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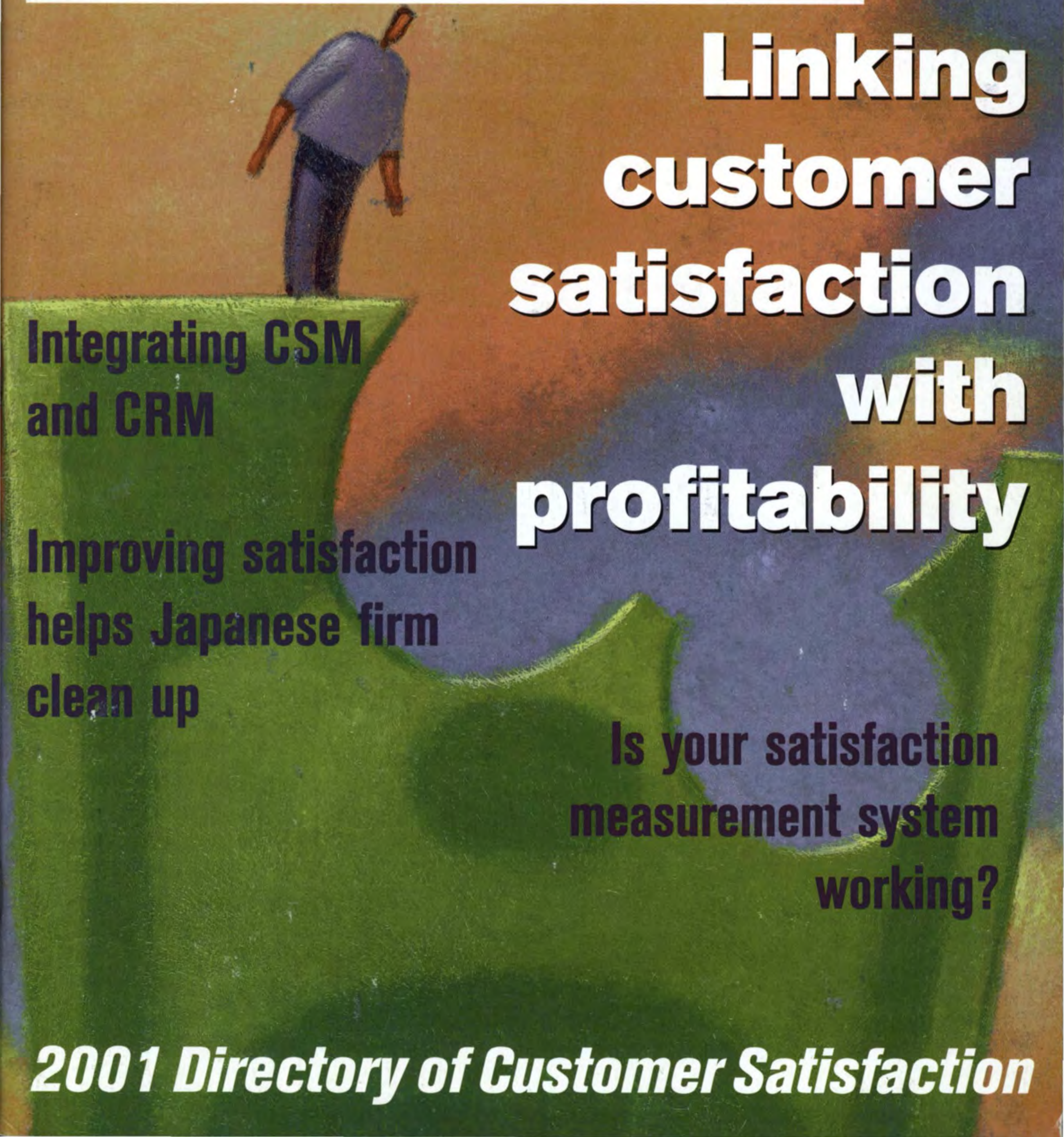

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Volume XV, Number 9 October 2001

CONTENTS

FEATURES

Case History

Techniques

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Don't tip your hand when doing satisfaction surveys

Consumers who are notified in advance that they are to be questioned about a particular product or service are more likely to be critical when surveyed afterwards than are those who don't receive such advance notification, according to research carried out by Chezy Ofir of the Jerusalem School of Business Administration at The Hebrew University of Jerusalem and Itamar Simonson of the Stanford University Business School. Their findings are due to be published in the *Journal of Marketing Research*.

The research was carried out under both laboratory conditions and in the field. Groups of consumers were tested for their reactions, some being notified in advance that they would be asked for their reactions and some not.

"It seems logical to assume that consumers' reactions will be more exacting regarding their experiences if they are asked for their reaction in advance," says Ofir. "One would predict that they will be more attentive to details at the time of purchase since they're aware that their evaluations should be based on solid information. This is in contrast to those consumers who have not been asked in advance for their evaluations, and whose reactions will be based only on vague recollections.

"Our research has proved, however, that one should not depend on what appears to be a commonsense assumption," Ofir says. "We found that notifying the consumer in advance that he will be asked for his reaction does not necessarily cause him to respond more accurately about the details of a product following purchase, but it does lead to him being more negative about it than if he had received no advance notification. This holds true both for products of known high quality, as well as for those of lower quality. And it is also applicable when the consumer is told that he should take into consideration both potentially positive as well as negative qualities of the product."

Ofir explains that this tendency seems to come from the "tipped off" consumer paying more than usual attention to his purchase, regarding it with a critical eye and looking for negative aspects more than he otherwise would have. And it is these details that seem to stick in his mind.

In some product and service areas, customers often expect to be surveyed

continued on p. 58

Non-buyers say Web sites still have influence

While online sales may not be increasing at the same rate they once were, shoppers are still surfing the Web. Ninety-two percent of online consumers use the Internet to shop and/or purchase online, according to E-Tailers vs. Retailers, the newest e-Visory report from The NPD Group, Inc., Port Washington, N.Y.

The report shows that even those consumers who aren't making purchases online are still influenced by what they see on retailers' Web sites.

Eighty-four percent of occasional buyers, those who say they have made an online purchase only once in the past six months or less often, describe their usual use of the Internet for shopping as "I usually shop online and go offline to purchase."

"Measuring online sales alone cannot capture the full benefit of a retailer having an Internet presence. We know that even consumers who don't typically purchase online are using retailers' Web sites to browse and decide what to buy," says Pamela Smith, vice president of NPD online research. "Although it may not result in a purchase at that time, it could translate directly into an offline sale."

How online shoppers describe their typical use of the Internet for shopping

All Shoppers	Percentage
Shop Online, Purchase Offline	51 %
Shop Online, Purchase Online	40 %
Shop Offline, Purchase Online	9 %

Source: NPD Online Research, May 2001

The report also focuses on consumers' reaction when presented with more than one way to purchase from particular channels. Consumers who currently shop at mass merchandisers say they will likely remain more loyal to traditional store locations for future purchases, while others who have traditionally shopped through catalogs say they are turning to the Web to make more purchases. For more information contact Danielle Biondo at 516-625-2351 or visit www.npd.com.

Michael Brereton has been promoted to the newly defined role of managing director, North America, for *Maritz Research*, St. Louis. In addition, **Gary Eversole** succeeds Brereton as group vice president of the Maritz Research Automotive Research Group. Also, Maritz Research has hired **Chris Watkins** as senior program manager for the central project management division.

Allan D. Orman has retired from *Orman Guidance Research, Inc.*, Minneapolis.

Howard Goldberg has been promoted to senior vice president of radio and sports marketing at *Scarborough Research*, New York. In addition, **Bill Nielson** was promoted to director of sales, sports marketing.

Diane Perduk Rambo and **Peter McIlroy** have been named partner at *Retail Planning Associates*, Columbus, Ohio.

InsightFarm, a Livingston, N.J., media evaluation and analysis company, has named **Duane Karabin** research coordinator and **Daria Friedman** research manager.

Susquehanna Surveys, Harrisburg, Pa., and *The Results Network, Inc.*, have named **Betty Hungerford** senior consultant. In addition, **William Bader** has joined the firms as audio/video technician.

Frank Markowitz has joined *On-Line Communications*, a Bartlesville, Okla., research firm, as vice president of sales in the firm's Cherry Hill, N.J., office.

Richard Gehling has been named managing director of *Research International Qualitatif*, for the U.K., and joins the main Research International U.K. board. Gehling will work alongside **Gayle Moberg**, a qualitative practitioner who recently joined RIUK's Board. Gehling will run Research International's main qualitative division in the U.K., while Moberg will head its Fifteen20 innovation consultancy business.

MORPACE International, Inc., a Farmington Hills, Mich., research firm, has named **Milan Popovich** a vice president-health care. In addition, **Brian Drake** has been promoted to vice president.


Popovich **Quinlan**

Richard Quinlan has been named vice president, business development, at *MarketVision Research*, Cincinnati.

Ben Goodson has been named call center manager at *Western Wats Center's* new business-to-business research call facility in Rexburg, Idaho.

Westport, Conn., health care information firm *IMS Health* has named **Murray Aitken** senior vice president of services & consulting, a newly created role.

National Research Corporation, Lincoln, Neb., has named **JoAnn M. Martin** to its board of directors to serve until the 2002 annual meeting of shareholders. The addition of Martin expands the board of directors to five.

International Communications Research, Media, Pa., has named **Kathy Fitzpatrick** vice president of client services in the firm's Chicago office.

Susan Hayward has joined Knowledge Networks, Menlo Park, Calif., as vice president and product director, syndicated services. **Eric S. Halata** has joined the firm's New York office as vice president, custom research. **Cindy Asen** has also joined the firm's New York office as vice president, managing director.

Robert Skolnick has been named president and CEO of *BAIGlobal Inc.*, a Tarrytown, N.Y., research firm.

Skolnick

He succeeds *Kathleen Knight,* who is now president emeritus and will be a consultant to BAIGlobal through the end of the year.

Fundamental Research Group Inc., Southampton, Pa., has named **Lori Smith** and **Tammy Palucis** project manager.

Bala Cynwyd, Pa., research firm *Strategic Marketing Corporation* has named **Carol Hebb** and **Joseph Romero** senior vice president.

Kamilah Garcia has joined the

continued on p. 74

Product & Service Update

Perseus debuts Palm survey app

Perseus Development Corporation, Braintree, Mass., has released a new survey application for Palm-Powered handheld computers. SurveySolutions In Hand allows for the creation of surveys that can be deployed on a handheld computer, eliminating the need for paper-based surveys. Once the surveys are completed, the survey administrator can compile and analyze the results and display them in tables or graphs.

SurveySolutions In Hand can be distributed at conferences and training forums to Palm users for attendees to complete satisfaction and feedback surveys. SurveySolutions In Hand can also be used by field-sales and field-service staff to gather feedback from customers and prospects.

Questionnaires are designed in a word processor environment and can be imported from Microsoft Word. SurveySolutions offers integration with Microsoft Office (Office 97, 2000 or XP); results can be exported to Microsoft Excel or Access, and presentations can be exported to Microsoft PowerPoint. For more information visit www.perseus.com.

Track response to DTC efforts

Pharmaceutical companies can now track changes in awareness and response to direct-to-consumer (DTC) promotions every week, with new DTC e-Monitor from Market Measures Interactive (MMI), a Livingston, N.J., research firm. DTC e-Monitor provides a continuous look at DTC activity and consumer reactions, with results delivered to users' desktops. The Web-based service offers an ongoing view of DTC effectiveness measures including ad awareness, doctor contact rates and prescriptions generated across 13 major conditions. Findings are presented on a weekly basis, with information for the current week updated in real time. MMI is also currently screening consumers — including both sufferers and caregivers — across more than 45 other conditions that will be added to its list of DTC e-Monitor categories. For more information contact Joel Bradus at 800-456-4405, ext. 121 or visit www.mmi-research.com.

Study looks at enterprise software market

The Momentum Research Group (MRG) has completed a study examining the brand perceptions and purchase intent of more than 240 enterprise software decision makers. The study identified a significant drop in brand integrity scores, one of six leadership dimensions tracked by the study. The Enterprise software module tracks respondent perceptions of 14 brands across the enterprise software category, including Ariba, Clarify, E.piphany, IBM, Microsoft, Oracle, PeopleSoft and Vantive. The study also provides additional brand metrics, including awareness, past purchase, past and future brand consideration, awareness of and attitudes toward collaborative applications and sources of information that influence brand purchase. For more information visit www.momentumresearchgroup.com.

