a consumer will make one of the biggest purchases of their lives (real estate) based on emotion or buy a car on a whim and yet still be willing to drive 30 minutes out of their way and wait an extra 10 minutes in line to save a dollar on a two-liter of Coke? Consumers’ decisions can be crazy and amazingly irrational. Even worse, when asked why or how they decided to buy, their responses appear impressively rational.

Let’s start with what ad effectiveness is not: ad engagement. My stomach churns at the mere mention of this idea. It pains me to discuss, but I must, because it’s an industry obsession. It has become more of a distraction over the last few years.

Don’t get me wrong – I’m not saying it isn’t relevant; I’m just saying it shouldn’t be the focus. Ad engagement is not the end; it’s a means to an end. If we have advertisers who want to engage consumers, great, let’s engage them until their heads pop. Just don’t come running back to me three weeks from now saying, “The ad isn’t getting the results we’re looking for.” We need to better understand which elements of engagement can help advertisers achieve their true advertising objectives. But like I said, we need to look at what’s important to the advertiser. We are full circle on what I mentioned earlier: We need to help answer the questions of “why.”

### Trying to find Bigfoot

Let’s get to the matter at hand. With apologies to J.R.R. Tolkien, “One number to rule them all. One number to find them. One number to bring them all and in the darkness bind them.” And yes, the idea of having one number is as fanciful as Tolkien’s *Lord of the Rings*. Many have been ambitious in their search to find this number and we should all applaud those efforts. Unfortunately the search can be likened to trying to find Bigfoot.

But it’s a start and it gets us moving in the right direction. The concern is, using complex and inflexible means may breed opportunity for error. The more variables

you include, the further away from truth you sometimes stray. Only the pertinent variables should be included. If ad engagement is a means to an end and you have end-metric results available, why would you also include ad engagement metrics into the equation? This only gives additional weight to variables that may or may not have had any bearing on the outcome. I opted not to include these variables when devising a formula.

We have to begin by defining ad effectiveness. After meeting with well over a hundred advertisers it occurred to me that complicated methods weren’t going to cut it and there had to be a simpler way. Let’s demystify, not mystify. After all, complexity doesn’t have a strong track record. (Have you looked at your newspaper’s rate card recently?)

How do advertisers define or measure ad effectiveness? It varies, doesn’t it? Our formula should vary as well. My goal was to find a simple and flexible approach. I also contend that the one number used for indexing or comparing should actually mean something. A number that doesn’t lend itself to meaning doesn’t sit well with advertisers. When faced with presenting one number without meaning, the conversation can sometimes lead to a lot of skepticism and derail discussions on how to make improvements.

### One desired outcome

Ad effectiveness is as good as your last ad, campaign or as good as those of your closest competitors. My experience has taught me that between 90-95 percent of the time advertisers are looking for one desired outcome: maximum response, either to their store, to the phones or to the Web site ... PERIOD.

Ultimately, our one number will be indexed/compared to the advertiser’s history and/or its competitive set. First, we have to understand what impacts maximum response. There are myriad things, but simply put: one, the percentage of people that saw the ad, and two, the percentage that intend on acting.

Assuming that your measurement tool is similar to the one we are

Figure 2

## Example of Outcome-Based Ad Effectiveness Index (OB-AEI)

Two different grocery store ads:

	Ad Recall	Visit Advertiser*	OB-AEP	Index vs. Average
Grocer A	62%	19%	11.8%	70
Grocer B	43%	49%	21.1%	126
<i>Avg. Grocery Ad</i>	<i>51%</i>	<i>33%</i>	<i>16.8%</i>	

### Index formulas:

$$\frac{(.62 \times .19)}{(.51 \times .33)} \times 100 = 70$$

$$\frac{(.43 \times .49)}{(.51 \times .33)} \times 100 = 126$$

\*In RAM this percentage is of those that recalled seeing the ad

using, this is what we have measured and that's where we need to start. Simply put, the "one number" starts by calculating the percentage of the potential audience that plans to act. This can be done by multiplying the advertiser's desired outcome percentage by the percentage of those that saw the ad. This is the number, or outcome-based ad effectiveness percentage (OB-AEP), you'll use for comparing and indexing. This secret is pretty disappointing, isn't it? See Figure 1 for how the OB-AEP translates into a basis of comparison or an index and Figure 2 for an example.

I was intrigued with the idea of being able to show this outcome-based ad effectiveness percentage on a quadrant chart and discovered that it's actually more interesting and complicated than you may think. As I started looking at the variations, something about the quadrant analysis didn't make sense to me.

Here's why looking at OB-AEP on a quadrant fails us: Quadrant analysis came from the world of academia. The business excellence



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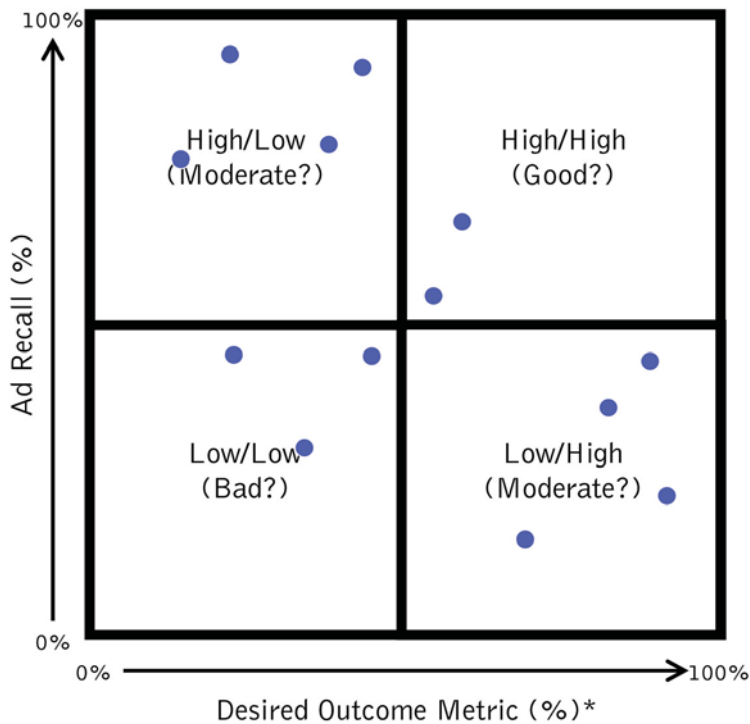
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Figure 3

### Outcome-Based Ad Effectiveness Model



good as mine. We know the upper-right is good and lower-left is bad; everything else is somewhere in the middle, right? I started plotting example ads into different quadrants to see if this quadrant analysis had merits.

As I said earlier, advertisers are looking for the one desired outcome, so we need to look at the OB-AEP or overall audience outcome. Using this basic formula we are able to calculate OB-AEPs for the example ads plotted (Figure 4).

You can now see why the quadrant fails us. In all four cases, where ads were equally effective, they actually fell into three separate quadrants. The OB-AEP doesn't fit the quadrant mentality. In fact, its distribution, based on equal effectiveness, looks more like Figure 5. It goes against a lot of things I was taught, but using the quadrant method we are unable to visually demonstrate ad effectiveness. I'll probably want to file a restraining order against my college marketing principles professor after saying this, but for our purposes of demonstrating ad effectiveness, it's time to ditch the archaic quadrant model.

We need to use this basic chart found in Figure 5. As you can start to see, the distribution pattern is actually very complicated for such a simple formula. Hang onto your berets and pocket protectors; it's more complex than you think. The chart we are looking at isn't actually two-dimensional; it's three (I'm thinking I just lost half the readers at this point).

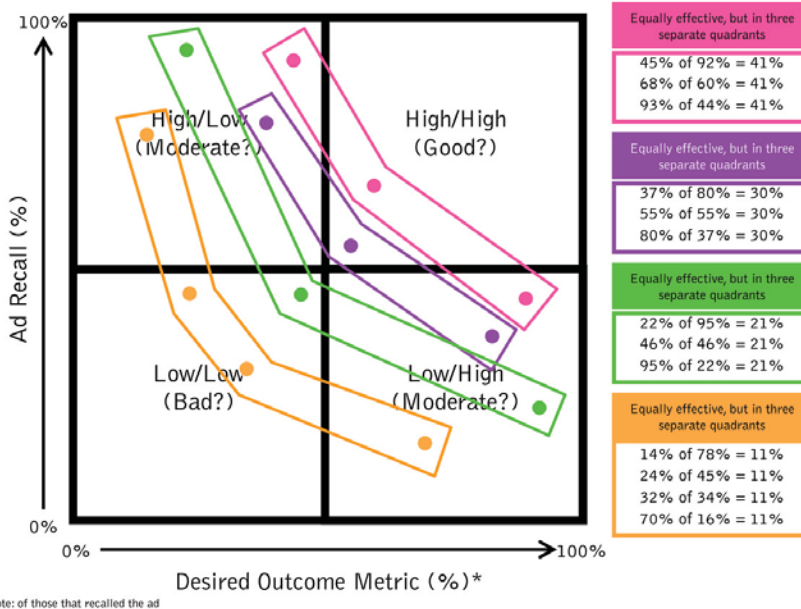
Okay, for the few who haven't given up on me, get this: When looking at the distribution of the OB-AEPs it creates what is called a hyperbolic paraboloid (now I'm probably down to two readers). What is a hyperbolic paraboloid and how can this be? See Figure 6 for a visual representation or visit my blog ([www.fightinanalyst.com](http://www.fightinanalyst.com)) for more details.

The better question is, how else can we explain the odd progression found in Figure 6? We've been so used to looking at two-dimensional charts, we forgot that we live in a three-dimensional world. The factor of these two metrics (recall and the desired outcome) gives us the one number, OB-AEP, or our third axis: z!

What can we learn from this?

