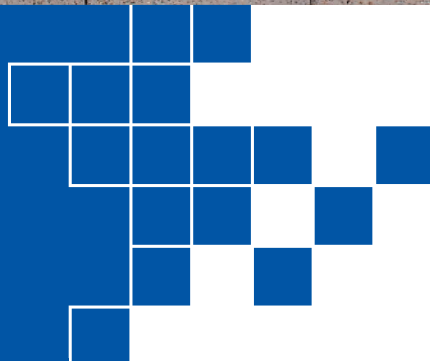




ANNUAL REPORT 2012




University of
South Australia

Ehrenberg-Bass
Institute for Marketing Science



Julian Major, Samantha Hogan, Associate Professor Jenni Romaniuk, Arry Tanusondjaja and Dr Margaret Faulkner.



CONTENTS

2	Australasian Chairman's Report
3	European and North American Board Chairs
4	Director's Report
6	We've Come a Long Way
10	Institute Overview
11	Founders
12	Who We Are and What We Do
16	Our Team
18	Virtual Reality - New Research Frontier
19	Duplication of Purchase Analysis
20	ANZMAC Conference
21	Wharton EMPGENS ² Conference
22	The Institute's Advisory Boards
26	Research with Global Impact
28	The Corporate Sponsorship Program
30	Corporate Sponsors
31	Market Research
34	2012 Publications
35	Marketing: Theory, Evidence, Practice
36	Academic Outcomes
38	Industry Conferences
40	The Future

Front Cover: Ana Mocanu, Dr Melissa Banelis, Dr Armando Corsi,
Dr Virginia Beal, Cathy Nguyen, Steven Dunn and Dr Svetlana Bogomolova.

AUSTRALASIAN CHAIRMAN'S REPORT

On behalf of the European and North American Board Chairs I provide the following report.

The Institute continued its steady development in 2012, assisted by the work of its three advisory boards. Board meetings were held in Australia and the United States. The year included some significant commercial milestones with the renewal or expansion of key contracts, and securing of a number of prestigious research grants. It also saw production of many influential academic outputs.

As noted elsewhere in this report, the Institute hosted two major conferences and achieved wide publicity for its work in new areas, such as social media. The impact of *How Brands Grow* continued, and the launch of a companion University textbook provided another avenue by which the Institute will influence marketing thought.

Also of note was the special section of the *Journal of Advertising Research* honouring the work of Andrew Ehrenberg; this was edited by the Institute Director and two Institute Adjunct Professors and contained many contributions likely to be of enduring value to industry and academia. It was pleasing to see joint work from the Institute and a major client published in this issue.

Further foundations were laid for the future.

The number of Associate Directors increased from two to five, while a number of other staff stepped up to higher responsibilities. The pipeline of new researchers expanded, as the number of research associates and honours students increased. The impact of these changes will be felt in the coming years.

The Institute does face some challenges in 2013. However, I am confident that it is well placed to continue to deliver new knowledge and to transform marketing practice.

Recommendations from the advisory boards have played a major role in the development of the Institute. Many initiatives that increased the fame of the Institute and its capacity for knowledge transfer have resulted directly from suggestions by the boards. I would like to thank my predecessor of the Australasian Board, Professor Gerald Goodhardt, for his outstanding work as Chairman in facilitating these developments.

Professor Malcolm Wright



EUROPEAN AND NORTH AMERICAN BOARD CHAIRS

PROFESSOR GERALD GOODHARDT

European Advisory Board Chair



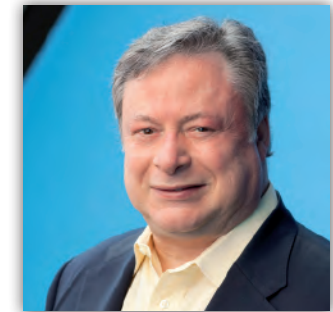
Gerald Goodhardt has been involved with the Institute since its inception seventeen years ago. Gerald is Emeritus Professor at City University, London, where he was Dean of the Business School (now Cass Business School). He is an Adjunct Professor at the University of South Australia and has

held visiting appointments at various UK universities. Gerald has an extensive academic background in marketing science, working closely with Andrew Ehrenberg to develop many of the original 'marketing laws', including the NBD model and its extensions to include brand choice.

Gerald was previously Chairman of all three of the Institute's Boards, however has handed over the responsibility of the Australasian and North American Boards in recent years. Gerald's input has been invaluable over the years and we are pleased to have him as our European Chairman.

DR JACK WAKSHLAG

North American Advisory Board Chair



Jack Wakshlag is among the leading research analysts in media today. He is Chief Research Officer at Turner Broadcasting System, Inc. His portfolio includes all research supporting Turner's strategic development, marketing, distribution and advertising sales. Previously, he was Executive Vice President and Head of Research for The WB Television Network and Associate Professor of Telecommunications at Indiana University.

As well as over 25 years of industry experience, Jack has published numerous articles and textbook chapters. He has been a member of the North American Advisory Board since its inaugural meeting in 2007, and we feel privileged to have Jack as one of our Chairs.



DIRECTOR'S REPORT

2012 was a busy year, one that we can be proud of even if it is not necessarily a year that we would like to repeat. Amongst other things, we hosted two major conferences, the Wharton EMPGENS² and ANZMAC, and in the same year we completed the introductory textbook we have been promising to write for many years.

Less visible, but no less important, our core research programs continued to make advances. These discoveries are now being added to in-house briefings for our Corporate Sponsors, and will soon appear in reports.

Our impact on the marketing world is undoubtedly increasing, and we'd like to think that we saw our influence in some positive turns in marketing practice in 2012, e.g.:

- A degree of sanity returned to the world of social media advertising, as advertisers asked questions, and called for more evidence and less zealotry. Facebook's tumbling stock price was an outcome (and a cause) of this 'sobering up'.
- After ten years marketing columns and conferences finally stopped talking about the death of TV advertising.

Unfortunately we saw less evidence of such positive changes in marketing academia. 2012 saw articles on 'Brand Love' published in both the *Journal of Marketing* and the *Journal of Advertising Research*, as academia belatedly caught on to something that hit its peak of fashion in marketing practice some time ago. These articles will no doubt spur a decade of largely pointless research, sadly including many doctoral theses. Fortunately, these fashions have limited cycles and generally fade within a decade.

On a more positive note 2012 was, for a number of our sponsors, a 'tipping point'. The year that senior management endorsed the concept of 'evidence-based marketing' and became aware of the Ehrenberg-Bass Institute. Each sponsor corporation is at a different stage, and has a different style of implementing our findings. In 2012 many reported that progress is now being made far faster. This news gives us great satisfaction.