CRM, online research products from Harris Interactive

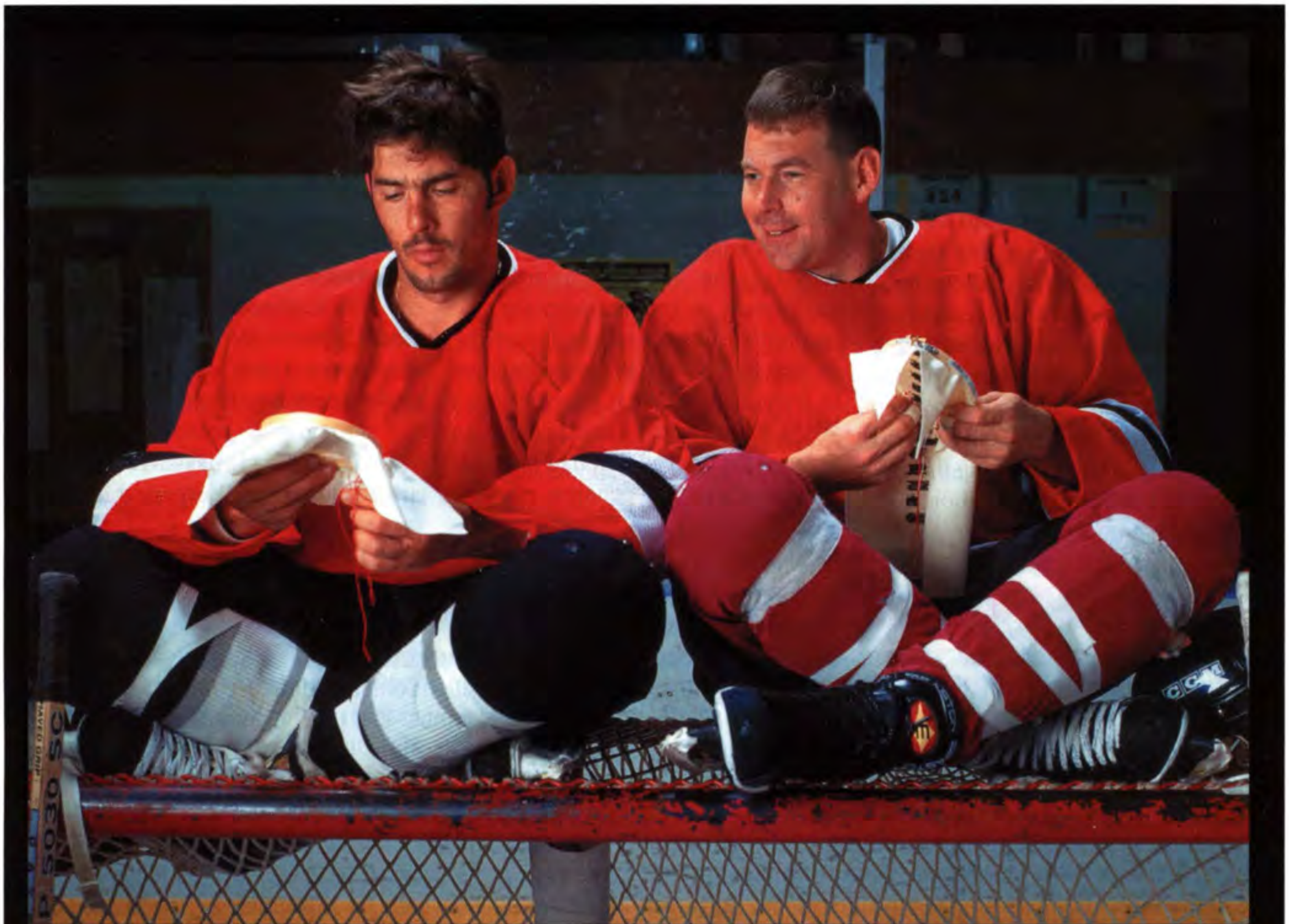
Harris Interactive, Rochester, N.Y., has launched Harris Interactive CX (Customer eXperience), a real-time customer relationship management process. CX is designed to discover, define and deliver strategies for improving customer lifetime value and loyalty by listening to and learning what clients and prospects have to say. The process guides businesses in gathering and interpreting information so they can respond accordingly with sales, service or marketing offerings that help to maintain and improve customer relationships. For more information visit www.harrisinteractive.com/cx.

The firm has also introduced new proprietary technology for conducting Internet-based market research. These new capabilities will automate a large portion of the survey research process, including questionnaire writing, quota management, data weighting, and analysis. The new systems include: Proprietary Internet Interviewing System; S4Author, which provides a graphical user interface (GUI) for the design, modification, and publishing of questionnaires (for the Internet as well as other methodologies, including CATI); Quota Management System, which permits the creation and management of quotas for Internet surveys using a Web-based interface; HiWeigh, an online and "on the fly" system for the calculation of survey weights; IntelliView, a Web-based online reporting application that permits researchers to view and manipulate both unweighted and weighted survey data while surveys are still being fielded. For more information visit www.harrisinteractive.com.

Book introduces users to ArcGIS

Getting to Know ArcGIS Desktop - Basics of ArcView, ArcEditor, and ArcInfo, by Tim Ormsby, Eileen Napoleon, Robert Burke, Carolyn Groessl, and Laura Feaster, is a workbook for learning ArcGIS, the newest geographic information system (GIS) technology from Redlands, Calif.-based ESRI. The three GIS products that comprise ArcGIS — ArcView,

continued on p. 70



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Research Industry News

News notes

Following concerted action by the **European Society for Opinion and Marketing Research** (ESOMAR) and the **World Association For Public Opinion Research** (WAPOR), a proposal to ban the publication and conduct of opinion polls in Ireland during the final week of an election has been dropped. An amendment had been added to the country's Electoral Reform Bill 2000 prohibiting the taking or the publication of opinion polls in the seven days prior to a general, local, Presidential, European election, or a by-election or a referendum on any change to the Constitution. The only remaining step for it to be passed was for the second chamber of Parliament to rubberstamp the bill before the summer recess. Following an alert by ESOMAR's representative in Ireland, ESOMAR together with WAPOR conducted a rapid campaign to arrest the final adoption of the measure, which carried penalties of up to £100,000 or prison for two years for any person convicted. The letter sent by ESOMAR (and undersigned by WAPOR) to numerous politicians and journalists urged the Irish government to reconsider this proposal, stating that the right to conduct and publish polls freely is part of the modern democratic process which allows citizens to make themselves heard.

United Business Media has announced a new corporate identity

Research Calendar

The Council of American Survey Research Organizations (CASRO) will hold its annual conference on October 10-12 at the Ritz Carlton Amelia Island, Amelia Island, Fla. For more information visit www.casro.org.

The Institute for International Research (IIR), in conjunction with the Interactive Marketing Research Organization (IMRO) and the American Marketing Association, will hold a conference on online research and usability on October 17-19 at the Fairmont Hotel in San Francisco. For more information visit www.iirusa.com.

Anderson, Niebuhr & Associates, Inc., Arden Hills, Minn., will hold a workshop on analyzing and reporting questionnaire data on October 18-19 at the Holiday Inn - On the Bay in San Diego. For more information call 800-678-5577 or visit www.ana-inc.com.

The International Quality & Productivity Center (IQPC) will hold a conference on online market research and Web-based surveys on October 23-24 at the Hotel Nikko in San Francisco. For more information call 800-882-8684 or visit www.iqpc.com.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on qualitative research on October 28-30 in Budapest. For more information visit www.esomar.nl.

The Advertising Research Foundation (ARF) will hold its annual Week of Workshops on October 29 to November 1 at the Westin Michigan Avenue, Chicago. For more information visit www.arfsite.org.

The Marketing Research Association (MRA) will hold its annual fall education conference and technology forum on October 31-November 2 at the Inter-Continental Hotel in New Orleans. For more information visit www.mra-net.org.

Research firm The Looking Glass will hold a one-day conference at its Syosset, N.J., facilities on focus group backroom effectiveness on November 2, 9, and 16. For more information visit www.ResearchOnResearch.com or call Sharon Livingston at 516-992-5666.

Frost & Sullivan will hold its annual conference on advanced marketing research techniques on November 4-8 at the Sheraton World Resort in Orlando, Fla. For more information visit http://conferences.frost.com/AMR.

The Philadelphia and Mid-Atlantic Chapters of the Marketing Research Association (MRA), and the Washington, D.C., and Ohio-Pennsylvania Chapters of the Qualitative Research Consultants Association (QRCA) are co-sponsoring "Focus on Research," a one-day seminar on qualitative methods on November 16 at the Columbus Club, Union Station, Washington, D.C. For more information contact John F. Bradley at 610-789-1370.

Tragon Corporation will hold a workshop titled "Ensuring Consumer-Defined Product Quality" on November 6-7 at the Sheraton Palo Alto, Palo Alto, Calif. For more information call 800-841-1177 or visit www.tragon.com.

The European Society for Opinion and Marketing Research (ESOMAR) and the Advertising Research Foundation (ARF) will hold a conference on advertising effectiveness on December 2-4 in Hong Kong. For more information visit www.esomar.nl.

— NOP World — for its market research businesses. NOP World - formerly the United Information Group — includes Audits & Surveys Worldwide, Mediamark Research Inc., NOP Research, and NOP World Health (which encompasses Market Measures Interactive, NOP Healthcare, and Strategic Marketing Corporation).

Opinion Research Corporation, Princeton, N.J., announced that its application for listing on the Nasdaq National Market System has been approved. The common stock of Opinion Research Corporation will trade under the symbol "ORCI."

Separately, the firm announced that it was cited by *Fortune Small Business* as one of the magazine's "100 Fastest-Growing Small Companies."

In August, **Harris Interactive Inc.**, Rochester, N.Y., and **Total Research Corporation**, Princeton, N.J., announced a merger agreement. The merger, which is subject to regulatory approval and approval by the stockholders of both companies, calls for Harris Interactive to exchange 1.222 shares of HPOL stock for each share of Total Research. When completed, existing Harris Interactive stockholders will own approximately 67.25 percent and Total Research stockholders will own approximately 32.75 percent of the outstanding equity of the combined company. Stockholders representing approximately 53 percent of the total outstanding common stock of Harris Interactive and approximately 24 percent of the total outstanding common stock of Total Research have agreed to vote their shares in favor of the transactions. The merger is expected to be finalized in the fourth quarter of this year. Following the merger, Total Research will become a wholly-owned subsidiary of Harris Interactive and, initially, will continue to operate under its existing name in the United States and Europe. The company will be managed by a newly created office of the chairman with Gordon S. Black, currently chairman and CEO of Harris Interactive, continuing in this role. David H. Clemm, currently president and COO of Harris Interactive, will become vice chairman for global operations and Internet research development, and Al Angrisani, currently president and CEO of Total Research, will become president and COO of the merged firm.

New York-based **Arbitron Inc.** has begun conducting syndicated radio audience measurement services for Mexico City broadcasters, advertisers, and agencies. The Mexico City radio ratings service is the first syndicated radio measurement conducted by Arbitron outside the U.S.

Dan Wiese Marketing Research, Cedar Rapids, Iowa, recently celebrated its 15th anniversary.

As of August 31, San Francisco-based **Modalis Research Technologies, Inc.** ceased its European operations. The action followed a long period of less-than-antic-

continued on p. 62

Qualitatively Speaking

Qualitatively Speaking is a regular column in which a revolving cast of authors offers their thoughts on various aspects of the multifaceted world of qualitative research — in 1,000 words or less! Submissions are welcome. Send your ideas or manuscripts to Quirk's Editor Joe Rydholm at joe@quirks.com.

Of bullies, friends, and mice

In focus groups, a little preparation goes a long way

By Brenda F. Murphy

Editor's note: Brenda Murphy is principal of Brenda F. Murphy & Associates, a Kalamazoo, Mich., research firm. She can be reached at 616-342-0190 or at starbrenda@aol.

Focus groups can be a relatively easy way to let employees from any area of a company hear firsthand how customers feel about a business, service or product, to determine consumer or "street" language about a product or service, or to test reaction to a new product, packaging concept or advertising. But if employees have never observed focus groups, a little preparation will help them understand the process and let them come away from the sessions having learned about their own business. First-time observers need to be prepared because they'll hear the good, the bad, the ugly, and most assuredly, the untrue.

Here are a few simple guidelines to follow when inviting first-time viewers to observe focus groups.

1. Ask observers to arrive at least a half-hour before the groups are scheduled to begin. This will allow them to familiarize themselves with the facility and get settled in the viewing room before the participants begin arriving. Since participants are not always told the name of the client, it's not prudent to have observers from the client company and participants introducing themselves to the receptionist at the same time. One company who wished to remain anonymous in a project had its cover blown by a late-arriving observer who stated very loudly to the receptionist, "Hi. I'm Joe Jones from ________." The company decided to conduct the group anyway, even though all the participants standing in the reception area now knew who the client was. A very expensive mistake!

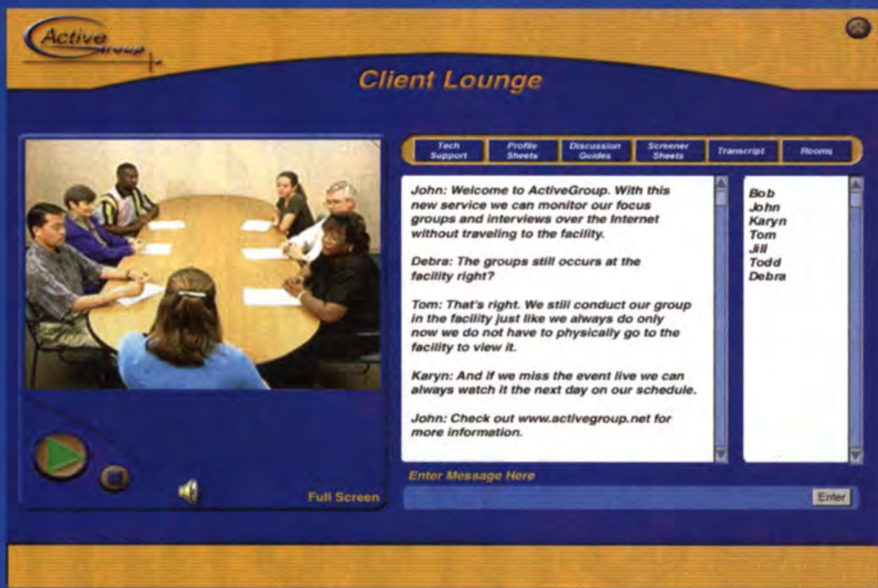
2. Make certain everyone gets a copy of the moderator's guide beforehand. While the guide is an outline of the topics and questions the moderator should ask, depending on how the group progresses, all questions may or may not be asked. Alert the observers that the questions may also be asked in a different order because the participants may impose their own order of importance on the topics. Having the outline beforehand allows observers to familiarize themselves with it and take notes when things change.

3. Be certain everyone understands who is participating in the focus groups. Participants who are invited to focus groups are screened to fit very specific criteria because the sample is so small. They are not just persons selected randomly off the street. Depending on the project specifications, they may be between certain ages, earn specific incomes, use a specific product on a regular basis or be "trier-rejectors," live in a particular zip code or have no warts on their left foot. Whatever the selection criteria, be certain the observers are aware of the project's objectives and the reasons for inviting these participants. It's important that the observers understand from whom they are hearing the information since it will help them put it into the context of their role in the company.

4. Make certain it's quiet in the backroom during the group. In other words, keep it down back there! The more people in the observation room, the higher the level of noise that might be heard in the discussion room. Most focus groups have soundproof observation rooms, but real differences exist in the quality of the soundproofing. It's difficult to concentrate on the conversation in front of the mirror if there is talking or raucous laughing behind it. If the moderator can hear it, rest assured the respondents can too.

continued on p. 61

View your focus groups over the Internet



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A call for satisfaction

Long John Silver's relies on IVR to measure customer opinions

By Gene Stefaniak, ZR Silk Tasby and Bruce Westcott

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"Our work to increase customer satisfaction levels, along with our co-branding and new Long John Silver's activities, proves that our strategy isn't just to bring ourselves up to regular fast-food standards. It's to bring our facility and customer service systems to a level that's above and beyond the quality of other fast-food restaurants." – Kevin Armstrong, president, Long John Silver's Restaurants, Inc.