Figure 4

### Outcome-Based Ad Effectiveness Model



model or Kim-Lord grid are two commonly recognized quadrant approaches. They were designed for strategic decision-making and not analytics. So I went down the path of trying to create my own OB-AEP quadrant. I placed ad recall percentage on the y axis and the advertiser's desired outcome percentage along

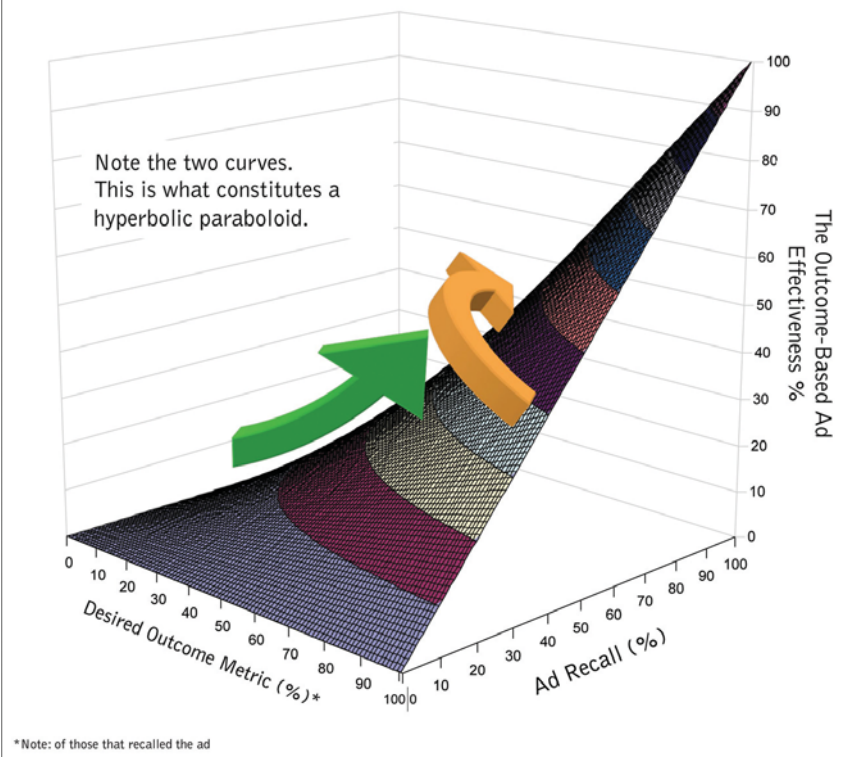
the x axis (Figure 3). Again, the desired outcome percentage can be interchangeable based on the advertiser's primary objective.

This quadrant should help us define what is or isn't effective, as labeled in Figure 3. As you will notice, I have question marks in each quadrant. Your definition would be as



Figure 6

## Outcome-Based Ad Effectiveness Model



### Increase recall and response percentages:

- exponential improvement, which removes all limits to maximum ad effectiveness potential
- incorporates art and science
- can get you the greatest return, but requires money, time and resources

See Figure 7 for a graphic example of improving effectiveness. Understanding what helps improve ad recall and desired outcomes/response (ad engagement or the means) can help us help advertisers get better results (the end).

The beauty of this formula and model is not just its simplicity but

its flexibility. We can now use this OB-AEP to compare ads against the advertiser's competitive set and use their desired outcome (whether it be potential store traffic, actual purchase intent, intent to look for more information, intent to visit the Web site, an increase positive feelings about the company, etc.).

Of the two readers I have left, I'm guessing at least one is wondering: "What about the 5 to 10 percent that don't just have the one desired outcome? Is a formula available for them?" Yes, but this added layer of complexity removes our ability to succinctly define the one number. I try to stay clear of using this method and advise others against using it. But for those few instances where the advertiser insists on including multiple variables like brand perception, likeability and traffic-driving directives, we do have an index formula available. (Equal or custom weights can be applied; e.g., 70 percent of my ad was for traffic and 30 percent was for brand.) Visit [fightinanalyst.com](http://fightinanalyst.com) for formulas and examples of equal and custom-weight multivariable outcome-based ad effectiveness indices.

When and where is it best to use any of these ad effectiveness indices?

- For internal communications,

## Research Company Spotlight - Advertising Effectiveness

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**Firefly Millward Brown**  
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[www.fireflymb.com](http://www.fireflymb.com)

**The Marketing Workshop, Inc.**  
770-449-6767  
[www.mwi-shop.com](http://www.mwi-shop.com)

**Precision Research Inc.**  
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[www.precisionresearchinc.com](http://www.precisionresearchinc.com)

**Analytic Partners**  
212-599-7630  
[www.analyticpartners.com](http://www.analyticpartners.com)

**comScore ARS**  
812-425-4562  
[www.arsgroup.com](http://www.arsgroup.com)

**Gallup & Robinson, Inc.**  
609-730-1550  
[www.gallup-robinson.com](http://www.gallup-robinson.com)

**Millward Brown**  
212-548-7200  
[www.millwardbrown.com](http://www.millwardbrown.com)

**The PreTesting Company, Inc.**  
201-569-4800  
[www.pretesting.com](http://www.pretesting.com)

**B2B International**  
914-761-1909  
[www.b2binternationalusa.com](http://www.b2binternationalusa.com)

**Davidson-Peterson Associates**  
207-985-1790  
[www.dpaonline.com](http://www.dpaonline.com)

**In Vivo BVA**  
646-747-4970  
[www.invivo-bva.com](http://www.invivo-bva.com)

**MSW Research**  
516-394-6000  
[www.mswresearch.com](http://www.mswresearch.com)

**Signet Research, Inc.**  
201-945-6903  
[www.signetresearch.com](http://www.signetresearch.com)

**Baltimore Research** » SEE AD 9  
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[www.baltimoreresearch.com](http://www.baltimoreresearch.com)

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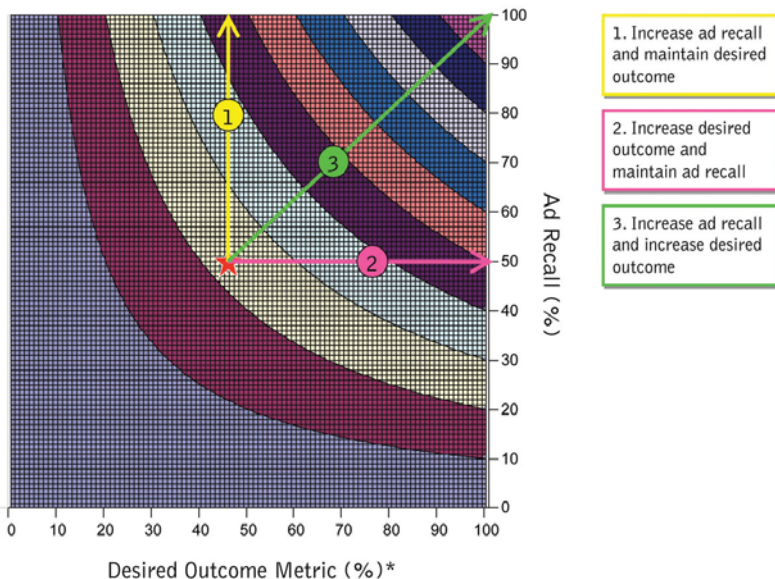
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Figure 7

### Outcome-Based Ad Effectiveness Model



as a warning system or a simple gauge. This can be a quick-and-dirty way to summarize how effective an ad was. Hint: don't let this number be the focal point of sales presentations. Too much time spent on discussing math and

methodologies takes the conversation further away from discussing how we can help improve results or answering the why.

- With advertisers who understand your research tool for measuring ad effectiveness, understand the

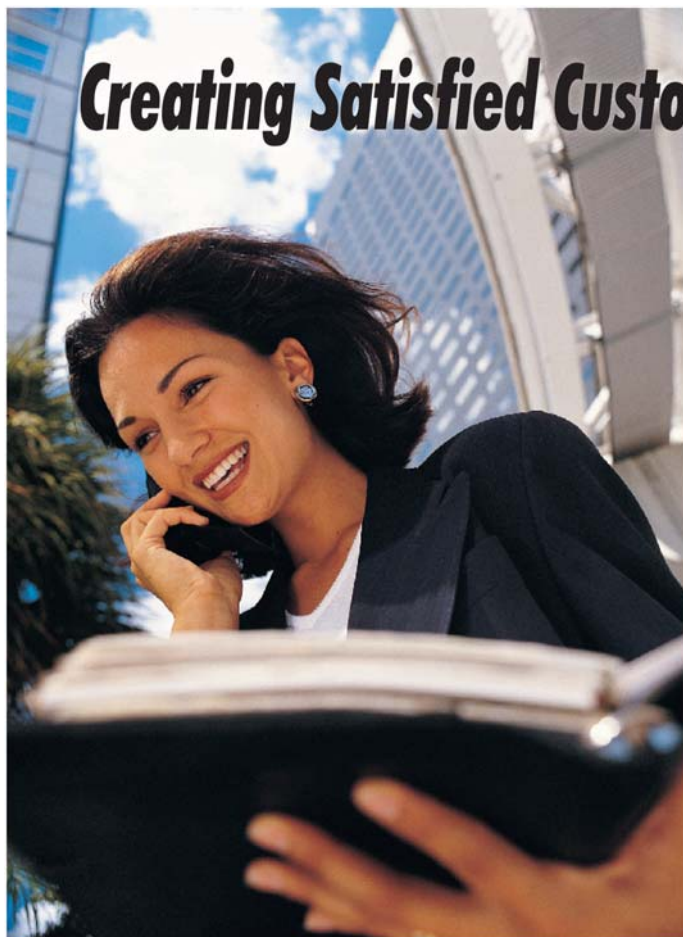
fundamentals of advertising, are ready for a more sophisticated way of gauging effectiveness or are looking for the same utility we are on an internal basis.