Professor Byron Sharp



2012 saw a change in the Institute's management structure. Increasing the number of Associate Directors from two to five, the Institute is now led by a larger senior management team. This change was an important step to ensure the Institute keeps pace with its rapid growth.

THE ASSOCIATE DIRECTORS ARE:

Associate Director (Operations)

- John Dawes

Associate Director (Special Projects)

- Rachel Kennedy

Associate Director (Staff Development)

- Larry Lockshin

Associate Director (International)

- Jenni Romaniuk

Associate Director (Commercial)

- Elké Seretis

Associate Directors: Associate Professor Rachel Kennedy, Associate Professor John Dawes, Elké Seretis, Professor Larry Lockshin and Associate Professor Jenni Romaniuk.

WE'VE COME A LONG WAY - AN ADDRESS BY BYRON SHARP

“One thing that strikes me looking at this youthful folly is that it was all dreadfully research oriented - uncovering regularities and modelling, and no marketing implications.

...totally hidden away is ‘the main finding that different brands’ repeat-buying rates do not in fact differ very much.’ No wonder that marketing people in 1996 not only talk about loyalty-building programmes but actually spend fortunes on them.”

Andrew Ehrenberg commenting on the reprint of his 1969 article ‘Towards an integrated theory of consumer behaviour’.

It’s now more than 12 years since Andrew Ehrenberg invited me to ‘come and run the place’. I took up the offer but without making a permanent move to London; instead there was a merging of Australian and British research teams, which led to the creation of the Ehrenberg-Bass Institute. It’s been a very busy period. I want now to reflect on one of our achievements over that time...

I recently watched an internal presentation by one of our Corporate Sponsors where the Chief Marketing Officer reflected on the success they have had, so far, in embedding the scientific knowledge into their marketing practice. He echoed Mitch Barns of Nielsen’s observation that competitive advantage lies in being able to act on this knowledge and then said that the discoveries have been around for 40 years but most marketers have been unaware of them, or unable to translate them into business practice.

On one hand he is absolutely right, we know how difficult it is for individuals to change their behaviour and it’s even harder for large organisations.

This means that there is real competitive advantage in being able to embed and act upon the marketing science.

Yet it isn’t true that all of this knowledge has been around for 40 years. Some seminal discoveries like the NBD and Double Jeopardy are now 40 years old, but progress on what they mean for practice required further research and thought. Progress occurred gradually over time, gaining considerable pace in this century.

Andrew Ehrenberg used to say that the ‘D’ in R&D was more difficult and took longer. In the past 12 years or so we’ve made very real progress in working out the implications of some of his, Gerald’s, and other’s, early discoveries. It’s easy to under estimate this progress, because once you have a simple theory that fits the known laws it seems...well, so simple (that’s the beauty of it). When it fits like a glove it’s hard not to believe that you hadn’t always seen the world that way. It’s only once we realise that the Earth is round that the idea of it being flat then seems preposterous.

When Victorian biologists (they were called naturalists back in those days), who were already well aware that new species were emerging and others had become extinct, were introduced to Darwin and Wallace's theory of natural selection they largely took to it immediately. Everything fitted. Many wondered why they hadn't realised it before. Soon after, many probably believed they had known it all along. To this day it's even claimed by a few that Darwin's grandfather knew it all years beforehand (based solely on a few side comments he wrote that showed he was thinking about evolution, as many naturalists at the time were). Which goes to show that once new ideas are accepted they seem as if they have been around forever, particularly if those ideas were many years in the making.

Looking back it seems amazing that when we started releasing reports for our Corporate Sponsors in 1999 there was no theory of mental & physical availability, we'd hardly written on the importance of reach (let alone how to achieve it),

nor on the need for particular memory structures, nor on the need for continuity of media spend, nor consistency in advertising, nor on the importance of branding, nor on distinctive brand assets.

This is starkly evident in report 1 released in 1999. Several years in the writing, this landmark position paper was meant as a definitive statement of current understanding of Dirichlet patterns, how they can be used and what they mean.

Yet those applications were discussed only fleetingly as 'providing benchmarks', e.g. for cannibalization in the laundry detergents market (Lomax et al 1996) and for loyalty programs (Sharp & Sharp 1997). The report starts with a hypothetical case study of using such benchmarks to set sales targets, in this case resulting in a new product launch being abandoned! How depressing.



WE'VE COME A LONG WAY cont

Today the report's discussion of implications seems astonishing in how little is said. Largely it consists of restatements that consumers are polygamous, that brands sell to similar user bases, and that brands must, logically, be quite undifferentiated. The only implication for practice is that advertising must be mainly defensive with its main task being to publicise. There is though a strong hint of what advertising must do in report #4 (Ehrenberg, Barnard and Scriven 1997):

"Differing market shares are then due to the very different numbers of people to whom each brand is 'salient', i.e. who feel positive about each brand".

So there is a 'reach' message here, but equally there is an attitude reinforce and/or shift message! This line was dropped for the final 2004 publication in Journal of Business Research.

Andrew had written quite extensively over decades that advertising could, and largely did, work without shifting hearts and minds (persuading). Over this period this was the most direct implication put forward for marketing practice. Yet this message was often misunderstood, it was seen as highly

controversial, and the managerial implications were actually said to make no change to practice! In July 2002 we released 'Brand Advertising as Creative Publicity' a new revised version of the earlier 1999 report. Andrew was emphatic that this superseded the previous version, he wanted the 'D' recognised. Similarly he was upset when the Journal of Advertising Research republished his 1974 article 'Repetitive Advertising and the Consumer' in their December 2000 issue featuring 'classic' articles. He feared that readers might take this for his current thinking. That 1974 article argued that advertising largely worked to reinforce existing habits but didn't say how - it was interpreted as 'reinforcing feelings of satisfaction' (e.g. by WARC editors). Over the years, across different publications, the emphasis shifted slightly towards maintaining awareness. But in spite of the use of the word 'salience' earlier (Ehrenberg, 1997) it wasn't until about a decade ago that refreshing memory structures took centre stage, and quite a bit later before this merged into a theory of mental availability, along with prescriptions for changing much advertising practice (note the complete u-turn).





When it came to discussing implications for marketing practice the dominant theme in the pre-2000 publications was that the empirical laws could be used to provide benchmarks, i.e. to see if a brand's metrics were unusual or not. In fact this was usually the only implication that was given. Again, today this seems extraordinary. Particularly when it wasn't at all clear back then what a deviation from, say, Double Jeopardy, would mean for marketing strategy. Certainly this wasn't discussed.

Since brand metrics were almost always normal the managerial implications were not obvious to most managers - 'if it's normal what should I do?' So perhaps it is unsurprising then that quite a few of them considered the story to be rather depressing. This wasn't helped by our reports offering prudent but uninspiring last line conclusions such as "competition means running hard to stand still, with profitable survival being greatly preferable to the most likely alternative" (report #1).