The directive from the corner office at Long John Silver's headquarters was clear and straightforward: develop a program that would elevate the customer experience, measure performance, reward excellence and build business. With essential management support, a cross-functional team was assembled for the task. This included restaurant operations, marketing research and information technology personnel at Long John Silver's, and Alliance Research as consultant and vendor for the measurement program.

Long John Silver's, a quick-service seafood chain based in Lexington, Ky., recognized the simple but key drivers of its future success:

• A typical heavy user spends $8,500 at Long John Silver's during their lifetime.

• A light user's lifetime spending at Long John Silver's is nearly $2,000.

• Growth means serving valued loyal patrons, and a host of new, first-time customers.

• Satisfied customers compound their value through word-of-mouth interaction.

• A satisfied customer becomes a repeat customer; repeat customers become heavier users.

• Every customer encounter represents a chance to accrue or to forfeit substantial future equity in the business.

To be actionable, the program had to be store-specific and to reflect Long John Silver's organizational and geographic responsibilities across the 1,250-restaurant chain. From a measurement standpoint, this dictated large-scale and cost-efficient data collection. The plan also had to recognize stand-alone stores as well as a growing number of A&W co-branded stores with a different product mix, as well as franchise restaurants with different, or even the absence of, supporting technology.

Reinforcing the program was an incentive bonus plan for the Long John Silver's store management force structured to tie financial reward to high customer satisfaction performance and error-free customer experiences. With the organization geared to the new incentive bonus plan, the demand for a steady stream of detailed information was predictable. Surprising in the evolution of the program was just how quickly and thoroughly the management force became engaged in and committed to the program, and how dedicated they became to leveraging every available nugget of information to achieve their goals.

Evolution

Long John Silver's began by undertaking a rigorous review process of alternative methods, research designs, application concepts and vendors, through which Crestview Hills, Ky.-based Alliance Research was selected as its program development partner.

At first, the measurement task was framed in terms of traditional CSM evaluation, identification of strengths and weakness, and general scorekeeping for the program. Alliance Research was charged with designing and administering the CSM component using Alliance's interactive voice response (IVR) technology. Automated graphic reports were generated monthly at the restaurant level and in a "roll-up" hierarchy through Long John Silver's operations management levels. This extended from the individual store manager to local market DMA (designated market area) managers through regional and division vice presidents up to system-wide evaluation.

As a pilot program was launched in 300 company restaurants, it became apparent that while the measurement aspect of the program was well received, restaurant managers and higher levels of Long John Silver's management wanted more than a report card. The program needed to better isolate the exact source of problems, and to provide ways to intervene in the event of a poor customer experience. To maintain occasion timeliness, two important methods of solving problems had to be deployed:

1. A focus on dealing with product, service and facility problems at the point of delivery, drilling down to the problem source, and;

2. Exercising proactive service recovery with dissatisfied customers, and those expressing any defect in their experience.

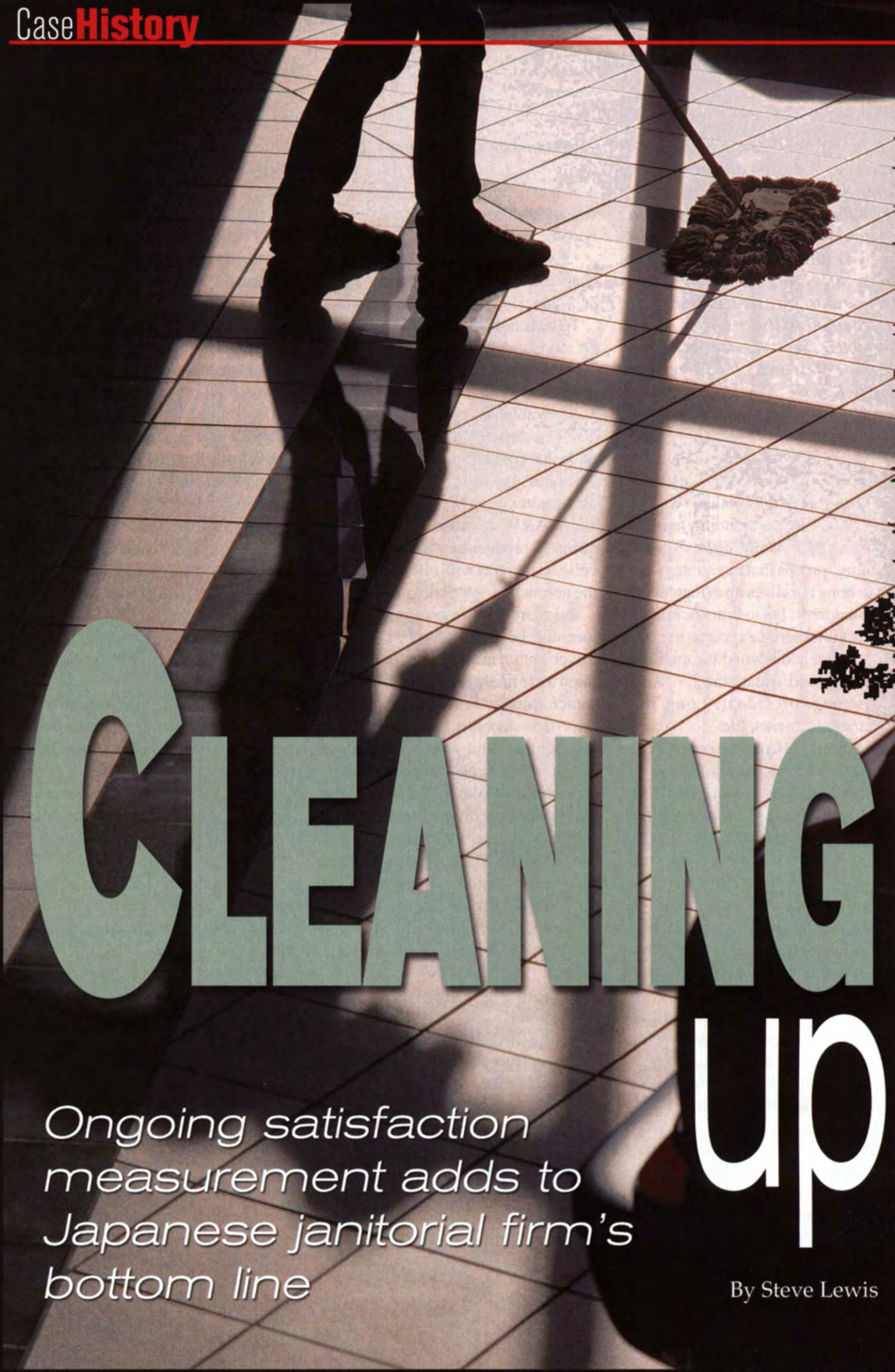
The program was re-engineered to provide a broader spectrum of information and a sophisticated set of mechanisms to fuel and reward proactive improvement, while at the same time maintaining the integrity of the measurement component. The restructured program puts Long John Silver's operations personnel at the "controls" of the customer experience by:

• focusing on ongoing and systematically gathered feedback from customers;

• providing managers with the tools to understand the specifics of a product or service defect;

• providing immediate information about a defective customer experience, in order to intervene to recover the customer.

continued on p. 56



Cleaning up

Ongoing satisfaction measurement adds to Japanese janitorial firm's bottom line

By Steve Lewis

Steve Lewis is co-founder of Development II, inc., a Woodbury, Conn., research firm. He can be reached at 203-263-0580.

When Kazuhiro Matoba, chairman of Miyago Co., Ltd., decided to survey his customers in Japan, he wasn't quite prepared for the wild ride that would ensue. Miyago, located in Yokohama, is one of Japan's largest janitorial firms, providing custodial services to many of Japan's prime public, office and retail spaces. Founded in 1972 by the entrepreneurial Matoba, Miyago now employs 2,000 people in a country that expects exceedingly high service levels.

When our company first approached Matoba about this project, he said, "Our main management strategy is not about revenue itself. Our most important policy is to improve our customers' satisfaction. We need to measure and benchmark their satisfaction and then improve it."

In 1997, during the first year of this study, we contacted 180 of Miyago's largest customers, including bus terminals, grocery chains, retail outlets and office buildings. An average of five people were contacted from each of these customer firms. These same customers have remained relatively constant over the course of the four years we have been conducting this customer satisfaction study.

Delve into the detail

Our first task was to explain to Matoba and his management team how to look at their customers' responses to the forthcoming survey. While most people are used to looking at the "satisfied versus dissatisfied" division, few are prepared to delve into finer detail. We divide responses into five basic groupings: totally satisfied, somewhat satisfied, somewhat dissatisfied, totally dissatisfied, and no opinion (or no response).

When a customer answers a question with a "totally satisfied" response, their relationship with the company is clear. "Totally satisfied" is effectively saying that there is little or no room for improvement. A "somewhat satisfied" answer indicates that something is not quite right with the relationship and improvements are required. A "somewhat dissatisfied" customer is not quite lost, but almost, and a "totally dissatisfied" response indicates that the customer is about to make, or has already made, another vendor choice. We also found that the word "total" translates easily and that its meaning is definitive across all languages.

By merging the satisfied or dissatisfied responses into one measurement, the message becomes cloudy. Our long-term analysis indicates that the purchase decision profile of a "totally satisfied" customer is very different from that of a "somewhat satisfied" one. One strategy is necessary to keep the "totally satisfied" customer in that position. Another is required to move a "somewhat satisfied" customer upward. If the survey results are combined, how can one differentiate, implement, and measure the success of corporate initiatives at two distinct levels?

"Our main management strategy is not about revenue itself. Our most important policy is to improve our customers' satisfaction. We need to measure and benchmark their satisfaction and then improve it."

Adjust thinking

As the survey progressed, the Miyago team had to adjust their thinking about satisfaction, for the percentage of "totally satisfied" customers is significantly lower than the combination of all satisfied customers. Also, the "somewhat satisfied" category of customers is usually the largest segment.

When we look at the range of responses from "totally satisfied" to "totally dissatisfied," we see that responses on either end of the spectrum are definitive, easily measurable points. When we move into the "somewhat" categories, the customers' responses become less conclusive. There is no guesswork needed as to where a "totally satisfied" (or "dissatisfied") customer stands. A "somewhat satisfied" customer, on the other hand, can easily slip over the line to "somewhat dissatisfied" (or vice versa), dependent upon any number of factors, some seeming quite minor but nonetheless critical. In other words, while the end point of a "totally" response is clear, a "somewhat" response has a wide latitude.

With Miyago, as well as in other studies, we have found that the purchasing decision profiles of customers are fully dependent upon their level of overall satisfaction with the company. For example, a customer who states that they are "totally satisfied" with

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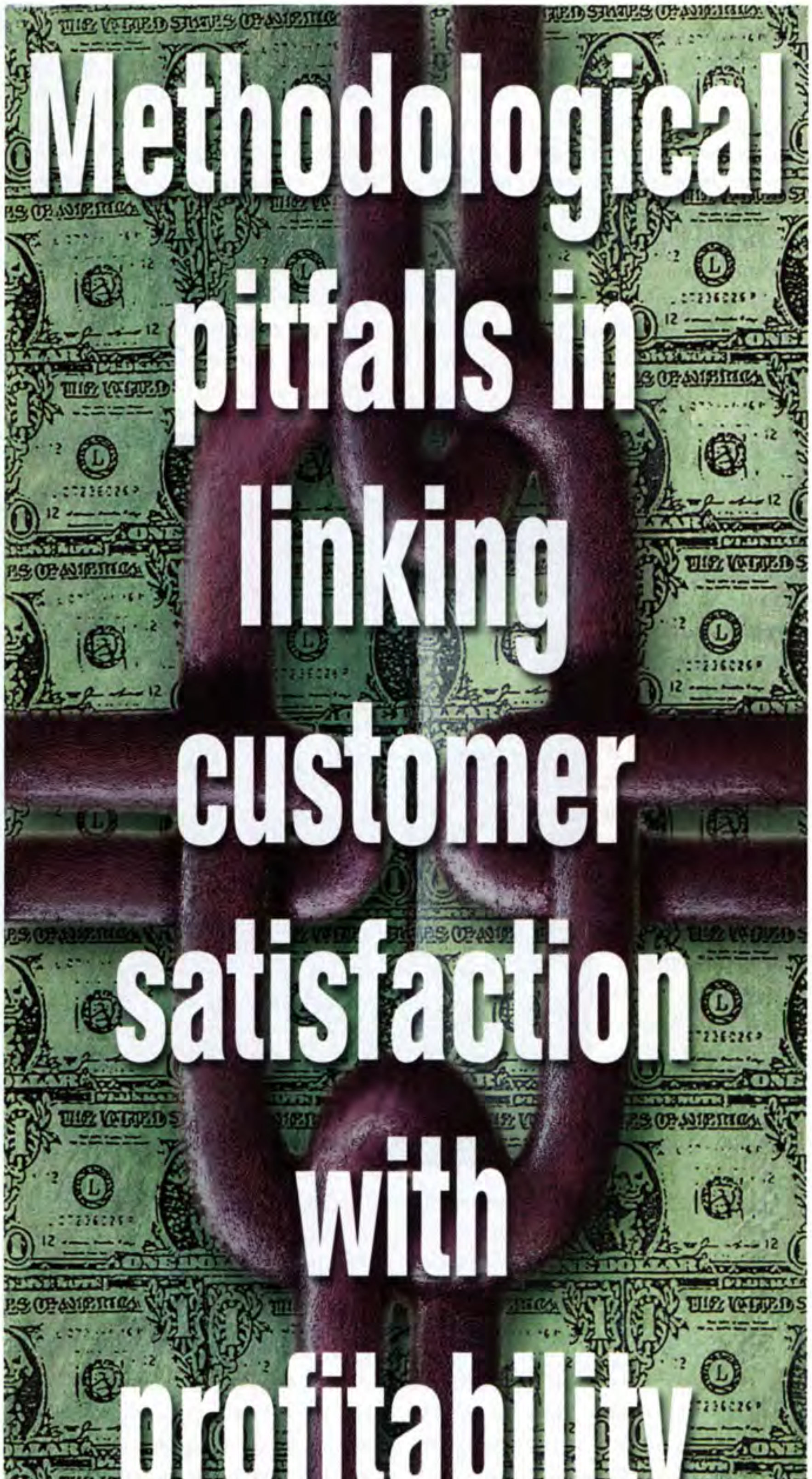

Methodological pitfalls in linking customer satisfaction with profitability

By Michael Murphy

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The linkage between customer satisfaction and profitability is a cornerstone of service improvement efforts. Measurement of customer satisfaction is irrelevant if this linkage does not exist. Because if variations in customer satisfaction do not connect with variations in profitability, attempts to manipulate satisfaction will have no impact on profitability. Several methodological issues can obscure the relationship, leading companies to erroneously assume that customer satisfaction measurement is not essential to their growth.

