Measuring customer value • Research industry AWOL on TQM? • (Dis)satisfaction research

October 1996

Quirk's MARKETING RESEARCH Review

Practical applications in marketing research

Quirk's MARKETING RESEARCH *Review*

C O N T E N T S

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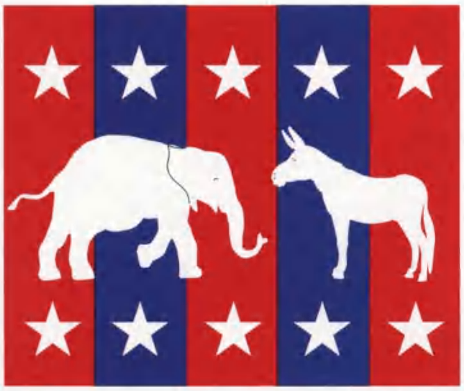
Survey Monitor

It's the character issue, stupid

More than two-thirds (69.3 percent) of Americans participating in a national survey by the Research Division of St.



Louis-based Aragon Consulting Group say they will be much more likely to vote for a presidential candidate who appears to be of good moral character and honest, making this the number one criterion considered when votes are cast.

"Our study showed that this issue is of particular concern to Republicans," says Gary Miller, president of Aragon Consulting Group. More than 80 percent of Republicans say the character issue is a major factor, compared to 63.2 percent of Democrats.

"Nearly as many people (63.2 percent) also are inclined to vote for a candidate who favors welfare reform," says Miller. "Again, this factor is of greater importance among Republicans, with 75.2 percent of them saying they would be much more likely to vote for a candidate who supports welfare reform."

More than half (52 percent) of those surveyed say they are much more likely to vote for a candidate who favors cutting taxes, and 63.5 percent report that they pay too many taxes. "Still, 55 percent of Americans say they do not think a candidate is believable when he advocates tax cuts, while 21.2 percent say such promises are believable," says Miller.

The Aragon study found that Democrats are significantly less likely than the rest of the population to say that they pay too many taxes. "Even so, more than half of all Democrats (52.2 percent) say taxes are too high, while 70.1 percent of Republicans, 71.4 percent of Reform Party members and 75.6 percent of the rest of Americans responded likewise," says Miller.

If taxes were to be cut, most Americans suggest reducing federal spending. Among the more popular suggestions are: cutting foreign aid (86.4 percent); reducing welfare programs (73.9

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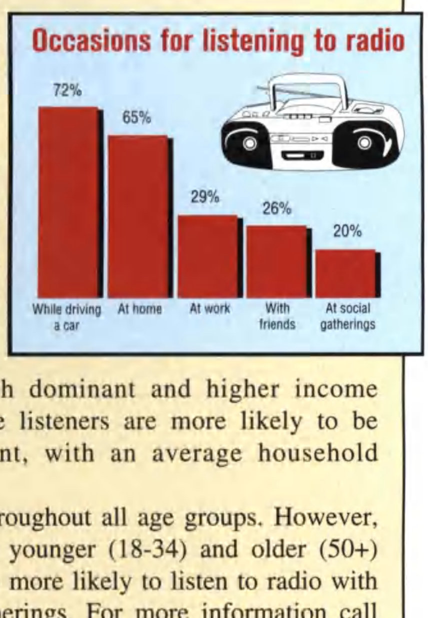
When do Hispanics listen to the radio?

Hispanics have already proven to be good (radio) listeners. Spanish-language stations have been dominating the ratings in the nation's largest radio market (Los Angeles) for the last three years. Hispanics spend over 20 hours per week listening to radio.

A recent poll by Market Development, Inc., San Diego, as reported in MDI's *Hispanic Perspective* newsletter, asked Hispanics in the five major markets when they tune in to the radio. Data reveals that more Hispanics listen to radio while in the car and at home than in the office or at social gatherings.



While the Hispanic car listener is more likely to be a male, the home listener tends to be a female. This might be due to the fact that more Hispanic men than women tend to drive a car and use it to travel to work.

Data also reveals that car listening is higher among U.S.-born, English dominant and higher income Hispanics. On the other hand, home listeners are more likely to be foreign born and Spanish dominant, with an average household income of around $20k.

Car listening is consistently high throughout all age groups. However, at-home listening peaks slightly with younger (18-34) and older (50+) Hispanics. Younger Hispanics are also more likely to listen to radio with friends and at parties and social gatherings. For more information call 619-232-5628.

Product & Service Update

Mercator releases update of snap

Mercator Corporation, Newburyport, Mass., announces the release of snap version 4, its survey design and analysis software. Version 4 offers users an enhanced on-screen survey design and layout facility. A library of options enables users to stylize their questionnaires to suit their individual needs. An extensive graphics option provides the ability to present data in a variety of forms. Users can select from an existing range of table and chart styles or create and save their own. For more information call 508-463-4093.

New geodemographic software

Market Statistics, New York City, has released MarketIntellect Version 1.8, which combines up-to-date demographic and economic data with the software to make sense of them. MarketIntellect 1.8 lets users perform geomarketing analysis and create their own maps showing geographic distribution of variables like income level and purchasing power. The software contains nine different databases, including retail and service industry sales, buying power indices, consumer expenditure potential, and updated census demographic figures. In addition, MarketIntellect 1.8 will accept users' customized data. For more information call 212-592-6273.

Forrester puts its services on-line

Forrester Research, Cambridge, Mass., has made available its line of technology research services and new value-added services via the Internet and corporate Intranets. Forrester Internet offers flexible purchasing options, allowing clients to select only those services and features that meet their needs. Pricing is based on the

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Research Calendar

MRA FALL CONFERENCE: The Marketing Research Association will hold its fall conference on October 16-18 at the Westin Hotel, Tabor Center, in Denver. The conference program, "MRA: Crosstraining for the Future," will teach researchers how to combine different tools and techniques for success. A computer lab will allow participants to experiment with a variety of business applications and learn how to "surf the Net." For more information call 860-257-4008.

INTELLIQUEST BRAND TECH FORUM: On October 23-24 IntelliQuest, Austin, Texas, will hold its fourth annual Brand Tech Forum at the Fairmont Hotel in San Francisco. This year's forum will explore the challenges involved in creating, managing and measuring brands. It will also examine the impact of interactive branding and the requirements of a technology brand to succeed on-line. For more information call 800-580-6715 or visit the IntelliQuest home page at http://www.intelliquest.com.

New Links

Home page has links to media sites

New Paltz-N.Y.-based Gebbie Press, publisher of the All-In-One media directory and disks, has launched a home page at http://www.gebbieinc.com. Included on the home page are selected links to top public relations firms worldwide, as well as a link to Kidon Media, which has a wealth of general media home pages, foreign and domestic. The All-In-One directory encompasses over 19,000 outlets in the print and electronic media. It includes detailed information on daily newspapers (1,625), weekly newspapers (5,900), radio stations (7,300), TV stations (1,250), and trade and consumer magazines (3,000), as well as separate Black and Hispanic media sections, news syndicates, networks and more. Gebbie invites users to submit additional PR, marketing, advertising, media and journalism links. Please E-mail them to gebbie@pipeline.com.

New site focuses on Latin American and pan-regional media

Audits & Surveys Worldwide, New York, and IBOPE International, a research company with offices across Latin America, have launched Zona Latina, a Web site which contains information on Latin American culture, news, data, reports in English and Spanish and offers links to broadcast, cable, publishing, advertising and media trade publication Web pages. The address is: http://www.zonalatina.com/.

DRG intros research bulletin board

Discovery Research Group, Salt Lake City, Utah, has created the Market Research Round Table, a bulletin board for discussion of issues relating to market research, at http://www.drgutah.com/wwwboard.

A united effort

Satisfaction research puts Twin Cities United Ways in touch with their core donors

By Joseph Rydholm
QMRR editor

You might not think a charitable organization would have to conduct customer satisfaction research, but charities face the same kind of problems that beset for-profit operations. Competition for the charitable dollar is intense, so, like a consumer product or service provider, a non-profit has to keep its contributors happy, lest they take their dollars elsewhere.

That's especially true in the Twin Cities of Minneapolis and St. Paul, an area known for its generous support of charitable organizations at both the corporate and private level. With so many worthwhile organizations chasing a (seemingly) finite number of dollars, it's more important than ever for charities to keep their donors satisfied.

Though their home cities engage in a kind of civic sibling rivalry, the United Ways of Minneapolis and St.

Paul long ago put any geographic prejudices aside and began working together. "We're facing the same issues," says Sue Johnson, vice president, marketing, United Way of St. Paul Area. "Our donors live in one community and work in the other. They often aren't all that conscious of there being two United Ways in the area. And many donor companies have offices in both cities."

This spirit of cooperation has extended to marketing research projects. While the two United Ways had conducted a lot of research, until recently most of it had been on a short-term, need-to-know basis. "Our research had been reactive rather than proactive," says Pam Carlson, director of advertising and promotion, United Way of Minneapolis Area. "We felt we didn't have a good ongoing sense of what our customers locally are thinking about United Way."

"We had done lots of surveys where we got perceptions about giving and about United Way but we had never asked what was most important to them and how United Way measured up in those areas," Johnson adds. "We needed a new methodology to be able to make the results more action-oriented."

The Marketing Research Committee of the United Way of Minneapolis and St. Paul recommended an ongoing customer satisfaction research program. "This was a commitment to an ongoing pulse taking. Just as the pulse of a human being changes, the dynamics of a relationship with any organization change over time," says Beth Fischer, president of Twin City Interviewing, a Minneapolis research firm, and chair of the United Way Research Committee.

(Other volunteer members of the United Way Research Committee include: Joe Brunner, senior vice president, Layton Marketing Group; Nancy Brown, president, Nancy S. Brown Marketing Research; Susan Flach, director of marketing information, IDS Financial Services; Susan Goode, assistant vice president, research services, Lutheran Brotherhood; Jody Hilgers, Hilgers Marketing; Bill Muggli, director of marketing research, Norwest Bank Minnesota; and Vicki Staudte, research director, Minnesota Public Radio.)

The objectives of the research were to: measure customer/stakeholder satisfaction; determine how to increase satisfaction and donor retention; provide systematic donor input on funding decisions; determine which problems in the community donors think United Way should work on; get insight into United Way's donor/market segments and what they value about United Way compared to other charities.

Core contributors

For the first phase of the research program, the United Ways wanted to survey three core segments of their audience: the existing base — employees of large corporations who contribute through workplace donation programs, usually during the fall fund-raising campaign; volunteers — those who donate their time through corporate or other programs; and agencies — those who work at agencies that receive funding from the United Way.

"We had done lots of surveys where we got perceptions about giving and about United Way but we had never asked what was most important to them and how United Way measured up in those areas. We needed a new methodology to be able to make the results more action-oriented."

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Customer value measurement

By Alex Vayslep

Editor's note: Alex Vayslep is division manager of Maritz Marketing Research Inc.'s Chicago office.

Bradley T. Gale's book, *Managing Customer Value*, has, at the very least, driven many of us to take another look at how we conduct customer satisfaction research. Based on our experience in implementing several customer value measurement (CVM) programs, CVM has distinct advantages compared to traditional customer satisfaction research. Generally, CVM:

• Provides the ability to link customer value trends to market share and therefore develop a tracking mechanism that is more closely aligned with meaningful business objectives.

• Measures price/value perceptions (as opposed to just satisfaction) in the market as a whole and therefore allows us to devise strategies to improve customer loyalty by comparing our client's performance versus the competition, as customers do.

As a strategic marketing tool, CVM is a superior design. However, discarding traditional — or what Gale refers to as "conformance-oriented" — customer satisfaction research can be hazardous to a company's customer retention efforts.

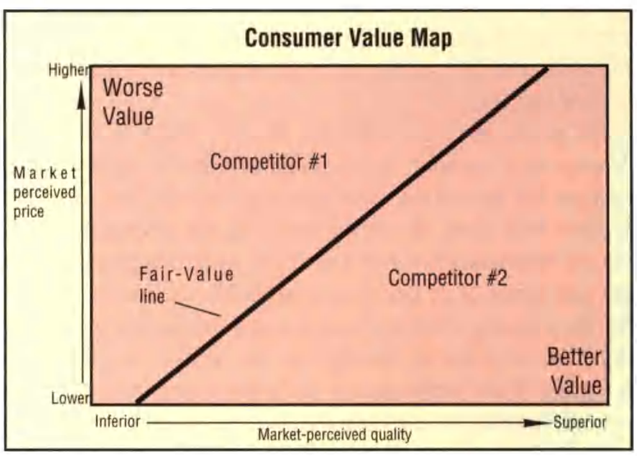
Before reviewing the strategic advantages and potential pitfalls of CVM, let's first review the basic principles of customer value measurement.

CVM's appeal was born from many marketers' frustration with their inability to tie customer satisfaction research results to traditional customer loyalty and customer acquisition metrics such as retention rates and market share. CVM addresses the two primary problems that limit the ability of customer satisfaction results to link with these traditional performance measures. Unlike most customer satisfaction research, customer value research addresses:

1. Performance perceptions of the competitions' customers as well as our client's customers.

2. All the broader issues relating to how customers select a product or service. This includes a more complete investigation of price perceptions as well as the less tangible buying influencers such as image and reputation.

The customer value concept is based on the principal that customers make buying decisions based on their relative value perceptions of two or more providers in the marketplace. More specifically, relative value is defined as perceived quality vis-a-vis price for all offerings in the market. The basic model is graphically displayed here.



The graphic depicts both quality and price perceptions for two competitors. Positions on the map are determined based on competitor performance ratios (overall price and quality scores). The fair-value line represents points at which a given provider should neither gain nor lose market share based on the importance of quality and price to the buying decision. At any point along this line, a company is perceived as charging the appropriate price for the quality provided.

The farther a competitor's position is to the right (superior quality) and to the bottom (lower price) of the map, the better overall value position it is in to compete. For a complete description of the techniques used to develop the map, see Gale's book.

How do we identify and define value?

Qualitative research typically provides us with the quality and price dimensions customers use to make purchase decisions. Customer value perceptions are based upon broader price and quality dimensions. Issues such as customer service, product quality, etc., make up the quality factor. Within both the quality and price factors, specific attributes emerge as the issues that drive overall perceptions for the factor. These attributes become the basis for performance measurement in quantitative measurement.

CVM requires us to measure our competitors' performance on the same dimensions that most customer satisfaction programs limit to just current customers. This is the primary tactical difference between customer satisfaction and customer value approaches. Just as important, CVM doesn't shy away from evaluating customers' price perceptions of the offerings made by marketers.

The willingness to evaluate price perceptions is a key differentiation for CVM when compared to the manner in which many customer satisfaction programs are currently implemented. "Quality" managers have a propensity to shy away from price issues in both the measurement and reporting of customer satisfaction surveys for fear of losing focus on quality improvement efforts.

While their motivation is understandable, neglecting the role of price perceptions ensures the inability to link research results with how customers (and non customers) actually behave in the market. Moreover, since CVM approaches call

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Data Use

Customer satisfaction and choice modeling: a marriage

By Bill Etter

Editor's note: Bill Etter is vice president and director of research at Rockwood Research, St. Paul.

Customer satisfaction research comes in many forms and varieties. There are differences in who is measured and how they are measured. Most studies measure only the client product or service; few measure competition. There are differences in the scales used to measure performance. Some use satisfaction scales (not satisfied to very satisfied); some use expectation scales (worse than expected to better than expected); others use requirement scales (falls short of requirements to exceeds requirements). There are differences in measuring attribute importance. Most don't measure it; some use rating scales; few use constant sum techniques. There are differences in calculating attribute importance; some prefer stated importance; some prefer derived importance; some look at both. This list goes on and on.

Something is missing

Regardless of the methodology, most practitioners are bypassing an opportunity to truly extend the value of customer satisfaction information. Providing a "satisfaction report card" will increasingly fail to meet management's need for direction. What happens if we are able to change the perception on an attribute of our product or service? A change in perception will lead to a change in level of satisfaction. Will the change in satisfaction lead to a change in brand preference, and therefore a change in market share, for our product or service? These and similar questions cannot be answered by most customer satisfaction research. In what follows we suggest that with some additional data, in many cases not too much beyond what is already being collected, coupled with some ideas from the area of choice modeling, the management "value gap" of satisfaction research can be closed.

An example

Customer satisfaction data can be integrated into choice models linking satisfaction measurements to preference and, in turn, to estimates of market share. Even better, once this linkage is established, the models can be used to simulate the share impact of gains (or losses) in satisfaction. These changes can be investigated for any given product or service, including a competitors', or any combination of competitive products or services.

An example is provided by Bradley Gale in his book *Managing Customer Value*. Gale outlines a sophisticated system for measuring customer satisfaction, but even his system falls short of what it could be. He strongly recommends measuring not only the client's performance but also the performance of key competitors. Measurements should be taken among users and non-users of companies' products. Attribute importance should also be measured. Gale then integrates these performance and importance measures into a single aggregate measure for each product or service he calls market perceived satisfaction (MPS)[1].

This aggregate MPS score (or any score calculated in a similar fashion) is available at the individual respondent level. At that level it is very similar to a preference or utility measure as discussed in the literature on choice modeling (see for example, Urban and Hauser, 1980). In other words, we have the data to calculate a preference measure for each product or service in each respondent's consideration set.

Once we recognize this score as a preference measure, it is relatively straightforward to convert it into a choice model, again at the individual respondent level. The choice model

can take the form of either a winner-take-all or probabilistic model[2]. Once the choice model is established, a simulator can be applied to examine the impact on choice of changes in satisfaction levels on one or more attributes. These changes can occur for your product and/or competitive products.

In order to accomplish this transformation from static satisfaction scores to a dynamic choice simulator several things need to be done to ensure its ultimate success.

Considerations to make it happen

First, attributes need to be carefully selected based on the impact they have on choice. Affecting brand choice is the reason most companies strive to improve customer satisfaction. The image customers or prospects have of a company, product, or service may be nice to know, but if it isn't tied to choice it is of less value. When selecting attributes for satisfaction research it is important to think in the context of choice. This also means that care needs to be given to having a proper balance of attributes. That is, all attributes of choice need to be covered and no one area should be oversampled.