It wasn't until the early 2000s that we realised that we had a very positive story to tell marketers, and could give increasing degrees of prescriptive advice, not just on what metrics to pay attention to and what to ignore, but also how to spend media

budgets, what to put in advertisements, and how to evaluate strategic and tactical alternatives. This was, and continues to be, very important 'D'.

The title of 'How Brands Grow' (2010) was very deliberate; it tantalisingly offered an answer to a very practical question. It could have been called 'Laws of Marketing' or worse 'Empirical Generalisations Concerning Buying and Brand Performance'.

Yet already 'How Brands Grow' looks a bit out-of-date, light on specific recommendations for marketing practice compared to the in-house seminars we provide to our Corporate Sponsors. Over the past 12 years these briefings have become a more important part of what we give back to sponsors, these sessions are now rich in managerial implications and prescriptions for strategy.

Our challenge for the next decade is not only to discover new scientific laws but to continue to integrate them into a prescriptive body of work covering an increasingly wide range of conditions, i.e. "in this circumstance do X". We have come a long way, but much research, and thinking, is still needed.

¹ "Bringing theory into line with practice" was the subtitle even of the 2004 report (#13).

INSTITUTE OVERVIEW

The Ehrenberg-Bass Institute for Marketing Science is a not-for-profit, world-class research institute of the University of South Australia.

After seventeen years of business, the Institute has grown to be staffed by over 60 specialist researchers and marketing professionals.

The Ehrenberg-Bass Institute's mission is to benefit industry and society by developing and disseminating scientific marketing knowledge. Our research aims to uncover law-like patterns and relationships and then build empirically grounded theory to explain and predict. This emphasis on scientific laws that hold over time, distinguishes our work from much research done in marketing.

The Institute offers two types of services.

The first is **market research**, providing clients with cutting-edge qualitative and quantitative research tailored to a specific marketing problem.

The second is our **corporate sponsorship program**, giving companies access to a multimillion-dollar program of marketing R&D which is supported by the world's leading marketers.



FOUNDERS

The Ehrenberg-Bass Institute was granted institute status by the University of South Australia in 2005, in recognition of over a decade of achievements.

Our name signals our research philosophy and honours two world-famous marketing academics who dedicated their professional lives to the discovery of scientific laws about marketing and buyer behaviour.



Professor Andrew Ehrenberg (1926 - 2010)

Professor Andrew Ehrenberg's fundamental belief was that the methods of physical science are also applicable to the social sciences. This principle enabled him to establish wide-ranging empirical quantitative generalisations about human behaviour. Over the years he made countless contributions to the field of marketing science, including the very important discovery of the Negative Binomial Distribution (NBD) model, which showed that brand purchase rates follow a predictable pattern.



Professor Frank Bass (1926 - 2006)

Professor Frank Bass pioneered the establishment of marketing as a science in which well-tested mathematical models could be used to predict the behaviour of future markets. His most renowned contribution to the field was the development of the Bass diffusion model, a mathematical model that describes the adoption patterns of new products.



Katherine Anderson, Professor David Corkindale, Bill Page.

WHO WE ARE AND WHAT WE DO

The Ehrenberg-Bass Institute is one of the largest university marketing research organisations.

We have over 60 researchers, which includes academics and higher degree research students, working together to achieve our research goals.

Our strength is not only our size, but also the diversity of our team. We have researchers from all over the world, each with their own unique industry experience and marketing knowledge.

We are passionate about research. We pride ourselves on our ability to push research boundaries and question conventional thinking.

One of the benefits of having a large team is that we can work on so many research projects at once. We can be dedicated to our clients and also continue to explore new areas.

The following photos will help put some faces to names, plus give you a taste of some of the exciting topics we are currently working on.



Skye Akbar
Researching the marketing of remote
Aboriginal tourism enterprise



Katherine Anderson
Validating **virtual reality** technologies
for consumer behaviour research



Zac Anesbury
Market structure consistency and
optimisation of **retail shelf space**



Geoff Atkinson
Components of **search engine
advertisements** that increase
click through rates



Dr Melissa Banelis
Empirical quantitative marketing
and **repertoire size**



Dr Virginia Beal
Improving **advertising effectiveness**,
branding and media placement



Dr Svetlana Bogomolova
Contextual and situational
influences in **consumer choice**



Jasha Bowe
Country image influence on **consumer
preferences** and choice behaviours



Associate Professor Johan Bruwer
Cellar door: catalyst for consumption
changes and sales multiplier



Dr Justin Cohen
Special projects in **wine business**
and retail



Professor David Corkindale
Determining the marketing influences
on **consumer behaviour online**



Dr Armando Maria Corsi
Retail and on-premise **choice
analysis** for wine and FMCG products



Associate Professor John Dawes
Price promotions and
brand loyalty



Dr Carl Driesener
Understanding online **buyer
behaviour** and advertising



Steven Dunn
Understanding consumers' responses
to **price changes** and price framing



Dr Margaret Faulkner
Understanding **brand health**, charity
support and marketing effectiveness



Dr Kesten Green
Better **forecasting** for better
decisions



Nicole Hartnett
Increasing the odds of making
sales effective advertising



Dr Elizabeth Hemphill
Business-to-business **social marketing**



Martin Hirche
Visitation effects on brands and sales in **wine tourism**



Samantha Hogan
Tracking the **brand equity** of light and non-brand buyers



Associate Professor Rachel Kennedy
Sales effective advertising plus its measurement and in-store choice



Dr Richard Lee
Consumer behaviour particularly within an Asian context



Marianthi Livaditis
The formation of **brand loyalty**, how natural is it?



Professor Larry Lockshin
Choice experiments, consumer goods packaging, **wine marketing**, retailing



Gosia Ludwichowska-Alluigi
How to improve the accuracy of **self-reported brand buying**



Julian Major
Investigating the attention grabbing potential of **distinctive assets**



Ana Mocanu
Typical vs novel **package design** and its effect on consumer choice



Dr Karen Nelson-Field
The ability of **social media** to assist brand growth



Dr Magda Nenycz-Thiel
Consumer perceptions and buying behaviour of **private label brands**



Kellie Newstead
Advertising **distinctive assets** in a multi-platform media environment



Cathy Nguyen
Cause-related marketing and **word-of-mouth** behaviour



Bill Page
Pester power, supermarket turnover and **parent-child interactions**



Associate Professor Jenni Romaniuk
Brand equity, word-of-mouth, buyer behaviour and distinctive assets



Dr Cam Rungie
 Integration of consumer discrete choice and **structural equation models**



Dr Anne Sharp
Sustainable marketing and initiatives for improved environmental behaviours



Professor Byron Sharp
 What is an **advertising** touchpoint worth? Under what conditions?



