



Strategic Analysis Report

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presented by

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CINEMA LATINO STRATEGIC ANALYSIS

STRATEGIC ANALYSIS

Objective

From Client RFP:

*“**Strategic Analysis** - will detail and document the patterns and behaviors of bilingual Latinos in the key markets we are targeting. Will also evaluate existing branding manual and elements.”*

Study Methods

Focus Group Study

The goal of the Dallas/Fort Worth focus group is to gain meaningful insight into the perceptions and attitudes of bilingual Latinos about attending movies in the theater, about movies with Spanish subtitles, and about the Cinema Latino brand and product offerings.

Dallas/Fort Worth was chosen for this study for two main reasons.

- The next new theater is projected to be built in Dallas (at Illinois & Westmoreland).
- The existing theater at La Gran Plaza in Fort Worth is successful.

Statistical Data Study

A study of public and private demographic studies was conducted to support/augment findings.

Review

An evaluation of existing Branding Manual and elements was conducted.

CINEMA LATINO STRATEGIC ANALYSIS

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FOCUS GROUPS

CINEMA LATINO STRATEGIC ANALYSIS

Focus Groups

Executive Summary

Yema Media conducted two focus groups in the Dallas/Fort Worth area to gain meaningful insight into the perceptions and attitudes of bilingual Latinos about attending movies in the theater, about movies with Spanish subtitles, and about the Cinema Latino brand and product. These discussions were held on the evening of October 30, 2006 in Addison, Texas, a suburb north of Dallas. The first group was comprised of eight bilingual, Latino teenagers, six males and two females, who had seen at least one movie in the past year. The second group was comprised of ten bilingual, Latino adults, six males and four females, who had seen at least one movie in the past year.

In terms of the highest priority questions posed by Sonora Entertainment Group, both discussions were very revealing. Sonora Entertainment Group wants to know if bilingual Latinos will travel further to watch movies with subtitles in their theaters. They want to know how bilingual Latino teenagers are motivated to attend movies. They want to know what will attract bilingual Latinos and cause them to return and recommend Cinema Latino theaters.

Although demographically similar, there were some marked differences between the teen and adult groups. These similarities and differences create a picture which can be applied to Sonora Entertainment Group's brand expansion strategy for an effective, sophisticated approach.

Both groups indicated that inconvenient distances will factor in negatively. The teens seemed more receptive to traveling further, but often are dependent on others for transportation. Some adults conceded that they might travel a reasonable distance out of their way for a special, more desirable experience.

The most striking contrast between the groups was the difference of opinion about movies with subtitles. None of the teenagers were concerned about subtitles – they were largely indifferent to subtitles, and also to the movie content in general. For teenagers, movie going is primarily a social event. On the other hand, most of the adults were not at all receptive to the idea of watching movies with subtitles. Subtitles in Spanish are perceived as a potential distraction. But many adults also conceded that they might be convinced by family or friends to attend just once or on occasion. It also bears mentioning that a majority of the adults are attending movies with their children, and going to movies is essentially a family outing. Adults were also open to new, better movie theater experiences as a motivating factor for return business.

From these points, a triangulation of motivation can be deduced. Adults can be motivated by their families to attend on a limited basis. If the experience is exceptionally positive and the distance is reasonable, teens and adults will return. It follows that if they return, overcoming distance and, in the case of adults, subtitles, they will be likely to tell others about their positive experience.

CINEMA LATINO STRATEGIC ANALYSIS

Focus Groups Findings

General Movie Going

GROUP ATTENDANCE

Teens: Attendance in groups of 5 or more peers; often meet up at theater with similar groups

Adults: 70% attend with family, especially children

PROS

- Experience: sound, screen, spectacle (teens & adults)
- Stadium seating (teens & adults)
- Newer theaters; specialty amenities (adults)
- Socializing (teens)

CONS

- Price of tickets (teens & adults)
- Price and quality of concessions (teens & adults)
- Ads (adults)
- Uncomfortable seats (teens)
- Crying babies; people talking; noisy teens

PRO & CON

- Previews

LOCATION

Teens:

- Proximity of the theater important. They don't want to travel too far.
- Teens often dependent on others for transportation. (This variable may sometimes favor a more distant theater.)
- Fifteen minutes cited as the limit for driving.
- Special offers, special pricing cited as motivators.