#### A way to calculate it

Is this the "one number?" No, but it's a way to calculate it and hopefully a sound and flexible way. Outside factors and consumer irrationalities are still cumbersome areas that can impact results to varying degrees, at different times, from business to business and from market to market.

Variables that may or may not have impacted the end results are not included, but do need to be understood to help direct our decisions for helping advertisers increase effectiveness (size, color, brand awareness, benefits of products/service, etc.).

One last bit of advice. Don't let ad effectiveness indices become a crutch. Research is not absolute, but it can give us better direction. The public is the true judge. | Q



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# Comparative analysis of emotion measures

## A case study using the Heineken "Weasel" commercial

In recent years, interest in studying the role of emotions in consumer decisions has spiked significantly. This is consistent with the increased focus on emotion in many areas of psychology and economics. The complex nature of the emotional process, which involves physiological and behavioral changes, has led to the development of new constructs for measuring emotions-based response and the enhancement of longstanding ones that go well beyond simple question-and-answer surveys. These systems have underlying similarities (e.g., they are generally nonverbal and provide continuous or nearly continuous measurement) but also underlying differences (e.g., they measure different aspects of emotional activation and have different analytic protocols). We will look in detail at three such systems: Picture Sorts (PS), as executed by Ameritest, Albuquerque, N.M.; the Biometric Monitoring System (BMS), as executed by Boston-based Innerscope; and facial electromyography (FEMG), as executed by our firm's Continuous Emotional Reaction Analysis (CERA).

### Three main protocols

Researchers studying emotions have relied on three main protocols to study emotions: self-reports (descriptions of feelings); physiological measurements (measures of blood pressure, heart rate, brain activity, etc.); and behavioral/expressive measures (eye, face and vocal expressions).

### Self-reports

In this protocol, researchers simply ask people to describe their current, past or typical emotions. The basic premise is that people know their own emotional states the best. Self-reports are straightforward data to

collect and enable researchers to tap into the emotional fabric, especially when they are interested in observing changes in emotion over time. But data from self-reports are not nearly as straightforward to interpret as they seem. This is because they carry with them numerous socio-psychological factors that can influence the validity of a response at generally unknown levels. These include the ability of a respondent to articulate his or her deeper thoughts or feelings; the motivation of the respondent to respond fully; the urge to respond in socially desirable ways; and biases intro-

### snapshot

A number of different approaches have emerged for measuring emotional response to advertisements. This article compares and contrasts the results of three different measurement techniques as they were applied to the same 30-second TV spot for Heineken beer.



By Sandeep Patnaik  
and Scott Purvis

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duced by the construction of the questioning sequences, etc. Also, the precision of self-reports often suffers because they are retrospective and because each person's standard of comparison differs.

### **Physiological measurements**

Several theorists, including Damasio (1994), argue that thought and emotions cannot occur independent of the body. When we think emotionally, our whole body is readied for action and we receive feedback from it. Consequently, a number of studies have turned to physiological measures to tap activity in the nervous systems, i.e., autonomic nervous system (ANS) and the central nervous system (CNS), to understand the dynamic interplay of cognition, arousal and emotion.

#### ***Autonomic nervous system:***

Many emotional conditions are states of intense arousal that are directly related to the activity of the autonomic nervous system, which has two branches, viz., the sympathetic nervous system and the parasympathetic nervous system. The sympathetic nervous system (SNS) is related to increased heart rate, breathing rate, sweating and adrenaline secretions. The parasympathetic nervous system (PNS) conserves energy to use in growth and development. Most studies of emotion physiology have focused on the SNS rather than PNS. However, this emphasis of the SNS favors the study of negative emotions. A positive emotion, like happiness or love, that is generally associated with less intense SNS activity may not be as arousing as a stronger negative emotion like anger or fear.

#### ***Central nervous system:***

Measuring brain activity to gauge emotional response gained increasing popularity in the 1990s. One of the most common techniques to measure brain activity is electroencephalography (EEG), which registers variations in brain waves produced by the cortex. A major strength of an EEG is that researchers can link electrical changes in general brain areas to exposure to emotional stimuli. However,

EEGs record activities of brain cells nearest to the electrodes and cannot access information from the deep brain areas that are especially important for emotion.

#### ***Behavioral/expressive measures:***

Apart from physiological indices, emotion researchers have also explored behavioral and expressive aspects of emotions.

The face is the most expressive part of the body and has been the target of attention by most researchers. Two major approaches to facial measurement include the facial coding schemes and electrophysiological recordings.

Ekman and Friesen's (1978) facial action coding system (FACS) is perhaps the best known among the facial coding schemes. In this approach, trained coders manually code facial expressions by identifying which muscles are contracted on a person's face at any given moment and recording how intensely and how long those muscles contract. Researchers use the patterns of muscle contraction as a nonverbal measure of people's emotions. FACS is quite useful for researchers studying the effects of emotion on social interaction. However, coding of facial expressions is very time-intensive and is greatly dependent on the coder's ability to consistently distinguish emotional movements from all of the other facial movements.

Another way of measuring facial expressions of emotions is through facial electromyography (FEMG). This technique measures electrical potentials from two major muscle groups in the face, the corrugator supercillii and zygomaticus major, via the placement of surface electrodes on the skin of the face. It is seen that activity of the zygomatic muscle, which controls smiling, is associated with positive emotional stimuli and positive mood state. In contrast, activity of the corrugator muscle, which lowers the eyebrow and is involved in producing frowns, varies inversely with the emotional valence of presented stimuli.

Researchers have been successful in adapting FEMG as a method to study emotional expression to advertising stimuli (Hazlett, 1999).

Bolls et al. (2001) found that zygomatic muscle activity was stronger during radio advertisements with a positive emotional tone whereas corrugator muscle activity was greater during ads with a negative emotional tone. FEMG has been shown to be capable of measuring response to weakly evocative emotional stimuli even when no changes in facial displays have been observed with the FACS system as well as when subjects were instructed to inhibit their emotional expression.

It is possible to broadly relate the three measurement systems at which we will be looking - PS, BMS and CERA - to the above emotions-research protocols - self-report, physiological and behavioral/expressive. PS emphasizes analysis of subjective experiences reported by the respondents. BMS relies primarily on physiological data gathered from respiratory, heart and motor responses. CERA is based on the behavioral/expressive FEMG technique.

### **Significantly different**

All three systems are significantly different from each other in their methodology as well as data analysis.

Picture Sorts uses visual sorting of photographic stills taken from the commercial to probe respondent reactions shortly after initial viewing, based on the respondent's memory, wherein the respondent attempts to reconstruct the experience after the initial exposure by use of picture-sorting cards. Multiple sorts are used to obtain multiple levels of self-reported response. Typically the respondents are expected to sort images based on those they recognize seeing.

The Biometric Monitoring System is a physiological measure that involves embedding biometric sensors in a vest or garment worn by the respondent. The embedded sensors detect and record biological measures such as respiration, heart rate, skin conductance, etc.

Continuous Emotional Response Analysis utilizes facial electromyography techniques to measure emotional responses to advertise-

Table 1: Comparison of Samples, Mode of Exposure and Method of Study

	Facial EMG	Picture Sorts	Biometrics
Sample size	40 males; 21-35 years of age.	203 males; 21-35 years of age.	30 males; 25-35 years of age.
Mode of exposure	Embedded in a 15-minute video	Online clutter exposure	Embedded in 30-minute TV program
Method of study	FEMG; measurement of contraction of facial muscles	Visual picture sorts of key executional frames; respondents interviewed online	Biometric Monitoring System; sensors embedded in garment measuring respiration, motion, heart rate and skin conductance.
System (company providing it)	CERA (Gallup & Robinson)	PS (Ameritest)	BMS (Innerscope)

ments. It relies on the precept that facial muscle movements offer the best “markers” to accompany emotional responses to a commercial. As mentioned previously, the technique involves measuring minute electrical impulses in two major muscle groups in the face, the corrugator supercillii and zygomaticus major muscle groups, which have been shown to be valid indicators of negative and positive emotional responses, respectively.

In addition to their essentially non-verbal nature, an underlying commonality in all three approaches

has been that they yield continuous measures. As such, it is feasible to compare them on a common continuum and highlight areas where their results are either similar or dissimilar.

### “Weasel” television ad

The common stimulus for all three measures was a 30-second Heineken beer television ad titled “Weasel.” The commercial features a young man with a winning smile and oozing with confidence arriving at a party carrying a brown bag, probably containing a six-pack of beer. As he heads for the refrigerator, he

exchanges looks and smiles with an attractive woman who appears to be checking him out. While stashing his “inferior” brand of beer in the fridge, the man notices another six-pack of a superior beer, i.e., Heineken. As the man grabs a couple of Heineken bottles, a title is superimposed on the screen: “The Weasel.” After making the deceptive switch, he rejoins the party. The concluding title reads, “It’s all about the beer.”

The commercial was tested, the data gathered and the results reported by each company as part of the Emotions in Advertising Project from the American Association of Advertising Agencies (AAAA) and the Advertising Research Foundation (ARF) (Table 1).