Therese Sjostrom
 How **luxury brands** grow. Behaviour, attitudes and perceptions



Marietta Szabo
 Understanding retailers and manufacturers' **price promotional planning practices**



Arry Tanusondjaja
 The effects of television audience fragmentation on reach-based **media scheduling**



Dr Jennifer Taylor
 The sales effects of **advertising**



Dr Giang Trinh
 Modelling changes in buyer **purchasing behaviour**



Oanh Truong
Buyer behaviour in emerging markets



Ulrich Veyhl
 The functional expert's role in different **business-to-business** selling teams



Michael Vogelpoel
Social marketing and pro-environmental decision-making amongst pastoral landholders



Meagan Wheeler
Sustainability and green brand buyer profiles and behaviour



Dr John Wilkinson
 Industrial marketing and **sales management**



Mohammad Yousuf
 Understanding effectiveness of advertising in **social cause marketing** campaigns

OUR TEAM

DIRECTOR

- Professor Byron Sharp

ASSOCIATE DIRECTORS

- Associate Professor
John Dawes
- Associate Professor
Rachel Kennedy
- Professor
Larry Lockshin
- Associate Professor
Jenni Romaniuk
- Elké Seretis

SENIOR RESEARCH ASSOCIATES

- Katherine Anderson
- Dr Virginia Beal
- Dr Dag Bennett
- Dr Svetlana Bogomolova
- Professor David Corkindale
- Dr Armando Maria Corsi
- Dr Carl Driesener
- Dr Margaret Faulkner
- Dr Charles Graham
- Dr Kesten Green
- Nicole Hartnett
- Dr Karen Nelson-Field
- Dr Magda Nenyycz-Thiel
- Dr Erica Riebe
- Dr Cam Rungie
- John Scriven
- Dr Anne Sharp
- Dr Jennifer Taylor

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- Geoff Atkinson
- Abou Bakar
- Dr Melissa Banelis
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- Dr Justin Cohen
- Steven Dunn
- Tommy Ha
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- Martin Hirche
- Samantha Hogan
- Stine Høj
- Ava Huang
- Natasha Kapulski
- Huda Khan
- Dr Richard Lee
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- Marianthi Livaditis
- Gosia Ludwichowska Alluigi

- Julian Major
- Dr Marc Mazodier
- Ana Mocanu
- Kellie Newstead
- Cathy Nguyen
- Dr Haydn Northover
- Monica Orlovic
- Sarah Overton
- Bill Page
- Dr Vipul Pare
- Therese Sjostrom
- Dr Lara Stocchi
- Marietta Szabo
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ADJUNCT PROFESSORS & RESEARCH FELLOWS

- Professor Scott Armstrong
- Associate Professor
Polymeros Chrysochou
- Associate Professor Eli Cohen
- Professor Robert East
- Professor Gerald Goodhardt
- Dr Jane Leighton
- Dr Emma Macdonald
- Dr Simone Mueller
- Associate Professor Jay Mulki
- Professor Ulrich Orth
- Dr Hervé Remaud
- Dr Herb Sorensen
- Associate Professor Tony Spawton
- Professor Philip Stern
- Professor Malcolm Wright



Zac Anesbury, Dr Carl Driesener, Therese Sjostrom and Ulrich Veyhl.

VIRTUAL REALITY - NEW RESEARCH FRONTIER

Shopping research: what's the reality when it comes to virtual reality?

Big brands have been using virtual reality technologies since the 1990s to visualise retail environments, foster retailer engagements and undertake shopper research.

While there are various tools on the market, typically virtual reality shopper solutions combine high-resolution images of retail environments with research and gaming technologies to gather insights about how consumers navigate stores and how they respond to in-store initiatives in terms of attention and brand choice.

However, even if virtual environments realistically portray retail environments and consumers are recruited to shop 'normally', virtual shopping behaviours may not reflect typical in-market behaviours.

As a result the Institute started a research initiative to validate if virtual reality is a tool marketers can trust for shopper research.

Our pilot results suggest that metrics of sales uplift, shopper engagement, time-in-aisle and attention may not be reliably correlated with in-market behaviours. We need to understand the conditions when we can and when we should not use such approaches.

For stage two of our project we invite a select group of Corporate Sponsors (experienced with virtual reality or willing to invest in it) to join us to continue to validate virtual shopping approaches across a range of categories, countries, approaches and shopping situations. We aim to determine:

- how accurate results are compared to the real world (in what conditions);
- if and which metrics can be calibrated to in-store behaviours (and how); and
- standards to increase the actionability of results and deliver cost-savings.

For more information or to express your interest in being included in this research initiative contact

Katherine Anderson or Assoc. Prof Rachel Kennedy
Virtual@MarketingScience.info



DUPLICATION OF PURCHASE ANALYSIS

Understanding the competitive structure of your category using Duplication of Purchase and Partition Analysis.

It is imperative that brand managers understand the competitive structure of their market before strategy development occurs. To facilitate this understanding, the Institute released a Corporate Sponsor report in 2009 titled 'Who Do You Really Compete With?'

Empirical evidence shows that brands share customers in line with their size. This is one of the fundamental laws of marketing - the Duplication of Purchase Law (DoP). This law provides a critical foundation for marketing strategy and tactic development (i.e. focusing on category reach rather than on developing unique brand positioning).

The DoP law tells us that brands share most customers with the biggest brands in their market, and the least with the smallest brands. In the table to the right, Daz customers are more likely to also buy Persil (the biggest brand) and least likely to also buy Fairy (the smallest brand).

Sometimes there are partitions in a market. This is where there is higher (or lower) sharing between a sub-set of brands than we expect. Understanding partitions is important because they indicate pairs of brands that compete more intensely against each other and may identify a gap for a brand launch.

Our researchers can analyse your market structure using DoP and give you a clear indication of how well your market fits the normal pattern, and the extent to which partitions exist.

Key points about the Duplication of Purchase Law

- Brands compete practically head-on with other brands in their category.
- Brands share customers in line with market share.
- Deviations from the law reveal market partitions.
- The law can be used to discover category boundaries to predict where a new brand/SKU will steal sales from.