Second, attribute scale sensitivity needs to be measured for each respondent. Not all scale intervals are created equal, and thus points on a scale should not be treated as equidistant from each other (see Semon, 1995). To illustrate, consider an attribute dealing with automobile safety. A requirement scale for this attribute might appear as

The safety of the automobile

	Typical Scaling	Self-Explicated Scaling
Exceeds my requirement by quite a lot	5	100
Exceeds my requirement by a little	4	90
Meets my requirement	3	85
Falls short of my requirement by a little	2	20
Falls short of my requirement by quite a lot	1	0

Typical scaling of this attribute for the purpose of computing average performance scores would assign an equal interval scale such as the one shown. Asked to scale this attribute in a self-explicated fashion (Srinivasan, 1988), an individual might assign the values or utilities shown. In this example there is little reward for exceeding requirements on automobile safety (maximum gain is 15 points), but there is a substantial penalty for falling short of requirements on automobile safety (maximum loss is 85 points)[3]. Self-explicated values, in addition to being more accurate than assuming, for example, equal intervals as a measure of satisfaction, are diagnostic in their own right. They identify penalty situations and reward opportunities.

Third, once one adopts a choice perspective for satisfaction research, it is clear that some attribute levels serve as choice thresholds in the spirit of conjunctive choice models. That is, a choice alternative perceived to perform at a given level of an attribute would preclude consideration of that alternative. For example, consider the automobile safety attribute above. It is certainly possible that if a respondent perceives that the safety of a given automobile falls short of his or her requirements by quite a lot that automobile would be dropped from consideration. It is especially important to identify these threshold levels because it is quite possible that improved performance

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Profiting from customer value analysis

By Madhav Srinivasan

Editor's note: Madhav Srinivasan is with KPMG Peat Marwick's Economic Value Management Consulting Practice in New York.

Increasingly companies are discovering that classic customer satisfaction research does not provide a true understanding of customer behavior and market dynamics. Leading-edge organizations are evolving from surveying and reporting of customer satisfaction to the measurement of the generation and delivery of customer value. Dr. Bradley Gale, in his book *Managing Customer Value*, proposes a powerful and elegant framework for studying customer value. The customer value analysis approach focuses on the value perceived by customers on price and quality parameters relative to competition. Customers list the factors that influence their spending behavior, and accord relative importance to, and competitive ratings along, each factor. These factors are then collected under two headings — total quality and total price. By capturing the two key elements of customer value, this analysis provides a true comprehension of the customer behavior in a competitive marketplace.

The results of the analysis are presented in a two-dimensional plot, the customer value map, with perceived quality being the X axis and perceived price plotted on the Y axis. A fair value line passes through points where relative price and relative quality match, and has a slope equal to the relative importance of total quality divided by the relative importance of total price. The firm and its competitors are graphed on this plot based on their relative quality and price. Firms that land below the fair value line offer superior value as they provide higher quality at a lower price. Firms which lie above the fair value line offer inferior value as they provide lower quality at a higher price. The customer value analysis theory predicts that firms that provide superior value, and lie below the fair value line, will gain market share. Firms that provide inferior value, and lie above the fair value line, will lose market share. At the fair value line, market share remains constant as price and quality factors match equally.

The customer value map is a good graphical representation of the redistribution of future market share based on present customer value perceptions. However, it does not provide clear indication of what firms need to do to improve their value position and gain market share. In addition, the plot does not directly enable management to optimally allocate resources to achieve this objective.

Resource allocation matrix

The resource allocation matrix is a practical tool that facilitates this decision. It is based on the data that is collected in the customer value analysis, hence it's easy to generate and understand. The horizontal axis of the matrix is the relative importance of the factor, and the vertical axis is the numerical difference between the rating of the firm and its competitors along that factor. In this approach, price and quality factors are treated alike. The numerical difference between the rating of the firm and that of its competitors along each factor becomes a proxy for the firm's competitive advantage. The matrix thus elegantly captures the factors which drive customers' behavior, and the firm's competitive advantage. Plotting all the factors on the matrix leads to an efficient allocation of resources for maximum impact on customer behavior and competitors.

The four quadrants of the matrix are labeled attack, protect, withdraw and hold, indicating the type of strategy appropriate to the factors in that quadrant.

The factors in the attack quadrant are of highest importance to customers, and where the competition has a distinct advantage. These factors have the highest priority in resource allocation. Investments should be large and immediate. In the protect quadrant are factors which are of high importance to customers, and where the company has a competitive advantage. Investments should be made to protect these from competitive inroads.

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Names of Note

Carol Kunicki has joined *Field Dynamics Marketing Research*, Los Angeles, as vice president.

Carol Rahn has joined *Maritz Marketing Research Inc.'s* Performance Measurement Group in Minneapolis as research manager. **David Porozok** has joined the Performance Measurement Group office in Iselin, N.J., as account manager. At Maritz headquarters in St. Louis, **Dan Lockhart** has joined as director of the company's new Marketing Sciences Department. **Jack Sorrentino** has been named group vice president of information systems for Maritz Marketing Research Inc.

Rahn **Tugend**

David M. Tugend, vice president of client services at *Doane Marketing Research, Inc.*, St. Louis, was appointed chair-elect for the U.S. Dept. of Agriculture Advisory Committee on Agricultural Statistics, which helps plan the Census of Agriculture. Tugend represents the American Feed Industry Association, where he serves on the Economic and Market Research Committee.

The Matrix Group, Lexington, Ky., has promoted **Molly Sweazy Burlew** to vice president and **Michelle Leugers** to field coordinator.

Sweazy Burlew **Leugers**

Elrick and Lavidge, Atlanta, has announced a number of staff additions: in the New York office, **David Rauch** has been added as vice president, and **Bob Adair** and **Barbara Brown** have been named account director; in the Atlanta office, **Marsha White** has been named account director and **Rhonda Storms** and **Jason Sherman** have been named project manager; in the Kansas City office, **Michael Johnson** has been named project director and **Terri Catlett** has been named account executive; in the Chicago office, **Pushp Kamal** has been named manager, analytical services, and **Rosalyn Ryan** has been named account director. The firm has also announced the following promotions: **June WestHolland** to senior group leader and **Bonnie Breslauer** to account director in the Atlanta office; and **Holly Drayton** to site director at

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Research Industry News

The June/July "Research Company News" section included an item about BRX/Global Inc. ceasing operation following the death of Joel Axelrod, its president and founder. While BRX/Global Inc. has shut down, former BRX/Global staffers will continue operating under the new name BRX/Global Research Services, Inc., at the same location in Rochester, N.Y., with the same telephone numbers and offering the same services.

Los Angeles-based **Diagnostic Research International** has opened a new office at 8 West Third St., Ste. 200, Winston-Salem, N.C., 27101. Phone 910-722-9907.

Market Facts, Inc., Arlington Heights, Ill., has opened a new office in Scottsdale, Ariz. It will be headed by Leslie Wheeler.

Minneapolis will serve as the U.S. headquarters of Canadian research firm the **Angus Reid Group.**

Seattle-based **Northwest Research Group, Inc.** has opened an office in the Chicago area at 4340 Dairyman Circle, Naperville, Ill., 60564. Phone 708-904-2497. Fax 708-904-2684.

Diagnostics Plus, Inc., has moved to 1333 South Allen St., State College, Pa., 16801. Phone 814-238-7936. Fax 814-231-7672. E-mail Diagplus@aol.com.

Schenkein/Sherman Public Relations, Denver, has formed a cyber research division with Cyber Dialogue, New York, an on-line research firm and sister company of Yankelovich Partners.

Consumer Market Analysts, Inc., Troy, Mich., has changed its name to AFFINA.

Dominion Focus Group, Inc., has opened a new facility with three focus group suites and a test kitchen at 2809 Emerywood Parkway, Ste. 100. Richmond, Va., 23294. Phone 804-672-0500. Fax 804-672-0567. For more information call P.A. Bana.

Jay L. Roth has formed a new research firm, **The Consumer's Voice, Inc.**, at 27 First St., Syosset, N.Y., 11791-2504. Phone 516-921-3311. Fax 516-921-3861.

The Insight Group Inc. has moved its offices to 2105 East Vaughn St., Tempe, Ariz.

Wirthlin Worldwide, McLean, Va., has opened a new client service office in Canberra, Australia under the name Australasian Research Strategies. Contact the company at GPO Box 1910, Turner, Canberra, ACT 2601 or 17 Barry Dr., Turner, ACT

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Measuring your competitive strength

By Michael T. Branham

Editor's note: Michael T. Branham is a market research and strategic planning consultant in The Woodlands, Texas.

Marketers often use the concept of market share, customer sat-isfaction, and market penetration to measure the relative success of their company's strategic initiatives. Competitive strength is another, perhaps more relevant, measure of effectiveness. Understanding competitive strength — the elements that comprise it and how to measure it — will enable you to focus on what your company needs to do to improves competitive position. The competitive strength index (CSI) provides management with a snapshot of their company's market position relative to the competition at a specific point in time. It is a useful tool for navigating the organization toward long-term dominance.

Defining competitive strength

The CSI measures a company's market potency relative to its competitors as reported by the market's collective customer base. It is a derivative of three measures: the proportion of the collective customer base naming a vendor as one of the best three vendors, one of their current vendors, and/or their primary vendor for the product or service of interest.

Measuring competitive strength

The first step in calculating the CSI involves the administration of a simple survey to a representative sample of the collective customer base. The survey consists of three open-ended questions.

1. Which vendors do you currently use? The goal of this question is to obtain a list of all vendors who respondents use — under any circumstances. In addition to vendors of choice, this question will reveal vendors who respondents use only in special situations.

2. In your opinion, who are the best three vendors in the market? This question will reveal vendors that respondents believe offer the highest levels of quality, service, and/or value. For industries with unusually high numbers of competitors, asking for the best five (instead of three) will provide a more complete profile of the marketplace.

3. Who do you consider to be your primary vendor? This question will reveal vendors that respondents use most often. The primary vendor is not always the respondent's vendor of choice.

Collecting data

The data collection process requires surveying a representative sample of the entire customer base for the service of interest — not just a survey of your customers. For example, a reprographics (photocopying services) company serving the legal profession should survey a random and representative sample of all paralegals in the geographic market of interest. Whereas, a sample limited only to your company's customers would bias the survey to favor your company.

Telephone surveys are the most practical method of data collection and will yield the highest response rate. This method also generates the most accurate and timely results. Most important, telephone surveys enable the interviewer to ask follow-up questions about the reasons for a respondent's answer.

Calculating the CSI

Once the survey process is complete, you are ready to calculate the CSI. Use the following formula to calculate the competitive strength of each vendor mentioned in your study.

Competitive Strength = X+Y+Z/N(.01)

where:

X=Percentage score in current vendors category

Y=Percentage score in best three vendors category

Z=Percentage score in primary vendors category

N=Sum total (X+Y+Z) for all vendors

First calculate the percentage of respondents naming each vendor in question one (current vendor), question two (best three vendors — regardless of ranking), and question three (primary vendor) respectively. Calculations for each question should be independent of one another. Second, for each

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Is the market research industry failing its TQM clients?

Researchers must meet changing management needs for improved customer knowledge and quality improvement goals

By Robert Eng

Editor's note: Robert Eng, Ph.D., is chairman of the marketing department at Babson College and president of Feedback Marketing Services Corp., Wellesley, Mass.

Global competitiveness gave rise to total quality management (TQM) and continuous quality improvement (CQI) in the early 1980s. Many corporations have heeded the call to restructure operations for efficiency. TQM and CQI have created substantial revenue opportunities for researchers . . . sort of. More and more we hear the following from clients:

"I need much more information than before and I need it more often."

But we also hear in the same breath:

". . . and by the way, I have less of a budget to do all of this."

There are indications that the market research industry is failing to meet clients' demands. The quality movements have revealed some structural inadequacies in the research business. The information needs of decision-makers have evolved at a pace and in directions that the research industry has not matched.

This article describes the prevailing principles of TQM and CQI that full-service research agencies need to understand to win and keep quality-driven clients.

Client dissatisfaction with research on the rise

An American Marketing Association-Advertising Research Foundation study of client satisfaction with research products and services described quite a bit of discontent with research process[1]. The major concerns were timeliness, data

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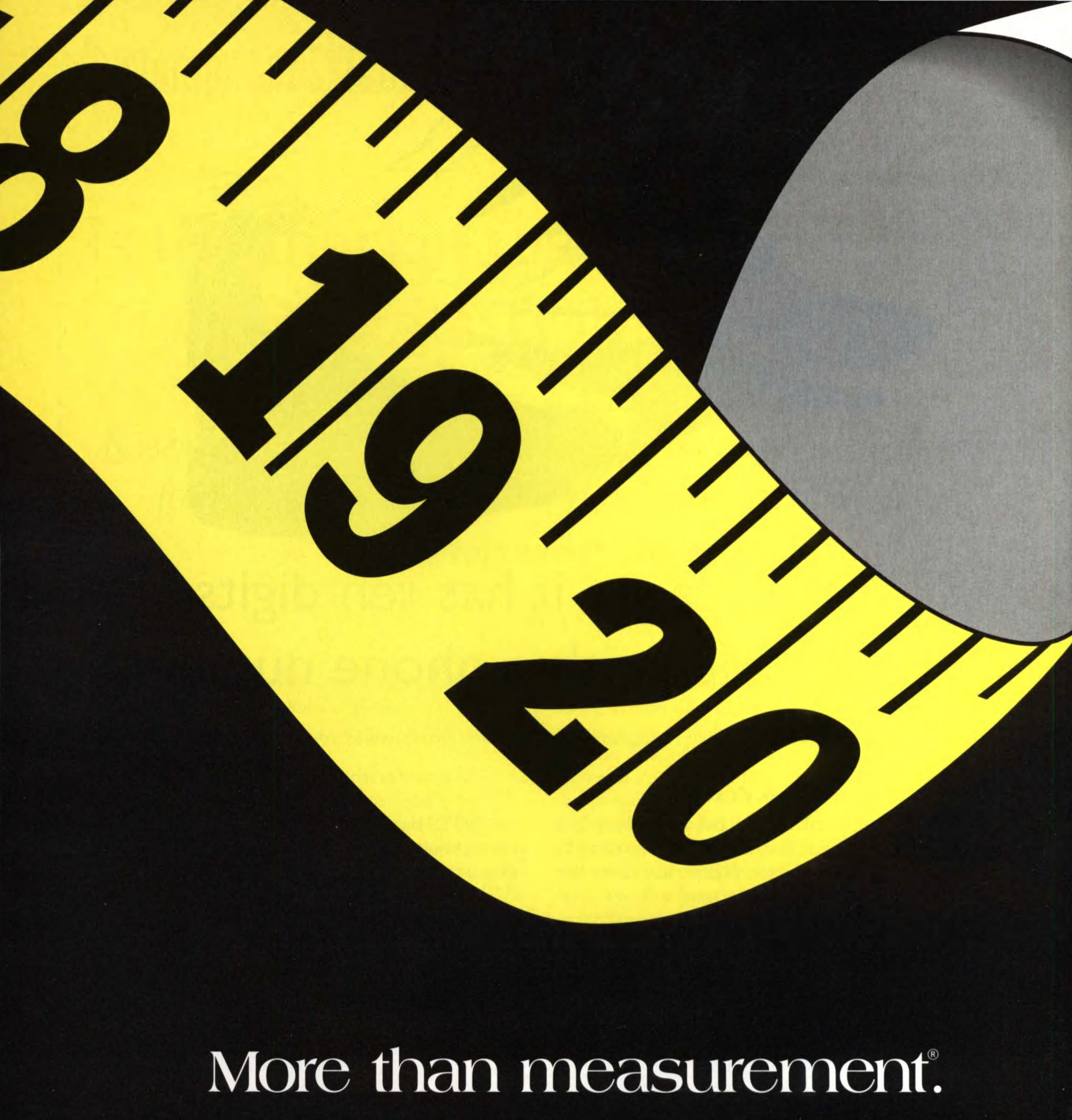
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CUSTOMER
VALUE

Value measurement

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for us to understand relative performance perceptions for all competitors in the market, we can more accurately predict both customer loyalty and market share.

Implementation of quantitative measurement

Most CVM surveys are conducted via telephone interviews in a "blind" fashion. In other words, the respondent is not made aware of the survey's sponsor.

A blind approach ensures that competitor evaluations are comparable. Sponsorship of a survey leads to significantly higher satisfaction or value ratings for the sponsoring firm — particularly if the respondent is evaluating a product or service they currently use. Maritz has demonstrated the biasing effects of sponsorship on satisfaction and competitor preference through parallel tests of both blind and sponsored approaches. The research revealed the sponsoring organization's scores dropped by as much as 20 percentage points when the identical survey is conducted "blind."

Although some CVM methodologies gather customer ratings for only the respondent's current or preferred provider, we strongly suggest obtaining ratings for both the sponsoring company and the appropriate competitor(s). Reasoning for this approach is twofold:

1. Most customers make buying choices based on value comparisons for two or more companies in the market. These decisions are based on either actual experience or perceptions determined by what they have seen or heard.

In either scenario, the comparison is based on the buyer's opinions. If we simply gather respondent satisfaction for their current or preferred company, any value comparisons (analyses) are not reflective of how a given buyer actually makes a choice.

2. The key to the most actionable analyses is to gather respondent-level data for both the current and competitive provider. Much of the analyses described hereafter are made possible (or better) by respondent-level analysis.

Among calls placed to the sponsoring organization's customers, gather competitor ratings for only the broader factors (price and various quality dimensions) — no individual attribute ratings will be asked for the competitor. Ratings for the sponsoring company will be based on experience, however ratings for the competitor will be determined primarily by what the customer has either seen or heard. While respondents are capable of rating broader factors without having experience with a company, it is difficult for them to evaluate performance on specific attributes based solely on what they have seen or heard.

Among calls placed to competitors' customers, gather ratings for the sponsoring company for only the broader factors in the same manner described above.

This method will provide the most actionable data set possible while minimizing questionnaire length and respondent irritation over asking questions which they are unable to answer.

Preference modeling

Once we have perceptions for both the sponsoring firm and its competitors on key customer value issues, we can model the criteria customers use to select a particular provider of a product or service. Preference (or difference) modeling for CVM programs is a technique developed by Maritz to answer the following questions:

1. Which criteria drive customers' preference for one company over another?

2. What is the relative importance of each of the attributes that drive the customers' choice or preference?

3. What are the likely criteria used by customers to defect or switch to an alternative supplier?

Preference modeling is a form of derived importance analysis that uses score differences (or gaps) at the respondent level to determine which issues drive perceived value preference for one provider over another.