A note on the comparative analysis: This analysis is based on findings available in the public domain, mostly as a result of the companies having participated in the AAAA/ARF study. The authors did not have direct access to the data sets obtained by either Ameritest or Innerscope. Comparing three differ-



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Table 2: Comparative Analysis of CERA, BMS and PS with Reference to Selected Key Events

Data Points	Descriptions of Event	Facial Electromyography (CERA)	Biometric Monitoring System (BMS)	Picture Sorts (PS)
A	Opening scene showing a man walking on the street, holding a brown bag.	No significant activation.	Flat and steady; little or no activation.	Slight rise in activation.
B	Scene of a party in progress; women in the hallway.	Sharp increase in both positive and negative emotion activation.	Flat and steady; no major positive activation.	Negative trend in activation.
C	Fuzzy shot of people crowding the hallway.	Slight decline in positive activation; negative activation remains high.	No change in either positive or negative activation.	Major decrease in positive activation.
D	Protagonist greeting others guests.	Significant spike in positive activation.	Steady increase in activation.	Sharp increase in positive activation.
E	Close-up of protagonist's (smiling) face.	Sharp decline in positive activation.	Slow and steady rise in positive activation.	Significant drop in positive activation.
F	Exchanges smiles with woman.	Slight increase in positive activation.	Slight increase in activation.	Sharp increase in positive activation.
G	Walks over and opens the fridge.	Modest increase in positive activation accompanied by some decrease in negative activation	Gradual and steady increase in positive activation.	Sharp decline in positive activation.
H	Advertised brand is revealed, "The Weasel" superimposed on the screen.	Positive activation declines along with increase in negative activation.	Sharp increase in positive activation.	Positive activation level reaches its peak.
I	Product switch is made.	Positive activation peaks as humor in the episode is recognized.	Steady decline in negative activation.	Positive activation holds steady.
J	Protagonist rejoins party.	Both positive and negative activation decrease after transition.	Positive activation continues to decline.	Sharp decline in positive activation
K	Dark screen followed by tagline, "It's all about the beer."	Positive stays high at branding; slight decline in negative activation.	Sharp decline in activation.	Positive activation holds steady.
L	Final branding moment.	High activation at payoff.	No payoff at branding moment.	Positive activation steady during final moments.

ent techniques using totally different methodologies and measurement metrics presented two challenges:

1. While both CERA and BMS are based on "moment-by-moment" physiological reactions on a temporal continuum, PS uses photographic stills of important scenes from the video to probe respondent response. In order to ensure comparability of results, it was necessary to first estimate the time sequence of each of the PS photographs so as to facilitate subsequent mapping of activation levels, measured by each technique against a common (temporal) continuum.
2. Because each of these three techniques used different scales (with different measuring units) to measure the activation levels, it was necessary to index and position all three sets of scores at the same

starting point in order to facilitate comparison. The indexed score for each technique was calculated by using the following formula:  $\text{indexed score} = (X - SP) / SD$ , where  $X$  = each observation,  $SP$  = starting point for technique, and  $SD$  = standard deviation for each technique. We have used a common term, activation levels (indexed), to represent respondents' reactions in the three techniques.

### Congruency and divergence

Analysis of the results obtained by each of the techniques reveals areas of congruency and areas of divergence. During the opening scene showing the visual of a person carrying a brown paper bag walking toward a house (seconds 0-4), the response level in each of the measures is consistent with little activation being evident; there is nothing

remarkable about either the scene or the protagonist.

Beginning at :04 and continuing to :08, the systems show significant differences. This time coincides with the screen revealing a party scene with young men and women standing in the hallway, chatting and enjoying themselves. PS shows the scene to be initially deactivating; BMS as generally neutral; and CERA as activating. Both PS and CERA show :08, where the actor introduces himself, to be an activating image.

CERA and PS both show sharp decline in audience interest between :08 and :09 while BMS response level remains unchanged. At this point the camera remains focused on one side of the protagonist's face (in contrast to the preceding party scenes).

The appearance of an attractive girl at :09 piques viewers' attention. All the measures record an increase in activation level of viewers, with PS recording the sharpest spike; both BMS and CERA register more modest gains.

When the protagonist walks to the refrigerator with the brown bag (around :10), PS records a sharp decline in activation that continues through :14, when the refrigerator door opens to reveal the contents. Both CERA and BMS register a steady and growing level of emotional activation during this time.

A key moment in the ad is at :14 where the "inferior" beer brought by the man is juxtaposed with the "superior" Heineken brand. All three measures record increasing activation. However, the actual apex in activation occurs at somewhat different parts of the exchange: for PS and BMS, it is when the word "weasel" appears, and for CERA, it is when the "exchange" takes place.

At about :20 there is a significant transition when the man walks out to rejoin the party after having switched the brand and flaunting the "superior" Heineken bottle. There is decline in positive and negative activation in all measures.

Beginning at around :25, the commercial fades to black, then says, "It's all about the beer," then fades to black again, followed by the Heineken logo at about :28. This is



a key moment in the ad that provides another important contrast in the findings of the three measures: CERA shows that the high positive emotional activation invoked during the brand “switch” is sustained through the end, when the final positioning line and brand name are shown; PS shows activation during the messaging but not during the branding; and BMS shows declining activation during both the messaging and branding.

Table 2 summarizes the findings of the three different methods at the aforementioned key moments of the commercial.

### Significant differences

In general, all three methods were consistent in identifying the peak activation period in the commercial. However, there were significant differences in what the three revealed about the build-up and selling messages.

BMS results were quite linear compared to both CERA and PS. In BMS the activation rose slowly but steadily till about :18 when both the Heineken and “inferior” brand were placed next to each other. Thereafter, the activation dropped steadily until the final branding moment, when it increased slightly. Like other measures of the sympathetic nervous system, BMS does better in recording strong arousals than when the level of activation is mild to moderate.

In contrast, both PS and CERA showed a dynamic and nonlinear response pattern. In the initial moments of the ad, where there was a transition from the street scene to the party scene, CERA proved to be the most sensitive measure in recording the expected spike in interest. Subsequently, there was a very sharp decline in PS measure, especially at the scene where the man was shown standing before the refrigerator; neither BMS nor CERA reveal such a sharp decline.

Another area of difference between the three methods was seen during the brand message and logo presentation toward the end of the commercial. BMS showed a decline in activation during these sequences while PS and CERA showed it being

maintained during the messaging and CERA showed it being additionally maintained during the branding.

The greater apparent sensitivity of PS and CERA seems to make them more actionable measures than BMS as they reveal how the components of a commercial contribute to its overall activation levels. Some of the less intuitive findings from PS (e.g., the peak at :09.5 showing a typical party scene and the valley at :13.5 exposing the brand) are difficult to explain though critics may

point to them as evidence of potential problems typically associated with non-coincidental, cognitively filtered self-reporting systems. Even though CERA’s findings seem to be largely in accord with the storyline of this ad, it is worth noting that FEMG, as a technique, is not free from criticism. Some have pointed to the obtrusive nature of the procedure, which may interfere with any spontaneous, natural reactions. Others have noted the possibility of non-affective processes like mental fatigue, task

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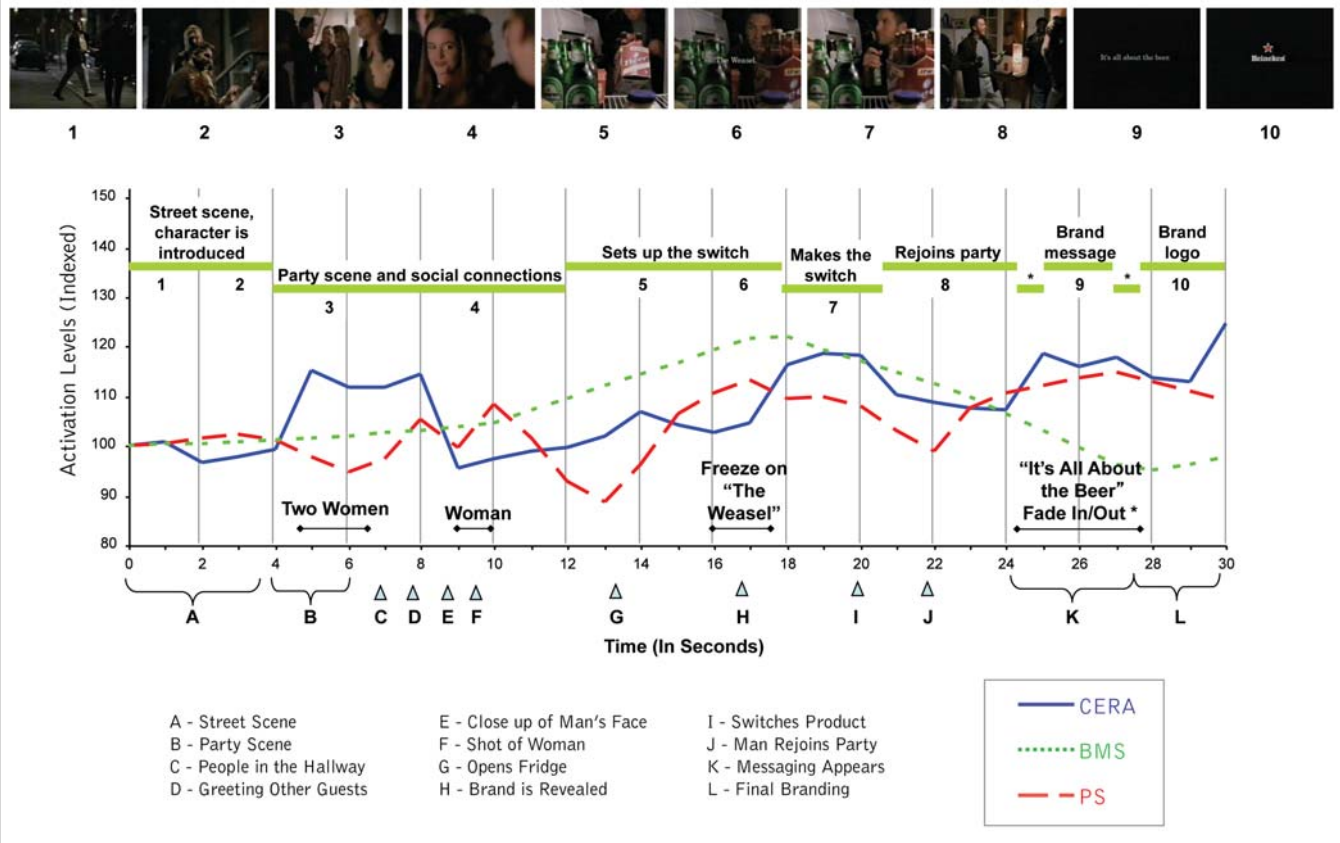
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Figure 1: A Graphical Representation of the Responses Recorded by CERA, BMS and PS



involvement, speech, etc., tainting the measure of electrical conductance in target muscles.