The measurement of customer satisfaction has become more common among organizations providing products and services to consumers and businesses. Customer satisfaction measurement is central to operations because it provides valuable feedback to organizations about where their efforts for improvement are most necessary, as well as indicating the degree to which improvements are likely to have the most significant impact on customer behavior and loyalty. In an effort to improve customer satisfaction, companies have spent millions of dollars evaluating customer satisfaction and making improvements, always assuming that their measures are directing them to address the right issues.

Organizations usually invest in customer satisfaction measurement because they assume that satisfied customers will engage in a number of behaviors beneficial to the company and demonstrate a long-term commitment to their brand. These behaviors include, but are not limited to, continuation of the customer

relationship, deepening of the customer relationship through cross-selling, and referrals to new customers. Thus, it has been assumed that customer satisfaction should be consistently and positively associated with a company's profitability.

This assumption of a customer satisfaction-profit link is the heart of the service profit chain (Heskett, Sasser, and Schlesinger, 1997). The model discusses the relationships among several organizational constructs, including employee satisfaction, motivation, and loyalty, customer satisfaction and loyalty, future purchase intentions, and profitability. The model has garnered considerable applied research support since its inception in 1997. The model connects customer satisfaction to several key organizational variables, such as employee satisfaction and tenure, as well as financial performance. Researchers have demonstrated strong support for many of the relationships hypothesized by the model.

The key linkage that must be demonstrated is the linkage connecting customer satisfaction to profitability. Demonstrating this linkage provides the ultimate justification for measuring customer satisfaction. Research has demonstrated that a highly satisfied customer is six times more likely to re-purchase than a customer who is merely satisfied (Jones & Sasser, 1995). In fact, if the linkage cannot be demonstrated for a company, then the measurement of customer satisfaction is irrelevant. However, there are very few cases where this relationship should not be demonstrated.

In most other cases, profitability should be strongly related to customer satisfaction. However, the statistical relationship between profitability and satisfaction will be obscured if research methodologies are not carefully constructed and implemented. Some standard guidelines should be followed when designing studies, while in other cases the unique situation of the organization must be considered when planning to empirically demonstrate a linkage between profitability and customer satisfaction. After discussing some of the situations where a linkage between satisfaction and profitability is not expected, methodological issues will be addressed.

Exceptions to the satisfaction-profitability link

Most commonly, the relationship will not exist if a majority of customers do not have a choice of which company will provide a product or service. These customers are what Heskett, et al (1997) defined as hostages. Hostages are customers who are not satisfied, but still express an intention to purchase from the company. The clearest example of a company whose customers are likely to be hostages are utility companies in communities where the customer has no choice of providers. A relationship between satisfaction and profitability would not be expected as customer satisfaction has little impact on a customer's choice of service providers.

This relationship would also not be expected to exist in situations where the cost of switching providers is low and there are many companies providing the product or service. Heskett, et al (1997) refer to customers in these markets as mercenaries, as price can be a strong determinant in the product/service choice process. Commodity markets are the clearest examples of this type of market, where customers have ready alternative choices and their selection is likely to be driven by price.

Methodological issues

Level of analysis issues

Typically, customer satisfaction is measured with respect to a specific instance of experience. This decision is supported psychometrically, as respondents can more accurately evaluate their experience at a specific point in time than if asked to cognitively combine their satisfaction with multiple experiences that they might have had with a company's products or services. These individual measures are commonly aggregated to represent the level of satisfaction typical of any customer interacting with a specific business unit, such as a store location or individual restaurant. Analyses are then conducted examining the relationship of unit-level satisfaction with a unit-level measure of profitability. Matching the level of analysis enhances the ability to identify a significant relationship between profitability and customer satisfaction.

Another alternative is to examine the relationship between loyalty and profitability. Theoretically, loyalty can exist with respect to a specific unit or to the brand, or both, in contrast to customer satisfaction, normally measured with respect to a specific experience. In other words, as a consumer, I may be satisfied or unsatisfied with my meal experience at a restaurant. While that satisfaction may have an impact on my likelihood of returning, other factors may also impact that decision. Further, I may recognize that the brand is a good brand, but a specific store or unit is poor.

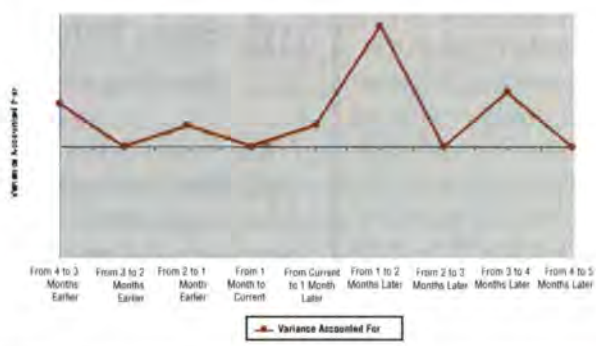
When conducting research with companies that might provide several alternative locations within a respondent's zone of convenience, the relationship between unit loyalty and unit profitability may not exist. Customers may be more strongly driven by brand loyalty and brand equity and operationalizing loyalty and profitability at a unit level may obscure the expected relationship. In this instance, profitability needs to be operationalized at a market level as do loyalty measures.

Customer need cycles

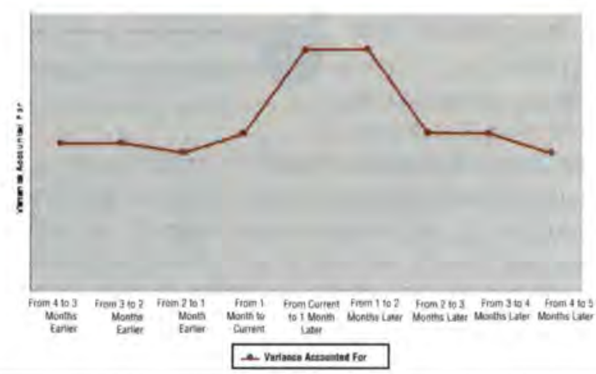
Depending on the product or service, a customer's need for future products or services may vary. For example, two clients provided our firm with sales data, each calculated on a quarterly basis. We linked the sales data for each individual unit to the satisfaction scores for the same unit. For the first client, analysis of the relationship between customer satisfaction and quarterly sales growth indicated that units with stronger satisfaction scores also had stronger sales growth. The relationship between the proportion of customers who are highly satisfied and subsequent profitability changes for this client are shown in the table. A 6 percent change in the proportion of customers who were highly satisfied was associated with a 5 percent change in profitability. The identical analysis was conducted for a second client with the outcomes indicating no relationship between unit satisfaction and unit sales growth.

The difference between the two client companies was the customer need cycle. The first client was a company with a very short need cycle, while the second client was a retailer with a product cycle of typically more than a year. Customer need cycle has a strong effect in understanding the difference between these results. A customer might reasonably patronize the former client more than once a day, however customer need is most commonly annual for the latter client. As a result, the impact of satisfaction is felt over a much longer and likely less immediate period of time. For the client with the long need cycle, relating customer satisfaction from the current quarter to current quarter sales growth is much less likely to identify a strong relationship than if one related it to sales growth for the same quarter the following year. Thus, study design must take into consideration the timing of the next opportunity for purchase.

Relationship of Overall Satisfaction to Percent Change in Sales Over Time



Relationship of Loyalty to Percent Change in Sales Over Time



Lag between satisfaction measurement and profitability

The time lag between measures of satisfaction and measures of profitability must be appropriate. Given a normal distribution of purchase behavior following experience with a product or service provider, it would be expected that if one measured satisfaction continuously each month the relationship between satisfaction and profitability would rise and fall when related to a single point in time measure of profitability. We have found this relationship with several clients whose products and services have short need cycles, specifically in the restaurant and retail industries. In both industries, the relationship builds up to a two-month lag in measurement, peaks, then falls sharply afterwards. The graphs above demonstrate how the strength of this relationship is moderated by time. Timing in other industries may vary based on seasonal demand, need cycles, or other situational factors.

Satisfaction-profitability effect size

Generally, our research has demonstrated statistically significant relationships between customer satisfaction and profitability, with satisfaction accounting for between 1 percent and 10 percent of the variance in profitability. This is strong evidence in support of the reliance on customer satisfaction measurement. Providing customer satisfaction feedback allows individual units to identify areas for improvement in customer service, which in turn supports a direct impact on profitability.

Profitability is driven by other constructs at several different levels of organizational functioning. At the customer level, decisions to purchase are also driven by factors such as location, product quality, price, etc. Thus, measures of these variables should moderate the relationship between satisfaction and profitability. Analysis of the relationship between satisfaction and profitability should attempt to remove as much variance related to these other factors as possible, in order that the satisfaction-profitability relationship be clearly demonstrated.

Measuring profitability

Profitability can be measured in many different ways. Our research has demonstrated the strongest impact for customer satisfaction on incremental sales growth. Reliance on this measure allows for several intervening variables to be controlled. For example, unit size often has a strong influence on profitability. Measuring profitability through the use of incremental sales growth removes the impact of unit size by comparing sales at a particular unit in the target month to sales at the same unit in a previous month. If seasonal differences are expected in sales, then it is also useful to compare the current month's sales to sales in the same month in the previous year.

Strong relationship

The service profit chain theorized a strong relationship between customer satisfaction and profitability. Research has continually demonstrated this relationship. However, as with any research, in order to find meaningful results, measures must be carefully constructed and designed. If you do not find a relationship between satisfaction and profitability and have reason to believe this relationship does not exist, the benefits of customer satisfaction measurement must be re-evaluated.

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Satisfaction Symbiosis?

Thoughts on integrating CSM and CRM

By Jeffrey W. Marr

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Looking back over my customer satisfaction measurement research career, which began in the late 1970s, I never cease to be amazed by the sheer duration, not to mention the ever-new stages, of what has been called the customer revolution. First, there was the rise of the service economy and the "search for excellence" that by the early 1980s demanded customer survey feedback. Then, the late 1980s and early 1990s brought total quality management and relationship management principles that motivated customer surveys and analysis to be more widely adopted and scientifically designed. By the turn of the decade and millennium, there came the increasing recognition of new measures of corporate performance: intangible assets, customer value modeling, and balanced scorecards. Each of these trends made customer surveys even more prominent as a key indicator of strategic performance.

Now here comes the big one — CRM

Over this same timeline, many client users of customer satisfaction measurements (CSM) evolved from customer satisfaction ratings per se, to customer value modeling, and then to customer loyalty modeling, which allowed them to track commitment levels among strategic customer segments. Now, along with the new emphasis on loyalty modeling, entire enterprises are converting not only to e-commerce, but also to business applications categorized as customer relationship management, or CRM systems. CRM systems are destined to have the largest impact of any trend yet upon customer satisfaction measurement. Though prior business changes promoted the evolution of CSM, CRM stands poised to eventually absorb CSM, although the volume of customer survey information will grow and techniques will continue to be refined as this change occurs.

Client enterprises are making enormous investments in these new customer relationship management systems. According to a March 2001 Forrester Report, "A typical global 3,500 firm will spend $15 to $30 million per year on software and services for its customer conversion." CRM is a business intelligence process built on software and databases that integrate front- and back-office customer information, and streamline customer contact applications. The CRM "movement" follows on the heels of the huge investments made by companies in the last 10 years or so to automate internal accounting, business process data, and inventory manage-

ment with enterprise resource planning (ERP) systems.

Allies, not rivals

While the prior investment in enterprise resource planning systems was mainly to support efficiency and drive out costs, CRM is more about maximizing revenue — better understanding one's customers, prospects, and suspects in order to sell more and earn customer loyalty. ERP and CRM systems share the same enabling force — information technology that centralizes the information storage, and makes it more accessible to users in the organization. If technology is the enabler, then the real driving force behind CRM is for the enterprise to become customer-centric. This is why we can say that CRM is another spoke in the wheel of the customer revolution. More aptly, picture CRM as the all-encompassing wheel of customer information, and these other elements of the customer revolution, including CSM, as the spokes.

After all, CRM systems are designed to capture and integrate all sorts of data about targeted customers (and prospects) — sales profiles, service transaction history, demographics, segment classifications, etc. By pulling together such detail from various sources, the hope is to transform static data into dynamic information that guides decisions in customer marketing, sales, and service, and makes the company more successful. If that just sounded like a definition of primary marketing research, it was intentional! CRM systems will conceptually offer what marketing research on customer satisfaction/value/loyalty research has always strived to do — to narrow the area of decision-making in fulfilling marketing strategy, and achieve business success.

But does this mean that CRM replaces CSM in any way? No. In fact, customer survey work is likely to grow. Where much of the data that feeds a CRM system is about what customers have done, CSM tells more about how they think and what they plan to do based on having evaluated their supplier, its products, and services. Such measures of customer thinking should

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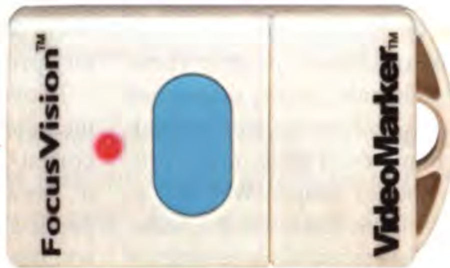

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become invaluable components of any advanced business intelligence system. Customer perceptions and loyalty intentions deserve an honored spot within any system that otherwise handles objective, static data on customer behavior. So the point is not how to do an end run around or fight the coming CRM revolution, but how to join up! The real question has become, how do we make sure that customer satisfaction data become part of our CRM systems as soon as possible?