Preference modeling techniques are an excellent fit with the principles of CVM since the model focuses on competitively based perceptions as opposed to just satisfaction for one company. In addition, we have found that preference modeling techniques provide importance hierarchies with significantly greater discrimination among attributes. In addition, these

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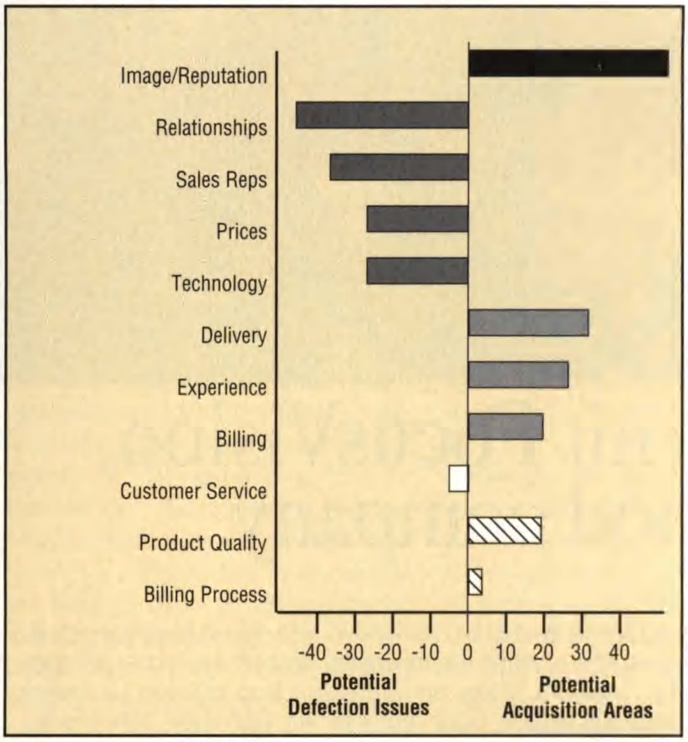
FOCUSVISION™ NETWORK, INC. 1266 East Main Street ■ Stamford, CT 06902 ■ (203) 961-1715 analyses typically provide a predictive model that better predicts customer actions (R-square, or goodness of fit explanation).



Preference modeling techniques can help prioritize probable defection and acquisition areas based on the:

• relative competitor performance scores on quality and price factors, and

• the importance weights developed by the model.

As such, we can prioritize strategies for market share improvement based on relative perceptions of the competitors in the market.

Like any strategic analysis of customer perceptions, we must ensure that value perceptions and needs are analyzed by key customer segments. While it is always tempting to "roll-up" results to a corporate level, assuming homogeneity in the marketplace usually results in improvement efforts that are inappropriate for some customers. If our clients have not conducted a formal segmentation study prior to measuring customer value, we typically analyze the results by whatever demographic, financial, or psychographic schemes are available to ensure understanding of how different customer segments view the market.

Financial linkage

CVM results have been successfully tied to financial results or market share in a number of studies. After measuring customer value for a number of time periods, we can attempt to establish statistical relationships using one or more of the following data sets:

• Customer value scores and financial performance over time for one or more market segments

• Customer value scores and corresponding financial performance for a large number of markets for one time period.

A correlation can be drawn between the two metrics in either scenario listed above. In addition, we can actually plot the two metrics as well.

Potential pitfalls

Appropriately, much has been made of some firms' success in tying CVM results with actual market share trends and other financial performance metrics. While these successes are enticing to organizations embarking on a CVM program, one should remember these results have been obtained in mature markets. While CVM approaches can still provide superior strategic information, growing industries can pose problems to the researcher wishing to link CVM results to financial metrics. Before proceeding with a CVM program, we suggest to our clients that they consider the following:

Source of market growth — Growth for companies that compete in new industries or that continue to attract new customers is as much or more a result of attracting first-time buyers as a result of stealing market share from current competitors. As such, surveying current customers for your firm and its competitors will not necessarily correlate to market growth or share.

For these markets, consider measuring perceived or expected customer value performance among likely adopters of the emerging product or service. While somewhat expensive, this can be accomplished by conducting the CVM study among the demographic and/or psychographic segments that are typical of the new customers entering the market for the first time.

The number of buying decision dimensions — For most industries, measuring price and quality dimensions is enough to help predict how customers actually behave in the real world. While plotting two dimensions on the customer value map makes analyses easy to present, in some circumstances, other criteria play an important role in how decisions are made and a method to deal with a third dimension must be developed.

Think about how you might decide from which service station to purchase gasoline — you may prefer Billy Joe Bob's price and service offering, however, you never pass a Billy Joe Bob's station on your way between work and home. In this case, location has become an important third dimension which is clearly outside the realm of price and quality. Similarly, if your company credit card is not accepted by Billy Joe Bob's, good ol' Billy is not even considered for gas purchases for your company car. Finally, other buying dimensions may include product or service awareness, or other, less tangible brand equity issues.

In many instances, including the so-called third dimension within the quality factor measurements may suffice. In other circumstances, we may wish to limit market share analyses to customer segments or geographic markets that are applicable. Regardless, the important thing to understand is to consider all buying decision criteria in how you design both your measurement instruments and your analyses.

What about customer satisfaction measurement?

While we advise our clients to measure customer value as part of a comprehensive performance measurement program, we suggest they maintain traditional customer satisfaction research as part of their overall customer loyalty effort. Traditional customer satisfaction research has some distinct benefits not always attained through a customer value program. These include:

• The ability to use an individual customer's comments and scores to take customer-specific actions to improve customer retention. Clearly, this is impossible with CVM programs as they must be unsponsored surveys and as such, respondent names can not be forwarded to our clients.

• A focus on doing the basics. While an emphasis on customer perceptions in a competitive context is a key advantage to CVM, ignoring the basics such as customer service, repair or service issues is a sure-fire way of losing market share. Customer value research usually covers too many broader factors to gather scores for the operational details (attributes) addressed by traditional customer satisfaction research.

Most of our CVM clients also conduct customer satisfaction research programs to maintain the benefits listed above. Typically, this involves conducting research with customers who have recently completed a transaction with the company, such as a repair or new service order.

Customer satisfaction measurement helps an organization focus on the issues that keep customers happy. Certainly, that is the first step in any customer loyalty effort. However, there is no guarantee that customers will stay loyal just because they are happy with the product/service they receive. What if the competition offers superior quality, or an equal level of service quality at a lower perceived price?

Understanding value perceptions of market offerings as a whole is the only way we can truly understand customer behavior with regard to customer loyalty. Moreover, analyzing both quality and price perceptions of all the competitors in the market through a comprehensive CVM program allows us to develop a big-picture view of the market and develop superior strategies aimed at both keeping current customers and winning new ones. ❑

Customer value analysis

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The factors in the withdraw quadrant are considered of low importance by customers, but they perceive the company much higher than the competition. Focusing on these factors provides minimum benefit, and these have the lowest priority in resource allocation. Factors in the hold quadrant are regarded as low importance by customers, and they rate the company unfavorably versus competition. Resources presently allocated can continue at the present level, but no significant returns should be expected.

The actual demarcation between these quadrants is a matter of experience and judgment, and based on the circumstances in each analysis.

Since both the firm and its competition can perform customer value analyses, and arrive at similar results, the quadrants get reversed depending on the point of view. The firm's attack quadrant becomes the competition's protect quadrant; and the competition's hold quadrant becomes the firm's withdraw quadrant.

Using the resource allocation matrix

The utility of the resource allocation matrix is best illustrated by using it to comment on several customer value analysis examples in Gale's book.

Raw Data: AT&T Universal Card versus American Express

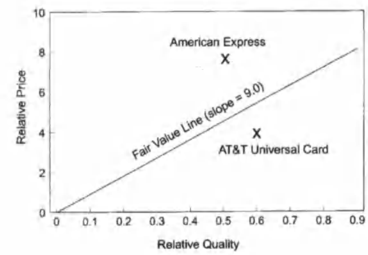
Attributes	Factor Weight	AT&T	Amex	Difference	Ratio	Weighted Ratio
Vendor acceptance	0.30	9	8	1	1.13	0.38
Phone calls	0.20	10	6	4	1.67	0.33
Protect purchases	0.10	7	9	(2)	0.78	0.08
Company logo	0.20	10	8	2	1.25	0.25
Professional	0.20	9	8	1	1.13	0.23
Total Quality	1.00					1.27
Annual fee	0.80	10	5	5	2.00	1.60
Interest rate	0.00	9	NA	NA	NA	NA
Vendor service fee	0.20	9	6	3	1.5	0.30
Total Price	1.00					1.90

Weight on quality 90%
Weight on price 10%

AT&T's Universal Card versus American Express Card

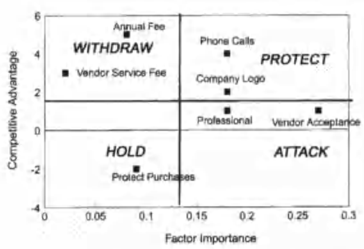
The American Express card faced strong competition from the new AT&T Universal Visa card owing to a weaker customer value proposition both in relative quality and relative price. Based on the customer value

Customer Value Map: AT&T Universal Card versus American Express



analysis raw data, the Amex card falls above the fair value line and AT&T's Visa card falls below the fair value line. AT&T's Visa card would then

Resource Allocation Matrix: AT&T Universal Card versus American Express

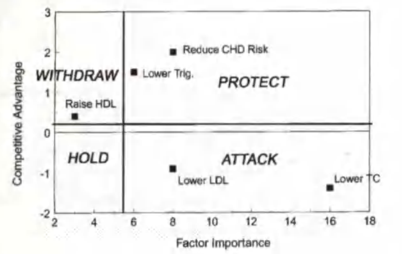


be expected to gain market share from Amex. Constructing the resource allocation matrix, the competitive situation becomes much clearer. From AT&T's perspective, vendor acceptance is clearly a factor which is most important to customers and where it has the least competitive advantage — hence it's in the attack segment and a first priority for resource allocation. Phone calls and company logo are important to customers, but clearly here AT&T has a good competitive advantage, and where Amex would attack first. Protecting these features is key. Annual fees and vendor service fees are of low importance to customers, and here AT&T has a large competitive advantage, and their location in the withdraw segment indicates that there is nothing to worry about. Purchase protection is of low importance to customers and Amex has a competitive advantage, thus it's in the hold quadrant — here AT&T should continue with its current level of resource allocation.

Parke-Davis' Lopid cholesterol drug versus Merck's Mevacor cholesterol drug

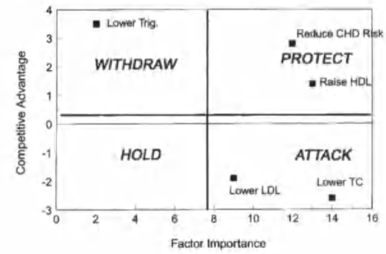
The Lopid versus Mevacor story is

Resource Allocation Matrix: Lopid versus Mevacor in 1989



interesting since there is comparable data for two points in time. Parke-Davis' Lopid was in competition against Merck's Mevacor drug for cholesterol treatment. Customer value analysis in this case predicted that Lopid would increasingly gain share against Mevacor. In 1989, the resource allocation matrix showed that lowering total cholesterol and lowering low density lipoproteins were of high importance to customers. For these factors, Lopid was perceived to lag Mevacor, and being in the attack quadrant, it's the first priority for Lopid's resource allocation. Reduc-

Resource Allocation Matrix: Lopid versus Mevacor in 1991



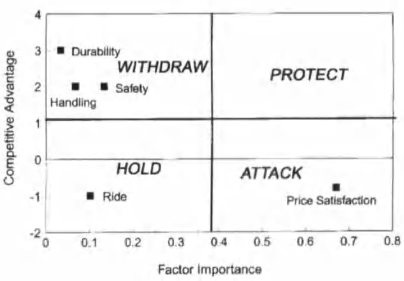
ing CHD risk and lowering triglycerides were of high importance too, but here Lopid had a good advantage. Raising high density lipoproteins is considered low importance by customers and Lopid is strongly positioned against Mevacor. Being in the withdraw quadrant, obviously not a concern for Lopid at this point.

Parke-Davis acted to change customer perceptions about Lopid by means of physician's education programs, a communications program, and working with blood-testing laboratories. In 1991, the impact was reflected in a changed resource allocation matrix. The major change was the increased importance given to raising high density lipoproteins by customers, and the marginally higher perception for Lopid on this factor. This feature jumps into the protect quadrant, and making it a point of potential attack from Mevacor. Lowering total cholesterol and lowering low density lipoproteins continued to be of high importance to customers, and Lopid still lagged Mevacor. Being in the attack quadrant, these two factors remained as first priority for Parke-Davis' resource allocation. Reducing CHD risk also increased in importance but here Lopid maintained its advantage. Mevacor would certainly be targeting to improve its advantage. Lowering triglycerides has fallen considerably in importance and Lopid is perceived better than Mevacor. Mevacor has been unable to improve its position on this factor.

Michelin's radial tires versus U.S. manufacturers' bias tires

When introduced into the U.S. market, Michelin's radial tires had an

Resource Allocation Matrix: Radial versus Bias Tires

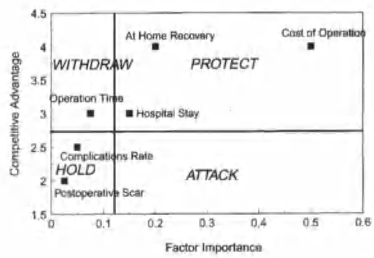


advantage against bias tires on relative quality but a relative disadvantage on relative price. When plotted on the customer value map, radial tires fell below the fair value line, and expected to gain market share. The resource allocation matrix shows that price satisfaction was clearly the factor that customers gave most importance, and here radial tires lagged the bias tires. Lying in the attack quadrant, reducing price should be the highest priority for Michelin. Factors like durability, safety and handling were of low importance and radial tires had a strong advantage, thus in the withdraw quadrant. On these factors, Michelin may consider withdrawing resources. The ride element was of low importance and the radial lagged the bias, placing it in the hold quadrant — Michelin should continue allocating the same amount of resources on this issue.

Johnson and Johnson's endoscopic surgery for gall bladder versus traditional surgery

Johnson and Johnson's usage of customer value analysis allowed its endoscopic surgery instrument supply unit to gain large market share from traditional gall bladder surgeries. The resource allocation matrix shows that the cost of the operation is by far the most important single element for customers. And here, endoscopic surgery has a $3,000 cost advantage, putting this factor in the protect quadrant. In order to be competitive, traditional surgery would first look at reducing the cost of the operation. In comparison to price, all quality factors have a combined importance of 50 percent. Amongst these, hospital stay and at home recovery have high customer importance, and traditional surgery has relatively lower competitive advantage, thus also in the protect quadrant. These would be the quality factors on which traditional surgery would be focusing on, and the areas that endoscopic surgery has also to guard against. Endoscopic surgery has the least competi-

Resource Allocation Matrix: Endoscopic Surgery - Gall Bladder



tive advantage on complications rate and post-operative scar in the hold quadrant. This should continue to be in focus. Operation time is a factor in the withdraw quadrant that need not garner resources at this time. Interestingly, endoscopic surgery has such advantage over traditional surgery that no factor lies in the attack quadrant.

Robust technique

As these examples illustrate, customer value analysis is a robust technique applicable in a wide variety of situations. Understanding customer value drivers and relative competitive positioning along these drivers leads to accurate predictions of future customer purchasing behaviors. While the customer value plot remains an excellent graphical representation, the resource allocation matrix makes the analysis effective and actionable. Firms can make efficient allocation of their resources to impact customer buying behavior to their advantage, and thus achieve maximum marketing impact. And as the Lopid versus Mevacor example shows, customer perceptions of value change with time and through proactive intervention by firms. Periodic customer research then becomes essential to align resource allocation with market trends. Treating price and quality factors equally also ensures that firms make correct decisions on how much to change prices and affect quality. In management's quest for higher market share, loyal customers and profitability, the resource allocation matrix can become a powerful tool. ❏

TQM

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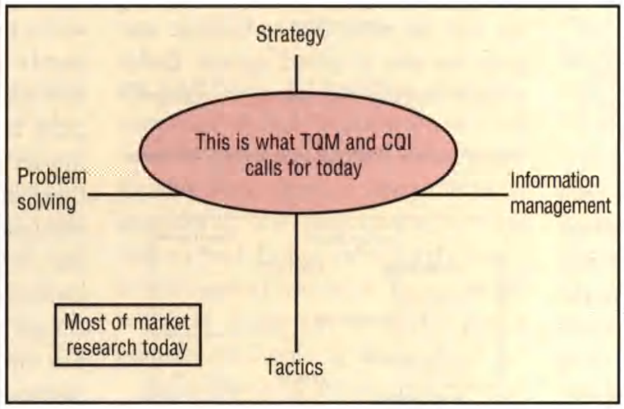
quality, cost and the relevance of findings to decision-making and profits. The finger- pointing is aimed at in-house as well as independent full-service research groups.

In-house market research departments have felt the impact of corporate cost-cutting and the dissatisfaction with the quality of research; their numbers have been reduced. Of the companies who still have research departments, almost one-third (30 percent) are not satisfied with their research department and would certainly consider closing them[2]!

While the industry isn't exactly at a crossroads, the relationship between researchers and client managers who have profit center responsibilities is at a critical stage. The specter of companies making decisions without waiting for research says more about managers' lack of confidence in research than their philosophy about the role of research in key decisions.

Much of the intellectual effort in market research has been narrowly focused on tactical issues in research — sampling methods, data collection procedures, questionnaire design issues and data analysis. A recent article criticized the pace at which the research industry was falling behind corporations' advancements in analysis and decision-making, ". . . it appears that market research never developed its own vision"[3]. It is clear that the leaders of the market research industry must think strategically about the relationship with their clients.

Figure 1
Market Research's Focus: Where It Is and Where It Should Be



Serving the quality-driven client

Researchers must define their business to be in line with clients' view of information. Some have done so but most have not.

We have found out that you win the TQM and CQI client by espousing four views spawned by the quality movements.

1. Customer knowledge is a strategic asset,

2. Customer measurement must be continuous and proactive,

3. Customer satisfaction must be directly linked to business activities, and

4. All business activities must come within cost targets

Customer knowledge as a strategic asset

While we in the research business have always argued that customer research spending is an investment, it has only been recently that corporate clients have turned to research for something more than just tactical projects. Unfortunately the market research industry has not responded[4].

Figure 1 explains why clients with quality programs are disappointed with market research. TQM and CQI customers have shifted away from short-term focus to long-term visions.

Any business decision at the moment is evaluated not only for its immediate impact but also for its long-term implications. Unfortunately, in many cases market research has not adapted its products to meet the changing information needs that accompany the changing perspectives in decision making. We in the market research industry must understand that our current and future clients have shifted to strategic views and their information needs are now broader in scope.

What pushed Corporate America to adopt strategic perspectives? Michael Porter from the Harvard Business School gave rise to the notions that really shape the corporate view of customer knowledge as a strategic asset. His value chain model is arguably the foundation on which corporate strategy throughout the world is built. The singular thread that ties all aspects of the business together is the unquestioned focus on creating added value for the customer.