### Unique opportunity

In conclusion, the study was a unique opportunity to compare and contrast three techniques' relative effectiveness in tracking audience emotional valence during the course of a single commercial. While all three techniques were successful in tracking significant changes in emotional reactions in the viewer, there were significant differences in the extent to which they were able to provide valence information for each. Comparative studies of this nature will be useful to establish the concurrent validity of different types of measures used to assess advertising effectiveness. | Q

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## Survey Monitor

continued from p. 8

from a group-buying Web site say that the concept will affect the way consumers shop in the future, according to Vancouver, B.C., research company Vision Critical. Group-buying is beginning to have an effect on the mind-set of consumers across the three countries, with people in the U.S., U.K. and Canada becoming more price-sensitive after taking advantage of a group-buying offer, but there are great demographic and geographic differences in how consumers partake in the group-buying trend.

Groupon has effectively achieved top-of-mind status in this new category of group-buying facilitators. About half of Americans (45 percent) have heard of Groupon, along with 35 percent of Britons and 34 percent of Canadians. Groupon has the highest level of awareness, with competitors trailing far behind (WagJag in Canada at 23 percent; EverSave in the U.S. at 20 percent; and Groupola in the U.K. at 9 percent). About half of respondents in the three countries had not heard of any of the group-buying Web sites mentioned by name in the survey. In the U.K., of those who hadn't heard of the sites, two-thirds were over the age of 55 (62 percent) while roughly half of those under 55 had not heard of them either. American and Canadian men are more likely than women not to have heard of group-buying.

Americans are most likely to purchase restaurant or food-related group-buying deals (46 percent); product deals such as clothing, tools, furniture or electronics (43 percent); or entertainment deals like movie and concert tickets (39 percent). British men are more likely to buy restaurant and food deals from group-buying Web sites (44 percent) while women prefer spa, salon and cosmetic deals (37 percent). Canadian women also buy spa and salon deals (42 percent) but both genders participate in restaurant deals (70 percent of men and 59 percent of women). Deals for children are the least-

purchased in the U.K. and Canada (8 percent and 4 percent) while spa and salon deals are bought least in the U.S. (13 percent).

Americans who have not bought a group deal say this is because they had not heard of the concept (12 percent) or aren't interested in group-buying (27 percent). One-in-five Americans (18 percent) who haven't bought from any group-buying sites say this is because they do not want to share their credit card information. In the U.K., some of those who have not participated also cited not wanting to share their credit card information (14 percent) but for the most part hadn't seen any deals that were of interest to them (59 percent). When asked why they have not bought any group deals, Canadians mentioned not having heard of group-buying until now (37 percent) or not having seen any deals they wanted to participate in (27 percent).

In the U.S., awareness about the concept of group-buying is lowest in the Midwest with 46 percent of respondents saying they have not heard of any of the listed group-buying Web sites. Two thirds of people in the Northeast have heard of one or more of the sites (67 percent). Awareness is consistent throughout the U.K., although Scotland has the highest level of awareness (53 percent of Scots have heard of one or more of the sites listed). In Canada, awareness is lowest in the Atlantic Provinces and Quebec (74 percent report having not heard of any of the Web sites listed) and highest in British Columbia, where 65 percent of respondents have heard of one or more group-buying Web sites.

In Canada, women are driving the group-buying trend, with 19 percent having bought from Groupon (compared to 11 percent for Canadian men). Both genders are equally likely to purchase from group-buying sites in the U.S. (men 20 percent, women 19 percent) and the U.K. (men 20 percent, women 17 percent).

Men in the U.K. are most likely to allow a group-buying deal they've purchased to expire before

they get a chance to use it (44 percent). Less than a quarter of British women (24 percent) have allowed a deal they bought to expire. In Canada, women are more likely than men to tell their friends about group-buying deals they've seen using Facebook, Twitter or e-mail (46 percent of women and 27 percent of men). As a result, one-third of Canadian women who have purchased a group deal have received a referral incentive (29 percent). Nearly half of Americans who have bought a group deal have purchased it as a gift for someone else (45 percent).

In Britain, 26 percent of men have purchased a deal, used it at a vendor and then returned to that same vendor at full price. Only 7 percent of British women return to pay full price. American men are twice as likely as women to return (36 percent to 18 percent). In Canada, women are more loyal (28 percent) than men (19 percent) when it comes to returning to a vendor at full price.

Among the three countries studied, Americans are least likely to pay full price (35 percent), followed by Britons at 31 percent and Canadians at 29 percent. Almost two-thirds of American men (64 percent) are willing to pay more for something they really want but prefer to get a deal. Two-thirds of women in the U.K. (68 percent) like to get a deal but will pay full price for something they really want. In Canada, 70 percent of men and 65 percent of women like to get a deal but will pay full price if required.

At least three in five Britons, Americans and Canadians who have bought a group-buying deal say it has made them more price-sensitive and as a result they now think twice before paying full price.

Two in five British men and one-third of Canadian men who have purchased from a group-buying Web site feel that group-buying ultimately harms the small businesses that participate in it - only 19 percent of British women and 13 percent of Canadian women share this view. Twenty-nine percent of Americans feel group-

buying is detrimental to small business. For more information visit [www.visioncritical.com](http://www.visioncritical.com).

### Consumers weigh the pros and cons of online vs. in-store shopping

While online shopping is increasing and in-store shopping is decreasing, the pros and cons of each serve as a testament to consumers needing both. Nearly 45 percent of online shoppers say they are making more online purchases than they did a year ago and 37.8 percent are shopping in stores less, but consumers are drawn to aspects of each, according to BIGresearch, Columbus, Ohio.

For great customer service and making returns, brick-and-mortar retailers beat the online competition, but when going head-to-head, online retailers win on shoppers' perception of product assortment, price and promotion.

According to adult online shoppers, 46.3 percent find the best assortment online, 16 percent in stores and 37.6 percent notice no

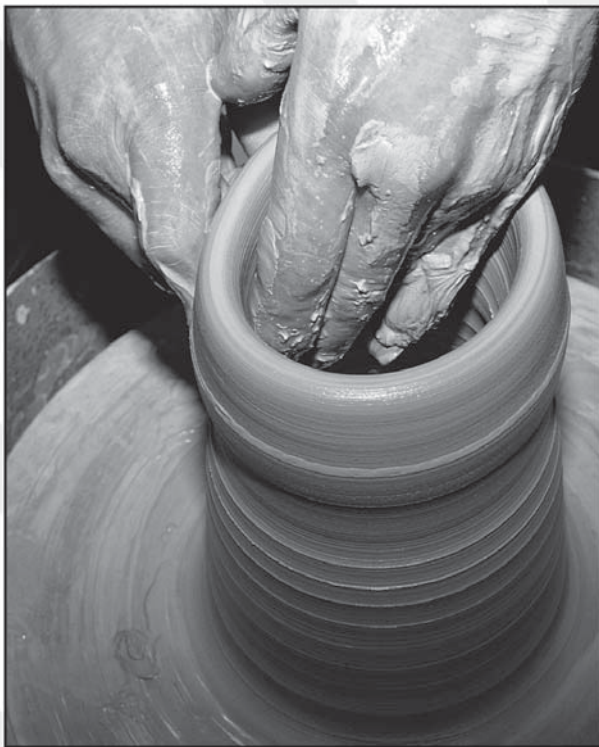
difference in assortment. When asked where they can find the best prices, over 50 percent say online, 14.4 percent say in stores and 35.4 percent believe pricing was the same in both places. Thirty-five percent believe the best sales and promotions are found online while 28.6 percent believe stores are superior. Over 36 percent think the sales and promotions in both places are the same. Regarding customer services, however, online retailers lag 20 percent behind brick-and-mortar stores (19.8 percent versus 49.3 percent). Just over 30 percent believe customer service is no different online or in stores.

Interestingly, 70 percent of online shoppers prefer to shop at an online retailer that also has a traditional storefront. Further, 62.3 percent would rather make a return in-person in a store while only 27.4 percent say they would rather ship it back. Just under half said that they enjoy the shopping experience at a brick-and-mortar retail store and an online retailer

equally; 32.9 percent said they like the online experience most; and 13.7 percent said in store.

However, while overall customer service ratings for online retailers lag brick-and-mortar, those online retailers who succeed in customer service are doing something very right, as seven of the top 10 customer service companies are either fully online or have a strong online/catalog presence. Zappos.com took top honors in a study conducted by BIGresearch on behalf of the National Retail Federation Foundation, Washington, D.C., and American Express, New York.

Newegg (No. 10) jumped five spots to make the top 10 this year. Continuing to impress shoppers with their stellar service, Amazon.com (No. 2), LL Bean (No. 3), Overstock.com (No. 4), Lands' End (No. 5), JCPenney (No. 6), Kohl's (No. 7), QVC (No. 8) and Nordstrom (No. 9) round out the remainder of the list. For more information visit [www.bigresearch.com](http://www.bigresearch.com).



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## Product and Service Update

continued from p. 12

intended to simplify research project management and creation while providing an application programming interface to allow users to integrate the platform into their own technologies.

USamp has planned full SampleMarket 2.0 support for mobile devices in the second quarter of 2011, enabling users to log in to their market research projects via smartphone; check on real-time feasibility and statistics; and stop or start projects from any location.