Adults:

- Proximity was the primary factor in choosing a theater.
- Special amenities, surrounding location, "specialty movies" (short-run, independent films) as a motivator. Twenty-five minutes travel cited as acceptable in special cases.

"Whoever has the best amenities. We go to Addison where you can eat and drink. It's better than having a hot dog. They can have pizza or a burgers or whatever they want."

"To me it depends. If I go with my husband then we go to Frisco, at the Mall because we'll go to Cheesecake Factory or something and then go to the movie theatre."

CINEMA LATINO STRATEGIC ANALYSIS

Focus Groups Findings

Movie Theater Concept

TEEN ATTENDANCE

The teenager discussion group emphasized that movie going was a social outlet more than an entertainment event. The content of the movies is unimportant.

- Primarily a social activity
- All agree they regularly go without knowing what movie they will see
- Going in large groups of 5 or more, meeting up with more at the theater

SUBTITLES

Teens: **No teens were bothered by the idea of Spanish subtitles**

- Since movie going is mostly a social event, the concept was received very well
- Teens would want to know if the theater was comfortable, if there are attractions in the surrounding area, and how much they will pay for concessions
- Being among other Latino teens was attractive

“I’d go to meet Latina girls.”

Adults: **70% bothered by subtitles**

- Subtitles perceived as a distraction

“I miss the movie because I’m trying to read the subtitles.”

“If you’re already bilingual then you know what they’re saying.”

“You’re reading what they’re saying instead of listening.”

- Subtitles are for Spanish-dominant movie goers
- Close Spanish-dominant family members might motivate attendance

CINEMA LATINO STRATEGIC ANALYSIS

Focus Groups Findings

Movie Theater Concept

CONCEPT

Teens:

- Positive response to Latino theater concept
- Participants cited family or friends who would benefit
- Some suggested they might like to take certain family members
- Some thought subtitles might bother other people;
reconfirmed that subtitles do not concern them

Adults:

- Marketing to Latinos is positive

“Latinos are very loyal and when they find something that they like they stick to it, they don’t change very often. So if they find a theater that caters to them they will keep going, especially if they have a good experience with it.”

- Theater concept uninteresting

LOCATION

Teens:

Concerns expressed about traveling too far:

- Price of gas
- Will the drive be too long?
- Will we be late to the movie?
- Will we be late getting home?

Everyone confirmed that they would like to try the theater at least once.

Adults:

- A full range of conditions cited before unusual travel was acceptable
 - How far; price of gas; who is driving
 - Timeframe of the outing; what else can be done in the area
 - What movies are showing; incentives (“free tickets,” coupons, etc.)

“If it’s in the Dallas area I’d go, but if it’s in Fort Worth I would not.”

CINEMA LATINO STRATEGIC ANALYSIS

Focus Groups Findings

Movie Theater Concept

CONCESSIONS

Teens:

- Latino/Mexican foods as concessions a good idea

“I’d like Latino music and food. You never have Mexican food at a movie theater, just hot dogs and popcorn.”

Adults: Positive response to the idea of Latino/Mexican foods as concessions.

- More appealing food options might change minds opposed to distance and subtitles
- Food suggestions:
 - Quesadillas – “finger food” – “They have those grills in theatres now, why not?”
 - Tacos
 - Chips and salsa
 - Nachos – “Real nachos” and “Real cheese”
 - Horchata

“For me, that would definitely be an experience. It might make me want to try the theater more if there was Mexican food.”

LOBBY MUSIC

Teens:

Lobby music is generally unimportant, but the idea of Latino music is appealing. Reggaeton style music is not particularly important to this group.

Adults:

Any kind of music in the lobby was fine if it isn’t too loud and the content isn’t offensive.

LATINO CROWD

Teens:

Unanimous positive response to the description of the theater’s environment.

Adults:

An environment with many Latinos speaking mostly Spanish is positive, and source of pride. Everyone agreed that it is very important to raise children to be bilingual.

“Being able to speak Spanish makes you feel pride – it’s important.”