If researchers are to have credibility with quality-driven customers we must understand that one of a company's most important strategic assets is knowledge about the customer and all that affects customer satisfaction5. It is an asset of no less importance than a patent on a new drug, state-of-art robotics for General Motors or prime retail location for Bloomingdale's.

There will always be tactical research projects. However, any particular project should be viewed as merely a single tile in the mosaic describing and explaining the customer. The results of any project must be structured to build a customer database.

If researchers are to have credibility with quality-driven customers we must understand that one of a company's most important strategic assets is knowledge about the customer and all that affects customer satisfaction. It is an asset of no less importance than a patent on a new drug, state-of-art robotics for General Motors or prime retail location for Bloomingdale's.

Measurement as a continuous and proactive process

The heart of any successful TQM or CQI program is customer focus and continuous improvement[6]. The prestigious Baldrige Award is given to corporations that demonstrate the use of all possible means of listening to customers, proactive customer systems, measurement beyond current customers and high levels of customer satisfaction.

Companies must continually improve to meet the changing customer needs and combat aggressive competitors who promise to deliver better satisfaction.

Nimble, entrepreneurial companies are superseding the big-budget, large-scale annual customer survey with continuous monitoring with a vision toward the future. Ideally, customer measurement should take place at the moment of transactions. At the very least, it should take place at the end of every transaction cycle.

The large retail chains provide a good example of what quality driven corporations would like to see in customer measurement. A common sight in a regional bagel chain, a national chain of coffee stores, a hair-styling franchise or a quick-serve restaurant is the customer comment cards located at points of purchase or exit. The intent is to get information continuously and at all moments of the transactions process.

The prevailing thought is that customers do in fact care enough to tell what they think but they are not going to expend any effort that they think is out of line with importance of the comment.

With respect to continuous feedback, the effort gets an "A" grade but the results deserve a disappointing "D." Customer comment cards are inexpensive and non-intrusive but the response rate is typically very poor and the depth of information very shallow. On the other hand, the annual customer satisfaction surveys using store intercepts or in-depth telephone interviewing are similar to shooting a 25-year high school reunion picture — an impressive undertaking, tough to locate all the persons you want, very expensive, and often a poor description of those who participated.

Link marketing activities directly to customer satisfaction

A recent news story about health care organizations in a major metropolitan area reported that the two health care organizations with the highest quality of operations were rated the lowest in quality based upon customer perception[7]. It's no wonder that regulatory agencies have mandated customer measurement since many health care providers are either uninterested or untrained to undertake such efforts.

Most quality-driven companies have very good, if not excellent, tracking systems for their operations. Unfortunately, many of them do not have customer measurement systems of corresponding quality.

Business activities must be directly linked to customer satisfaction measures. Otherwise, it is difficult if not impossible to determine how to maintain customer loyalty. The battle for customer loyalty is infinitely more intense today than it was a couple of decades ago. The pressure to act decisively and react quickly to market share threats is intense.

Most methodologies only provide "still-life" pictures of the customer satisfaction at the moment. Companies really need true time-series or "motion video" of marketplace dynamics to tell them how they got there and what they can do about it.

What is the future of customer measurement? First, the future is exciting. Second, it will be technology driven and it must be linked with a company's internal measurements as never before.

Imagine a retail store setting such as a quick-serve restaurant. Historically, the store has three sets of measurements — operational data such as amount of french fries used and the temperatures at which they were cooked, data about transactions at the counter such as the number of orders with hamburgers with no french fries and two soft drinks, and after-transaction data which monitors customer perceptions past the counter.

Most quality-driven companies have very good, if not excellent, tracking systems for their operations. Unfortunately, many of them do not have customer measurement systems of corresponding quality.

Using technology such as smart sensors and radio frequency transmission, data collection can be conducted on all aspects of the operation in real time. Thus, customer satisfaction that is expressed at the table about service or food quality can be linked directly to personnel and back-room operations. This information provides a dynamic picture of what is happening.

Real-time customer measurement with linkage to activities is a challenge and an opportunity for market researchers. The need for real-time customer measurement is being addressed but not really being solved.

Target costing for all business activities

Target costing — a phrase that comes from CQI — is another call for the research industry to re-engineer the way it works with clients and implements market research projects. The underlying concept is very simple to understand. Take the price that a customer is willing to pay for your product or service. This is your sales revenue. Next, define how much profit you want out of that selling price. Then, subtract the desired profit from the selling price and you have the cost that your business activities must come in under.

The "target costing" principle has touched on all aspects of the business including the budget for market research. The days when we simply passed the costs onto an unquestioning client are pretty much gone. It's getting tougher and tougher to get a client to accept a bill of $30 per hour for an interviewer when the client knows the interviewer may getting less than half of that. More than ever, it is the client who sets the cost per respondent target for the research company to meet.

One of the largest banks in the world, ABN AMRO, outsources its consumer research to a market research firm. This decision to turn it over to outsiders was born of the need for more effective research at less cost. Outsourcing of course is not new. However the kind of working relationship between ABN AMRO and the research agency may become more common. ABN AMRO sets the strategic information needs and directs the research to agency deliver within the given budget. The research agency keeps only 40 percent of the budget. The rest goes to other agencies who have the necessary experiences and specialties.

Writing is on the wall

Forty top business executives operating industry giants such as Texas Instruments, Kodak, Campbell Soup, Dow Chemical, General Electric, Prudential and others of the same stature were posed the question, "How important is re-engineering to the future success of your company?" A resounding 83 percent said "critical for future success and survival"[8].

The writing on the wall has been there for a long time and the market research industry hasn't read the message that it must re-engineer its own operations to meet the requirements of the quality-driven organizations.

How does the market research industry go about this?

1. Develop greater capabilities to design research projects that have true strategic impact for its clients. The market research personnel must adapt to the major shifts in the perspective of the managers. Clients' managers are being trained to operate cross-functionally now and their demands on research have been shaped accordingly.

2. Develop methods and products that meet client demands for continuous, real-time information that connects customer feedback with business activities. Some of the solutions may lie with technology and others with research procedures. All solutions depend on the ability of the market research industry to think outside of the box while thinking as the client would think.

3. Fundamentally change the operations of the research company. Data collection and analysis procedures have not changed in decades. They are still labor intensive, involving interviewers, supervisors, statisticians and technical writers.

TQM and CQI are more than buzzwords. They are facts of life which every market research organization not only must learn to live with but also become part of. The following slogan is one that research companies need to adopt from their own clients:

When it comes to our company, the only opinions that count are those of our customers!

Who could argue with that? ❑

References

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[6]Rao, A. *Total Quality Management*, New York: John Wiley & Sons, p. 57, 1996.

[7]Stein, C. "Top Quality HMOs Not Rated Most Popular," *The Boston Globe*, April 2, 1996, p. 37ff.

[8]"That's Benchmarking — Not a Fad or a Quick Fix, but a Way of Managing Change," *Financial World*, September 1993.

Names of Note

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the Atlanta data collection center.

Linda Shea has joined *Opinion Research Corp.*, Princeton, N.J., as associate director of the Customer Satisfaction & Retention Practice of ORC-Princeton Group.

Karen Hendricks, president and CEO of *Baldwin Piano & Organ Company*, has been appointed to the board of directors of *ACNielsen*.

Joseph Plummer has joined *Audits & Surveys Worldwide*, New York, as vice chairman.

St. Louis-based *Aragon Consulting Group's* research division has added **Tiejun (Tom) Tang** as senior research analyst.

Bill Gramley has joined *Targetbase Marketing*, a division of The M/A/R/C Group, Dallas, as senior vice president.

Eileen Wolford has been appointed senior vice president of the *Angus Reid Group*.

Debra Alexander has been named senior associate, VP, at the new Chicago office of Seattle-based *Northwest Research Group, Inc.*

Gloria Williams-Elias and **Dave Taber** have been named vice president of *Market Development, Inc.*, San Diego.

Darin Krantz has joined *Marketeam/Doane*, St. Louis, as research analyst. In addition, **Mark Golde** has been named research associate.

Krantz **Golde**

Diagnostics Plus, Inc., State College, Pa., has promoted **Michelle Hostetler** to director of quality and operations.

Data & Management Counsel, Inc., Chadds Ford, Pa., has named **Philip Rosenberg** as vice president, business development.

Todd Myers has been promoted to director of the telephone center at *Response Analysis Corp.*, Princeton, N.J. The firm also has appointed **Steven Marks** as account executive. In addition, **Subhra Ghosh** has joined the firm's telecommunications group as senior research director.

Daniel Sammartino has joined the *TeleSession Corp.*, New York, as account director in the promotional division.

MarketVision Research, Inc., Cincinnati, has named **Jon Pinnell** to the new position of vice president, marketing sciences.

The Delahaye Group, Portsmouth, N.H., has named **James Beakey** head of its Survey Research Group.

Market Facts, Inc., has promoted **Joann Schaumann** to vice president in its Arlington Heights, Ill., headquarters. **Jan Hodes** has been promoted to vice president in the firm's Washington, D.C., office. **Leslie Wheeler** will head the new Market Facts office in Scottsdale, Ariz.

Schaumann **Hodes**

Wheeler **Craven**

Robin Craven and **Nancy Massey** have been named research associate at *CB&A Market Research*, Winston-Salem, N.C.

Pat Sabena (Sabena Qualitative Research Services, Westport, Conn.) has been reelected as 1996-97 president of the *Qualitative Research Consultants*

Association, Inc. (QRCA), New York. Other newly elected officers are: vice president **Alice Rodgers** (Rodgers Marketing Research, Canton, Ohio); secretary **Linda LaScola** (LaScola Qualitative Research, Washington, D.C.); and treasurer **Maryanne Pflug** (MKP Research, Steubenville, Ohio). **Suzette de Vogelaere** (Concepts & Strategies, Mill Valley, Calif.) was elected to the board of directors.

Herron Associates, Inc., Indianapolis, Ind., has promoted **Sue Nielsen** to

Nielsen Jorgensen

vice president, **Paul Jorgensen** to director of data collection and **Kelli Rouse** to director of marketing.

Rouse Ackerman Klausner

Polaris Marketing Research, Atlanta, has promoted **Lucy Ackermann Klausner** to vice president.

Sheila Walsh has joined *Cramer-Krasselt*, a Chicago communications firm, as research manager.

Tim Huberty has joined *The Loring Partnership*, a Minneapolis marketing consulting firm, as research director.

Behavioral Analysis Inc., Tarrytown, N.Y., has appointed three new assistant vice presidents: **Alison Munsch**, **Laura Piezzi** and **J.B. Rawlins**.

Quality Controlled Services, St. Louis, has promoted **Bob Smith** and **Kim Kardenetz** to senior project director. **Mark Schmitz** has joined the firm as manager, Trained Consumer Services.

Dan Coates has joined *Burke Marketing Research*, Cincinnati, as a senior account executive.

Coates Obusek

Charles Obusek, vice president of brand and marketing information for *Dr Pepper/Seven Up, Inc.*, has been named to the Advisory Board of the University of Texas at Arlington's Master of Science in Marketing Research degree program.

David Spievack has joined *Walker Information's* Walnut Creek, Calif., office as vice president of business development.

Donna Closterman, **Betty Fraley** and **Michael Kuhn** were re-elected to three-year terms on the board of directors at *Burke, Inc.*, Cincinnati, Ohio. **Jim Roberts**, the firm's vice president of marketing services, was elected for the first time.

Janice Bleyaert has joined *Conway/Milliken & Associates*, Chicago, as account group director. In addition, **Matthew Mack** has been named account manager. **Sharon Swanson** has been promoted to account group director.

Daniel Murphy has been named vice president and general manager of the new Winston-Salem office of *Diagnostic Research International*, Los Angeles.

Product and Service Update

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number of users, services and features. Available immediately to existing clients, the Web-based products include: three years of Forrester Research Reports, Briefs and Journal entries indexed by Forrester's custom keywords; a personalized research tracking feature that highlights any new research in areas where the client has expressed interest; searching capabilities including relevance ranking, natural language querying and Boolean logic querying. For more information visit the company's Web site at http://www.forrester.com or call 617-497-7090.

Service provides credit reports on research companies

Creditview, Inc., West Haverstraw, N.Y., now provides a credit reporting service designed to meet the special needs of the market research industry. The service enables users to evaluate a new or existing client's payment history and credit rating(s). By using a multi-source method of compilation, Creditview has compiled a database of and for the market research industry. Data includes company location, telephone, fax, E-mail and Internet address, principal's name(s), other personnel, primary and secondary SIC codes, type of business, number of employees, sales volume, credit rating(s), years in business, and a detailed history of past projects and remittance times for each. The project history and remittance times are compiled from ongoing contributions to the database from field services, tab houses, coding services, printers, sample companies, and other suppliers to the industry. The reports are normally completed in an hour or less. They can be faxed or mailed and soon will be retrievable online. For more information call 914-429-4119.

Raosoft issues update of UFill

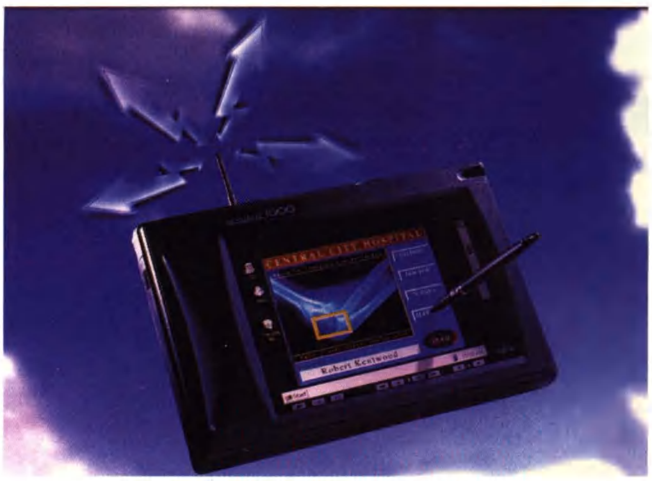
Raosoft, Inc., Seattle, has released version 3 of its UFill data collection program. The collected data is stored in an associated database that is unseen by the person entering the form. Its DBF data format lets UFill become a generic data collector that can feed data into organization databases. UFill can be distributed across networks, either on file servers or as an E-mail attachment. UFill can be put on Web sites for downloading and mailing back. It can also gather information through: disk-by-mail, kiosk-type display on standalone computers, and notebook computer. A Professional Developers' Edition is also available. For more information call 206-525-4025.

New service designed for testing consumer packaged goods

Promotion Decisions Inc., Cincinnati, Ohio, has introduced National Shopper Lab, which compiles information on consumer purchasing decisions gathered directly from more than 200,000 consumers via frequent shopper programs. Promotion Decisions Inc. developed National Shopper Lab through five years of cooperation with seven leading retailers. With National Shopper Lab, store-based or panel-based tests can be conducted, or it can be used for tracking purposes and panel analytics. For more information call 800-886-8877.

Tablet PC suitable for research use

Fujitsu Personal Systems, Inc., Santa Clara, Calif., has introduced the Stylistic 1000 RF, a Windows-compatible tablet PC featuring Proxim's built-in 2.4 gigahertz wireless LAN radio. The Stylistic measures 7.3 x 11 x 1.6 inches and weighs 3.6 lbs, making it suitable for market research applications requiring a portable surveying unit. The Stylistic 1000 RF can be configured with Windows for Workgroups 3.11 and Pen Extensions 1.0 including the CIC Handwriting Recognition System 4.0 or Windows 95 with Pen Services 2.0 and the CIC HRS 5.0. For more information call 800-831-3183 or visit the Fujitsu Web site at http://www.fpsi.fujitsu.com.



Fujitsu's Stylistic 1000 RF tablet PC

Database builder helps reach youth market

Regulus Communications, Inc., Lincoln, Neb., the producer of the Young Author's Magazine Anthologies, has introduced its DataSHARE initiative for market research programs. Through the 33,000+ schools and home computers YAM now reaches, clients will have a 16 million+ youth population from which to build a database for market research. DataSHARE allows World Wide Web automated responses from kids and families to be delivered by E-mail to a clients desktop computer. Through its "Read and Write Activity Center" on the Web, the Young Author's program provides clients with electronic connections to kids and families via desktop computer and the Internet. Each DataSHARE project is available to individual clients under an exclusive license arrangement that fully protects both the data and the client. No other company is allowed to use the protected responses from a client's project. For more information call Richard Austin at 402-435-2111.

Version 2 of ASK?em out now

Infonetics Corp., Northboro, Mass., has introduced version 2 of its Windows-based ASK?em software, which allows users to conduct CATI or mail surveys. The new version offers integrated graphics and a variety of graphing formats, from bar charts to trend charts. Version 2 enables users to automate all phases of the survey administration process, including survey design, contact list generation, conducting the survey, survey management and tabulation of the results. For more information call 508-393-8088.

Survey Monitor

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percent); establishing fees for national parks, museums, etc. (68.1 percent); privatizing the administration of certain government services (50.5 percent); cutting agriculture subsidies (48.6 percent); cutting the defense budget (45.4 percent) and cutting the Department of Education (18.6 percent). However, 14.9 percent call for maintaining spending at current levels, thereby allowing the deficit to increase.

"While the news media reported that abortion was a divisive issue at the Republican National Convention, we found that, on a scale of one to five, about a quarter of all Americans (26.4 percent) would be much more likely to vote for a candidate who opposes abortion rights," says Miller. That group included 39.3 percent of all Republicans.

"However, it is important to note that respondents generally fell into three categories," says Miller, who reported that 39.2 percent of Americans are more likely to vote for a candidate who supports abortion rights, while 33.1 percent are more likely to vote for a candidate who opposes abortion rights, and 20.7 percent are not swayed by this issue.

Of those participating in the Aragon study, 35.6 percent identify themselves as Republicans, 41.3 percent are Democrats; and 4.3 percent are Reform Party members. The rest of those surveyed identify with other political groups or declined to state their political preference. More than 85 percent of the respondents are registered voters. The Aragon study, conducted in August prior to the Republican and Democratic national conventions, has a margin of error of ±5.4 percent. For more information call Barbara Hohbach at 314-726-0746.

Nearly all U.S. adults save coupons

Coupons are clipped and saved by nearly 90 percent of American adults, according to Decision Analyst, Inc., an Arlington, Tex., research firm. In its recent national survey of over 9,600 U.S. households, Decision Analyst found that 88 percent of all adults in the United States clip and save cents-off coupons.

The survey revealed that Sunday newspapers are the consumer's favorite source of cents-off coupons. When asked, "Where do you typically find the best cents-off coupons?" approximately 87 percent of coupon-clippers named the Sunday newspaper as offering the "best cents-off coupons."