Among the enhancements included in SampleMarket 2.0 are a complete redesign with a simplified user interface; project, group and e-mail wizard pages; access to panelists from uSamp's U.S. panel for clients with or without their own panel; fielding parameters for the uSamp channel, with the ability to control daily quotas or directions; the ability to define group quotas by channel, such as a desired amount from a client's own panel and another amount from uSamp's channel; and real-time cost per interview (CPI) monitoring and CPI limits with e-mail alerts. For more information visit [www.samplemarketbeta.com](http://www.samplemarketbeta.com).

### SurveyApp released for mobile research

The research collaboration msw loop from MSW Research Inc., Lake Success, N.Y., and Loop Analytics LLC, Oldsmar, Fla., has launched SurveyApp for the iPhone, iPad, iPod Touch; Android; and the SurveyApp Mobile Panel. SurveyApp is a mobile market research platform designed for companies to conduct market research with respondents who earn rewards every time they participate. The SurveyApp business model is free to download, and respondents earn money for taking surveys or by completing a comprehensive behavioral and attitudinal profile. SurveyApp aims to allow marketers and advertisers to tap into the mobile market for surveys, with tar-

geting capabilities, result turnaround and accuracy. The platform capabilities are also available for installation directly in client apps to collect observational analytics and administer surveys using a non-disruptive methodology. For more information visit [www.loopanalytics.com](http://www.loopanalytics.com).

### Company debuts first Facebook management tool for businesses

Ridgeland, S.C., social media technology company mediafeedia has introduced a social media management tool exclusively for Facebook. Companies can access the digital tool at no charge from mediafeedia's Web site and use its dashboard to manage and publish content on their Facebook pages.

Using a Web-based interface, mediafeedia does not require downloads to operate. Users are able to create a mediafeedia account and import Facebook business pages that they currently administer. These pages will be added to the user's mediafeedia dashboard and synchronized with Facebook. The dashboard features a selection of free functionalities for businesses on Facebook, including the ability to manage multiple Facebook fan pages from a single dashboard; receive e-mail notifications about comments on fan pages and respond directly via e-mail; post real-time Facebook status updates that include text, images, links and link attachments; schedule future wall posts for specific dates and times; view and edit scheduled messages in a central location; share Facebook page responsibilities with other administrators; and grant administrators access and permissions for specific pages. For more information visit [www.mediafeedia.com](http://www.mediafeedia.com).

### QuickQual offers 'assisted' qualitative research

20|20 Research, Nashville, Tenn., has released QuickQual, an offering built around 20|20's QualBoard online bulletin board platform designed to use proprietary processes, technology and a qualitative assistant to deliver 14-day (or less) project turnaround on consumer studies in the U.S.

The 14-day clock starts when 20|20 receives the project specifications. The process starts with an up-front planning session with the qualitative assistant, and the assistant will write the screener and provide guidance in writing the discussion guide. The QualBoard can run for up to three days. The qualitative assistant will load the discussion guide and provide limited probing as needed. The qualitative assistant will tag key content in the discussion for use during analysis and deliver a daily highlights report. Upon project completion, 20|20 will send incentives to participants and the assistant will provide a complete, customized report and transcript package. For more information visit [www.2020research.com](http://www.2020research.com).

### Briefly

FocusVision, a Stamford, Conn., research software company, has enhanced its video-editing tool which is integrated into the online archive FocusVision provides after every project. Improvements include a playback feature to facilitate fine-tuning of clip content; an updated interface; and pop-up Tool Tips. Once created, users can combine their video clips into highlight reels and insert them into PowerPoint presentations. For more information visit [www.focusvision.com](http://www.focusvision.com).

Revelation has released its Visual Activity Scheduler, an upgrade to Revelation Project designed to make online qualitative research easier and more visually intuitive using drag-and-drop functionality. The interface features aim to allow users to gain a holistic view of activities across segments and participants; review activity progress; and schedule, remove or delete online activities. For more information visit [www.revelationglobal.com](http://www.revelationglobal.com).

Menlo Park, Calif., research company Knowledge Networks has expanded the number of young adults and Hispanics involved in its KnowledgePanel. In 2011, Knowledge Networks intends to more than double the number of



young adults (ages 18–24) and increase Hispanic representation by more than 40 percent. For more information visit [www.knowledgenetworks.com](http://www.knowledgenetworks.com).

Columbia, Md., research company Arbitron Inc. and Hailey, Idaho, business solutions company Marketron have integrated Arbitron's TAPSCAN Web, a Web-based sales proposal and analysis system, with Marketron Exchange, the media ecosystem platform for connecting buyers and sellers electronically to share orders, invoices, performance information, ratings information and more. Linking the two systems is intended to give radio sales executives an efficient, all-in-one sales and traffic solution. For more information visit [www.arbitron.com](http://www.arbitron.com).

New York research company Ipsos North America's omnibus division has added cell-phone dialing to its Ipsos U.S. Express Telephone Omnibus. The omnibus also offers weekly Spanish interviews at no additional charge. For more information visit [www.ipsos-na.com](http://www.ipsos-na.com).

Stamford, Conn., research company InsightExpress has launched LiveInsights, a real-time campaign measurement, optimization and reporting tool for brand marketers. LiveInsights is designed to eliminate fundamental issues with existing real-time reporting options, namely the need for weighting. Results are available to clients via a customized dashboard that delivers data using Adobe Flash technology. For more information visit [www.insightexpress.com](http://www.insightexpress.com).

ProsperChina, a Worthington, Ohio, research company, has introduced InsightCenter, a consumer-centric dashboard intended to deliver the responses of 19,000+ consumers who participate in the ProsperChina Quarterly survey. Users can choose from thousands of data points to display the latest shopper insights. For more information visit [www.goprosper.com](http://www.goprosper.com).

London research company Skopos has launched the MTrack/TabTrack/

ChatTrack syndicated tracking application to measure and track the commercial and collective impact of mobile, tablet and social network channels. Every quarter Skopos will survey 500 U.K. citizens on their awareness and usage; opinions and evaluations; drivers and barriers for the mobile and social networks as channels for buying, shopping, connecting, socializing, entertaining, etc. For more information visit [www.skopos.info](http://www.skopos.info).

Israel research company Dooblo has released version 1.31 of its SurveyToGo software. The upgrade is provided free of charge to all SurveyToGo customers. New features include live quota support; free-form sketching questions; SPSS Quantum data format support; and live image capture from the laptop client. For more information visit [www.dooblo.net](http://www.dooblo.net).

C&R Research, Chicago, has a debuted market research online communities called ParentSpeak, designed to bring together parents of children up to 18 years of age for client-sponsored research. Among the research capabilities offered through ParentSpeak are online immersion and advisory sessions, including online chat sessions and focus groups, bulletin boards, exploratory surveys, photo and video journals and voicemail shop-alongs. For more information visit [www.parentsspeak.com](http://www.parentsspeak.com).

Chennai, India, research company Rightrack has launched Easy Research Pro, an online business research tool that uses a social media style of participant interaction and multimedia streaming. For more information visit [www.rightrack.net](http://www.rightrack.net).

Kinesis Survey Technologies LLC, an Austin, Texas, research company, has updated its Kinesis Survey solution to include built-in support for Google Analytics to allow users to track survey respondent activity by each survey URL for all survey projects. For more information visit [www.kinesisurvey.com](http://www.kinesisurvey.com).

Glastonbury, Conn., marketing

communications agency Cronin and Company LLC has added an analytics component including reporting and analysis; search engine optimization; and Web analytics to its media offerings. For more information visit [www.cronin-co.com](http://www.cronin-co.com).

Experian, a Costa Mesa, Calif., research company, has expanded its marketing services with Experian Hitwise in India. Experian's Internet measurement service is intended to help domestic and international marketers operating in India to improve their online marketing, content development, affiliate strategies and search tactics. Experian Hitwise reports on 200,000+ Web sites across 119 industries and over six million search terms, based on the anonymous and aggregated Internet activity of an opt-in panel of Indian Internet users. For more information visit [www.experian.com](http://www.experian.com).

GfK Research and Technology, Nuremberg, Germany, has launched GfK Network Intelligence Solution (GfK NIS), designed to monitor mobile Internet usage and user behavior in real-time. GfK NIS uses data from operators' IP traffic to produce insights into daily mobile Internet usage. NIS aims to measure user behavior on all Web sites visited using any mobile Internet device. For more information visit [www.gfkrt.com](http://www.gfkrt.com).

Reston, Va., research company comScore Inc. has released Video Metrix 2.0 in the U.K. The online video measurement service features several enhancements, including the ability to filter video viewing activity between advertising and content; a reach/frequency tool to help agencies plan against online video; additional reporting metrics; and ranking of video advertising networks by actual reach of ads delivered. For more information visit [www.videometrix2.com](http://www.videometrix2.com).

Orem, Utah, research company Opinionology has launched panels in Italy and Spain. For more information visit [www.opinionology.com](http://www.opinionology.com).

## Research Industry News

continued from p. 14

**dunnhumbyUSA** have partnered to conduct a study to help consumer packaged goods marketers better understand the link between consumers' usage of brand Web sites and in-store brand-buying behavior. The study will be based on an integrated panel of one million U.S. Internet users who have given comScore explicit permission to have their online behavior continuously measured and matched to dunnhumbyUSA's in-store brand-buying data.

**Ruby Tuesday Inc.**, a Maryville, Tenn., restaurant chain, and Cincinnati research company **dunnhumbyUSA** have signed a three-year agreement to incorporate continually-updated information about customer behavior and preferences into Ruby Tuesday's operations in U.S. restaurants. Financial terms were not disclosed.