CINEMA LATINO STRATEGIC ANALYSIS

Focus Groups Findings

Movie Theater Concept

REWARD CARDS / COUPONS

Teens:

The group was generally indifferent to these devices, but acknowledged they were potentially positive motivators (no negative response).

“It’s cool if you go a lot. I had one and I would always forget it.”

Adults:

- Redemptions/rewards should be substantial/proportionate
- Electronic rewards card is more appealing than punch card
- Testimony of teens resisting using coupons – seen as “cheap”

“The Grand does that already. You get popcorn. It is not a motivating factor.”

“It is a motivating factor for me because I feel like I’m a loyal customer so they should do something for me.”

“It depends on what it is. If you have to go ten times to get a small drink, that’s not going to do it.”

RAFFLES AND TEEN VIP ACTIVITIES

Teens:

- Giveaways might motivate some teens to attend. Teen activities would motivate attendance, but some acknowledged that reactions could be mixed.

“It might be too loud. It’s like a party in the lobby.”

“That’s tight though. But some people might not like a big crowd.”

Adults:

Giveaways did not interest the group. Participants were guardedly optimistic about the idea of teen activities. A large group of teens having fun is fine as long as it does not interfere with their own theater experience.

- Teens in an organized activity is positive
- A large group of excited teens might make some customers nervous
- Teen group activities should not interfere with the experience of other customers or lead to misbehavior

CINEMA LATINO STRATEGIC ANALYSIS

Focus Groups Findings

Movie Theater Concept

GENERAL COMMENTS

Teens:

- Most thought the idea was interesting enough to try it out
- Some said it was no different to them than any other theater on the weekend
- One acknowledged that if the theater was within 15 minutes, he would bypass competing theaters to go to the Latino theater (as long as the movies were the same)
- If the experience was unique, they would tell their family and friends

“I went to a movie theater in Costa Rica in a theater like this, I was with a bunch of friends and they thought it was really cool and they were begging to go, that it would be really fun, we should all go, and it was really fun.”

- Teens asked questions about plans for the theaters and the existing theaters. They expressed genuine interest

Adults:

- Two strong rejections of theater concept; four conditional acceptances
- Continued affirmation that Spanish-dominant family members would be a primary motivator
- Three participants cited the importance of theater *cleanliness*
 - Restrooms
 - Seats
 - Floors, aisles
- Better food, especially for the kids

CINEMA LATINO STRATEGIC ANALYSIS

Focus Groups Findings

Visual Cues Summary

Participants were shown some images pertaining to the Cinema Latino visual identity and asked to rate the images from one to five, a one being most favorable, and a five being the least. They were given no other information. Some participants in the adult group offered additional comments.

THE IMAGES

- A. Cinema Latino signature colors (abstract design)
- B. Earth tones (abstract design)
- C. Red, white and blue (abstract design)
- D. Cinema Latino logo - signature colors
- E. Cinema Latino logo - Red, white and blue
- F. *Nuestro Cine*
- G. ¡Vivelo!
- H. Polaroid Poster ad concept
- I. Identity Concept 1
- J. Identity Concept 2

- The current identity with its colors rated favorably in contrast to new identity concepts and some color variations.
- ¡Vivelo! was especially successful in both groups.
- The Polaroid ad concept rated very favorably with adults; and favorably, but less so, with teens.
- In some cases, red, white and blue variations rated higher than current signature colors, indicating that more acculturated bilingual Latinos are less likely to respond to color schemes relating to Mexican heritage.
- *Nuestro Cine* artwork rated very poorly with adults, eliciting four negative comments; mixed to low ratings from teens

CINEMA LATINO STRATEGIC ANALYSIS

Focus Groups Findings

Statistical Data

TEENS

Average Age: 15 years old

Age range: 13 - 17

Female 2

Male 6

How much Spanish is spoken in your home/with friends?

60% speak Spanish at home (or with friends) on a regular basis

25% speak Spanish “a lot” or with “almost everyone”

Number of times attended movies in the theater this year?

Average: 18 times

Range: 5 - 50

10 times or more: 75%

20 times or more: 37.5%

30 times or more: 25%

Attended movies with friends or family who do not speak English?