The lowest value coupon that consumers will "bother to save and redeem" is 26 cents, on average, across all product categories. "This suggests that coupons of 25 cents or greater value will have the most impact in the marketplace," says Jerry W. Thomas, president/CEO of Decision Analyst, Inc. "Very low value coupons [those less than 15 cents] will tend to be ineffective, especially in attracting new users to a brand," Thomas says.

The incidence of coupon usage appears to be roughly equal across all age groups. That is, the percentage of consumers who clip and save coupons varies very little by age group. However, younger consumers (those 18 to 44) tend to redeem more coupons each week than older consumers (45 or older). The 18 to 44 age group redeems over eight coupons per week, while the 45 or older group redeems about seven per week.

The incidence of coupon usage tends to be affected by education. Among consumers with a high school education or less, 91 percent use coupons. In comparison, only 82 percent of consumers who attended graduate school use cents-off coupons. Similarly, consumers with household incomes below $40,000 per year are more likely to use coupons than consumers with household incomes above $40,000.

Decision Analyst, Inc.'s national survey of coupon usage, conducted earlier this year, has a margin error of ±1 percent. For more information call 817-640-6166.

Olympic advertising: playing the Games to win

The 1996 Olympic Games in Atlanta set the world's standard for athletic excellence. The Olympics have also become one of the premier showcases for marketing accomplishment. With businesses paying $40 million for the rights to a Worldwide Sponsorship,

the opportunity for a company to become associated with the Olympics is a uniquely rich marketing game with its own set of victors and also-rans.

Gallup & Robinson, an advertising and marketing research company based in Princeton, N.J., tracks public response to Olympics advertising efforts by periodically surveying consumers about their awareness of the sponsors and their attitudes towards Olympics sponsorship. The study method is based on telephone interviews conducted as a part of Gallup & Robinson's standardized advertising research programs. At the conclusion of selected general audience magazine advertising studies, readers are asked about their attitudes towards advertising in general, Olympics advertising in particular, and their unaided awareness of which companies are Olympics sponsors. The data offers an objective assessment of how successful companies have been in their own high-stakes competition. The following results are based on interviews with 250 respondents conducted in May.

Two months prior to the actual Games, 79 percent of people could name at least one of the official sponsors. The average person knew two sponsors correctly. Overall awareness levels were up from 62 percent and 1.6 sponsors in January.

Men and women were similar in their awareness. Eighty-one percent of men and 77 percent of women were able to name at least one sponsor when asked. On average, both men and women were able to name 2.1 correct sponsors.

	Awareness (%)		
	Total Sample	Men	Women
Named at least one correct sponsor	79	81	77

Coca-Cola has been the most effective company at registering its sponsorship of the Olympics with consumers. Forty-seven percent of people knew that Coca-Cola was associated with the Atlanta Games. The second best-known sponsor was McDonald's, which was known by 34 percent of people.

	Awareness (%)		
Sponsor	Total Sample	Men	Women
Coca-Cola	47	50	45
McDonald's	37	40	34

Two out of three people (66 percent) agreed that Olympics sponsors were doing a good thing for the country. Additionally, six out of 10 believed that Olympics sponsors were the real leaders in their industries. However, only one in three respondents felt that they liked to watch Olympics advertising better than regular television advertising or that this year's Olympics advertising was the best they'd seen.

	Agreement (%)		
Statement	Total Sample	Men	Women
Olympics sponsors are doing a good thing for the country	66	61	70
Companies that sponsor the Olympics are the real leaders in their industries	60	64	57
I like to watch advertising about the Olympics more than regular TV advertising	36	30	39
This year's Olympics advertising is the best I've seen	36	33	38

Importantly, companies that have been most successful at establishing their sponsorship with the public, like Coca-Cola and McDonald's, have accomplished the additional goal of minimizing the credit that is sometimes shared with competitors when uncertainty or confusion exists in the public mind about who the official sponsors are. People were nearly five times as likely to correctly think of Coca-Cola as the sponsor over Pepsi (47 percent versus 10 percent). They were three times as likely to think of McDonald's as the sponsor over Burger King (37 percent versus 12 percent).

	Awareness (%)		
Company	Total Sample	Men	Women
Coca-Cola	47	50	45
Pepsi-Cola	10	10	11
McDonald's	37	40	34
Burger King	12	12	12
Pizza Hut	6	5	7
Wendy's	3	3	2

The sponsorships of some companies were known by less than 10 percent of respondents. And for several sponsors, the public was as likely to credit a direct competitor rather than the company itself with being the Official Sponsor. This may be due to a lack of a solid communications program by the sponsor or efforts to defuse the sponsor's position by a competitor. For example, people were as likely to name United Airlines or American Airlines as they are Delta Airlines, the actual sponsor. And people were as likely to name Federal Express or the U. S. Postal Service as they were UPS, the actual sponsor.

	Awareness (%)		
Company	Total Sample	Men	Women
American Airlines	8	5	9
Delta Airlines	8	9	8
United Airlines	8	6	9
Federal Express	7	5	8
Postal Service	5	3	6
UPS	5	6	4

According to Scott Purvis, president, Gallup & Robinson, Inc., "With most media opportunities, there is very little evidence that people give advertisers some kind of 'extra credit' just because they've run their messages in a particular context. With the Olympics, though, people view sponsorship as a good thing for the country and a role for the real leaders in their industries. Thus, a company's success in becoming known as a sponsor brings with it the benefits of having its messages heard by a large audience that is more favorably disposed to the marketer's participation than is normal." For more information call 609-924-3400.

New products flood market

Choice is good; it's a universal truth we've all been brought up to believe. But is there such a thing as too much choice? It's a question that consumers may begin to ponder as they come to terms with what can only be described as an explosion of choice in the supermarket. According to Naples, N.Y.-based Marketing Intelligence Service's *Product Alert* publication, 1996 is shaping up as the biggest year in history for new product introductions.

Through the first three months of 1996, *Product Alert* has reported more than 6,500 new food, beverage, health & beauty aid, household and pet products. Annualized, that's equivalent to more than 26,000 new products — a doubling of new products since 1986.

The numbers are staggering because the average supermarket contains only 30,000 products, according to the Food Marketing Institute. The point is rapidly being reached where an empty supermarket could be stocked with nothing more than one year's worth of new product introductions!

Although product entries are up, supermarkets aren't doubling in size to accommodate all of the new entries. Something has to give and that something is the new product failure rate, which is likely to creep higher. Today's new products must produce immediate results, or else. Slow sellers are routinely culled in a matter of weeks, not months, as in the past.

The quantity of new products is up, but is the quality? While new brands like SnackWell's and Mentadent are big hits, roughly eight of every 10 new products represents an extension of an existing brand or line. Products that are truly new and different are a shrinking minority. According to Marketing Intelligence Service's Innovation Ratings, just 6.6 percent of 1996's new entries feature innovations in formulation, positioning, packaging, technology or creating new markets. That's down from a peak of 18.6 percent in 1986. "Product innovation has really taken a back seat to 'bandwagon' marketing," says Tom Vierhile, general manager of Marketing Intelligence Service. "If something gets hot, everyone jumps on the bandwagon. Alpha hydroxy acid took off in 1993 and now virtually every skin care maker has a product featuring the ingredient. *Product Alert* reported 175 new alpha hydroxy acid skin care products in 1995 alone. Salsas are the same. *Product Alert* reported 81 salsa entries in 1990 and we nearly topped that in the first quarter of 1996 with 76 new salsa products."

The explosion of choice marks the decline of "one size fits all" marketing and rise of "just my size" marketing. For facial tissues, that translates to 22 different package choices for Kimberly-Clark's Kleenex Expressions line. Consumers can "express themselves" with varieties like Thai-riffic, Sunflower, Quilt, and Peacock. Or for coffee, it means choosing among the 600 different flavor, package and size choices offered by San Diego-based Stella Bella Coffee. Rest assured, there's something for everyone — literally!

New Product Introductions: 1986-1996

1986	12,436
1987	14,254
1988	13,421
1989	13,382
1990	15,879
1991	15,401
1992	15,886
1993	17,363
1994	21,986
1995	20,808
1996 ... (estimated)	26,000

Source: Marketing Intelligence Service, Ltd.

So many choices, so little time. The average wage earner today spends the equivalent of an extra month on the job each year compared with their counterparts of just two decades ago. Working mothers routinely juggle up to seven tasks at once. Combine these increased time demands with the explosion of choice and you begin to see why the average American is in a state of physical and mental overload. It's causing some consumers to say enough is enough. In the past five years, the American Institute of Stress reports that 28 percent of Americans have voluntarily made changes that led to less income, but a more balanced life. This may signal a trend toward lifestyle simplification that could eventually slow new product proliferation. For more information call Tom Vierhile at 800-836-5710.

Meats make the grade with consumers

In a recent survey conducted by Creamer Dickson Basford's research subsidiary, CDB Research & Consulting Inc., chicken, beef and pork were recognized by consumers as being healthier and more nutritious than 10 years ago. Consumers agreed that all three meats also were safer and more convenient to prepare than in the past.

A telephone survey was conducted among 100 people who are consumers of chicken, beef and pork at least once a month. While consumers acknowledged safety, health and handling improvements for all three meats, chicken stood out for its highly recognized convenience. Seven out of 10 consumers, and men in particular, said chicken was more convenient to serve today than it was 10 years ago.

The majority of people (80 percent) felt comfortable about their knowledge of chicken handling and preparation. Conventional sources of information such as newspapers, magazines, cookbooks and television remained the primary vehicles of information on recipes. The use of the Internet was marginal but on the increase.

However, more than half of consumers (53 percent) admitted wanting more exciting ways to prepare chicken. Consumers said they would increase their consumption of chicken to more than once or twice a week provided they had interesting chicken recipes. "This survey is indicative of the latest change of attitudes toward meat," says Larry Chiagouris, managing director of CDB Research & Consulting. "Consumers are regaining confidence and interest in chicken with simplified and accessible preparation methods." For more information call 212-887-8000.

How to get the rest to the Internet

In a survey of people who were aware of but did not use the Internet, the most popular reason to start using the Internet, cited by 66 percent of respondents, was to provide access to educational material for their children. The *USA Today*/IntelliQuest Technology Monitor survey, reported in *Intelligram*, a publication of IntelliQuest Inc., an Austin, Texas, research firm, also found that videoconferencing (60 percent), access to information about hobbies or interests (57 percent) and access to work-related information (54 percent) would get them interested in using the Net.

All of these activities, excluding videoconferencing, are already widely accessible via the Internet. Other oft-mentioned activities, such as E-mail (49 percent) and getting job information (47 percent), are also common on the Internet. This may indicate that lack of awareness of what the Internet can provide may be a large stumbling block towards mainstream adoption.

Ironically, activities that many claim will bring the masses to the Internet are the same activities that non Internet users claim to be of the least interest.

Banking from home (32 percent) and shopping from home (31 percent) were shown to be of interest to about one-third of respondents. The findings were based on telephone interviews with randomly selected individuals conducted by IntelliQuest in December 1995. For more information call 512-329-0808.

Environmental movement alive and well

Is America's concern over the environment waning, as some people think? Hardly, according to a new nationwide survey conducted by American Opinion Research, Princeton, N.J., for the Council on Packaging in the Environment (COPE). In fact, the results show the environment may be one of our most consistent national concerns.

The staying power of environmental concern is one of the key findings of the COPE study. While never the top issue in consumers' minds, environmental concern has remained steady over the past several years while concern over other issues, such as the economy, health care and education have fluctuated dramatically, often in direct correlation to media coverage.

Twenty percent of all adults currently rate the environment as a "very serious issue," about the same as rate the economy as "very serious." However, while concern about the economy has fluctuated wildly over the past four years, public concern about the environment has remained constant despite a dramatic fall-off in media coverage.

Other findings of the survey of 1,000 adults selected at random from all 50 states:

• 79 percent have taken some action during the past three months to help the environment. And, when pressed, they could support their claim by stating exactly what they did. Women and people in the mid-Atlantic states (New York, New Jersey, Pennsylvania) rated the highest for doing something to help the environment, including recycling, patronizing companies with good environmental records and conservation activities.

• 63 percent say they are "personally doing more now" to help the environment than they were doing three years ago; only 2 percent say they are doing less. Adults with children are most likely to say they are "doing more," to help the environment. This confirms previous research that children, learning about the issue at school, are pressuring their parents into environmental actions.

Recycling tops the list of steps consumers are taking. However, adults are also listing an increasing variety of actions, including:

• Looking to buy from companies with good environmental records

• Reducing energy and water consumption

• Buying refills and concentrates

• Reusing plastic bags

"This study clearly confirms a trend that the environment is becoming more personally oriented and less issue-oriented," says Chris Murphy, executive director of COPE. "People are taking more personal actions, more directly related to how they live their lives. This gets less media attention than an oil company boycott, so some observers believe, incorrectly, that environmental concern is losing steam."

The Environmental Protection Agency and the Federal Trade Commission worked with COPE to develop some of the questions asked on the survey which also covered a variety of issues, including: labeling, understanding environmental terms, packaging issues and others.

COPE is a national coalition of consumer product companies, packaging producers, materials suppliers, retailers, trade associations and recyclers committed to promoting programs that integrate the concepts of the environment and economic sustainability in the design, use and disposition of packaging.

The COPE study, based on interviews with 1,000 adults selected at random from across the United States, has a margin of error of ±3 percent. For more information call 202-331-0099.

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2612, Australia. Phone 61-6-257-5847. Fax 61-6-257-5860. For more information contact Mark Textor, managing director.

MarketVision/Gateway Research, a division of MarketVision Research, Inc., Cincinnati, Ohio, has opened a consumer research center at the Six Flags Over Texas theme park in Arlington.

Custom Research Inc. (CRI), Minneapolis, has been selected to receive a site visit for the 1996 Malcolm Baldrige National Quality Award. CRI is one of nine companies and one of two small companies in the country to be selected for a site visit.

Applied Consumer & Clinical Evaluations (ACCE), based in Mississauga, Ont., and Buffalo, N.Y., has been awarded ISO 9001 registration. The firm specializes in performance and clinical testing of consumer package goods, using test subjects and controlled evaluation procedures. ACCE's registration, which took about a year to complete, was conducted by registrar Quality Management Institute, a division of the Canadian Standards Association.

Cardiff Software, Inc., San Marcos, Calif., has signed an agreement with Kofax Image Products to include Cardiff's Tri-CR recognition software in Kofax's ImageControls Developer's toolkit. The partnership provides software developers with a Visual Basic/Visual C++ platform for creating production-level document imaging and data collection applications for Windows 95 and Windows NT.

Claritas Inc., Arlington, Va., has entered into an agreement to acquire **Strategic Mapping, Inc.** (SMI), subject to SMI's shareholder ratification. Terms of the agreement were not disclosed. The combined company will provide local-area demographic updates, lifestyle segmentation targeting products, and desktop marketing analysis systems. Claritas plans to build on the SMI product line, honor all SMI contracts and provide continued support and service to SMI clients.

Medical Economics Company, a Montvale, N.J., provider of health care information products and services, has formed a new database marketing unit, MEDEC Business Direct, to provide targeted health care information and database marketing strategies tailored to a variety of uses, including market research, direct mail and telemarketing. MEDEC Business Direct will be based in Chicago.

Information Resources Inc., Chicago, has formed an alliance with The Univision Television Network, the nation's largest Spanish-language television network. As part of the agreement, IRI will provide Univision with a new package of data and analytical solutions to assess the effectiveness of ethnic marketing programs in terms of increased sales.

CB&A Market Research, Winston-Salem, N.C., has been selected to provide a study of local travel habits in Raleigh, N.C.

Opinion Place, a Winnipeg research firm, has moved its central telephone facility and administration offices to Unit #6, 1146 Waverley St., Winnipeg, Man., R3T 0P4. The phone numbers remain the same. The focus group and mall intercept facilities will remain at the Polo Park location.

GF Media, Inc., has acquired ownership of Effective Media Services from its partner, Active Media Services, Inc. Effective Media Services is a media planning and placement company that uses analysis of ratings and lifestyle cluster data to create ad campaigns. Effective Media's new headquarters is at 50 Chestnut Ridge Rd., Montvale, N.J., 07645. Phone 201-930-1010. Fax 201-930-1221.

Northwest Research Group, Inc., Bellevue, Wash., has opened a Web site at http://www.nwrg.com.

SIL Worldwide Marketing Services has moved its Miami area office to 7601 North Federal Highway, Suite 205-B, Boca Raton, Fla., 33487. Phone 561-997-7270. Fax 561-997-5844.

Mark Gottlieb has formed **Mark Gottlieb Consulting** to provide direct marketing and research consulting services. The firm's address is 464A Liberty St., Ste. 102, Little Ferry, N.J., 07643. Phone 201-807-9091. E-mail gottlieb@styx.ios.com.

Paria Group has opened a new data collection facility at Central Park East, 1815 S. State St., Ste. 4000, Orem, Utah, 84058. Phone 801-226-8200. Fax 801-226-4819.

Palshaw Measurement, Inc., has opened an Atlantic Region client service office in Virginia, with vice president Aldor Peterson in charge. The office is located at 2034 Heather Glen Rd., Charlottesville, Va., 22911. Phone 804-975-2016. Fax 804-975-2416. E-mail palshaw1@ix.netcom.com.

Market Statistics, New York, has announced a joint effort with **American Business Information, Inc.** As a result of the strategic relationship, Market Statistics can now augment its demographic and business data with American Business Information's national business listings.

Data Development Corp., New York, has become the exclusive U.S. licensee for the Stochastic Reaction Monitor, a marketing research tracking system. The Stochastic Reaction Monitor is currently offered in 36 countries. It was introduced by Stochastic Consulting International in 1981.

Dun & Bradstreet Information Services has invested $2.3 million to acquire a minority stake in MarketPlace Information Corporation. In addition DBIS received warrants to acquire additional shares. Waltham, Mass.-based MarketPlace provides the technology and marketing support for the desktop marketing product D&B MarketPlace, which enables small businesses to find new customers by accessing DBIS' database of approximately 10 million U.S. businesses.

Evansville, Ind.-based **RSC**, The Quality Measurement Company, and **Media Marketing Assessment Inc.**, Westport, Conn., have joined forces to "lead the advertising industry to greater sales productivity" and work together to provide their full line of advertising development, planning and assessment tools.

Perception Research Services (PRS) has signed a licensing agreement with ProFakt Market Research of Munich, Germany, to bring PRS Eye-Tracking capabilities to Germany. PRS already markets and implements these services in the United Kingdom through an alliance with Conquest Research in London.