Port Washington, N.Y., research company **The NPD Group** has renewed its information-sharing alliance with Framingham, Mass., office supply company **Staples Inc.**

**Decision Analyst**, an Arlington, Texas, research firm, has adopted Westport, Conn., research company **Imperium's** RelevantID digital fingerprinting technology.

Encino, Calif., research company **uSamp** has been selected by Denver, Colo., research company **GutCheck** to provide the automated delivery of

screened and qualified participants for moderated, online qualitative market research studies.

Additionally, Washington, D.C., financial information company **Kiplinger** has chosen uSamp to power a custom online market research panel under the Kiplinger name.

### New companies/new divisions/relocations/expansions

Westlake Village, Calif., research company **J.D. Power and Associates** has formed a dedicated digital research team to further incorporate online and mobile media platforms into its market information research services. The company has hired Fabien Reille to lead the company's digital research activities.

London research company **Populus** has launched a data collection and processing business dubbed Populus Data Solutions (PDS). Patrick Diamond will lead the division.

Research veterans Sam McGuire and Alison Bigsby have founded **Samson Research** in London. The firm is online at [www.samsonresearch.co.uk](http://www.samsonresearch.co.uk).

**Gazelle Global Research Services LLC**, New York, has opened its qualitative viewing room located at the company's headquarters. The room holds a group of eight participants with a separate viewing room for four-to-eight clients.

**The Dieringer Research Group Inc.** (DRG), Brookfield, Wis., has opened a Focus Center

to host in-person focus groups and in-depth interviews at its headquarters. The DRG Focus Center includes two focus group suites, plus a smaller suite designed for in-depth interviews.

Chicago research company **Synovate** has opened a full-service office in Geneva, Switzerland.

Fresno, Calif., research company **Decipher Inc.** has created a division to serve users of its Beacon software suite.

**Innerscope Research Inc.**, Boston, has opened a dedicated biometrics and neuroscience media lab. The Innerscope Media Lab is located in Boston and features two client viewing rooms with a large test room that has the space and capability to biometrically test up to 30 people at one time. The lab also features a separate area with seven eye-tracking stations.

**Kinesis Survey Technologies LLC**, an Austin, Texas, research company, has opened a London office. Tariq Mirza has been appointed managing director, Europe.

Orem, Utah, research company **Opinionology** has opened a service bureau in London to support its European panels.

**Radius Global Market Research**, New York, has opened **Radius EMEA**, a London office and team dedicated to serving clients in Europe, the Middle East and Africa. Michael Fodor has been named managing director, Radius EMEA.

### Research company earnings/financial news

**The Nielsen Company**, New York, priced its initial public offering of 71,428,572 shares of its common stock at \$23 per share. Shares of common stock began trading on the New York Stock Exchange under the ticker symbol NLSN on January 26, 2011.

## Need a project quote?

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## Names of Note

continued from p. 10

**Rupert Blackwell** has been named board director for *ICM Research*, London.

*Radius Global Market Research*, New York, has added **Tacis Gavoyannis** to its London EMEA management team as senior vice president, business development.

*Schlesinger Associates*, an Edison, N.J., research company, has promoted **Eric Hellman** to director, business development, Schlesinger Online Solutions; and **Jeffrey Taylor** to facility director, San Francisco. The company has also appointed **Jason Horine** as director, online qualitative solutions; and **Debby Schlesinger-Hellman** as director, Phoenix.

*GfK Custom Research North America*, New York, has named **Angelina Villarreal** vice president, multicultural research.

New York research company *WorldOne* has hired **Jeff Palish** as senior vice president, business development. WorldOne has also promoted **Kim-Fredrik Schneider** and **Stephane Malka** to executive vice president.



Schneider

Malka

**Hugh McGoran** has joined Reston, Va., research company *com-Score Inc.* as senior vice president, U.S. ad agency sales.

*Morpace Inc.*, a Farmington Hills, Mich., research company, has promoted **Duncan Lawrence** to president and COO and **Sharna Morelli** to executive vice president.

Netherlands research company *Nebu*

has made four appointments: **Ian Roberts**, chief commercial officer; **Rob van Hees**, manager, customer care; **Peter Takacs**, Web development; and **Berend de Jong**, CTO.

**Andrew Jeavons** has joined Seattle research company *Survey Analytics* as executive vice president.

**April Morris** has been appointed president and owner of *Focus Groups of Cleveland*, a Cleveland research company.

**Tony Brown** has been promoted to senior account executive at *EMI – Online Research Solutions*, Cincinnati.



Brown

Atlanta research company *Talking Heads* has named **Eric Daigle** senior account director.

Denver research company *iModerate* has hired **Steve Auerbach** as vice president, sales, West; and **David Baron** as vice president, sales, East.

**Fabien Reille** has been hired to lead the digital research division of Westlake Village, Calif., research company **J.D. Power and Associates**.

*Scarborough Research*, New York, has named **Brian Condon** executive vice president, commercial development.

Glastonbury, Conn., research firm *Cronin and Company LLC* has promoted **Gary Capreol** to senior vice president, director, media and analytics.

**Brad Nimmons** has been named director, client services, at Portland, Ore., research company *Rentrak Corporation*.

Milwaukee research company *Market Probe* has hired **Don Ryan** as vice

president, technology practice.

London research company *Added Value* has appointed **Nic Bulois** as head of quantitative insight in its U.K. office.

**Jodie Roberts** has joined New York research company *GfK Roper Consulting* as regional director, Asia-Pacific.

Westport, Conn., research company *Firefly Millward Brown* has named **Cécile Conaré** CEO, U.K. business, and director, Europe.

**Ken Kaisen** has been named CTO and CIO of *Vertis Communications*, Baltimore.



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# calendar of events

ESOMAR will hold its annual Asia-Pacific conference, themed “Increasing Value Through Simplicity,” on **March 20-22** in Melbourne, Australia. For more information visit [www.esomar.org/apac](http://www.esomar.org/apac).

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on **March 20-23** at the New York Marriott Marquis in Times Square. For more information visit [www.thearf.org](http://www.thearf.org).

Research Magazine will hold its annual conference on **March 22-23** at the Grange St. Paul's Hotel in London. For more information visit [www.research-live.com/research2011](http://www.research-live.com/research2011).

The Pharmaceutical Marketing Research Group will hold its annual national conference on **March 27-29** at JW Desert Ridge in Phoenix. For more information visit [www.pmrg.org](http://www.pmrg.org).

SymphonyIRI will hold its annual summit on **March 28-30** at the Fontainebleau Miami Beach Resort and Spa in Miami. For more information visit <http://cpgsummit.com>.

Gartner will hold its customer 360 summit on **March 30-April 1** at the JW Marriott LA Live in Los Angeles. For more information visit [www.gartner.com/technology/summits/na/customer-360](http://www.gartner.com/technology/summits/na/customer-360).

The Merlien Institute will hold a conference, themed “Qualitative Consumer Research and Insights,” on **April 6-8** at The Diplomat Hotel in Sliema, Malta. For more information visit [www.merlien.org/upcoming-events/qcri2011.html](http://www.merlien.org/upcoming-events/qcri2011.html).

IIR will hold a conference focused on design and culture and brand identity and packaging on **April 11-13** in Chicago. For more information visit [www.iirusa.com/fuse](http://www.iirusa.com/fuse).

Connecting Group will host a confer-

ence, themed “Market Research and Insights in Action,” on **April 12-14** in New York. For more information visit <http://connecting-group.com/web/eventoverview.aspx?identificador=16>.

Cleveland AMA will hold its annual market research conference on **April 14** at the Doubletree Hotel Cleveland South in Independence, Ohio. For more information visit [www.marketingpower.com](http://www.marketingpower.com).

Globalpark will hold its annual mobile research conference on **April 18-19** at The May Fair Hotel in central London. For more information visit [www.mobileresearchconference.com](http://www.mobileresearchconference.com).

IIR will hold a conference focused on technology in market research on **May 2-3** at The Allerton Hotel in Chicago. Register with code TDMR11QUIRK to save 20 percent. For more information visit [www.iirusa.com/tdmr](http://www.iirusa.com/tdmr).

The Society of Competitive Intelligence Professionals (SCIP) and Frost & Sullivan Institute will host SCIP's annual international conference and exhibition on **May 9-13** at the Buena Vista Palace Hotel and Spa in Lake Buena Vista, Fla. For more information visit [www.scip.org](http://www.scip.org).

The Qualitative Research Consultants Association will hold its first symposium on excellence in qualitative research on **May 12** at the University Club of Chicago. For more information visit [www.qrca.org](http://www.qrca.org).

The American Association for Public Opinion Research will host its annual conference on **May 12-15** at the Arizona Grand Resort in Phoenix. For more information visit [www.aapor.org](http://www.aapor.org).

The Pharmaceutical Business Intelligence and Research Group will hold its annual

general meeting on **May 15-18** in San Antonio. For more information visit [www.pbirg.com](http://www.pbirg.com).

The Council of American Survey Research Organizations will hold a management conference on **May 16-17** at the Hyatt Regency in Chicago. For more information visit [www.casro.org](http://www.casro.org).

IIR will hold a conference focused on innovation and collaboration, themed “A New Front End: The Era of Collaboration,” on **May 16-18** at the Seaport Boston Hotel and Adjacent World Trade Center in Boston. For more information visit [www.iirusa.com/feiusa/fei-home.xml](http://www.iirusa.com/feiusa/fei-home.xml).

The Marketing Research and Intelligence Association will hold its annual conference on **May 29-31** at the Delta Grand Okanagan in Kelowna, British Columbia. For more information visit [www.mria-arim.ca](http://www.mria-arim.ca).

The Life Insurance and Market Research Association will hold its annual marketing and research conference on **June 1-3** at the Renaissance Boston Waterfront Hotel in Boston. For more information visit [www.limra.com](http://www.limra.com).