75% Yes 25% No

Family members living outside the US? 87.5%Yes 12.5%No

What country? Mexico 87.5%, Peru & Cuba 12.5%

CINEMA LATINO STRATEGIC ANALYSIS

Focus Groups Findings

Statistical Data

ADULTS

Average Age: 33.3 years old

Age range: 19 - 48

Female 4

Male 6

Married: 7

Single: 3

Income: Average hourly (3) \$12.41/hour

Average yearly (7) \$61,000/year

How much Spanish is spoken in your home/with friends?

90% speak Spanish at home (or with friends) more than 25% of the time.

60% speak Spanish at home half the time or more

20% speak Spanish at home over 90% of the time

Number of times attended movies in the theater this year?

Average: 16 times

Range: 2 – 30+

10 times or more: 80%

20 times or more: 40%

30 times or more: 20%

Attended movies with friends or family who do not speak English?

30% Yes 70% No

Family members living outside the US? 100%Yes 0%No

What country? Mexico 60%, El Salvador 30%, Honduras, Peru & Puerto Rico 10%

CINEMA LATINO STRATEGIC ANALYSIS

Focus Groups CONCLUSIONS

Teens

- Bilingual Latino teens are a more viable market than bilingual Latino adults.
- Grassroots, local Spanish radio and word-of-mouth marketing will likely prove effective for teens.

Adults

- Adult bilingual Latinos will be very difficult to attract without encouragement from trusted sources.
- The attitudes of adult bilingual Latinos about theater distance and subtitles can be characterized as “mainstream.”
- The study shows they prefer general market media, suggesting that Cinema Latino’s current ad buys will be ineffective with this group.
- Adults can be swayed to try a new theater experience based on sets of conditions:
 - Who suggests the outing?
 - What are the limits of comfort for travel and time?
 - Is the area of town attractive?
 - Are there incentives? Rewards and coupons may help.
 - Is the reward of attending proportionate to the perceived extra time and distance

Location

Distance is the most significant obstacle to attracting bilingual Latinos. This vulnerability must be offset by a strongly positive theater experience.

Subtitles

To gain repeat adult business, the theater must offset the perceived inconvenience of subtitles with an exceptionally positive experience that offers more than the average theater.

Concessions

Adults (and teens) might be persuaded to attend by the quality of the concession offerings, and if there were Mexican food items on the menu. A reputation for good concessions could be a powerful tool to drive attendance.

Environment

Comfort, tasteful lobby music and a clean environment are important to adults. A messy restroom can easily undo a positive theater experience.

Repeat business

Repeat business, recommendation and customer loyalty are all entirely dependent on and proportionate to the perceived positive quality of the visitor’s first-time experience.

Identity

The current identity with its colors and *¡Vive!o!* are generally working well. *Nuestro Cine* artwork is not appealing. Polaroid ad campaign appeals to bilingual Latinos as well.

2

STATISTICAL DATA STUDY

CINEMA LATINO STRATEGIC ANALYSIS

Statistical Data Study

Hispanic Bilingualism and Acculturation

The rate of Spanish/English bilingualism among Hispanics is commonly estimated nationally at about 65%. Truly bilingual Hispanics comprise about 20% of the overall Hispanic population, with approximately equal portions on either side relying heavily on one language or the other. Thirty-eight percent are estimated to be Spanish-dominant.

Rates of acculturation, assimilation and isolation roughly follow these numbers at 60%, 20% and 20% respectively.

Fifty-seven percent of Hispanics ages 14 – 24 prefer English to Spanish, and prefer English-language media. Ninety percent of bilingual Hispanics ages 5 – 17 speak English “very well” or “well.”

Hispanic Spending Habits

Hispanics households with children are 75% more likely to attend movie theaters once a week or more than general market households.

The Hispanic youth market (Hispanics under the age of 18) is expected to grow at a rate 32% in the next 15 years, compared to a rate of only 7.8% in the U.S. general population.

While Hispanics are generally considered brand-loyal, younger Hispanics are willing to try new products and brands. They are attracted by contemporary styles that enhance their image.

Sixty percent of all Hispanic disposable income is dominated by English-dominant Hispanic households.

Hispanics purchase more, purchase more with cash and purchase more compulsively than general market counterparts. Hispanic spending grew at rate of 6.9% between 1997 and 2001 compared to a general market rate of only 4.4%.