Where CSM fits in

The enabling technology and software of CRM will incorporate data coming from a wide array of customer channels, or contact points. These include field sales visits, dispatched service calls, call centers, reseller/dealers, accounts receivable, order processing, and, of course, Web and e-mail interactions. The intent is to warehouse this data to make it accessible for analysis and to enhance the understanding of customers. In reading literature on CRM applications, the priority application to date seems to be the automation of inputs from the sales, marketing, and order-taking processes in order to help others make the best offers to targeted customers. In short, the first order of CRM has been to sell more — cross-sell, up-sell, etc. The promise of revenue growth undoubtedly helped justify investing in new customer relationship management systems. But early CRM applications and these classic channels of CRM data leave out another crucial force behind top and bottom line growth — customer loyalty intentions, and the underlying attitudes that drive them.

Want loyalty? Don't forget the loyalty predictions!

To overlook customer value/loyalty measurement survey data as one of the crucial CRM channels would be ironic, because it's rare to read a white paper about CRM systems without coming across Fred Reichheld's work from his 1996 book *The Loyalty Effect.* Reichheld emphasized the importance of measuring and predicting customer loyalty using surveys. The most common reference to his study notes that profitability can be enhanced 100 percent over time by retaining just 5 percent more of one's customers. But those same white papers often fail to emphasize the crux of Reichheld's work — that customer value or loyalty survey feedback is at the heart of knowing how to enhance customer retention. These surveys absolutely warrant being included as one of the premier channels of customer information. Those of us who are professionally responsible for CSM information take the initiative to carve out a role within these new systems for customer survey data.

In fact, the mission of anyone responsible for the customer satisfaction or loyalty survey feedback should be to position CSM as the "premium channel" for CRM. If CRM is all about business intelligence, what is more strategic than including the voice of the customer? There should be no argument that the customer's own assessments of service transactions, their relationship and brand assessments of the supplier firm and competing brands, and especially their intentions to be loyal in the future, deserve a premier spot alongside other customer data.

Adding CSM to the CRM mix

Logistically, customer survey data simply offer one more channel of detailed information to load into the CRM system along with that from the other customer channels, namely the front-office operations such as sales and customer contact centers, and the back-office data stores of other processing, invoicing, sales and service history, etc. While the concept for pooling customer data seems simple, the reality of implementing the technology to make it work is not. Many large organizations struggle with the length of time it takes to make a wide-scale CRM system fully operative. If the emphasis in buying the new system was mainly to automate sales force data in order to grow the level of cross-selling, then it may take awhile to get around to integrating the customer survey elements and data. But where

CRM exists, market research managers should be helping accelerate the process — at the very least by considering how to incorporate CSM into the new system, and discussing this with experts in IT, CRM, and the survey database, inside and outside the organization if necessary, to understand what integration will require. Just by becoming part of CRM, customer surveys should become even more valuable to the enterprise. CRM architecture and storage have been designed to the end of making information more accessible to designated associates within an organization. The ability of companies to act upon their customer survey data has always hinged on how readily the findings are disseminated, how easily referenced by the customer-interfacing people, and how well they are used to change processes and better manage relationships. Becoming part of CRM can only enhance the effectiveness of CSM.

Symbiosis in the customer data warehouse

In addition, the inclusion of customer survey findings in CRM systems will make the other customer channel inputs more useful, because the information from front- and back-office customer channels can enhance the value of customer survey information, and vice versa.

It's all in the analysis. Consider the information related to individual customer accounts. CRM data will guide the segmentation of customers in the B2B world, helping companies understand who are the most profitable and important accounts. In that sense, CRM identifies the most coveted customers, and clarifies what these target accounts have experienced. But that really just sets up what the CSM "premium" channel can bring to the table. Customer loyalty surveys can dynamically connect with the other data by indicating how the targeted customers feel about their relationship with your firm and what they plan to do about it.

In advanced applications of customer loyalty survey analysis, B2B client enterprises today seek to know which of their accounts are "truly loyal" or "at risk." It's an added joy for senior account managers to learn the attributed reasons for this loyalty classification, whenever the survey data can be augmented by details of the sales and service history of the same accounts. Why wouldn't marketing communications, sales, and customer service teams demand receiving such a complete understanding of the individual accounts they service, once they have entered the world of CRM?

One of the traditional strengths of marketing researchers will be invited to the CRM "party" — analytical skills and resources. The myriad of data stored within CRM will demand intelligent, discerning analysis; expertise in applying analytic software and other resources to glean the most valuable information and practical implications from the centralized database.

Some of the strategic issues to be resolved from the analysis will include:

• Which strategic accounts/types are

most vulnerable and why, in terms of buying characteristics, attitudes, and service history?

• Which strategic accounts have become the most loyal/least vulnerable and why?

• Which business processes are priorities for improvement in order to boost customer retention of key accounts?

Fine-tuning customer service on the fly

Customer survey or CSM data to this point has focused mainly on the relationship assessment surveys that evaluate all aspects of the business relationship rather than a single transaction. But the advent of CRM certainly offers an important role for transaction CSM/survey data as well. In the world of consumers and mass-market customer service, the immediacy of customer feedback on service transactions can be used to fine-tune the operating procedures and training in customer contact centers. Customer transaction surveys are normally conducted among a sample of customers who initiated contact for various reasons. When a company implements a CRM system, and already conducts customer transaction surveys, it may want to gather survey feedback more real-time and continuously, since it now has a better means of disseminating the additional information. This is especially true as the customer contacts and the follow-up surveys are increasingly Web-enabled rather than phone- or mail-based. The customers' perceptions of different aspects of service can conceivably be tied to other pieces of information available in the CRM database, such as the particular service representative, service conditions at the time, etc.

Get on board and propose a merger!

In many leading enterprises, CRM has already "left the station," or will soon be doing so. A recent survey by the Boston Research Group for international data storage firm EMC Corporation surveyed 100 CEOs, CIOs, and other senior executives, and confirmed the immediacy of the CRM adaptation trend. The survey revealed that 60 percent of companies have already made the decision to install CRM, and a third of those were well on the way to completion. (More study detail is available at www.emc.com/information_generation/perspective).

Senior managers responsible for customer satisfaction information face the need for some careful planning in the near future on how to get aboard the CRM train. A customer relationship management system is neither an enemy, nor a process competing with or replacing CSM. CRM is about enabling a firm to really become customer-centric — thus pushing the same old goal that we in the CSM profession have always had, but arming it with the catalytic wave of enabling technology to make it happen. CRM and CSM seem destined to complement each other, just as in the old saying, "Iron sharpens iron."

Let's help bring these two together.

Is your satisfaction measurement system working?

By Stacey Sacks

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Customer satisfaction measurement is a multi-billion dollar business in the U.S. We all know that keeping customers satisfied is a vital component for success in the marketplace, no matter what product or service is being sold. We also all know that in order to manage customer satisfaction, we must measure it. This is most commonly done through customer satisfaction surveys, focus groups, customer complaint data, call center statistics, as well as other methods. All of this activity may produce terrific data, but is it really generating actionable information and, thus, more satisfied customers?

If the ratings on your customer satisfaction survey change, do you know what actions to take or which internal "knobs" to turn? Do those actions reliably produce the desired effects on your ratings? If the answer is yes, congratulations — you are on the right track! Your customer satisfaction measurement system is probably securely linked to internal metrics that drive product and process changes. But, as with many companies, if the answer is no, it may be time to take a close look at your data collection process and customer satisfaction measurement system as a whole.

To determine if your system is working for you, here are a few key questions to answer:

• Are we asking the right questions? Do you truly understand which needs customers are satisfying through the use of your product or service? How are your product's features meeting those needs? A customer satisfaction survey should collect data at a sufficiently detailed level to support decisions about product feature changes and upgrades, while leaving the door open for new and creative product innovations.

• Are we asking the right people? A convenient sample may not always give you the most accurate information. Companies need to include unhappy customers as well as happy ones, former customers as well as current, and hard-to-find customers as well as those you know how to reach.

• Is the frequency of data collection appropriate? Surveys related to an event, such as an interaction with customer service, a re-purchase or a product upgrade, may be important to get the true pulse of the customer base short-

ly after an experience with your company. But be careful — over-surveying is also a danger.

• Does the analysis and reporting of the data present an accurate picture of what customers are telling you? Small sample sizes and frequent surveying can paint a misleading picture if not analyzed appropriately. Make sure any necessary caveats are presented with data and that only real changes are highlighted. Also, be sure your reporting includes information on relevant events in the marketplace that may be affecting your ratings.

• Can data collection be improved or streamlined? If you think you are spending a lot of time and money on your customer satisfaction data collection, there may be opportunities to streamline. Changing the frequency of the surveys, the sample sizes, or the methodology may provide opportunities to save time and money. The Internet has become a fast and inexpensive way of gathering data and is appropriate for many customer groups.

How is it being used?

Equally important to the data collection process is how customer satisfaction data is ultimately used within your company. In many organizations, the collection of customer data is completely disconnected from processes that take advantage of such rich information. To determine if your organization is making appropriate use of customer data, ask yourself the following questions:

• Is customer data fed into your internal processes for product development and process improvement? Many product development teams are so focused on technology that they are unable to respond to customer needs that may be difficult to quantify or measure. In some situations, product and process managers are willing to use customer data, but have simply been denied access for political reasons.

• Are there new opportunities for the use of customer data? If customer information is not being used systematically for product and process development, then there are opportunities! Managers responsible for collecting customer information know how valuable this information is to an organization and it is often their responsibility to sell it within the company. There are many tools, such as quality function deployment (QFD), which can help to facilitate the linkage between customer needs and the development of product features and specifications. By creating and nurturing such a linkage in one business or division, you can then use that area as a model for an integrated, common system across the organization.

Periodic look

Measuring customer satisfaction is an important first step and most organizations already have some sort of a system in place. But taking a periodic look at how that system evolved and how the data are being used internally is critical. The keys to managing customer satisfaction successfully are gathering accurate and timely information from the right people, and using this information in a systematic way to drive product development and process improvement.

Taking our own advice

Ten ways for research firms to increase customer satisfacion

By John Voda

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As marketing research professionals and consultants, many of us have helped companies large and small to identify ways to enhance customer satisfaction. We have interviewed their employees from the CEO down to the front-line staff. We have conducted in-store intercepts, focus groups, executive interviews, telephone surveys and maybe an online survey or focus group. By now, you'd think we would know EVERYTHING there is to know about achieving and maintaining customer satisfaction.

But how many of us actually heed the advice we provide to our clients? Have you ever called your customers to ask them how satisfied they are with your performance? Are you hoping "no news is good news"? Are you afraid your call will only encourage clients to complain about problems best left under the rug? Is the counsel we've been giving our clients — "Ask your customers!" — too bitter a pill to take, after all?

While most of us dislike criticism and complaints, seeking feedback from your clients yields numerous benefits. First, it shows the client you really DO care about their business, which helps strengthen the relationship. Also, clients often notice problems that you may not be aware of or that you might think are trivial. But we all know it is the customers' perception that matters — not our own.

By acting on your clients' suggestions you can improve your service to them and to your other clients as well. And more often than not, the exchange will be pleasant and positive, and, like donating blood, what you initially dreaded you'll find to be enjoyable and rewarding.

Following are a few of the suggestions I've picked up from clients over the years. Many of them may seem obvious to you, but those are often the very ones that get overlooked.

1. When preparing a bid or proposal, be specific regarding everything you are going to do (and not do, when appropriate) including how, with whom, where, and at what price. Leave no details open to interpretation (or dispute) later on. Then, deliver what you promised. Or go even further and exceed your clients' expectations.

2. Read and understand all project information from the client before the

project begins. Allow time to ask the client questions and receive clarifications before respondents walk in the door. If you are executing research for other firms, remember that frequently your clients have to ask their clients for the information. And their client may be across the world in another time zone.

3. Follow all project instructions to the letter (there is a reason the client spent the time to write that 10-page briefing document!). Follow good research protocol (don't aid respondents when screening them, don't read the list of answer options if it says not to, do write legibly, etc.). Yes, it takes time to thoroughly brief all the interviewers, but research is only as good as the weakest link, so a flaw in any step can jeopardize the integrity of the entire project.

4. Maintain organized documentation of all project details, and ensure your teammates can find them quickly when you are unavailable. Distribute any client changes or updates — don't assume that word will trickle down to the troops.

5. Provide the client with one contact person who is aware of project details, and have a designated backup as well. Ensure clients have the direct phone number. Providing an evening/weekend number will win you brownie points, while making clients navigate a complex phone system is a sure way to tick them off (especially if they don't reach anyone and have to leave a message!). Provide your contact information (phone, fax, and e-mail) on all communications. There is nothing more annoying than an urgent e-mail or phone message requesting a call back, with no phone number provided. Don't make clients look for it.

6. Ensure project tallies/updates are sent on time and are accurate, especially quota information. Keep clients in the loop and alert them to problems early — while there is still time to regroup and react. Notify the client if you anticipate difficulty achieving deadlines or making quota (no one likes surprises). Treat clients as a partner and look out for their welfare as much as your own. Provide honest communication to clients — don't just give them the good news, tell them about difficulties as well. Better yet, provide suggestions for solving the problems — you'll earn goodwill and maybe more work down the road.