For further information about Duplication of Purchase Analysis contact

Elké Seretis, Associate Director (Commercial)

Elke.Seretis@MarketingScience.info

Buyers of:	Who also buy:							
	Penetration	Persil	Ariel	Bold	Daz	Surf	Tesco	Fairy
Persil	18%	-	48	32	35	23	21	8
Ariel	11%	81	-	34	38	31	28	9
Bold	8%	75	47	-	43	22	19	10
Daz	8%	83	53	44	-	23	19	9
Surf	5%	79	61	31	32	-	50	8
Tesco	5%	81	64	33	31	59	-	9
Fairy	3%	54	34	29	25	16	15	-
Average	8%	75	51	34	34	29	25	9

ANZMAC CONFERENCE

In 2012 the Ehrenberg-Bass Institute hosted the Australian and New Zealand Marketing Academy Conference (ANZMAC). ANZMAC is an annual conference that brings together marketing academics and practitioners to share and discuss the latest marketing knowledge.

The theme of the conference was 'Sharing the Cup of Knowledge', recognising that one of today's key challenges is ensuring research is given a voice and that this voice is heard by marketers.

The conference was a great success with over 400 delegates in attendance. It was pleasing to see so many international delegates at this year's conference, providing a truly global perspective on today's marketing challenges.

Hosting the conference provided the Institute with invaluable networking opportunities and helped enhance its academic profile and position as a leading marketing research institute.



Natasha Kapulski, Tom Benson, Dr Elizabeth Hemphill and Jasha Bowe.



WHARTON EMPGENS² CONFERENCE

In June 2012, the world's thought leaders in advertising converged in the United States for the second 'Empirical Generalisations in Advertising Conference'. This invitation-only event was hosted by the Wharton School (University of Pennsylvania) in partnership with the Ehrenberg-Bass Institute and the Advertising Research Foundation (New York). The purpose of this conference is to share high quality research with law-like patterns, and findings that hold true across multiple studies. This year's conference focused on a central theme: 'What Works in the New Age of Advertising & Marketing'.

The conference brought together an outstanding group of researchers and practitioners from diverse backgrounds that presented over 40 papers on research-based knowledge in the field.

Attendees at the two-day event included academic and industry leaders from companies including Coca-Cola, Microsoft, Google, Yahoo!, Mars Inc., Forbes, Saatchi & Saatchi, ZenithOptimedia, Nielsen and comScore.

The first conference, held in 2008, produced 21 laws for intelligent advertising decisions, published in a special edition of the *Journal of Advertising Research*, that became the best selling edition of the journal - ever!

The findings from the 2012 conference will be published in an edition of the *Journal of Advertising Research* in 2013, edited by Jerry Wind, Byron Sharp and Karen Nelson-Field.

THE INSTITUTE'S ADVISORY BOARDS

The Institute is very fortunate to be advised by three Boards with such high calibre executives from Australasia, Europe and North America. The Boards ensure that the Institute's research agenda is industry focused.

A key purpose of each meeting is to provide growth and research direction pertinent to each region.

AUSTRALASIAN ADVISORY BOARD MEMBERS

Malcolm Wright - Chairman

Byron Sharp - Director, Ehrenberg-Bass Institute

Peter Danaher - Monash University

Mark Geraghty - Elders Ltd.

Gerry Griffin - University of South Australia

Annabel Hamilton - People's Choice Credit Union

Larry Lockshin - Ehrenberg-Bass Institute

Sylvia Mason - KWP! Advertising

Kathryn McArthur - Colgate-Palmolive

Bruce McColl - Mars

Phil Parker - The Nielsen Company

Doug Peiffer - OzTAM

Isak Pretorius - University of South Australia

Mark Uncles - University of New South Wales



Australasian Advisory Board: Mark Geraghty, Phil Parker, Kathryn McArthur, Bruce McColl, Larry Lockshin, Malcolm Wright, Isak Pretorius, Peter Danaher, Sylvia Mason, Annabel Hamilton, Byron Sharp and Mark Uncles.



EUROPEAN ADVISORY BOARD MEMBERS

Gerald Goodhardt - Chairman

Byron Sharp - Director, Ehrenberg-Bass Institute

Mathew Barbagallo - Mars

Ros Davis - Colgate-Palmolive

Bruce Hardie - International Journal of Research in Marketing

Peter Harrison - Kellogg's

Philip Mackie - The Edrington Group

Stuart Maw - The Coca-Cola Company

Paul Murphy - Kantar Worldpanel

John Scriven - Ehrenberg Centre

Garth Viegas - SABMiller plc

Chad Wollen - Vodaphone

THE INSTITUTE'S ADVISORY BOARDS cont

NORTH AMERICAN ADVISORY BOARD MEMBERS

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Robert Barocci - Advertising Research Foundation

Artie Bulgrin - ESPN, Inc.

Karen Ebben - General Motors

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Jim Nyce - Sun Products Corporation

Brandon Paris - General Mills, Inc.