Mature Marketing and Research, Boston, has joined with **Pranses Research Services**, Hoboken, N.J., to offer a quarterly omnibus on senior lifestyles. For more information call Terry Pranses at 201-659-2475 or Dr. Leslie Harris at 617-720-4158.

Diagnostic Research International, Los Angeles, has opened an office in Winston-Salem, N.C. Daniel Murphy has joined the firm as vice president and general manager of the new office.

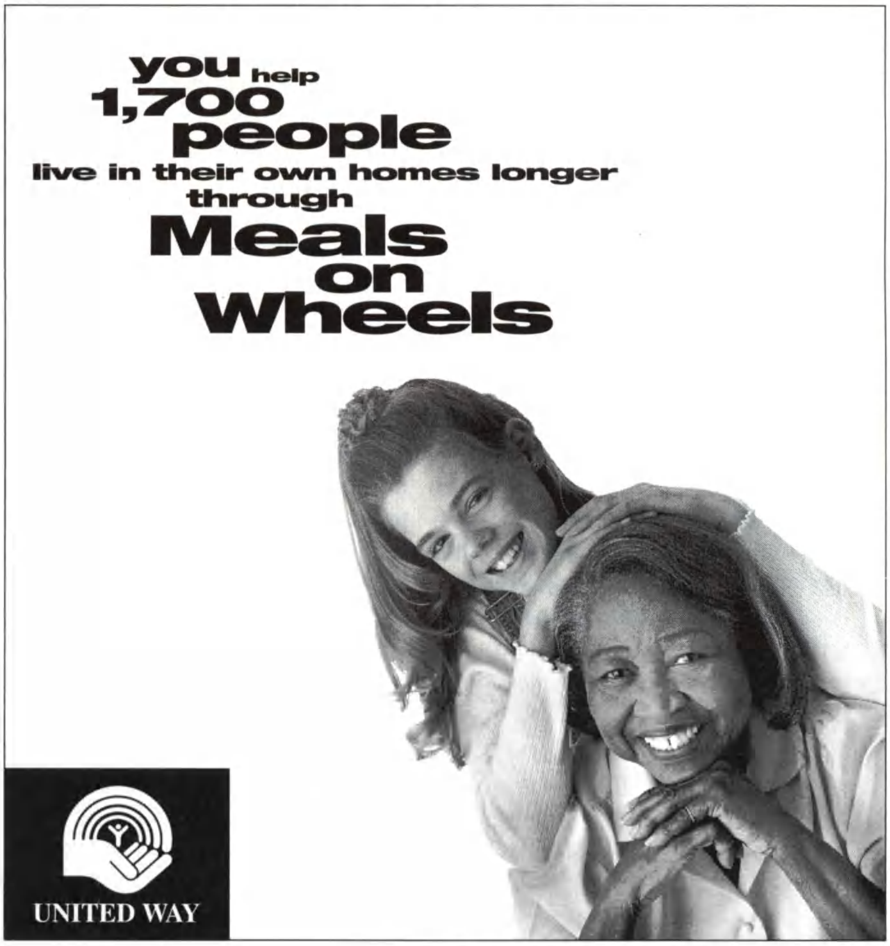
United Way

continued from p. 11

"We felt it was important to talk first to those who we already had a relationship with," Fischer says. "We wanted to come up with a list of attributes, to determine what the factors are that bring someone into a relationship with United Way. What are they looking for, as a donor, as a volunteer, as part of an agency that receives support for their programs from United Way?"

The satisfaction surveys were distributed (in many cases with the help of local corporations, which passed them out to employees) at the conclusion of the fall 1995 United Way campaign.

The six-page survey asked respondents to assess the importance of statements like "United Way invests my contributions wisely" and "United Way keeps administrative costs to a minimum," using a five-point scale ("extremely important" to "not at all important") and then indicate how they felt United Way performed in that area ("strongly agree" to "strongly disagree").



To reassure donors that their contributions do make a difference, the Twin City United Ways began an ad campaign showing how many people are helped by various United Way programs.

Respondents were asked to divide a $100 contribution among several areas of need, including "providing food and shelter" and "nurturing children and youth," both as they would and as they felt United Way would.

The survey also looked each respondent's recent contribution behavior and asked how they preferred to receive information about the United Way and why they had or had not contributed in the past.

Gap analysis

After the results were tabulated, Fischer used gap analysis to identify service areas that needed attention. "With gap analysis, you can tell where you have opportunity gaps. I prefer to call them that because if you look at the gaps as a problem, someone will

always want to assess blame. They're opportunity gaps because we know something that we didn't before and we have an opportunity to do something to change it," she says.

Gap analysis is an excellent way to make research findings easily understandable to a lay audience, which was especially valuable in United Way's case. "Beth did a really nice job of putting the findings into everyday terms," Johnson says. "We present the findings to such a diverse group of volunteers. Some of them are very comfortable with research, others aren't. We needed to make it palatable and easy to see its usefulness."

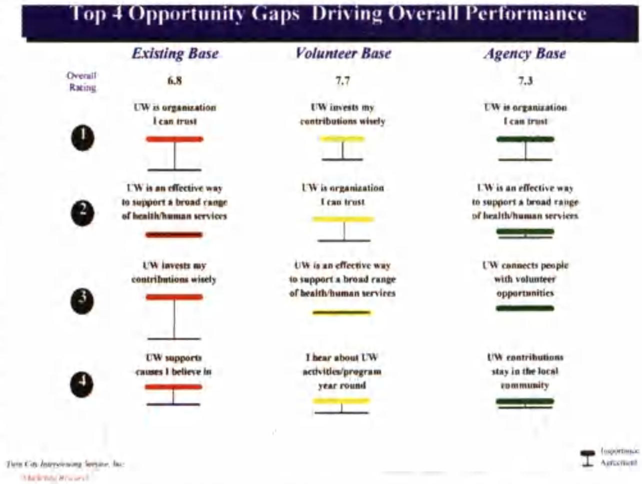
"If I present the results of research and someone in the audience isn't a number cruncher and they can't walk out of the presentation with a solid understanding of the findings then I haven't done my job," Fischer says.

"Throwing numbers at them doesn't work. They want to know how they can do their job better. So if they're going to use the information, they have to understand what we found out. That's what researchers are about: creating value in the information that we provide. When we can't do that, the research just sits on a shelf."

Different perceptions

The research showed that each segment had its own set of perceptions and priorities (see Fig. 1). For example, those in the existing base ranked the statement "United Way is an organization I can trust" as most important, while those in the volunteer group gave more importance to United Way investing contributions wisely.

"How the dollars are spent really drove their satisfaction level," Johnson says. "What is really most important to them is that we're helping people who need help. That was heartening to me. While they may have opinions about fund-raising, they were really starting to understand why we're out there."



Members of the United Way Research Committee used illustrations of importance/agreement gaps identified by the research to quickly communicate findings to a lay audience.

With the existing base, the research showed importance/agreement gaps in responses to the statements "United Way is an organization I can trust" and "United Way invests my contributions wisely."

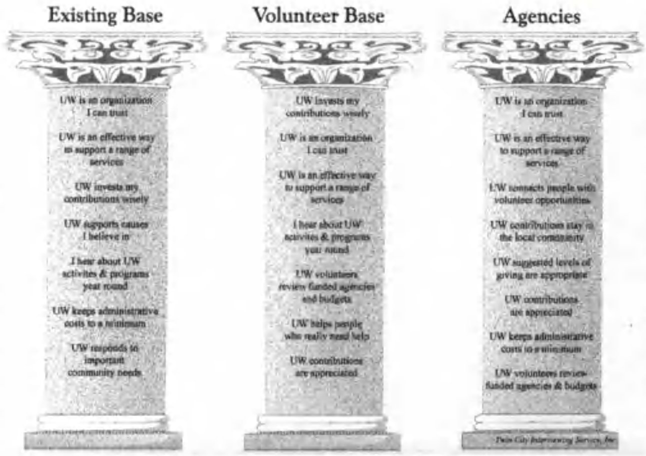
"Just like in any category where they spend their money, people are looking for value in the charitable market," Carlson says. "They want to be able to trust us, to know that we're spending their money wisely, that we're helping a broad spectrum of people. In order to help reassure them that they are investing their charitable dollars wisely with United Way we need to come up with more concrete data on results."

"Throwing numbers at (an audience) doesn't work. They want to know how they can do their job better. So if they're going to use the information, they have to understand what we found out. That's what researchers are about: creating value in the information that we provide. When we can't do that, the research just sits on a shelf."

Thus the Twin City United Ways have begun asking the agencies they fund to demonstrate that their programs get results. "While we know that the agencies have always done good work, in St. Paul, and I know Minneapolis is moving toward this, we're asking the agencies to evaluate their programs and give us concrete information about how their programs are improving people's lives. We think that's going to help close the gap that the research identified," Johnson says.

The research also paved the way for more funds to promote United Way programs throughout the year, rather than just once a year during the fall fund-raising campaign. "Our corporate giving base said they wanted to hear about United Way year-around. I had felt that we were underdeveloped in our year-around communication efforts, but it's difficult for a staff person to make those budget recommendations without something to back them up. If I can point to the research and show that it is something that donors want, that helps me build my case for a stronger year-around program," Johnson says.

This survey was the first time that the United Way had formally sought the opinions of people in the agencies it funds. "When we've worked with the agencies we've never asked them to put on their donor hats," Johnson says. "We've asked them about community issues, but this was the first time that we talked with them as a United Way donor. The hypothesis going in was that they might allocate the $100 differently because they are more involved with the community and community issues. They turned out to have rankings very similar to the corporate respondents."



Each of the three United Way donor segments had a set of performance criteria it expected the charity to meet. "Just like in any category where they spend their money, people are looking for value in the charitable market," says Pam Carlson of the United Way of Minneapolis. "They want to be able to trust us, to know that we're spending their money wisely, that we're helping a broad spectrum of people."

Growing segments

In the next year, the Twin City United Ways plan to survey the non-donor audience, including three growing segments — retirees, small businesses and at-home workers. This group will be quite different from those addressed in the first wave — many of them may have had little or no contact with the United Way. But the research approach will stay the same.

"The methodologies are similar to what you might use in a for-profit project but it's a different environment," Fischer says. "Whereas with a consumer product, where you talk about the product and the package and the taste, now we're talking about a relationship. Any methodology we use has to be tailored to the environment it's being used in. In for-profit research, people are looking at service dimensions, looking for expectation-performance gaps. It's not that much different in United Way's situation."

Give a voice to the donor

An important side benefit of the research has been giving a voice to the United Way donor, Johnson says. "As we've presented the results to our board and to other committees, it's made people aware of how the donor is thinking and gotten them thinking about ways to use the research. Before this we really didn't have as much acceptance of using donor research as a part of understanding our business. This research has been taken more seriously because of its long-term strategic implications." ❑

Moderators

Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 612-854-5101/ fax 612-854-8191.

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The focus group bill of rights

By Tom Greenbaum

Editor's note: Tom Greenbaum is president of Groups Plus, Wilton, Conn.

The Client's Rights

- ☞ To retain a moderator who is an experienced and competent professional in focus group research.
- ☞ To know who will conduct the groups and who will be writing the report before signing the contract with the moderator.
- ☞ To receive a discussion guide well in advance of the groups in order to provide inputs to the moderator relative to modifications.
- ☞ To agree to all recruitment specifications and to review a copy of the recruitment screening questionnaire before participants are asked to come to the groups.
- ☞ To be provided with a one-page summary of the participants (without last names, addresses, or phone numbers as per the QRCA Code of Ethics) in each session with key screening criteria identified.
- ☞ To be provided with a formal, written report of the groups on or before the date agreed upon.
- ☞ To be provided with information about the various research Codes of Ethics (QRCA, CMOR, RIC) with respect to respondent confidentiality and respect.
- ☞ To have full groups of qualified participants who arrive on time at the facility, understanding that at times this will not happen.

The Moderator's Rights

- ☞ To be treated as a partner in the research project rather than a vendor of goods or services or an adjunct staff member.
- ☞ To be paid promptly by the client organization according to contractual agreements.
- ☞ To receive feedback from the client about the moderator guide well in advance of the actual focus groups to permit sufficient time for final preparations.
- ☞ To review any stimuli to be used in the groups (i.e., concepts, products, advertising, etc.) at least 48 hours before the sessions to permit an adequate review of the materials and appropriate amendments to the guide and to understand that sometimes this will not happen.

The Facility's Rights

- ☞ To be given written, detailed instructions by the moderator relative to recruiting specifications for the groups.
- ☞ To be paid the anticipated incentives in advance and the balance of the charges within a 30-day period following the completion of the last group.
- ☞ To be advised immediately when reservations for space being held are to be canceled.
- ☞ To be treated as a partner in the research project process rather than just a vendor of goods and services.
- ☞ To receive the respect of the moderator before, during and after the focus group sessions.
- ☞ To be respected for knowledge of the area in which they live and the situational aspects of that city.
- ☞ To be given adequate time to recruit groups and not be pressured into unrealistic situations due to disorganization by clients or moderators.
- ☞ To have their facilities treated with the same respect that moderator and clients would treat their own offices or homes.

The Respondent's Rights

- ☞ To be told the general content of the discussion to preclude them participating in a subject about which they would not feel comfortable.
- ☞ To be told about video or audio taping of sessions and the presence of people observing the sessions from behind the one-way mirror.
- ☞ To be paid for coming to the groups in the event they are not selected for participation and they arrived at the facility within 10 minutes of the agreed upon starting time.
- ☞ To be treated with dignity and respect by the personnel at the facility and those conducting the research in the room and behind the mirror.
- ☞ To receive light food and beverages consistent with the time of day the groups are held.
- ☞ To have the right to withdraw or not answer any question or sample any product at any time.
- ☞ To be assured of confidentiality; that is, that their names, addresses, phone numbers of personal information will not be released to clients without their permission. ❑

Data Use

continued from p. 16

(satisfaction) on one attribute may be achievable only at the expense of a lower level of performance (satisfaction) on a second attribute (e.g., improved acceleration at the expense of miles per gallon). Also, actions by one company in the marketplace may promote a loss in perceived satisfaction for a competitor's product or service on one or more attributes.

Lastly is the matter of attribute importance weights. While the type of modeling we are advocating can be accomplished with rating scales for measuring attribute importance, we are much more comfortable using constant sum measurements. Constant sum eliminates the tendency of many respondents to use relatively high scores for all attributes versus the tendency of others to use relatively lower weights[4]. Also, when measuring importance it is a good idea to put the measurement task in the context of choice, e.g., "Please divide 50 points (or stickers) across the attributes to indicate their relative importance when choosing among products (services) in the category."

The choice model[5] can integrate all measures at the individual respondent level and be used to predict choice. With the simulator in place, it is a simple matter to select different change scenarios and explore the impact of the selected changes on choice behavior. The change scenarios can involve both your product or service and one or more competitors.

Thus instead of guessing about the relative impact of alternative satisfaction improvement strategies and, by inference, share improvement strategies, one can use the simulator to rank order these strategies. The link to absolute, as opposed to relative, market shares is more imprecise, but the model and simulator provide the possibility to ball-park profitability and ROI implications of alternative strategies.

Tracking considerations

Scale sensitivities, and perhaps attribute importance, are relatively stable over time. Thus, once measured, they are unlikely to change appreciably over a span of several years. This would be especially true in a relatively stable and/or mature market. On the other hand, perception of product/service performance on attributes driving choice are likely to be more variable. Thus from a tracking standpoint, measurements can be limited to product/service performance on an annual, or more frequent, basis and measurement of attribute importance and scale sensitivity measured every few years, depending to some degree on market dynamics.

Two added benefits

Having a choice model/simulation capability can point to clear direction for change on ideal point attributes[6] assuming they are appropriately scaled. When satisfaction is measured on typical scales (e.g., a five- or seven-point scale from very unsatisfied to very satisfied) low levels of satisfaction on ideal point attributes are difficult to interpret. As an illustration, suppose 40 percent of a company's customers are dissatisfied on such an attribute. A real opportunity, right? But what if half the 40 percent want to move in one direction, for example more carbonation, and half in the other direction, less carbonation? A change in one direction will make the product worse for half of those already dissatisfied plus affect in a negative way the satisfaction level of the 60 percent who are already satisfied. Such situations are characteristic of attributes which have ideal points somewhere in the middle of the possible range of values. For such attributes dissatisfaction is not necessarily an opportunity. Using a requirement or expectation scale or a scale with units of the attribute (e.g., carbonation measured from a little to a lot of carbonation) along with self-explicated values will allow a proper interpretation of dissatisfaction. The choice model/simulator will allow for estimating the impact of movements in either direction on preference or share.

A second benefit of looking at customer satisfaction research through the eyes of a choice model is the ability to incorporate the concept of brand equity as discussed by Park and Srinivasan (1994). Consideration of this topic is beyond the scope of this article, but the main requirement, besides some of the ideas introduced here, is an objective or expert measure of brand performance on the attributes.

Enhance value

Putting customer satisfaction measurement in the context of self-explicated choice models can enhance the value of this important research area by allowing management to truly understand the strategic implications of satisfaction improvement strategies for their or competing products or services. All that's required is a wedding. ❑

[1] Actually market perceived satisfaction is a weighted average of two sub-scores called market perceived quality and market perceived price.

[2] In a winner-take-all model the alternative with the highest preference score is the "winner"; in a probabilistic model preference scores are converted to probabilities using either a constant utility or random utility model (see Ben-Akiva and Lerman (1993) for a discussion).

[3] For other attributes there may be a substantial reward for exceeding requirements and little penalty for falling short.

[4] A two-cluster solution on attribute importance ratings frequently results in one cluster with relatively high scores assigned to all attributes and the second cluster with relatively low scores across all attributes. This necessitates centering the data, an unnecessary step when using constant sum measurement.

[5] The choice model advocated here takes the form of a conjunctive-compensatory model (Srinivasan 1988).

[6] Ideal point attributes are ones with the ideal point in the interior of the scale, e.g., amount of carbonation in a soft drink, in contrast to vector attributes, where more is always better, e.g., safety in the automobile.

References

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Competitive strength

continued from p. 22

individual vendor mentioned in the survey— add the percentage scores (in the form of whole numbers) for all three categories of questions to arrive at a sum total. Third, add the sum totals for every vendor together and multiply by .01. You are now ready to calculate the competitive strength score for each individual vendor. Simply use the value calculated in step three as the denominator and divide it into the vendor-specific value calculated in step two to arrive at the competitive strength score for the vendor of interest. You should arrive at a number between zero and 100 for each vendor mentioned in the survey. By using a bar graph to display the results, you can display the relative strength of each of your competitors.