7. Fill out project paperwork (surveys, tallies, forms, FedEx labels, etc.) correctly and accurately. Find

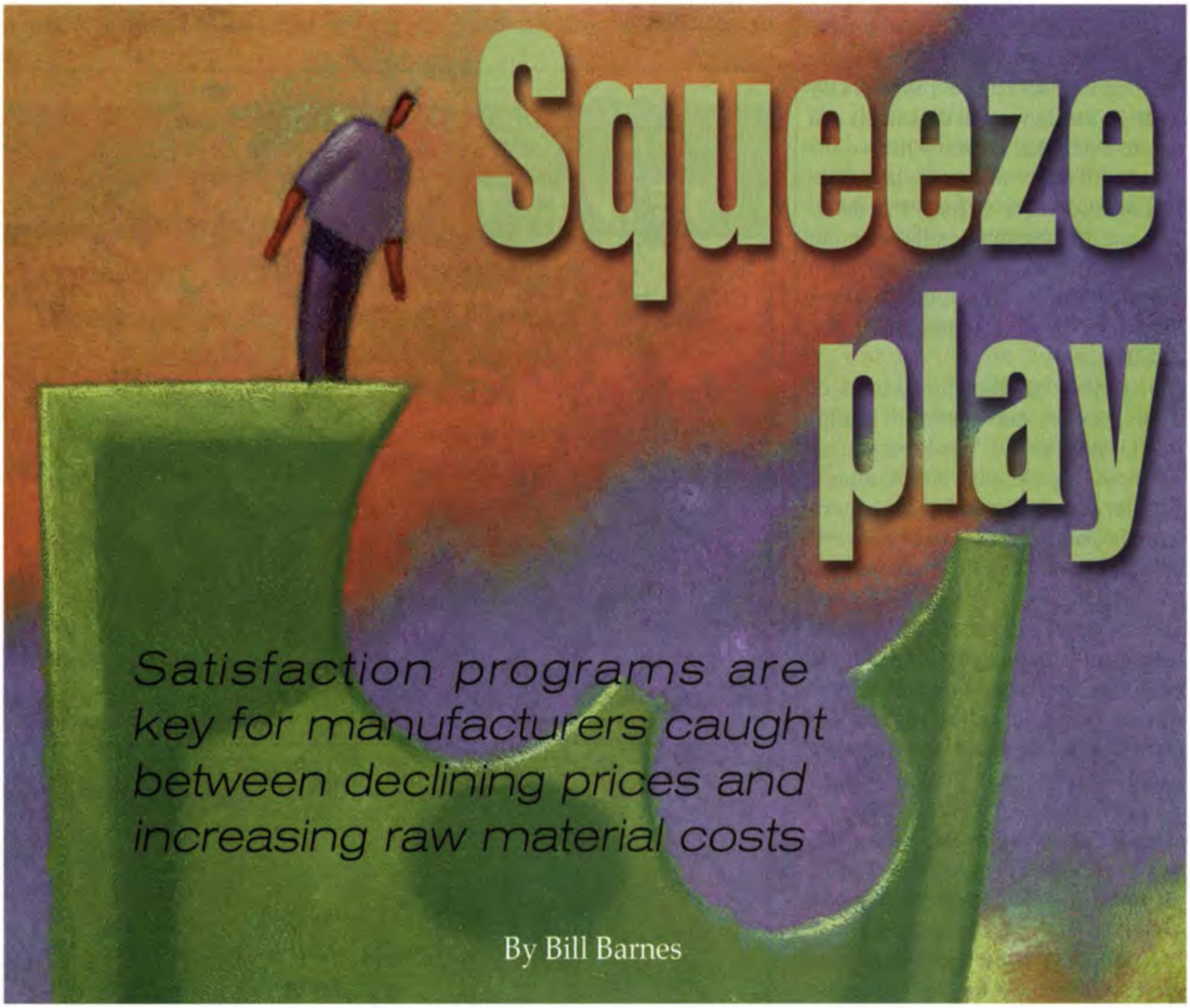
out if the client has any preferred methods/formats and if so, make sure the entire team knows and follows the client's standards.

8. When sending packages to the client, ensure everything is secure and safely wrapped (especially audio/video tapes and diskettes) and create a detailed contents list, so the client will know what is inside. Send shipments on (or before) the deadline and if shipping details were not provided by the client, obtain them before you are racing to the airport at 9:45 p.m. to make the last FedEx deadline.

9. If you conduct interviews or focus groups, make sure all equipment is idiot-proof. What seems easy for the A/V geek may confuse others. Ensure your audio and video equipment is clearly labeled so anyone can operate it — especially when they are rushed, harried, and tired! Make sure all personnel can handle basic functions, and test all audio and video equipment before respondents arrive. Make a backup tape, just in case, and clearly label tapes with the project and the respondent's name. If you are sending computer disks, make and keep a backup copy of all files. (And you are regularly saving a backup of all your computer files off-site, aren't you?)

10. Finally, remember that clients are human too — they occasionally screw up, they get frustrated by problems, and they usually appreciate a chance to laugh, when appropriate. Humor can help relieve stress but use it sparingly — you never know who might be with the client on your conference call. E-mail jokes can land you — and your clients — in hot water, and are best deleted. No matter how bad things are, remain pleasant and professional. Focus on finding solutions rather than making excuses or pinning blame on others.

Following these guidelines will help you develop a reservoir of client goodwill so that when the inevitable problem does occur, your firm will have a more understanding client. Always doing the little things correctly will make the occasional big problems more bearable.



Squeeze play

Satisfaction programs are key for manufacturers caught between declining prices and increasing raw material costs

By Bill Barnes

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In today's economy, manufacturers of all kinds are caught in the squeeze between flat or declining selling prices and increases in costs for raw materials. Despite higher sales volumes, the overall revenue may not be increasing due to lower average selling prices. The margin squeeze comes when these companies experience increased raw material costs combined with flat or overall declining revenue.

In the past when raw material costs increased, these increases could usually be passed on through the value chain until it reached the consumer. However, the emergence of "super retailers" — retailers with enough purchasing power to force suppliers to reduce selling prices — has changed the ability for these price increases to be passed on in the value chain.

These super retailers like Wal-Mart and Home Depot have a lot of power over suppliers because they can simply go elsewhere with their lucrative orders. This cost-reduction pressure gets pushed down the value chain. Therein lies the squeeze — there is little opportunity for bargaining for a higher price.

As the value chain gets closer to basic raw materials like petrochemicals used in plastics and chemicals, these companies must accept the higher raw material costs. Basic petrochemical prices are strongly influenced by OPEC, which has recently controlled overall production better than in the past. This has kept supply and demand in more of a steady state that has resulted in higher selling prices, as evidenced by the higher prices at the pump and last winter's heating bills.

The automotive sector is also an example of not accepting cost increases from raw material suppliers. In fact, Chrysler recently made

announcements in the media on its strategy for improved profitability, which included saving money on raw materials. Chrysler will ask for and get price concessions from its suppliers. Which, in turn, will reduce its suppliers' profits.

It has been demonstrated that there is no latitude with selling price and no latitude with raw materials costs. In addition, this squeeze is compounded by increased pressure from Wall Street for companies to continue to deliver quarter-to-quarter earnings increases.

Keeping in mind the fact that for most manufacturers, raw material costs and payroll costs account for 80 to 90 percent of the total revenue, management feels the pressure to do something to control the bottom line since market factors prevent them from increasing the top line.

Companies have a few choices of strategies that can minimize the squeeze impact. Common company reactions include:

1. A branding initiative. Branding is a great strategy for creating consumer pull-through and differentiation. Yet it can be expensive, time-consuming and difficult to measure in terms of effectiveness.

2. Niche market creation. Sometimes a company can create a market niche for its product or service. This then tends to diffuse the commodity pricing of products and services. This strategy also is time-consuming and will only work if a company's competitors don't employ the same strategy, otherwise you become a commodity again.

3. Staff reduction. This strategy appears to be the most common one in today's markets due to the large impact payroll costs have in the total cost of goods. Reducing employees through layoffs can be done quickly but is extremely painful for management to implement. This strategy also severely damages employee morale. Usually staff reductions are decided by examining non-mission critical functions based on management's view.

The bigger challenge with these approaches is that decisions are made without a clear understanding of what the customer truly values from the business and what is driving the customers' loyalty to the company's products or services.

Integrating the voice of the customer

While a labor reduction decision may be right for a business based on market conditions that management did not plan for, resource reduction decisions can produce better results if they are made based on what the customer values and which product and service attributes are driving customer loyalty. This ends up being reflected in the ever-important top line or revenue.

The customer's view of value is so important simply because they are the stakeholder with the money. The money for every employee's paycheck originates from a paying customer. While this is a very obvious statement, many manufacturing companies become asset-driven versus customer-driven as they focus on how to consistently deliver profitable results. Therefore all resource decisions need to be made with a view of what the customer values. In fact any resource allocation decision should be made based on a balance of two questions:

1. Will it will reduce the cost of doing business?

2. Will it increase or decrease the customer's desire to purchase?

Listening, understanding and making changes based on the voice of the customer should apply to staff reduction decisions or year-to-year budget setting. Resources should be allocated to the enterprise based on what the customer will pay for.

When decisions are made without customer data on resource allocation, organizations exhibit a "functional bias" in their decisions as to what is most important. For example, the research and development department says that new products are most important; the sales department says that maintaining business relationships is most important; supply-chain personnel say that the ability to deliver when promised is the most important, etc.

If customer research is designed correctly, then the voice of the customer will present a non-biased view. Traditional market research companies can help companies collect and analyze customer data. However those leading the way in today's difficult market can provide the ever-critical deployment and improvement-planning component. Effective data deployment provides the organization the capability to align customer data to its operation data and aids the organizations in prioritizing internal process improvement efforts that will improve customer loyalty.

And, change-management programs that allow organizations to sustain process improvement must also be included in these deployment initiatives. Effective deployment happens when the customer data is used to implement appropriate internal process changes and resource allocation decisions.

Working with marketing research: a message to marketers

There is ample evidence that sound research practices drive business success. So why do our colleagues in marketing not believe in research?

By Robert Walker

Editor's note: Robert Walker is principal and founder of Surveys & Forecasts, LLC, a Fairfield, Conn., research firm. He can be reached at 203-255-0505 or at bob.walker@surveys-forecasts.com.

Recent discussions with several senior executives left me with the impression that marketing management sees the research function as being in a rather grim state of affairs. Most seriously, there is the belief that the usefulness and quality of marketing research is on the decline. True, a staffing crunch, declining response rates, and ever-shrinking timelines are worrisome trends. And yes, there have been a few embarrassing, high-profile gaffes (i.e., New Coke). Yet, on balance, the capabilities of research have never been stronger and, given the risks, the need for sound research has never been greater. Businesses simply cannot afford to marginalize this essential, knowledge-seeking function.

Why, then, is there so often a disconnect between the promise versus perceived delivery of marketing research among our colleagues in marketing?

Nearly all marketing executives I come into contact with express a strong belief in research, yet some fail to appreciate the distinction (which, on the surface, seems trivial) between basic market research and higher-level, value-added marketing research. Market research consists of important, albeit basic, marketplace facts — sales, share, demographics (i.e., "report card" data). At the other end of the continuum is marketing research, which actively investigates marketing opportunities and problems, evaluates marketing strategies and actions, and — most importantly — plays an integral role in improving the company's marketing process. The very best researchers add value not just by knowing their craft, but by truly understanding the relationship between customers and their brands and each brand's place in the organization's overall portfolio. They think like an owner, act as internal advocates for their brands, and actively champion their role across the organization. Given the choice, as a marketer, which of these two forms of "research" would you rather have working for you?

Too often, the research process is seen by marketers as an obstacle to action, because needed research does not fit into pre-ordained timelines. The true dollar value of some research is

also viewed as a conceptual abstraction, making it an easier target for criticism. What, for example, is the true value of research if the decision is to not move forward with a bad idea. What value do we attribute to research when an optimized sales message takes longer to develop, but results in a meaningful share gain? Marketers will often (but incorrectly) point to the high failure rate of new product introductions, and conclude some type of deficiency in marketing research itself. Yet, upon closer scrutiny, available data contradicts this assumption. Information Resources recently reported the results of a two-year study of all consumer packaged goods brands and line extensions in 21 categories introduced between 1996-1998. The study showed that:

- Half of all new brands and 53 percent of all line extensions failed, but this statistic included so-called "launches" with absolutely no media support.
- In-market testing greatly improved the odds of success; brands that succeeded in live test markets enjoyed post-launch success rates of over 80 percent.
- Not surprisingly, media support was a strong correlate of success. Introductions with $5MM+ in Year 1 advertising achieved an average success rate of 75 percent, versus just 32 percent for products with < $1MM in spending.

New products are the life-blood of every business: in the CPG industry alone, 1,000 new brands and 25,000 SKUs are introduced each year. In this jam-packed environment, why should we be shocked that many new products fail? Shouldn't we be celebrating the fact that research identifies so many that succeed? The roadside is littered with the wreckage of ill-conceived, ineptly-marketed ideas. Might a little marketing research have helped a few dot-coms find their way?

Recent jumps in U.S. research spending are also viewed by some marketers as evidence of a declining value proposition in research. Spending, however, is highly correlated with economic trends, and lately there has been much more contraction than growth. An annual study of marketing research directors (conducted by Surveys & Forecasts for Career Consulting Group of Stamford, Conn.) shows that consumer packaged goods research spending as a percent of sales has remained remarkably flat (hovering near 1 percent) for much of the past decade. What has increased is the spending per research professional (from $900K in 1995 to $1.2MM in 1999). This study also shows just one-third of research directors as "extremely" or "very satisfied" with their current staffing levels. In our current low-growth economic environment, companies are cutting research staff further to sustain margins. As this happens, the "survivors" (typically the more highly skilled researchers) become reactive order-takers. The time once reserved for careful planning, design, and test interpretation is replaced by rote test execution. If marketers tacitly accept this "dumbing down" of the research function, is it really a failure of marketing research?

As we emerge from our current economic malaise, businesses will again need to create new products and launch new marketing strategies. Smart companies understand that intelligently developed research programs will not automatically "invent" new products for them, but will consistently drive business success, year after year. Here are some fundamental, but oft-forgotten, ways to tap into the full potential of your company's marketing research team:

1. Staff your department with research experts who are also business generalists. Researchers without basic business acumen will inadvertently squander your company's valuable research dollars. Re-examine the skill sets assigned to your most important brands or businesses, and adjust if necessary.

2. Create an environment in which your research people are fully engaged, and are free to disagree with you. If you truly want an advocate for your brand, be willing to hear from those closest to the end-customer.

3. Communicate! Involve your key research people early in the brand planning cycle. Knowing the strategic priorities of the business leads to better anticipation, research design, and interpretation. In turn, make research responsible for keeping your team abreast of changing consumer needs and market trends.