David Poltrack - CBS Corporation

Greg Rogers - Procter & Gamble

David Schmittlein - Massachusetts Institute of Technology

Joe Stagaman - The Nielsen Company

Stan Sthanunathan - The Coca-Cola Company

Jerry Wind - The Wharton School



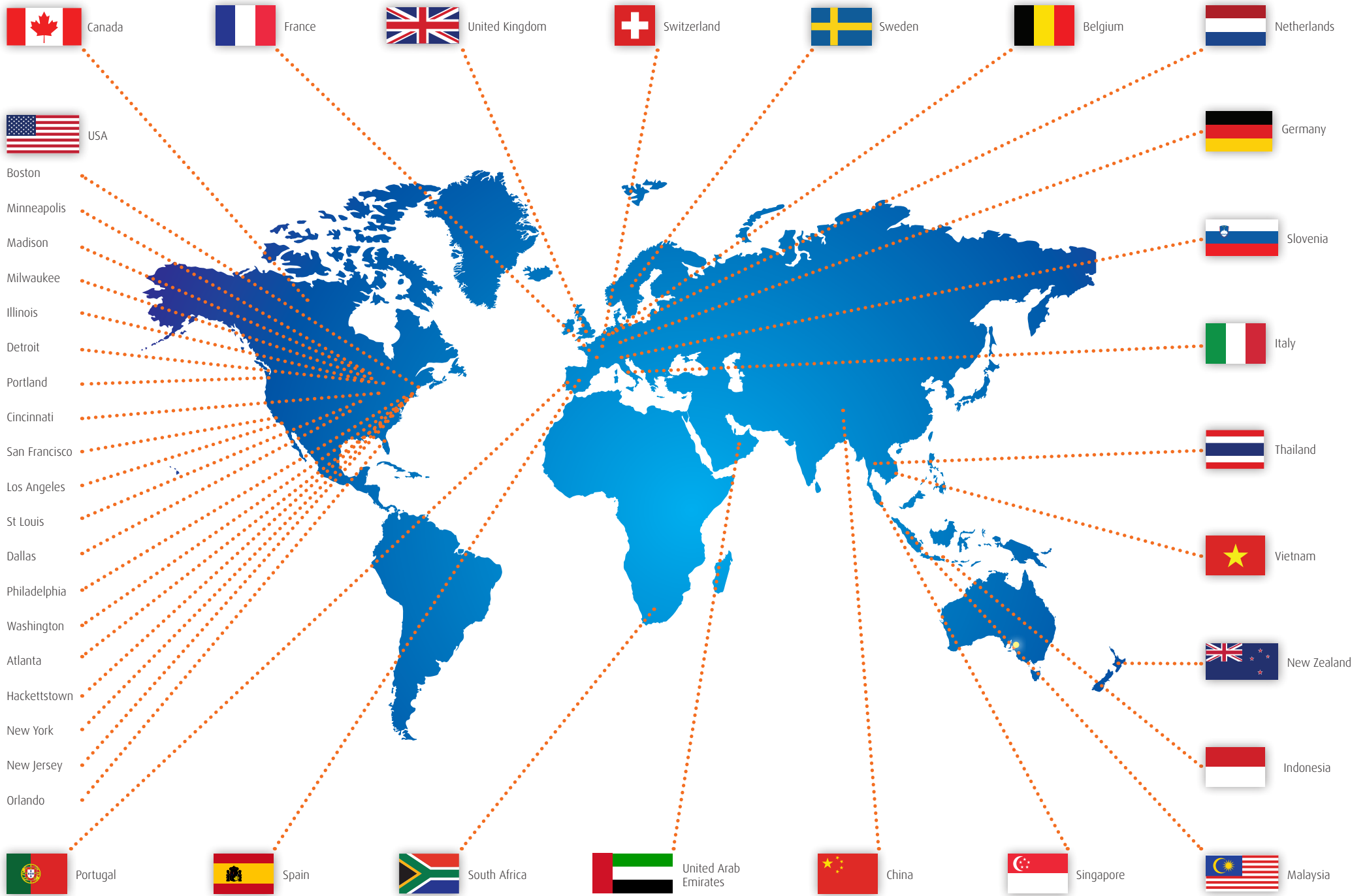


RESEARCH WITH GLOBAL IMPACT

While we are based in beautiful Adelaide, South Australia, we operate at an international level. Our researchers fly all over the world to visit the offices of Corporate Sponsors and present at esteemed international academic and industry conferences.

Each year we are spending more time overseas visiting new countries and cities. This map shows the places that we presented our research in 2012.





THE CORPORATE SPONSORSHIP PROGRAM

For more than a decade big brands like Coca-Cola, Unilever and Procter & Gamble have supported the Institute's exciting R&D initiative.

No single company has a research budget large enough to adequately explore all areas affecting marketing practice. The Institute's solution (pioneered by Andrew Ehrenberg), was to create a program where companies could pool their resources to create a multimillion-dollar research program.

The program tackles some of the biggest questions in marketing:

How can advertising's full effects be measured?

How to allocate investment across brands?

When to advertise?

When to price discount?

Today the Institute has over 60 global Corporate Sponsors contributing to this unique initiative.

The program builds fundamental knowledge about buyer behaviour and brand performance that is useful and practical, that can help set marketing objectives and steer long-term strategy.

Research discoveries are grounded in empirical evidence, allowing the findings and benchmarks to be used again and again with confidence.

The program delivers cross-industry insights and norms that can be applied to brands and markets anywhere in the world.





CORPORATE SPONSORSHIP INCLUDES

The latest developments in marketing knowledge

Regular updates are sent to sponsors (any marketing and research staff that are nominated within the company) to share new research findings.

In-house marketing seminars

Sponsors receive up to two interactive masterclasses with their team per annum on a topic of choice.

Access to 60+ sponsor reports

Each year the Institute publishes reports that explain new findings in a concise and understandable way. A library of past reports is available online with password protected access.

Access to online learning modules

The Institute is developing a suite of online courses as an interactive learning tool for our Corporate Sponsors. The first two modules, *Six Simple Steps of Data Reduction* and *Mining Panel Data for Insights* are available and can be accessed through the members-only area of the website.

Expert Advice

Sponsors have access to the knowledge and advice of over 60 marketing specialists.

COST OF PARTICIPATION

Location	Per annum
Australasia	AUD \$35,000 (+GST)
U.S.A	USD \$35,000
Europe	£ 25,000
Global*	AUD \$105,000 - \$175,000

*Global membership is an option for multinational corporations.

The Institute also offers significant discounts for extra companies from within the same group.

EXAMPLES OF SEMINAR TOPICS

- How brands grow
- The real reason marketers need advertising
- Loyalty and brand performance
- Identifying and using your distinctive brand assets
- Addicted to price promotions?
- Brand salience: what it is and why it matters

For further information about becoming a sponsor, to organise a sample seminar or see a full list of seminar topics please contact

Elké Seretis, Associate Director (Commercial)
Elke.Seretis@MarketingScience.info

CORPORATE SPONSORS

AUSTRALASIA AND CHINA

ANZ National Bank
Akzo Nobel Paints
Carlton & United Breweries
Cerebos
Colgate-Palmolive
Department for Environment
and Natural Resources
Elders
Fonterra
Foxtel
GlaxoSmithKline
GWRDC
Kraft Foods Ltd
KWP! Advertising
Lion Dairy & Drinks
Mars
Meat & Livestock Australia
Mondelez Asia Pacific
National Pharmacies
Network TEN
People's Choice Credit Union
PHD
Roy Morgan Research
Schweppes Australia

Seafood CRC
The Coca-Cola Company
The Nielsen Company
Unilever
University of South Australia

EUROPE

BP International
BrandScience
Britvic
Coca-Cola Great Britain
Colgate-Palmolive
Kantar Worldpanel (Spain)
Kantar Worldpanel (UK)
Kellogg's
Leo Burnett
Mars
Mountainview Learning
Pagen
SABMiller
The Coca-Cola Company
The Edrington Group
The Nielsen Company
Unilever
Vodafone

USA AND CANADA

Advertising Research Foundation
CBS
Colgate-Palmolive
ESPN
General Mills
General Motors
Innerscope Research
Kimberly-Clark
Mondelez International
Otsuka
Procter & Gamble
S.C. Johnson
Sun Products Corporation
The Coca-Cola Company
The Nielsen Company
Turner Broadcasting
Unilever

SOUTH AFRICA

Caxton Publishers & Printers
Colgate-Palmolive
Distell
FirstRand





Marketing and Business Development Team:

Rosaleen O'Brien, Toni Gallos, Emma Primett, Elké Seretis, Kirsty Willis, Elizabeth Gunner and Lindsey Peshanoff.

MARKET RESEARCH

Effective market research can help improve the efficiency of marketing activities and highlight valuable consumer insights. Often however, it produces semi-digested raw data or mysterious statistics which, without benchmarks, are of little use.