Hispanics in Dallas / Fort Worth

Dallas/Fort Worth is rated the nation’s 7th largest Hispanic market, with 1.6 million Hispanics comprising 24.5% of the total population.

Growing at a rate of 25.1%, the Hispanic population in Dallas/Fort Worth is expected to grow to 2 million by 2011.

The Dallas/Fort Worth population is growing ever more diverse. In 1970, Dallas/Fort Worth was considered culturally homogenous, but by 2011 is expected be 50% – 100% multicultural.

CINEMA LATINO STRATEGIC ANALYSIS

Statistical Data Study

Hispanics in Texas

Hispanics in Texas are the largest minority group at 35.8% of the population. Out of 8.2 million households in Texas, 2.2 million are Hispanic. Hispanics in Texas account for about one fifth of the overall U.S. Hispanic population.

85% of Hispanics in Texas are of Mexican descent, compared to 71% nationally. 12% of the Texas population is foreign-born.

Hispanics in Texas controlled more than 85 billion in purchasing power in 2004, growing at rate of 6.7% over 7 years.

Hispanics in the U.S.

Hispanics currently comprise 14.8% of the general U.S. population (not including Puerto Rico). The Hispanic population is growing at a rate four times faster than the general population.

Trends indicate that U.S. Hispanics will number 51 million by 2011. By 2050, Hispanics will approach nearly 25% of the total U.S. population at over 102 million.

The median annual income for Hispanic households in 2006 is \$35,990. Two thirds of Hispanics ear over \$25,000 a year. Hispanic Buying power is projected to reach one trillion dollars before the end of the decade.

The median age of U.S. Hispanics is 27. Fifty-five percent of Hispanics are under 30 year of age; one third are under 18.

Sixty-two percent of Hispanics have lived in the U.S. 17 years or less.

Sources:

U.S. Census Bureau

American MarketScape DataStream 2006 Geoscape International 2006

Hispanic Fact Pack 2006 Edition Crain Communications, Inc. 2006

The U.S. Hispanic Economy in Transition HispanTelligence®, Hispanic Business Inc. 2005

3

REVIEW OF BRANDING MANUAL AND ELEMENTS

CINEMA LATINO STRATEGIC ANALYSIS

Review of Branding Manual and Elements

This summary is an itemized review of the Cinema Latino 2005 Branding Manual.

1. Cinema Latino Brand Strategy

Component 1, the primary target consumer, is being dramatically modified. This will affect components 2 and 3.

2. Brand Framework

Mission

The Mission does not need much adjustment, if any, to embrace new target market, but assumptions about how to conform to the Mission will need to change.

Market

This will need modification. As Cinema Latino seeks more mainstream dollars, it must adjust its view of its market. There should be a shift toward the quality of the product.

Essence

All items are powerful and solid. A review of all points and their application on-site should be made. Revisit assumptions about lobby music, concessions and theater cleanliness.

Key Words

It may be useful to revisit the order of the words on this list as the brand expansion ensues. Quality and Innovative, for example, may begin to take a more prominent role. A word like "Unique" may perhaps be added.

Brand Overview

A shift toward the emphasis of the quality and singularity of the experience may necessitate adjustments in some of the quadrants in this scheme.

3. Key Messages & Application

1) ¡Vivelo!

This is the most effective identity element after the logo.

2) *Las mejores películas de Hollywood y America Latina*

This important selling point does not need modification, but consideration of new message must come in to play at this level in brand expansion. Reach mainstream movie goers at this level.

3) *Cinema Latino de...(cuidad)* & 4) *Direccion*

The concept behind this element is sound – only needs reinforcement as more theaters are built.

5) *Totalmente en Espanol / en su idioma*

As more theaters open and the message is modified for a wider audience, this element may not keep its prominence, but it should not be eliminated. It is likely that this message may incorporate into the brand awareness without verbal reinforcement.

6) *Nuestra Familia* & 7) *Llame gratis al 888-588-CINE*

Strong, sound elements.