4. Benchmark your research department against other peer group companies to determine best practices, and to see if you are staffed appropriately. Be willing to make the investment in good research people to get the quality you need.

5. Take the time to get the proposition right, and then adhere to clear standards for go/no go decisions in advance of research results. Using internal "spin" to move marginal ideas ahead wastes time and money. David Ogilvy once quipped, "On those rare occasions when I have advertised products which consumer tests have found inferior to other products in the same field, the results have been disastrous." Be able to accept negative results and move on.

6. Develop normative databases for idea screening, positioning research, product testing, copy research, and tracking studies. This is the only way to ever know if you are moving forward or simply treading water.

7. Eliminate internal "client" vs. "vendor" thinking when dealing with marketing research. Marketing and research are not adversaries; both should be working in concert toward one common goal: the success of the business. The "client" is the customer who buys your product.

8. Avoid going to research with requests for specific tests. Instead, present the marketing problem or issue, and then let your researchers advise you of the most appropriate response.

9. Support industry efforts to encourage the cooperation of the public. Commit time and money to industry advocacy groups — such as the nonprofit Council for Marketing and Opinion Research (CMOR) — who are educating the public about legitimate survey research, and who are lobbying against restrictive legislation. It will help all of us in the long run.

Managing data from multimedia studies

By Dave Koch

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Technological advances have provided today's researcher with many options for data collection. Both the old and the newer methods have their strengths and weaknesses. As a result, many researchers are utilizing several different data collection techniques to ensure they are reaching the right numbers and types of respondents. For example, 75 percent of the data collection on a survey project may be done using an Internet survey. The researcher may also choose to augment the sample with a mailing to insure representative response rates from a particular demographic that is less likely to be Internet-enabled. Additional phone interviews may also be done to round out the sample.

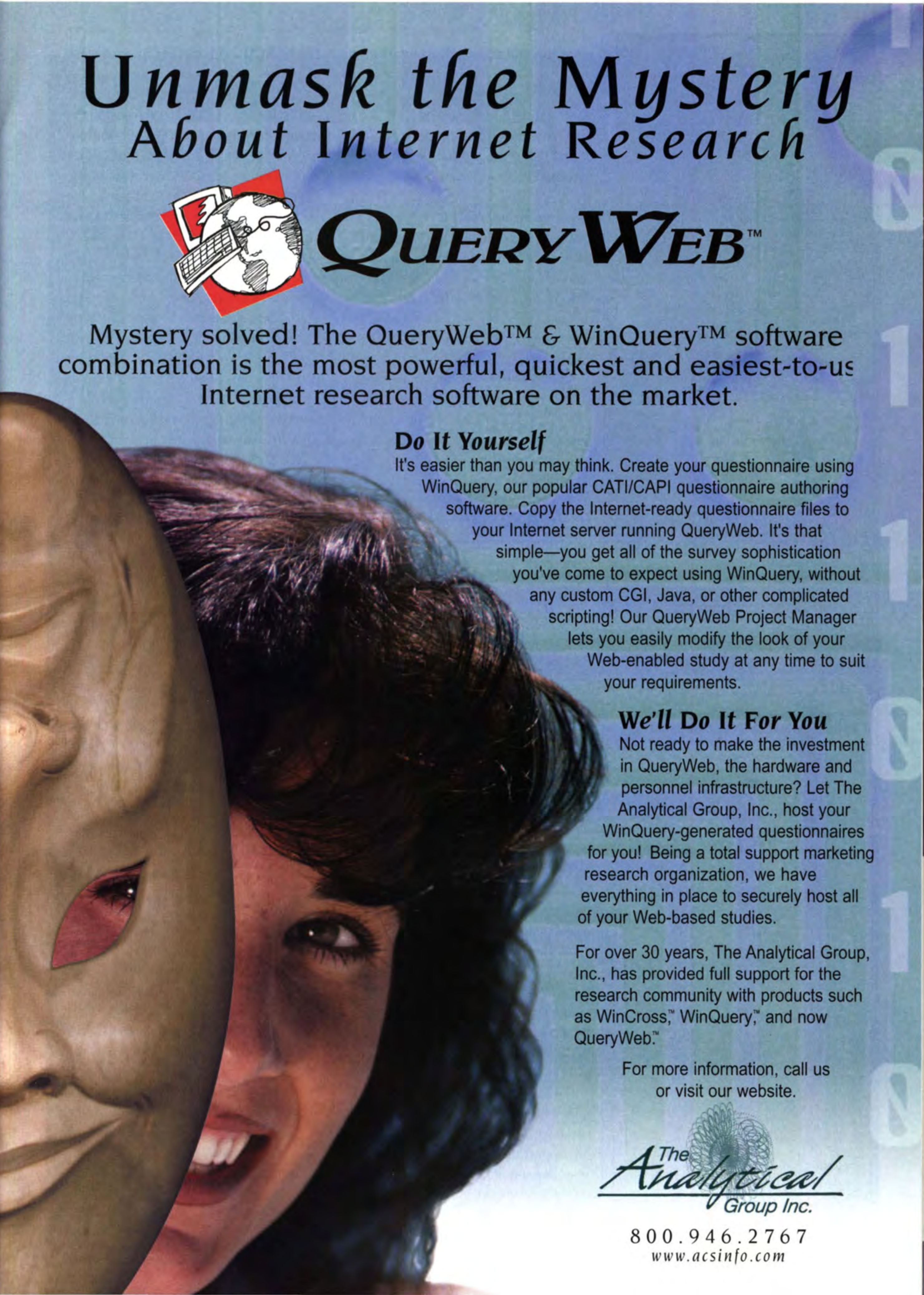
The end result is often data coming in from different vendors, at different times, and often in different formats. This can result in a compatibility nightmare for data processing if you are not careful.

Most of these types of problems can be avoided with good planning at the very beginning of a project. However this can be difficult in today's work environment. Researchers are often so busy in the initial stages of getting the project ready to field that all back-end processing details are put on the back burner. This may seem to make sense as you rush to meet deadline pressures and deal with last-minute client changes. However the price can be very high in terms of your time, the use of company data processing resources, and even project quality.

Examples of problems we have witnessed include:

• The Internet vendor supplied the data in an Access format, the CATI vendor supplied the data in a delimited ASCII format, and the data entry vendor supplied data in a column binary format — the end result being needless headaches for the data processing department.

• The rating scales for a paper questionnaire were captured as most satisfied = 5 and least satisfied = 1, while the Internet supplier programmed the scales exactly opposite with most satisfied = 1 and least satisfied = 5. The error was not caught until the tables


Unmask the Mystery
About Internet Research
QUERYWEB™
Mystery solved! The QueryWeb™ & WinQuery™ software combination is the most powerful, quickest and easiest-to-us Internet research software on the market.
Do It Yourself
It's easier than you may think. Create your questionnaire using WinQuery, our popular CATI/CAPI questionnaire authoring software. Copy the Internet-ready questionnaire files to your Internet server running QueryWeb. It's that simple—you get all of the survey sophistication you've come to expect using WinQuery, without any custom CGI, Java, or other complicated scripting! Our QueryWeb Project Manager lets you easily modify the look of your Web-enabled study at any time to suit your requirements.
We'll Do It For You
Not ready to make the investment in QueryWeb, the hardware and personnel infrastructure? Let The Analytical Group, Inc., host your WinQuery-generated questionnaires for you! Being a total support marketing research organization, we have everything in place to securely host all of your Web-based studies.
For over 30 years, The Analytical Group, Inc., has provided full support for the research community with products such as WinCross,™ WinQuery,™ and now QueryWeb.™
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were run and the discrepancy became obvious. Once again, lots of wasted time in data processing, as well as a potential data quality problem.

• Open-ends from a paper study were coded using a code list developed by the vendor. On a later portion of the study, fielded via CATI, coding was done by an internal department. Not realizing the data needed to tie back to a prior segment, the coding department renumbered the code list completely so they could use two-digit rather than three-digit codes. The end result was that none of the coded data matched, and the open-ends had to essentially be data processed as two separate projects, taking twice the time.

As these examples demonstrate, the cost of failing to manage multiple data sources properly can be very expensive. The key to success is taking the time to carefully consider back-end processing requirements when you first begin setting up your project.

Here are some tips to keep in mind next time you are planning to field a multimedia study.

1) Make sure you have control of the data layout. Create a data map at the same time you finalize the questionnaire. All supplying departments and vendors should commit in advance to supplying collected data in a set format, and in the exact layout you specify. You should have the option (although you may not use it) of combining the files from all different suppliers into one file for data processing. Some key items to keep in mind are:

— Be sure to include specific rules on capturing data. For example, how will multiple answers be handled? Or how many codes will be allowed for each open-end that is coded.

— Make sure all rating scales are consistent. Don't leave room for your scanning vendor to assign a 5 to extremely satisfied and a 1 to extremely dissatisfied, while your Internet provider does exactly the opposite.

— If open-ends will be captured, make sure they will be supplied in the same format by all vendors or supplying departments.

— Be specific on file formats. Your data processing people will not want to receive files from one vendor in fixed-field ASCII, and another in an Access database.

2) Bring the data processing people (if it is not you) in on your project in the initial planning stages. If your company has several programmers, one should be assigned to a project in the development phase rather than at the last minute. This way data processing can clearly define their data needs before the project goes to field.

3) Centralize back-end processing as much as possible. For example, have all the coding done by one vendor, or by your own coding department. This will lead to increased efficiency and better consistency in how data is handled. The same applies to data cleaning and tabulation. Once again, make sure all of your data suppliers are committed to a common format and layout.

4) Pay close attention to timing. Note that the fielding time for the mail or phone portion of your study will be different than that of the Internet portion. Make sure that the timing of the fielding of all methodologies is coordinated to meet the requirements of your study.

5) Be careful to proofread all survey documents very carefully, and reference the documents for other methodologies often. In other words, make sure that the exact same questions are asked on your mail study as your Internet portion. The same verbiage should be used whenever possible to avoid influencing the respondents' answers in any way. Also, make sure that any concept or stimuli information that is presented to the respondent is the same.

Plan and document

The key to successfully managing the data from a multimedia study is to plan and document your data requirements upfront, before anything hits the field. Make sure that all supplying departments and vendors have a very clear picture of exactly what you are looking for as a deliverable. If they cannot commit to supplying it, you may want to consider another vendor. The end result will be more efficient use of the valuable data processing resources of your company and potentially shorter lead times to delivery of final reports.

Long John Silver's

continued from p. 19

Importantly, reports are available on an instant real-time basis through a password-protected Web site hosted by Alliance Research. This allows for instantly generated e-mail notification of DMA managers and restaurant managers each time a customer reports an unsatisfactory experience or, conversely, one in which they were "delighted."

The process

The resulting process uses a variety of technologies in tandem to achieve program goals.

Invitations to participate are issued to a cross-section of Long John Silver's customers through a central point-of-sale (POS) receipt system in company-owned restaurants. The number of invitations printed is in direct proportion to the number of receipts issued on an nth-transaction basis. Franchisees either use a POS receipt system or issue printed cards with instructions for participating. Invitations are issued in English and in Spanish, and the IVR script gives the option of completing the interview in English or Spanish.

A customer PIN code is required to access a toll-free telephone number. The PIN identifies the restaurant where the purchase experience took place. Where receipts are programmed, a unique multi-digit code is created for each customer by encrypting the restaurant number and information about the transaction. For franchisees without central POS programming capabilities, the PIN gives a restaurant identification number.

The invitation asks customers to call a toll-free telephone number within 48 hours of the restaurant experience. The multi-digit code procedure assures that calls are timely because the transaction date and time are embedded in the PIN code.

As questions are asked by a pre-recorded voice, customers answer through the numbers on their touch-tone telephone. The information is captured in a continuously updated database that then dispatches e-mail notices to DMA managers and restaurant managers, and instantly updates all reports on the secure Web site. Long John Silver's and franchisee personnel are issued secure passwords to the Web site to review automated graphic reports and a host of other information available for their restaurants.

To improve response rates, an incentive is offered. A word code is given at the end of the study. Customers record that word on their receipt invitation (or card) and present it at the restaurant to redeem their incentive on their next visit. The word code changes periodically.

Report components

The measurement and service recovery program has a number of important elements, all of which are triggered by customer comments in the survey:

• Progress measurement. The "traditional" CSM report deliverable, shown in automated graphic representation, displays trends in each restaurant's overall customer satisfaction and intent to revisit, and evaluation of facilities, and food and service delivery over time.

• Benchmarking. All reports compare to measures for the prior period and to chain-wide measures, with tests of statistically significant differences.

• Problem isolation. This component identifies problems and their sources in the customer experience through the use of follow-up "drill-down" questions. These questions are asked only if customers register a rating reflecting a defective experience.

• Service recovery. In the IVR interview, customers opt in to agree to accept a call from a district manager if Long John Silver's wishes to talk with them further about their experience. If the experience is poor, alerts are dispatched for customer follow-up and problem resolution. Prompt and earnest follow-up reinforces Long John Silver's commitment to customer satisfaction. The Alliance Research database recognizes triggering events and gives immediate notification of unsatisfactory experiences by e-mail and Web site reporting through two channels:

1) RED Alert – Allows DMA managers to learn more about the problem and recapture the customer by notifying them of low overall satisfaction and providing them with the customer's telephone number.

2) Manager Report – Notifies the restaurant manager of operational defects under the manager's control and provides the customer's telephone number, if needed, for further diagnosis and service recovery.

• Monthly and quarterly summary reports. Through a secure reporting Web site, summary reports give continuously updated graphic information of all measures by individual restaurant, with line-item benchmarking comparisons to the prior period, as well as chain-wide performance on the same uniform measures. Also included are summaries of the proportion of customer occasions where RED Alerts or Manager Alerts have been issued, with detail of the problems encountered.

• Roll-Up Reports – This element gives detailed and easy-to-read summaries of restaurant groupings rolling up to each market and to Long John Silver's levels of management responsibility: DMA managers, regional vice president, division vice president and the Long John Silver's chain in total. Access is secure to authorized personnel for restaurants within their jurisdiction only.

• Celebration – This element immediately congratulates restaurant managers each time a customer reports a completely satisfactory and problem-free experience, reinforcing manager commitment to excellence and continuous improvement.