Factors influencing competitive strength scores

Several intervening factors will cause inconsistencies in survey responses and effect the CSI. For instance, a respondent may name a vendor as one of the best three vendors but not as a current vendor or a primary vendor. This situation might occur when a vendor named as "one of the best" is inaccessible to the respondent due to inconvenience, price, or a lack of decision-making authority. Other times, a respondent may name a vendor as their primary vendor and a current vendor but not as one of the best three vendors. This usually occurs — in a business-to-business relationship — when the respondent must use a particular vendor, who they do not consider to be one of the best three, due to a management directive.

Short-term purchase incentives, such as special offers, will occasionally enhance the competitive strength of a vendor. For example, a chain of gas stations offering a free soft drink with every fill-up may temporarily increase the number of people who would name it as a current vendor. This situation can increase the gas station's competitive strength for the duration of the special offer. However, if the gas station is unsuccessful at forming longer term relationships with its "special offer customers" — its competitive strength will be of short duration. Depending on the timing of the survey process, such situations can distort the outcome of your study. Asking respondents to explain the reasons for their answers will help you identify influences that temporarily enhance a vendor's competitive strength score.

Each time the surveyor encounters a discrepancy in responses to the three questions, he or she should ask the respondent to explain the discrepancy and make a note of the reason. By eliciting additional information, you will be able to discover specific reasons for otherwise illogical survey results. For example, some companies (in the business-to-business arena) may win a number of "exclusive vendor" relationships with large corporate accounts due to price alone. When this situation occurs frequently, a company with inferior quality or service may obtain a relatively high overall competitive strength score. Asking respondents to explain the reasons for their answers will provide insight regarding the competitive strength of companies that have a poor reputation for quality or service.

Detailed information about a respondent's reasoning is also useful for identifying strengths and weaknesses of specific competitors. Consider asking every respondent a series of follow-up questions to discover the rationale for their answers. For example, ask "Why is XYZ company your primary vendor?" Or "Why did you name ABC company as one of the best three vendors but not as one of your current vendors?" Remember, the reasons for a company's competitive strength score are often more important than the score itself.

Using the CSI as a strategic planning tool

• Define the reasons for your score and the scores of your competitors. The survey will help you evaluate the market's perception of your company's practices relative to the competition. It also provides insight about the merits and pitfalls of marketing strategies implemented by your competitors. Use the survey as an opportunity to learn valuable lessons from the competition that will enable your company to make better strategic decisions in the future.

• Use the survey as an opportunity to collect competitive intelligence data. Respondents can enlighten you to previously unknown information useful for anticipating future initiatives of your competitors. Moreover, you might discover competitor weaknesses that your company can use to its advantage. The survey may even reveal new competitors in the marketplace.

• Use the CSI as a benchmarking instrument. The CSI will provide you with a snapshot of your competitive standing. Therefore, administer the survey on a regular basis, perhaps annually, to stay abreast of your position in the marketplace. ❑

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Customer satisfaction directory

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Scotty Levitt, Pres. Mktg. Rsch. & Cnsltg. Div.

Macro International's Customer Loyalty Plus (CL+) is a new, unique system for measuring and building customer loyalty worldwide. Consisting of three phases (assessment, planning, improvement), CL+ improves profitability by identifying, strengthening and building your loyal customer base. Focusing on loyalty results in significant savings since costs are 4-6 times higher to win a new customer than to keep a customer loyal.
(See advertisement on p. 77)

Madenberg Associates
50 Larkin St.
Huntington Station, NY 11746
Ph. 516-673-7300
Fax 516-351-4577
E-mail: madenberg@msn.com
Douglas I. Madenberg, Principal

M/A/R/C Research
7850 N. Belt Line Rd.
Irving, TX 75063
Ph. 214-506-3400
Fax 214-506-3505
Sharon Munger, President

MARCON
555 René-Lévesque O., 750
Montreal, PQ H2Z 1B1
Canada
Ph. 514-393-1378
Fax 514-875-7505
E-mail: marcon@cam.org
Pierre Ducharme, President

MARITZ
MARKETING RESEARCH INC.
More than measurement

Maritz Marketing Research, Inc.
1297 N. Highway Dr.
Fenton, MO 63099
Ph. 800-446-1690
Fax 314-827-8605
http://www.maritz.com/mmri.htm
Phil Wiseman, Vice President, Marketing

Maritz Marketing Research Inc. specializes in customized solutions to service quality needs. Utilizing customer satisfaction measurement, customer-focused training, reward and recognition systems and communications programs, Maritz supports and drives performance improvement strategies throughout an organization. Whether you need measurement or a totally integrated solution, Maritz is the answer - nationally and internationally.
(See advertisements on pp. 26, 27, 32)

Market Access Partners
8200 S. Quebec St., Ste. A3-273
Englewood, CO 80112
Ph. 800-313-4393
Mary C. Goldman, Managing Partner

Market Advantage
4708 Main St., Ste. 201
Lisle, IL 60532
Ph. 708-271-1315
Fax 708-271-3011
Bruce Buteyn, Dir. Sales & Mktg.

MARKET OPINION RESEARCH
an M.O.R. PACE company

Market Opinion Research
31700 Middlebelt Rd., Ste. 200
Farmington Hills, MI 48334
Ph. 810-737-5300
Fax 810-737-5326
James Leiman, Ph.D., Sr. Vice President

M.O.R., a full-service research supplier, has experience conducting customer satisfaction research for automotive, consumer, financial, health care, industrial and insurance clients using QFD, CS indexing, expectation/gap analysis, problem resolution, and retention methodologies. New analysis techniques and state-of-the-art software have been designed to address the unique needs of our clients. Contact us to talk with a veteran research manager who will help you develop and implement an actionable customer satisfaction program. Learn how to understand the voice of your customers; measure the extent and importance of your customer's problems; and build a house of quality. *(See advertisement on p. 76)*

Market Probe, Inc.
2655 N. Mayfair Rd.
Milwaukee, WI 53226-1310
Ph. 414-778-6000
Fax 414-778-3730
E-mail: mprobe@execpc.com
http://marketprobe.com
Dr. Derek Allen, Director of Research

Marketing & Research Resources, Inc.
5705 Industry Ln., 2nd fl.
Frederick, MD 21704
Ph. 301-694-2800
Fax 301-694-5171
Lisa Hammer, V.P. Research

Marketing Evaluations/TVQ, Inc.
1615 Northern Blvd.
Manhasset, NY 11030
Ph. 516-365-7979
Fax 516-365-9351
E-mail: qscores@soho.ios.com
Steven Levitt, President

Marketing Metrics, Inc.
305 Rte. 17
Paramus, NJ 07652
Ph. 201-599-0790
Fax 201-599-0791
E-mail: TVavra@marketingmetrics.com
Terry G. Vavra, President

MarketVision®

MarketVision/VALTec
MarketVision Building
4500 Cooper Rd.
Cincinnati, OH 45242-5617
Ph. 513-791-3100
Fax 513-794-3500
Rex L. Repass, President

MarketVision Research®, Inc. specializes in customer value analysis and retention through MarketVision/VALTec, a strategic joint venture with The VALTec Group, Inc. The MarketVision/VALTec Value Alignment System® is a proprietary model owned and developed by the VALTec Group, Inc. MarketVision/VALTec is a proponent of the "value proposition". We are dedicated to the belief that perceptions of quality and customer service are not based solely on product or service attributes, but must consider price. MarketVision/VALTec has significant experience in communications and information technologies, healthcare, utilities, packaged goods, and entertainment research. Offices in Cincinnati, Charlotte, Orlando, Dallas, and Indianapolis. An *Inc. 500* company.
(See advertisement on p. 78)

MATRIXX Marketing Research
4600 Montgomery Rd.
Cincinnati, OH 45212
Ph. 800-323-8369
Fax 513-366-8386
Barry Maners, Director

MATRIXX Marketing Research specializes in helping their client base understand the key aspects of the client's relationship with the customer and determining specific impactors of the customers value perception. A MATRIXX CVM (Customer Value Management) program is specifically designed to not just measure "satisfaction", but to isolate the key elements that describe your customer perceived value package. A typical MATRIXX CVM program combines: 1) qualitative and quantitative research to gather information from the customer in key areas developed for each MATRIXX client; 2) clear, concise reporting which is focused on MATRIXX's Performance Induced Impact. PII develops clear analysis of the magnitude of strength and magnitude of weakness for each value package component; 3) Development Workshop Training during the quantitative portion of the CVM program so that your organization is ready to act when Performance Induced Impact statements regarding value are delivered; 4) hands-on deployment and implementation guidance using your customer value assessments. Extensive experience in business-to-business and consumer research in health care, manufacturing, utilities, automotive and consumer products. A division of Cincinnati Bell, Inc.
(See advertisement on p. 79)

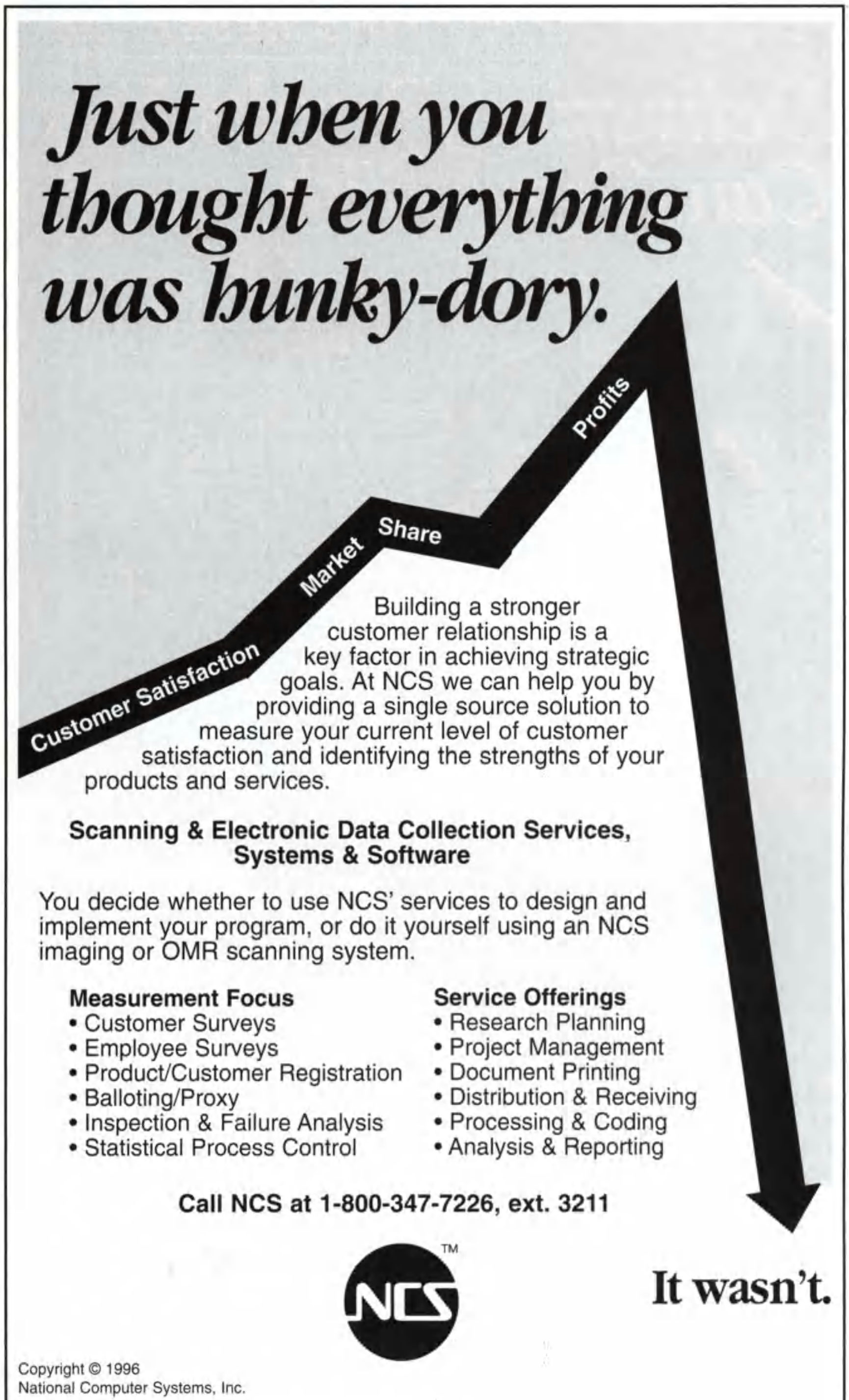
McMillion Research Services
1012 Kanawha Blvd. E.
Charleston, WV 25301-2809
Ph. 304-755-5889
Fax 304-755-9889
Gary or Sandy McMillion, Owners
Member NETWORK

MDI Research
P.O. Box 902
Cardiff, CA 92007
Ph. 619-736-4448
Fax 619-759-2759
E-mail: jabmdir@aol.com
Jacqueline Arsivaud, Principal

The Melior Group
316 S. 16th St.
Philadelphia, PA 19102
Ph. 215-545-0054
Fax 215-545-0078
Linda J. McAleer, President

Mercator Corporation
172 State St.
Newburyport, MA 01950
Ph. 508-463-4093
Fax 508 463-9375
E-mail: 75372.2436@compuserve.com
K.E. Murphy, General Manager

SNAP Professional® survey software is the right answer for your survey research, providing on-screen questionnaire design and three data entry modes for applications including CATI and CAPI with optional data verification on all data. Analysis includes crosstabulations, frequency and grid tables, powerful 2-D and 3-D graphics and a full range of descriptive statistics. Manipulate results via percentages, weights, scores, zero suppression, ranking and unlimited filters. Additional capabilities include literal response analysis for verbatims, data import/export and batch operation reporting. Available for Windows, Windows 95, Windows NT and OS/2 and Warp.
(See advertisement on p. 78)



Meyers Research Center
58 W. 40th St.
New York, NY 10018
Ph. 212-391-0166
Fax 212-768-0268
Arthur Zimbalist, Sr. Vice President

MGA Communications, Inc.
1125 17th St., Ste. 1800
Denver, CO 80202
Ph. 303-298-1818
Fax 303-297-3526
E-mail: mgacompr@aol.com
Doug Magee, V.P. Research

Michelson & Associates, Inc.
1900 The Exchange, Ste. 360
Atlanta, GA 30339
Ph. 770-955-5400
Fax 770-955-5040
E-mail: focus@onramp.net
http://www.michelson.com/research
Mark Michelson, President/CEO

Moosbrugger Marketing Research
901 W. Hillgrove Ave.
La Grange, IL 60525
Ph. 708-354-5090
Fax 708-354-6813
E-mail: mmr77@aol.com
Mary C. Moosbrugger, President

NCS
4401 W. 76th St.
Edina, MN 55435
Ph. 800-347-7226 or 612-830-7600
Fax 612-893-8102
E-mail: dcs@ncs.com
http://www.ncs.com

A full-service-research and consulting firm, NCS specializes in large-scale customized assessments of internal and external customer/employee attitudes. NCS tailors research to each client's needs and helps turn information into actionable results throughout the organization. NCS offers multiple data collection technologies, e.g., Internet, E-mail, phone, paper-based. NCS customers may use any or all of NCS' available services including project management, research, survey design, printing, distribution, database management, analysis, reporting or in-house software and systems.
(See advertisement on p. 80)

NETWORK
601 Madison Ave.
Covington, KY 41011
Ph. 606-431-5431
Fax 606-431-5838
E-mail: network.cen@earthlink.net
http://www.vrcinc.com/network.htm
Linda Tessar, President/COO

The research industry's "Virtual Corporation". Technically oriented - Customer driven. Centralized project management: One contact - bidding through billing for design, field management, DP and analytical services. National source for telephone, central location and qualitative data collections through owner-operated affiliates. CfMC software for CATI/CAPI/CASI and DP capabilities. Applied SOPs ensure quality and consistency across markets. Extensive industry knowledge and expertise.
(See advertisement on p. 82)

Nordhaus Research, Inc.
20300 W. 12 Mile Rd
Southfield, MI 48076
Ph. 810-827-2400
Fax 810-827-1380
John King, President

Full-service national research company; quantitative/qualitative research. Five experienced moderators; 190 monitored central telephone stations utilizing Ci2, Tel-Athena and Quantime CATI and predictive dialing technology for unparalleled results and efficiency. Complete data processing capabilities, statistical analysis; focus group facilities in Southfield and Grand Rapids, MI, and Atlanta, GA, locations. Nationwide access to mall locations. Specialists in advertising, health care, financial/banking, media and utilities.
(See advertisement on p. 81)

NSRC (National Survey Research Center)
10107 Brecksville Rd., Ste. 340
Brecksville, OH 44141
Ph. 216-838-7640
Fax 216-838-7650
Lauren Wagner, Mgr. Client Relations

Opinionmeter, Inc.
P.O. Box 10025
Berkeley, CA 94709
Ph. 510-482-4317
Fax 510-482-4317
E-mail: opmeter@opinionmeter.com
http://www.opinionmeter.com
Morgan Strickland, Director of Operations

OPINIONS UNLIMITED

Opinions Unlimited, Inc.
Three Riverway, Ste. 250
Houston, TX 77056
Ph. 713-888-0202
Fax 713-960-1160
Andrew S. Martin, Ph.D., Principal

Full-service custom research consulting and data collection. Over 15 years experience assessing customer satisfaction for electric/gas utilities, financial/insurance industry, consumer goods, service industries - consumer or business-to-business, computer software, telecommunications, agricultural industries. Seventy-five-station central CATI telephone interviewing facilities, CATI programming, tabulation, analysis and reporting. State-of-the-art focus suites in two Texas locations, Amarillo and Houston. Internationally known moderator one of the principals.
(See advertisement on p. 42)

Pacesetter Surveys
2028 Timberlane Way
San Mateo, CA 94402
Ph. 415-345-2580
Fax 415-345-5332
E-mail: Pacesurv@aol.com
John Cole, President

Pattern Discovery, Inc.
314 Fitzwater St.
Philadelphia, PA 19147
Ph. 215-928-1619
Fax 215-928-1301
E-mail: 73700.1212@compuserve.com
Steven Hokanson, President

Penton Research Services
1100 Superior Ave.
Cleveland, OH 44114-2543
Ph. 216-931-9283
Fax 216-696-8130
E-mail: pentonrsch@aol.com
http://penton.com/corp/research
Kenneth Long, Director

Perdue Research Group
2000 Glen Echo Rd.
Nashville, TN 37215
Ph. 615-298-5117
Fax 615-298-5668
Greg Fuson, Account Manager

Performance Plus
Boston Field & Focus, Inc.
111 Speen St., Ste. 105
Framingham, MA 01701
Ph. 508-872-1287 ext. 112
Fax 508-879-7108
E-mail: NRoberts@aics.net
Shirley Shames, President
Member NETWORK

Personal Touch Marketing
617 Detroit St., Ste. 120
Ann Arbor, MI 48104
Ph. 313-741-1134 or 800-324-3216
Fax 313-741-1206
E-mail: DebB3497@aol.com
Deborah Babcock, President

PINE COMPANY
Data Processing for Marketing Research

Pine Company
1607 16th St.
Santa Monica, CA 90404
Ph. 800-969-PINE (7463)
Fax 310-453-3969
E-mail: PineData@aol.com
http://www.pinedata.com
Ben Pine, Founder/Chairman
Dan Dickson, CEO
Debbie Harbort, COO
Ed Sugar, Dir. Mkt. Rsch Sales & Mktg.
Shannon McNeely, Dir. Sales & Mktg.