CINEMA LATINO STRATEGIC ANALYSIS

Review of Branding Manual and Elements

8) *Tus golosinas favoritas de Mexico*

A modification of this element may be in order to bring in line with brand expansion message. Quality of concessions may take precedence.

9) *Primera cadena de cines*

This message must take more prominence. It may be modified to further differentiate Cinema Latino from general market theater competitors.

Key Messages for Non-target Audiences

With new target markets, the line between target and non-target audiences has moved and may continue to move. Some of these elements may change place in terms of their importance. In particular, it may become less important to emphasize **2) Spanish-dominant** as it becomes an assumed part of Cinema Latino identity. When bilingual Latinos hear about Cinema Latino, they should not understand any message to seem exclusionary, because this is negative. **3) Original** might be modified not to indicate Cinema Latino's history of being *first*, but rather *unique*. **7) Experience** may need to be modified to emphasize *quality*, because the experience alone is not sufficient to attract bilingual Latinos in numbers. **8) Value** and **9) Comfortable** might be reversed in priority.

Unsuitable Messages for All Audiences

These distinctions are sound.

4. Cinema Latino Brand Position

What sets Cinema Latino apart from other direct competitors?

Revisit the order of these items. Emphasize quality, unique concessions.

What sets Cinema Latino apart from indirect entertainment choices?

Spanish-dominance is not a high priority item to bilingual consumers.

5. Cinema Latino's Target Audience Examined

Primary Target Audiences

This list will number up to five with the addition of bilingual Latino adults and teenagers.

What does the target audience want? What does the target audience value?

Concerns of new target audience are different than the current lists. These lists will need thoughtful revision.

Secondary Target Audiences

Families & Males

This does not change

Youth

It may prove essential to reconsider teens as a primary target audience. Over the next decade, Hispanic youths will grow considerably, taking on a prominent role as significant economic drivers.



CINEMA LATINO STRATEGIC ANALYSIS

Review of Branding Manual and Elements CONCLUSIONS

The Branding Manual is thorough and consistent. Brand expansion will require modifications to certain elements. Many elements will not change, but assumptions about them must be revisited and revised to accommodate the new target markets.

To attract the new target market of bilingual Latinos, especially adults with their families, the message must shift toward emphasis of quality, unique experience while deemphasizing, without sacrificing, Spanish-dominance, in-Spanish, and Mexican heritage elements.

4

RECOMMENDATIONS

RECOMMENDATIONS

1 Market differentiation with product upgrades

Attract more affluent, educated bilingual customers with a unique, higher quality product than the competitors. The current experience alone will not be enough to inspire repeat business. Commit to a competitively higher quality theater experience for your customers. The theater must appear attractive, clean, and inviting. Concessions should be of higher quality and reflect the Mexican palate of the target market. The environment should be tweaked for optimum comfort and broad appeal.

- **Concessions**

Improve and expand concession offerings. Bilingual Latinos will be attracted to a uniquely Mexican menu and higher quality food.

2 Change message to reflect expanded target market

Emphasize the positive differences between Cinema Latino and general market theaters. Consider an angle about the importance of Spanish-language retention and bilingualism to families. The current theme of "nuestro cine" is not strong enough to attract bilingual Hispanics.

3 Reach the teen market

Bilingual teens will drive new and repeat sales now and especially into the future as Hispanic teens become an increasingly powerful demographic. Create an aggressive new teen promotion program. Dedicate resources to support a long-range view of drawing large numbers of teens.

4 General market advertising

Ad buy strategy must change to reach a significant number of bilingual Latinos. Even if bilingual Latinos divide media consumption 50-50 between Hispanic media and general market media, bilinguals will then be only half as likely to see or hear a Cinema Latino ad with the current strategy.

5 Test product upgrade

Select a theater to test product changes. Calculate incremental costs against incremental ticket and concession sales to calculate return on investment and determine viability potential roll out.

- **Test new message and ad buy**

Focus on critical changes in test market to determine viability.

6 Track marketing results

Use every available means to track the results of all marketing efforts. Expanding target markets and new message and ad strategies complicate the marketing picture exponentially. Close monitoring will yield critically valuable information.

7 Incentives

Rewards cards and coupons will continue to play an important role in repeat business. Electronic rewards and gift cards are attractive and instrumental in collecting data.