The Council of American Survey Research Organizations will hold its annual technology conference on **June 2-3** at the Millennium Broadway Hotel in New York. For more information visit [www.casro.org](http://www.casro.org).

The Marketing Research Association will hold its 2011 annual conference on **June 6-8** in Washington, D.C. For more information visit [www.mra-net.org](http://www.mra-net.org).

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](mailto:emily@quirks.com). For a more complete list of upcoming events visit [www.quirks.com/events](http://www.quirks.com/events).

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# Online pharma MR course gets an update

I think I've finally found a recession-proof part of the research industry: continuing education and professional development. In chatting last month with Don Marek, executive director of the Marketing Research Institute International (MRII) - the body that administers the Web-based Principles of Marketing Research courses along with the University of Georgia (UGA) - I learned that the courses narrowly missed having their best year ever last year. In spite of - or, more likely, because of - the gloomy economy, it seems that a lot of companies and researchers across the world decided a little skills-enhancement was a good idea.

With this issue's focus on pharmaceutical marketing research, I had contacted Marek to find out more about the MRII's newly-updated Principles of Pharmaceutical Marketing Research online certificate course. The new version of the course debuted last summer, after a year-long effort to revise the existing pharma course and move it to the same new platform enjoyed by the Principles of

Marketing Research course.

Marek says changes in technology were the main reasons for the update. "Obviously, as with all of marketing research, online-based research is becoming more and more prevalent in the pharmaceutical industry. Because much of the research deals with hard-to-reach doctors and respondents, there has been a move to online video-based, remote-type focus groups and qualitative research. Plus there is the rise of social media. And the online specialist panels are very important. So we wanted to be able to keep pace with all of that," he says.

Both the main Principles course and its pharma cousin are self-paced, self-study endeavors. Like the main course, the pharmaceutical course has 11 modules: marketing and its interface with marketing research; introduction to marketing research and planning the research process; research design; sampling; data collection methods; measurement approaches; understanding data analysis; advanced data analysis; communicating research; global marketing research; and trends in marketing research.

Woven into the pharma course are case studies written by pharmaceutical marketing research professionals. Each case covers the background of the business issue, the study objectives, the research methods employed and interpretation of the results. Some of the topics include: new drug classes - attitude/trial/usage; inferring bipolar and schizophrenic cases by hospital; research management and ethical and legal constraints in the pharmaceutical industry; and global research - understanding attitudes toward cervical cancer vaccination.

## Patient and diplomatic

While the course doesn't focus on teaching specialized skills for pharma marketing researchers, Marek says that anyone looking to enter the pharma research world needs to be patient and diplomatic. "There aren't any unique skills needed for the majority of pharmaceutical research. You have to be analytical and have good interpersonal skills. You have to be very patient because things are highly regulated and may not move as fast as you would like. You have to



be extremely diplomatic because you are dealing with doctors. And you have to be very good at digging out secondary research sources because there is such a big body of secondary research. Those qualities – patience, diplomacy and investigative skill – are valuable in all kinds of marketing research but they are especially helpful in pharmaceutical research.”

Another skill – discipline – also comes in handy when your aim is to complete a self-paced course like those offered by the MR II and UGA. With the course’s 11 modules, Marek says many students set a goal of completing about one per month. While individuals need to look within for motivation, many of the companies that enroll large groups of employees in the courses form study groups, led by a senior internal researcher, to keep students on track.

“The study groups can meet about once a month. At the end of every module is a practice exam and the group can go through the exam and discuss it. The person leading the study group can look at the exam questions and say, ‘That’s the book answer, but in our company we do it slightly differently, for these reasons.’ And that has been very helpful for them in terms of letting them use the courses as in-house training and professional development exercises,” Marek says.

### Continue growing

Interest in the courses will likely continue growing, no matter what the world economy does. Marek says that more and more students from outside the U.S. are enrolling, especially from Southeast Asia, China and Korea. As businesses go global and seek local research partners in foreign lands, being able to show that employees have completed courses like those offered by the MR II will help the in-country research operations establish their credibility, Marek says. “When foreign research firms deal with big multinational firms, the big problem they have is convincing them that they know what Western firms are looking for. And these local companies are able to point to employees having completed the MR II course as proof that they have received training and are aware of what the firms are looking for as far as standards and practices.” | Q

## Coming in the April issue...

### Measuring the health of an online community

Doug Pruden and Terry Vavra explain their community engagement index, which is designed to analyze members’ current and future participation levels, their attitudinal connection to the community and also identify which management tactics are working best.

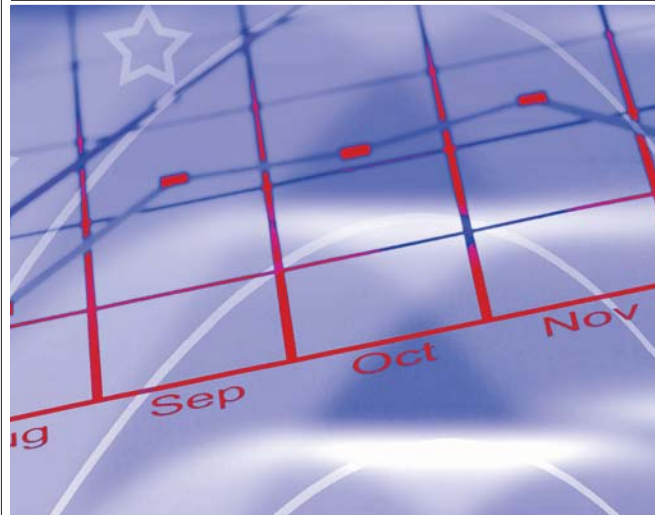
### Burning questions for online communities

Bob Yazbeck of Gongos Research tackles four pertinent questions surrounding online communities: Does size impact engagement? To brand or not to brand? Will conditioning occur with overexposure? Can mobile communities be representative?

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# before you go...

## online and offline

News about Quirk's and quirks.com

### Get Quirk's on your iPad or iPhone

Quirk's has launched an iPad app (dubbed Quirk's Magazine) and an iPhone app (called Quirk's Magazine - Mobile). Both apps are designed to automatically download the latest issue of the magazine directly to your mobile device so you'll always be up to date - wherever you are. Both apps are free of charge, so download and enjoy them today!



### Traveling to conferences this month? Look for Quirk's!

Quirk's will serve as a media partner for the Advertising Research Foundation's annual Re:think convention and expo on March 20-23 in New York. We will also have representatives at the

Pharmaceutical Marketing Research Group's national conference on March 27-29 in Phoenix. We hope to see many of our readers and editorial contributors. We're always happy to put a face to a name and hear firsthand what researchers would like to see from Quirk's in the future. It's not too late to register for these events! Simply visit our online events calendar for more details at [www.quirks.com/events](http://www.quirks.com/events).

### Add your voice to our blog

This month we'll debut the Research Industry Voices section on the Quirk's blog. Your input is welcome! Whether you're on the client side or the vendor side, if you would like to submit a guest blog post, contact Quirk's Editor Joe Rydholm at [joe@quirks.com](mailto:joe@quirks.com).

Posts must be original (not previously posted elsewhere), objective (if you're a research vendor, no promoting your company's products or services) and research-focused.



## cover-to-cover

Facts, figures and insights from this month's issue



Although 92 percent of executive respondents believe that satisfied customers are very important or extremely important to their company's bottom line, fewer than half solicit customer feedback on a continuous basis and more than one-fifth solicit feedback only once a year or not at all. In fact, 14 percent of executives surveyed said their companies don't solicit customer feedback. (page 8)



Bad survey design turns your Ferrari into a Model T. And it happens every day. There are three main problem areas in old-school surveys: missing data, collinearity and direct questions. (page 22)



Consumers tend to approach accessing content on the iPad in a "lean-back" fashion. That is, the iPad's larger size allows for more considered engagement with what's being presented on-screen than on a phone's smaller screen. (page 50)



Weather, product quality, locations and pricing offers are only a few of an exhaustive list of things that can impact results. Even if we were able to factor these in, there's one nearly unpredictable factor that cannot be measured: the consumer. (page 54)

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For more information and to see Delve's locations visit [www.delve.com](http://www.delve.com).

To register, send an e-mail to [contest@quirks.com](mailto:contest@quirks.com) with your complete contact information. Please include "Delve Contest" in the subject line. Deadline to enter is March 31, 2011. The winner will be selected at random and announced in the May issue of *Quirk's*.

Congratulations to January's winner, Kimberly Gattuso of Walt Disney Parks & Resorts, Hattiesburg, Miss. January's prize was one free Qualvu DIY project.

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HEALTHY DATA



## HAND PICKED.

WorldOne's emunity™ ensures you have healthy, clean data. Our hand selected panelists, consisting of over 600,000 medical professionals worldwide, are all phone verified. As a market leader in Global Healthcare Fieldwork, we are vigilant in our pursuit of the highest standards when it comes to building and maintaining our research panel. With credentials and data you can trust, feel confident in your decision and in WorldOne.

For more information visit, [www.worldone.com](http://www.worldone.com)





# Why Guess Who's Completing Your Surveys?

## Be Certain with SSI.



The internet reaches vast numbers of consumers. But new access brings new challenges—and the danger of trading quality for quantity. That's why SSI builds all our samples on 30+ years of proven sampling science—constantly sharpened with new advances. So you can be positive all participants are exactly who they say they are. And you can target and re-contact them with total confidence.

### To ensure all respondents show their true identities, SSI:

- Uses only trusted panels and communities, **NOT** random Web intercept
- Progressively profiles participants in real time
- Authenticates participants through third-party databases
- Prevents duplicates with sophisticated digital fingerprinting

Why wonder who's completing your surveys? Know for certain with SSI. Contact us at 203-567-7200 or [info@surveysampling.com](mailto:info@surveysampling.com).

*The Science of Sampling*



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