The Ehrenberg-Bass Institute not only provides clients with reliable market information, but correctly interprets data and draws insights and implications for marketing strategy. The Institute is able to achieve this as the market research conducted is underpinned by fundamental knowledge from the R&D program, which provides clients with unique insights that cannot be obtained elsewhere.

The Institute has the largest team of full-time marketing scientists in Australia. As well as specialised knowledge, researchers are experienced in market research design, analysis and reporting.

The Institute conducts both qualitative and quantitative market research.

The Ehrenberg-Bass Institute conducts all of its survey research in-house to ensure quality is maintained at every stage of a project. The Institute has its own Computer Assisted Telephone Interviewing system (CATI) to conduct telephone interviews both nationally and internationally. It also has the facilities to conduct focus groups, in-depth interviews, online surveys, experiments and mystery shopping research.

Our clients receive market research reports that turn data into meaningful information; findings that are clear, concise and easy to understand. Reports identify which findings are important (and which are not) and include recommendations that explain how this new information can be used in marketing strategy.

MARKET RESEARCH cont

RESEARCH SERVICES

The Institute offers a wide range of research services, which include but are not limited to:

- Advertising pre-testing
- Advertising effectiveness tracking
- Single source data analysis
- Brand equity tracking
- Brand attribute assessment
- Distinctive asset measurement
- Customer base modelling
- HH panel data modelling
- Market structure analysis
- Forecasting
- Loyalty program effectiveness
- Price sensitivity/reactions to price changes

We employ a variety of methods, covering quantitative and qualitative data collection techniques, and a wide gamut of modelling approaches.

Research methodologies are chosen based on a client's needs.

AREAS OF EXPERTISE

- Advertising
- Branding & Brand Equity
- Buyer Behaviour
- Loyalty
- Marketing Metrics and Accountability
- New and Traditional Media
- Pricing
- Service Quality
- Shopper Research
- Sustainable Marketing
- Wine Marketing

CLIENTS

Over the years the Institute has worked with a wide range of organisations including consumer goods companies, services, retail, not-for-profit organisations, government bodies and multinational corporations.

For more information about the Institute's research services contact

Elké Seretis, Associate Director (Commercial)

Elke.Seretis@MarketingScience.info





2012 PUBLICATIONS

REFEREED JOURNAL ARTICLES

Casini, L, Corsi, A M, Daniele, C, Marinelli, N, Marone, E & Scozafava, G (2012) "Contabilita' analitica e sostenibilita economica del settore vitivinicolo: ii caso del Chianti Classico", *Economia e Diritto Agroalimentare*, 17, 1, 83-103.

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Cohen, J, Lockshin, L & Sharp, B (2012) "A better understanding of the structure of a wine market using the attribute of variety", *International Journal of Business and Globalisation*, 8, 1, 66-80.

Corsi, A M, Mueller Loose, S & Lockshin, L (2012) "Let's see what they have...: what consumers look for in restaurant wine list", *Cornell Hospitality Quarterly*, 53, 2, 110-121.

Dawes, J (2012) "Brand-pack size cannibalization arising from temporary price promotions", *Journal of Retailing*, 88, 3, 343-355.

Green, K & Armstrong, S (2012) "Evidence on the effects of mandatory disclaimers in advertising", *Journal of Public Policy and Marketing*, 31, 2, 293-304.

Kennedy, R & McColl, B (2012) "Brand growth at Mars, Inc.: How the global marketer embraced Ehrenberg's science with creativity", *Journal of Advertising Research*, 52, 2, 270-276.

Lee, R & Neale, L (2012) "Interactions and consequences of inertia and switching costs", *Journal of Services Marketing*, 26, 5, 365-374.

Nelson-Field, K, Riebe, E & Sharp, B (2012) "What's not to 'like'?" Can a Facebook fan base give a brand the advertising reach it needs?", *Journal of Advertising Research*, 52, 2, 262-269.

Nenycz-Thiel, M & Romaniuk, J (2012) "Value-for-money perceptions of supermarket and private labels", *Australasian Marketing Journal*, 20, 2, 171-177.

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Nguyen, C & Romaniuk, J (2012) "Factors moderating the impact of word of mouth for TV and film broadcasts", *Australasian Marketing Journal*, 21, 1, 25-29.

Olsen, J, Thach, L & Hemphill, L (2012) "The impact of environmental protection and hedonistic values on organic wine purchases in the US", *The International Journal of Wine Business Research*, 24, 1, 47-64.

Page, B & Sharp, A (2012) "The contribution of marketing to school-based program evaluation", *Journal of Social Marketing*, 2, 3, 176-186.

Pare, V & Dawes, J (2012) "The persistence of excess brand loyalty over multiple years", *Marketing Letters*, 23, 1, 163-175.

Romaniuk, J (2012) "Lifting the productivity of television advertising: nothing matters more than the brand. Nothing.", *Journal of Advertising Research*, 52, 2, 146-148.

Romaniuk, J (2012) "Marketing matters: The various words of mouth - moving beyond the 'Road-to-Damascus' conversion", *Journal of Advertising Research*, 52, 1, 12-14.

Romaniuk, J (2012) "Modelling mental market share", *Journal of Business Research*, 66, 2, 188-195.

Romaniuk, J, Bogomolova, S & Dall'Olmio Riley, F (2012) "Brand image and brand usage: is a forty-year-old empirical generalization still useful?", *Journal of Advertising Research*, 52, 2, 243-251.

Sharp, B, Wright, M, Dawes, J, Driesener, C, Meyer-Waarden, L, Stocchi, L & Stern, P (2012) "It's a Dirichlet World: modelling individuals' loyalties reveals how brands compete, grow, and decline", *Journal of Advertising Research*, 52, 2, 203-213.

Uncles, M, Kennedy, R, Nenycz-Thiel, M, Singh, J & Kwok, S (2012) "In 25 years, across 50 categories, user profiles for directly competing brands seldom differ: Affirming Andrew Ehrenberg's principles", *Journal of Advertising Research*, 52, 2, 252-261.

Zorna, S F, Lee, R & Murphy, J (2012) "Marketing implications of traditional and ICT-mediated leisure activities", *Behavioural and Information Technology*, 31, 4, 329-341.

MARKETING: THEORY, EVIDENCE, PRACTICE

BOOKS AND BOOK CHAPTERS

Davison, S L, Thompson, K, Dawson D & Sharp, A (2012) "Reducing wasteful household behaviours: contributors from psychology and implications for intervention design" in *Designing for Zero Waste: Consumption, Technologies and the Built Environment*, Lehmann, S & Crocker, R (eds), EarthScan, London, UK.