Established in 1967, Pine Company is the West's largest provider of data processing for market research - the first to offer scanning with Intelligent Character Recognition (ICR), which recognizes handprint. Ideal for customer satisfaction surveys, ICR has the speed and accuracy of Optical Mark Reading and frees questionnaire design from special printing requirements. Pine Company also provides coding, data entry, tabulation and presentation graphics.
(See advertisement on p. 65)

Polaris Marketing Research, Inc.
359 E. Paces Ferry Rd., Ste. 300
Atlanta, GA 30305-2351
Ph. 888-816-8700
Fax 404-816-0352
E-mail: research@polarismr.com
http://www.polarismr.com
Jan Edward Carlson, President

Polaris offers a full-service qualitative and quantitative research design and execution. We specialize in customer satisfaction benchmark and tracking studies, employee and lost customer research. We are experienced in the telecommunications, health care, tourism and travel, financial services, information services and Yellow Pages advertising industries. Our fully automated, state-of-the-art, in-house telephone interviewing center can handle projects from small to complex.
(See advertisement on p. 82)

Multi-Dimensional Intelligence™

The Polk Company
26955 Northwestern Hwy.
Southfield, MI 48034
Ph. 800-635-5522
Fax 303-298-5489
Michael Spadafore, Product Manager

Polk's Research Profiling and its dedicated team of expert consultants provide the primary research segment with the richest and most versatile targeted samples in the industry, allowing researchers to most effectively and efficiently conduct quality consumer research.
(See advertisement on p. 83)

Prince Market Research, Inc.
2323 Hillsboro Rd., #500
Nashville, TN 37212
Ph. 615-292-4860
Fax 615-292-0262
E-mail: dprince@PMResearch.com
http://www.pmresearch.com
Dan Prince, President

Prognostics
Stanford Research Park
900 Hansen Way
Palo Alto, CA 94304
Ph. 415-812-3900
Fax 415-812-3919
E-mail: kkowaleski@prognostics.com
http://www.prognostics.com
Kelli Kowaleski

PROJECTIONS INC. Marketing Rsch. & Counsel
47 Marlboro St.
P.O. Box 585
Keene, NH 03431
Ph. 603-352-9500
Fax 603-357-0000
E-mail: info@projections-inc.com
http://www.projections-inc.com
Michael Kenyon, President

Questar
2905 W. Service Rd.
Eagan, MN 55121
Ph. 612-688-1961
Julie Fontaine, Supv., Marketing Support

Specializes in customized assessment of customer satisfaction and customer value management - helping clients compare the value they offer with that of their competitors. We are a leader in linking management practices to long-term customer satisfaction, loyalty and retention.
(See advertisement on p. 9)

The Question Shop, Inc.
2860 N. Santiago Blvd., Ste. 100
Orange, CA 92867
Ph. 800-411-7550 or 714-974-8020
Fax 714-974-6968
Ryan Reasor, President

Raosoft, Inc.
6645 N.E. Windermere Rd.
Seattle, WA 98115
Ph. 206-525-4025
Fax 206-525-4947
E-mail: raosoft@raosoft.com
http://www.raosoft.com/raosoft/
Catherine McDole Rao, Vice President

Research Data Services, Inc.
600 S. Magnolia Ave., Ste. 350
Tampa, FL 33606
Ph. 813-254-2980
Fax 813-254-2986
E-mail: KlagesMktg.@aol.com
Walter J. Klages, Ph.D., President

Response Analysis Corp.
1060 State Rd.
P.O. Box 158
Princeton, NJ 08542
Ph. 609-921-3333
Fax 609-921-2611
E-mail: diane.linck@response-analysis.com
http://www.response-analysis.com
Diane S. Linck, Exec. Vice President

The Response Center, Inc.
6809 Market St.
Philadelphia, PA 19082
Ph. 610-352-2800 ext. 2214
Fax 610-352-7382
E-mail: admin@response-center.com
Patrick Baldasare, President

RIVA Market Research
7316 Wisconsin Ave., Ste. 450
Bethesda, MD 20814
Ph. 301-652-3632
Fax 301-907-0209
E-mail: RIVAqmr@aol.com
Naomi R. Henderson, President

CJ Robbins
P.O. Box 10274
Pittsburgh, PA 15232
Ph. 412-681-7975
Fax 412-681-7975
Carole Robbins

Robinson Research
W. 524 Indiana
Spokane, WA 99205
Ph. 509-325-8080
Fax 509-325-8068
E-mail: Robinson@soar.com
William D. Robinson, President

Rockwood Research
1751 W. County Rd. B, Ste. 210
St. Paul, MN 55113
Ph. 612-631-1977
Fax 612-631-8198
E-mail: rockwdplus@aol.com
http://www.rockwoodrc.com
Robert Hill, President

RONIN Corporation
103 Carnegie Center
Princeton, NJ 08540
Ph. 800-352-2926
Fax 609-452-0091
E-mail: ronin@ronincorp.com
http://www.ronincorp.com
Harry F. Bunn, President

E.C. Runner & Associates, Inc.
4650 N. Port Washington Rd.
Milwaukee, WI 53212
Ph. 414-332-8050
Fax 414-332-7377
Ed Runner, President

Sawtooth Technologies, Inc.
1007 Church St., Ste. 402
Evanston, IL 60201
Ph. 847-866-0870
Fax 847-866-0876
E-mail: info@sawtooth.com
http://www.sawtooth.com
Brett Jarvis, Dir. of Sales & Mktg.

Scantron Service Bureau
14661 Franklin Ave.
Tustin, CA 92680
Ph. 714-730-8232
Fax 714-730-6377
E-mail: pmmiszko%sb@scantron.com
http://www.scantron.com
Paul M. Miszkowicz, Director

Service Strategies International, Inc.
12001 N. Central, Ste. 350
Dallas, TX 75243
Ph. 214-233-3010
Fax 214-419-1555
E-mail: al@servstrat.com
Andy Lilliston, General Manager

Socratic Technologies, Inc.
3850 25th St., 2nd fl.
San Francisco, CA 94114
Ph. 800-5-Socratic
Fax 415-641-8205
E-mail: info@sotech.com
http://www.sotech.com
Bill MacElroy, President

sers Sorkin-Enenstein Research Service, Inc.

Sorkin-Enenstein Research Service, Inc.
500 N. Dearborn St.
Chicago, IL 60610
Ph. 312-828-0702
Fax 312-828-9530
E-mail: sersinc@aol.com
Allen Sorkin, President

Quantitative and qualitative consumer and business-to-business market research. Full-service capabilities. Specialists in market segmentation, customer satisfaction, product evaluation, competitive positioning, concept generation, advertising effectiveness. Creative custom design consultation, multivariate methods, computer applications. Findings are action oriented.
(See advertisement on p. 85)

Sterling Research Group, Inc.
5901 Sun Blvd., Ste. 200
St. Petersburg, FL 33715
Ph. 813-866-2400
Fax 813-867-4129
E-mail: Act_Now@srgtampa.com
Ronna Rowlette, Ph.D., Vice President

Stewart International Associates
177 E. Silver Spring Dr.
Milwaukee, WI 53217
Ph. 414-964-8876
William W. Redemann, President

Strategic Vision, Inc.
P.O. Box 420429
San Diego, CA 92142
Ph. 619-576-7141
Fax 619-576-9235
E-mail: gorrell@vision-inc.com
http://www.vision-inc.com
Daniel A. Gorrell, Vice President

Sunbelt Research Associates, Inc.
1001 N. U.S. Hwy. One, Ste. 310
Jupiter, FL 33477
Ph. 561-744-5662
Fax 561-575-7296
E-mail: SRESEA1359@aol.com
Barbara Allan, President

Survey Service, Inc.
1911 Sheridan Dr.
Buffalo, NY 14223
Ph. 716-876-6450
Fax 716-876-0430
Susan R. Adelman, President

TeleSession Corporation
355 Lexington Ave.
New York, NY 10017
Ph. 212-599-1500
Fax 212-599-5290
E-mail: lcvt@together.net
Lincoln G. Clark, Executive Director

USA/DIRECT, Inc.
194 Andover Rd.
Sparta, NJ 07871
Ph. 201-726-8700
Fax 201-726-8787
Guy Parker, President

The Wagner Group, Inc.
53 W. 21st St.
New York, NY 10010
Ph. 212-627-0066
Fax 212-727-7492
Jeffrey Wagner, President

WalkerInformation

Walker Information
3939 Priority Way South Dr.
Indianapolis, IN 46240
Ph. 317-843-3939
Fax 317-843-8897
E-mail: cburking@walkernet.com
http://www.walkernet.com
Connie Burking, Director

Product and service lines include: customer satisfaction measurement and management, corporate reputation and stakeholder assessment, organizational culture assessment, marketing research, data management, database marketing and clinical research. Walker Information's comprehensive measurement and management services help build business success in more than 75 countries throughout the world via our CSM Worldwide® Network and new subsidiaries in Mexico and Canada.
(See advertisement on p. 5)

Willard & Shullman, Inc.
Greenwich Office Park, Bldg. 2
Greenwich, CT 06831
Ph. 203-629-2233
Fax 203-861-5600
E-mail: mark@wands.com
Mark D. Willard, Managing Director

Winona Customer Satisfaction

Winona Customer Satisfaction
8800 N. 22nd Ave.
Phoenix, AZ 85021-4258
Ph. 602-906-3254
Fax 602-906-3270
George Gaines, Exec. Vice President

Winona's unique customer satisfaction programs are custom-designed for each client, utilizing state-of-the-art data collection, data processing, and a database-driven automated reporting system especially suited for companies with multiple reporting levels. With a 282-station CATI telephone center and a complete in-house mail processing department, Winona has the capacity to handle all types of projects.
(See advertisement on p. 87)

Yarnell, Inc.
147 Columbia Tpke., Ste. 302
Florham Park, NJ 07932
Ph. 201-593-0050
Fax 201-593-0164
E-mail: SYarnell@yarnell-research.com
Steven M. Yarnell, Ph.D., President

Classified Ads

1996-97 SourceBook Listing Additions and Corrections

Please note the following corrections to the 1996-97 QMRR Researcher SourceBook (corrections shown in bold):

The listing for Margaret Yarbrough & Associates, Alameda, Calif., on p. 81 should include the designation "**Member NETWORK**."

In the display ad and listing for Superior Research, Atlanta, on p. 121, the area code for the phone and fax numbers should be **770**.

The listing for Personal Touch Marketing, Ann Arbor, Mich., on p. 160 contains two typos. The ZIP code should read **48104** and the E-mail address should read **DebB3497@aol.com**.

On p. 171, **Flaspohler** Rose Marketing Research, Inc. was misspelled.

The listing for Answers to Questions, Bay Shore, N.Y., on p. 198 should include the designation "**Member NETWORK**."

In the display ad for Friedman Marketing Services, Mamaroneck, N.Y., on p. 205, the area code for the Detroit office should be **810**.

On p. 218, KS&R Consumer Testing Center at the Shoppingtown Mall should be listed as **KSR's Insite**.

On p. 236 in the listing for A&B Interviewing, Inc., Guadalajara, Mexico, the phone and fax numbers should have "**011**" before them.

The listing for S.M. Gongaware Market Research Service on p. 250 should be located under the **Pittsburgh** subheading rather than State College. In addition, the firm is located in **N. Huntingdon**, Pa., not N. Huntington.

In the display ad for Research House Inc., Toronto, on p. 277, the toll-free number at the top of the ad should read **1-888-673-0416**.

The listing for Plaza Research-New York, Paramus, N.J., was inadvertently omitted. Below is the listing as it should have appeared.

PLAZA RESEARCH

Plaza Research-New York
120 Rte. 17 N.
Paramus, NJ 07652
Ph. 201-265-7500 or 800-654-8002
Fax 201-265-7269
http://www.plazaresearch.com
Jill Gottesman, Director

Plaza Research is one of the nation's leading networks of focus group facilities. Qualitative research is our only business; we provide precise recruiting for focus groups and state-of-the-art facilities in corporate settings. Further, we are a fully coordinated and integrated network, sharing resources and capable of running multiple site studies effortlessly. Information on facility availability, bids/pricing, or updates for ongoing studies in any of the Plaza facilities may be obtained with one toll-free telephone call. Currently we operate facilities in the following metropolitan markets: New York, Los Angeles, Chicago, Atlanta, Dallas, Philadelphia, Denver and Houston. Locally, each facility is managed by a director who has both a proven track record and thorough understanding of the immediate market. Thus each study (or facet of a multi-city study) is treated with the utmost care and diligence, on-site, by an experienced marketing professional.

Please add the following firms to the 1996-97 Researcher SourceBook:

The Arbitron Co.
142 W. 57th St.
New York, NY 10019
Ph. 212-887-1300
Fax 212-887-1401
Shelly Cagner, Press Relations

AustinTrends
7101 Hwy. 71 W., Ste. 213
Austin, TX 78735
Ph. 512-288-8501
Tom Jukam, President

Business Communications Co., Inc.
25 Van Zant St., Ste. 13
Norwalk, CT 06855
Ph. 203-853-4266
Fax 203-853-0348
E-mail: buscom2@aol.com
http://www.buscom.com
Dr. Robert Butler, Dir. of Operations

Data Monitor
41 Madison Ave., fifth fl.
New York, NY 10010
Ph. 212-661-2525
Fax 212-661-5551
E-mail: debka@ibm.net
Debra Albert

J. Dempsey Associates
62 Bruni Ave.
Ludlow, MA 01056
Ph. 413-547-8797
Fax 413-547-9090
E-mail: DMPSYMKTNG@aol.com
Joan Dempsey, Owner

Focus Research & Marketing
P.O. Box 356
Boys Town, NE 68010
Ph. 402-491-0408
Fax 402-491-0465
John M. Lee, President

Organizational Studies International, Inc.
5407 Eglinton Ave. W., Ste. 108
Etobicoke, ON M9C 5K6
Ph. 416-626-7343
Fax 416-626-1292
E-mail: osi@interlog.com
Jim Graham, President

Organizational Studies International, Inc.
150 North Wacker Dr., Ste. 1950
Chicago, IL 60606
Ph. 312-977-9040
Fax 312-263-8516
E-mail: osi@usa.net

Preston Research
110 Lowry Lane
Lexington, KY 40503
Ph. 606-276-6114
Fax 606-276-5024
Leanna Hall

Research Management Inc.
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From the Publisher

By Tom Quirk
QMRR publisher

This satisfaction 'research' left the customer unsatisfied

One of the goals of customer satisfaction research is to help companies retain their customers. But as a friend of mine experienced recently, it can also be used to drive them away.

Like many young married couples with a growing family, my friend and his wife decided it was time to replace one of their cars with a brand new minivan. They visited several dealerships during the evaluation phase, looking at vans from four different car companies. When they settled on a make and model, they chose a nearby dealer that actively promoted the quality of its service.

Their salesman seemed like a nice fellow. The sales negotiations went reasonably well. With no trade-in to haggle over, the process was pretty simple and my friend and his wife settled on what they felt was a fair price. The salesman promised them they'd be driving their new minivan in six weeks.

After six weeks elapsed, they didn't hear from the dealership. Well into the seventh week my friend called for an update on the vehicle's status. He was told to direct inquiries to the salesman, who was unavailable at the time. He left a message. After two days the salesman hadn't called back. Another message. Again no response. A third message. Finally a call back. It was now eight weeks since the order was placed.

The salesman said the minivan would arrive in three weeks. He vehemently denied ever promising six-week delivery. But he assured the couple they would be seeing their new vehicle in just three weeks. Naturally they weren't happy but what else could they do? They had to wait.

Finally, the minivan arrived as promised. My friend and his wife rushed to the dealership to pick up the vehicle. The salesman went over the usual details, the invoice, license plates, the van's features, etc. And then, as the couple sat in their new vehicle waiting to drive off, he mentioned that if they had any complaints he would like to hear them now because he was evaluated based on customer responses to surveys conducted shortly after the vehicle was delivered. To ensure strong marks for himself, he wanted any complaints or criticisms to be given to him personally.

Needless to say, my friend and his wife did not react positively to this confrontational approach (one which I have found is very common in automobile dealerships). The whole process had been unpleasant, what with the delivery delays, the unreturned phone calls and the salesman's condescending attitude towards my friend's wife. They just wanted to get the keys and leave. Which they did, reassuring the salesman that everything was fine.

A week later my friend received a call on behalf of the dealership from a representative of a company hired to survey new vehicle purchasers. He agreed to participate. For most of the questions, he was able to provide high ratings for the vehicle and/or the dealership. But when the interviewer began to ask questions about the salesman, my friend expressed his frustration over the salesman's handling of the delivery delay. At the completion of the interview he felt better, believing he had done his part to notify the dealership that one of its salespeople was not sensitive to certain customer issues.

Late the next morning my friend received a call from the salesman, who was irate. He had just returned from his sales manager's office where he had been handed a copy of my friend's responses to the telephone interview. The salesman could not understand why a customer would give an interviewer such negative information. He was angry and intimidating and would not let my friend off the phone for several minutes.

When my friend finally hung up, he too was angry. He thought his responses to the survey were confidential and would be used for statistical purposes only. He was obviously wrong. When he called the dealership's sales manager to complain about how the information was used the sales manager defended the practice and refused to apologize.

Not surprisingly, my friend has vowed never to purchase another vehicle at that dealership. He also says he will never again participate in an automobile-related customer satisfaction study, no matter how legitimate. I'm sure his experience isn't an isolated one, which is unfortunate, because the research industry desperately needs respondents.

But if companies continue to conduct "research" of the type my friend experienced, invalid surveys that damage the already tenuous relationship between interviewer and respondent by violating the rules of confidentiality in the name of employee evaluation, they will poison the pool of willing research respondents — perhaps permanently. ❑