Mazodier, M (2012) "Ambush Marketing: innovative or immoral?" in *Events Management: an international approach*, Ferdindand, N & Kitchin, P J (eds), Sage Publications, London, UK.

Sharp, B (2012) "Marketing: Evidence, Theory, Practice", Oxford University Press, Victoria, Australia.



In 2012 we completed our first introductory marketing textbook. It is the book marketing executives have been asking us to write for years. A textbook that reflects modern knowledge about marketing, and evidence-based thinking.

Marketing: Theory, Evidence, Practice, published by Oxford University Press, is an introduction to marketing science, explaining what we know about marketing, and why that should guide what we do in practice.

At the Institute, a lot of our industry work involves dispelling myths and helping our clients re-train their staff to think about marketing differently. With this textbook we aim to influence students from the start, at undergraduate level, so we can produce smarter marketers for the future.

This textbook is a genuine collaboration, combining the knowledge and insights of Institute staff, our industry partners and academic peers. We very much appreciate the support and effort from each of our contributors.



Dr Richard Lee, Dr Anne Sharp, Martin Hirche and Meagan Wheeler.

ACADEMIC OUTCOMES

RESEARCH DEGREE COMPLETIONS

PHD

Dr Virginia Beal

The effect of television promos on audience behaviour: new programs.

Dr Lara Stocchi

Exploring the link between consumer behaviour and brand associations.

Dr Giang Trinh

Modelling changes in buyer purchasing behaviour.

MASTERS BY RESEARCH

Stine Høj

Metrics and measurement methods for the monitoring and evaluation of household food waste prevention interventions.

Bryony Jardine

Retaining the primetime TV audience: examining adjacent program audience duplication across markets.

Lewis Liao

The impact of packaging elements on consumers' unconscious emotions.

Arry Tanusondjaja

Evaluating reach-maximising tactics on a fragmented television audience market.

HONOURS

Geoff Atkinson

What makes consumers click?

Grady Clarke

Facebook engagement: is it really worth the effort?

Tommy Ha

Is differentiation a necessary condition to obtain a price premium?

Samantha Hogan

Attribute elicitation procedures: a comparison of four techniques.

Mohammad Yousuf

Adoption of brand elements by small to medium business enterprises (SMEs).

ACADEMIC CONFERENCES 2012

- 41st European Marketing Academy Conference (EMAC)
- Academy of Marketing Conference
- Australian and New Zealand Marketing Academy Conference (ANZMAC)
- Consumer Behaviour and Marketing Conference
- Cross Media Generalisations
- Eyetrack Australia Conference
- International Choice Modelling Conference
- International Colloquium on Place Management Marketing and National Branding
- Marketing Science Institute Retailing Conference
- National Sales and Management Conference
- Wharton Empirical Generalisations in Advertising II Conference (EMPGENS²)
- Wine MBA Conference

VISITORS TO THE INSTITUTE IN 2012

- Dr Dag Bennett - London South Bank University, UK
- Dr Gregory Bresolles
 - Bordeaux Ecole du Management, France
- Dr Don Esslemont - Massey University, NZ
- Professor Gerald Goodhardt - City University, UK
- Mr Nikolay Korotkov
 - Market Research Ideas & Insights, Russia
- Professor Jordan Louviere
 - University of Technology, Sydney
- Associate Professor Jay Mulki
 - Northeastern University, USA
- Dr Herb Sorensen - TNS Global, USA
- Professor Joffre Swait
 - University of Technology, Sydney
- Professor Malcolm Wright - Massey University, NZ

INDUSTRY CONFERENCES 2012

AUSTRALIA

Connecting Up Nonprofit Industry Conference, Sydney

Dr Margaret Faulkner - Understanding which emotions drive video sharing.

Disability Employment Australia, Melbourne

Dr Elizabeth Hemphill - What employers have to say about jobs for people with disabilities.

Marketing Week, Adelaide

Dr Karen Nelson-Field - Would the real best practice please stand up. Integrating Facebook into marketing strategy based on tested knowledge.

Mumbrella360, Sydney

Dr Karen Nelson-Field - Emotional drivers of video sharing: a multiple study approach.

UniSA Knowledge Works, Adelaide

Professor Larry Lockshin - Research into wine packaging with a few detours.

Australian Sales & Marketing Institute, Melbourne

Professor Larry Lockshin - What matters most: what's in the package or on the package?





Mohammad-Yousuf, Marietta Szabo, Kellie Newstead and Ulrich Veyhl

OVERSEAS

Advertising Research Foundation

Re: think Conference, USA

Dr Karen Nelson-Field - Would the real best practice please stand up. Integrating Facebook into marketing strategy based on tested knowledge.

Advertising Research Foundation Audience Measurement Conference, USA

Professor Byron Sharp - Does Media Matter When Giving and Receiving Word-of-Mouth?

Asian Marketing Effectiveness Conference, China

Professor Byron Sharp - How Brands Grow.

AustCham Conference, China

Dr Svetlana Bogomolova - Lost your Customers?

Global Islamic Marketing Conference, UAE

Abou Bakar - The Use of Religious Symbols on Packaging to Influence Product Preference and Rating.

IJMR Research Methods Forum, UK

Associate Professor Rachel Kennedy - What Research Can We Trust?

THE FUTURE

2013 is certain to be another busy year for the Institute. With three Board meetings planned across three continents we will have lots of staff travelling, talking to clients and spreading our knowledge.

Building our international reputation and global activity remains a core focus for the Institute and every year we make progress. 2013 will see further business development in the Australasian region, with our first trip to India planned. We will work closely with our existing Corporate Sponsors to help grow their business in Asia and find new opportunities for expansion.

After the successful launch of *How Brands Grow* in 2010, this year we plan to release an e-Book version. This will help further our reach by making it more accessible, allowing us to get the knowledge in front of more marketers globally.

2013 will also see the release of *Viral Marketing: the science of sharing* by Dr Karen Nelson-Field, the first in a series of short management books designed to deliver important, understandable

information to marketers. The series will cover a range of marketing topics, authored by different marketing scientists at the Institute.

We continue to look into emerging areas such as virtual reality and social media to ensure our clients have access to the latest thinking. We also continue to look for opportunities for collaboration, both with academic institutions and industry partners.

We look forward to the year ahead. The Institute has a team of bright thinkers, eager to take on any challenges that 2013 may bring.

KEY GOALS FOR 2013

- Launch an e-Book version of *How Brands Grow*
- Develop a managerial book series and launch the first in the series
- Develop our business in Australasia
- Embark on the Institute's first trip to India
- Continue our upward trajectory publishing in top international journals
- Grow our Corporate Sponsorship base by 10 new sponsors





Zac Anesbury, Dr Karen Nelson-Field, Dr Cam Rungie and Michael Vogelpoel.



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