The results

In a matter of months, Long John Silver's saw its customer service performance and manager involvement escalate. The concept stresses the manager's top three tools for excellence as:

1. Leadership. Managers are reminded that when it comes to customer service, a restaurant's team follows its manager's lead.

2. Training. The first part of "excellence" is "excel" and, according to Long John Silver's, that takes training. The importance of management is stressed through a key statement: "Each time the manager interacts with customers, a Service Excellence training session is in progress."

"Just look behind you," the company tells managers, "You'll see your team noticing and eventually imitating your every action."

3. Service management. Since customer-driven measurement gives a grade of sorts, Long John Silver's tells managers to use it as a teaching tool. For example, a high number of dissatisfied customers means that managers are flirting with an "F," and it's time to hit the training and reinforcement books again.

Program expanded

The program has since been expanded to all company-owned stores, and is now offered to Long John Silver's franchisees. With the support of this multi-directional program, Long John Silver's has entered a period of growth and business success unprecedented in the company's history. Here's what a few Long John Silver's managers have to say about the program:

"We're so much better than our competition now that we've actually put them out of business. There are, or should I say there were, two other seafood QSRs [quick-service restaurants] in town. We put them both out of business. The reason? We serve a better product, and we treat our customers right!" — Scranton, Pa.

"We're just nicer to our customers than most of the other restaurants around here. Their employees don't care, and ours do. My customers come in and compliment me on my staff all of the time." — Tyler, Texas

"It's important to communicate with your guests if you want to be successful. Find out what you're doing wrong and fix it, or find out what you're doing right and keep doing it!" — Plano, Texas

Survey Monitor

continued from p. 8

in advance (hotel questionnaires, cars, educational programs, for example). Therefore, Ofir says, researchers should take the following points into consideration:

1. It is preferable not to notify consumers in advance that they will be asked for their reactions regarding their satisfaction with a particular product or service.

2. When such advance notification is given, one should factor in the tendency toward negativism in analyzing the results that are obtained.

3. It is advisable not to do repeat surveys of the same consumers when one is trying to determine consumer trends. Such repeat surveys will always produce distorted results, the research found.

4. When comparing results from different groups of consumers, one must take into consideration whether any of them may have been aware in advance of their being surveyed.

Generally speaking, Western consumers have favorable expectations regarding products and services they purchase, and therefore negative aspects will stand out more than positive ones. Despite this, people in many cases still have highly positive responses when asked about goods and services they've used. This is not the case, however, when the consumer knows in advance he is going to be asked about a specific item; in such case, he pays much closer attention to judging the product or service and gives much greater weight to whatever negative aspects he may find in it.

This phenomenon was observed in questioning people in various settings, including shoppers at supermarkets and other stores, computer purchasers, visitors to museums, television viewers, students in courses and others.

In one of the tests conducted by the researchers, consumers were asked to look only for negative aspects in what they were about to buy. In another test, consumers were told in advance to expect only poor service. As expected, these groups expressed dissatisfaction.

Control groups were approached in advance of purchase but were told only that they would be asked to express their level of satisfaction; their responses were similar in their dissatisfaction to those who were notified to look specifically for negative aspects or to expect poor service. This demonstrates how in any case prior notification results in a lower satisfaction level than one finds among consumers who are not told in advance that they are to be surveyed. For more information contact Chezy Ofir at msofir@mscc.huji.ac.il.

Beijing choice not a winner

Fewer than one in 10 Americans consider Beijing an excellent choice as a host site for the 2008 Summer Olympics, and almost three in five give it negative marks (59 percent rate it an only fair or poor choice), according to research from Ipsos-Reid. Two-thirds of people age 45 and older (68 percent) give the choice negative marks, as do half (50 percent) of adults under age 45.

Toronto would have been the first choice of almost half (46 percent) of all Americans, far outpacing Paris (which places second), Beijing, Osaka and Istanbul. Paris generates a gender gap, with 23 percent of women but only 14 percent of men preferring Paris.

Preference for Toronto is greatest among American adults in the regions where Toronto is more accessible — to Americans in the Northeast (53 percent make Toronto their first choice) and the Midwest (51 percent). Preference for Toronto is lower where Toronto is further away, in the South (40 percent) and West (43 percent).

When asked to specifically focus on the politics of the choice (setting aside the issue of whether Beijing can handle the logistics of hosting an Olympics), half (55 percent) assess this as a bad choice rewarding bad behavior on human rights, rather than a good choice that could promote reform and a new opening of China to the world. Republicans (61 percent) and adults age 45 and older (60 percent) are especially negative.

Few (35 percent) have much confidence that China will improve its human rights record. Among those who think Beijing was an excellent or good choice, 64 percent have at least some confidence that China will improve its human rights record as a result of getting the games. Among those who think Beijing was an only fair or poor choice, 81 percent say they have little or no confidence that China will change its behavior. To view the complete results visit www.ipsos-reid.com/us/media/content/displaypr.cfm?id_to_view=1264.

Reality TV: why do we watch?

What fuels the phenomenal success of *Survivor*, *Big Brother* and a host of other so-called reality programs? Through an online survey of more than 2,100 television viewers, E-Poll, Encino, Calif., asked the people who love and/or hate (and sometimes love to hate) reality TV what motivates their viewing of this genre and what specific show elements separate the hits from the misses.

The appetite for reality TV remains especially strong for the "committed" viewer (those who "make a point to watch" reality TV): 92 percent of this group are open to watching new reality shows, sifting into three levels of interest — those who say "the more, the better" (39 percent), those interested in watching one or two new reality programs (36 percent), and those who will only watch if the show is as good or better than their favorite reality show (17 percent).

While 61 percent of "casual" reality TV viewers (those who "sometimes watch") are open to watching a new reality show, this group is more discriminating in their tastes, with 23 percent willing to watch a new show only if it's as good as or better than their favorites. Thirty-nine percent of this "casual" group has no interest in watching a new reality show at all, which means that the number of people available to sample a new show is shrinking. Producers will have to pay even closer attention to viewer needs and desires if they want to capture this increasingly elusive audience.

As with audiences of other TV genres, the reality viewer watches for involvement: identification with contestants and playing along with the TV game. The top two reasons for watching, among both committed and casual viewers, are "guessing who will win/be eliminated" and "seeing real people face challenging situations." Interestingly, one of the lower-ranking reasons for watching was "romance/relationships among contestants," perhaps why the relationship-oriented shows failed to have the trajectory of *Survivor*.

"Moral" concerns — the perceived trashiness of the content and the unappealing human values these shows present — are among top reasons given by those who do not watch reality TV. Fifty-five percent of non-viewers chose "too trashy or low-class" as one of their reasons for avoiding reality TV, 49 percent chose "don't like the human values/traits they present," 38 percent believe that "contestants are just trying to get famous," and 33 percent find the shows "too voyeuristic" (multiple selections were allowed).

One finding which turned up across several questions was a very clear audience concern over potential fakery involved with these shows. Thirty-five percent of non-viewers have rejected reality TV because they believe "the shows are fake or rigged." This sentiment is also reflected in an unprompted open-end question asking for the "one biggest complaint about reality programs." The #1 most-cited complaint (mentioned by 20 percent of the entire sample) was a concern over fake, scripted, and staged situations.

Viewers seem less tolerant of allowing reality contestants their 15 minutes of fame: 44 percent said they felt contestants were flat-out boring, while another question found that 38 percent of non-viewers cite "contestants just trying to get famous" as reason for avoiding the genre altogether. And, similar to the prior point, viewers bristle at phoniness: 45 percent of the total sample claimed "phony/over-dramatized situations" led to them rejecting a reality show they had sampled.

German Internet audience world's most heavily male

More than 63 percent of the Internet audience in Germany is male, making that country's online community the most predominantly male of the 26 countries measured by Nielsen//NetRatings, Stamford, Conn.

In contrast, the audiences in the U.S. and Canada are the only audiences in the world where females are the majority, while Asia-Pacific is experiencing strong growth in the number of women online.

"Germany is an established Internet market with the third-largest Internet universe in the world," says Richard Goosey, chief of measurement science and analytics, Nielsen//NetRatings. "Where are the women in this market?"

In June, German men spent nearly eight-and-a-half hours online during 18 online sessions, while German women spent seven hours online during 14 sessions. "Surprisingly, for an audience so heavily skewed towards men, sites mainly focused on sports were the second-least popular category in Germany in June," Goosey says. "Followed only — not as surprisingly — by family and lifestyle sites, which were the least popular category last month."

Goosey also pointed to France, where the Internet audience was nearly 62 percent male. "The time difference in Internet usage between the genders in France was much more pronounced in France," he says. "French men spent more than eight-and-a-half hours online across 19 sessions, while French women spent half as much time online — just over four-and-a-half hours across 11 Internet sessions. French women are obviously not as enamored of the Internet as their male counterparts."

On the other hand, a Nielsen//NetRatings study of women's Internet activity in Asia-Pacific found that females in that region — while still in the minority — are fast gaining ground on their male counterparts. That study found that since January of this year, the number of female surfers has grown an average of 36 percent across the region, with the number of Korean women online increasing 55 percent, followed by Taiwan at 27 percent, both Singapore and Australia at 16 percent, Hong Kong at 11 percent and New Zealand trailing the region at 10 percent.

In both Germany and France, telecom and Internet services Web sites were the most popular category, reaching nearly 80 percent of the active audience in both markets. In France, despite the heavily male audience, certain categories that would be expected to attract male Internet users, such as sports and automotive sites, ranked very close to the bottom of the category list for June, attracting well under 10 percent of the active audience.

In contrast, the U.S. and Canada were the only markets where females comprised the majority of the Internet audience in June. In the U.S., where 52 percent of the audience was female in June, the time spent online by each gender was more even — 10-1/2 hours for men and just over nine hours for women. Search engines, portals and online communities were the most popular category in the U.S. The first category that could be construed as favoring one gender — computers and consumer electronics — ranked sixth on the list of most popular U.S. categories, attracting 24 percent of the active audience. Family and lifestyle Web sites, which would be expected to bring in female surfers, was the eighth-most popular category, attracting 17 percent of the active audience.

Qualitatively Speaking

continued from p. 16

5. Be prepared for bullies, friends, and mice. Every focus group has different dynamics that depend completely on the personalities of the participants. Actually it's a bit like improv! Some groups may have a bully. A focus group bully is a person who tries to monopolize the conversation and force his/her opinions on everyone else. The bully usually sits at the opposite end of the table from the moderator and often attempts to moderate the group from there. An experienced moderator will work around this person, keep the group focused and encourage everyone to give their opinions.

When friends are recruited accidentally to participate in the same focus group, they invariably want to sit next to each other and talk to each other during the group. (This may happen in more sparsely populated areas.) Private conversations tend to be disruptive; they make it more difficult for everyone to hear what others are saying. Generally this can be avoided by having seats assigned with name cards before the session begins.

Although everyone is encouraged to speak freely during the discussion, the group may have a mouse — a person who says absolutely nothing and barely responds even when asked a direct question. It's the moderator's job to encourage this shy person to express his or her opinions. Sometimes this can be done by giving the person a task, or asking him or her to work with another member of the group. But it may happen that the person still contributes nothing. The client wonders why the person came and is annoyed at having to give them a cash incentive for hearing nothing.

6. Comments must be evaluated in context! In focus groups people will say what they perceive as the truth. It may or may not be — after all, it's just their perception. And it may be the perception of only one or two people. Observers must be cautioned to keep the big picture in mind and not be sidetracked by the comments of one or two dominant individuals or those most positive or most negative about the topic under discussion. Remember that there are no numbers attached to the comments heard. Hearing eight out of 10 people say they like or dislike the packaging of the burglar alarm does not mean 80 percent of the population at large feels the same way. The results of one group mean nothing and even multiple groups can be misleading. So be very cautious in evaluating this type of research. It's not projective and no numbers can be attached to it. It's easy to hear only what one wants to hear, not what's actually being said.

7. Discuss with the moderator beforehand how communication during the session will be handled. Sometimes during the discussion additional questions spring into the observers' minds. If arrangements are made beforehand, a note can be brought in to the moderator, or the moderator may give participants an activity or task to complete and actually leave the group and come into the observation room to talk with the observers about a particular topic or how a line of questioning should be handled. Every moderator has their own style of dealing with interruptions; it just needs to be established up front.

More valuable

A little extra time spent preparing employees for observing focus groups can make them more valuable to the employees while making them become an integral part of the research process. Recently a client for whom a set of four focus groups was conducted in Detroit brought 14 employees to observe the discussions. The backroom group included people from sales, accounting, creative, finance, training, and management. Almost all of them had never seen a focus group before and had no idea what to expect. The short briefing session conducted before the first group prepared them for the process, allowed them to listen more actively to participants' comments, evaluate the comments in context and take notes on important topics. The end result proved to be a more productive and positive experience for everyone.

Research Industry News

continued from p. 15

ipated sales results in the region. The shutdown resulted in the layoff of approximately 40 European employees and is part of a larger, worldwide restructuring effort.

TeleSage Inc., a Seattle provider of automated telephone survey software, announced that its SmartQuest software has been certified by CT Labs, an independent testing service serving the computer telephony industry.

Brazil-based research firm **Market Analysis** has launched its Web site at www.marketanalysis.com.br.

Wilton, Conn.-based **Greenfield Online, Inc.**, has received a business process patent for its online focus group business, called FocusChat, invented by Hugh Davis, the company's chief technology officer and a founder of the firm. The U.S. Patent & Trademark Office issued the patent (No. 6,256,663) on July 3 and the company learned of the action July 24. The new patent is for "a system and method for conducting focus group discussion among remotely located participants."

Maritz Marketing Research Inc., St. Louis, has shortened its name to Maritz Research.

Knowledge Networks, a Menlo Park, Calif., research firm, has secured $40 million to fund further growth. The financing was led by new investor Maveron, with participation from existing investors Oak Investment Partners, Alloy Ventures, Meritech Capital Partners, and Oak Hill Venture Partners.

Seattle-based **Global Market Insite, Inc.** has been admitted under the terms of the Safe Harbor Agreement data protection agreement between the United States and the European Union (EU). The agreement allows the uninterrupted flow of personal information from the EU to the United States, based on established Fair Information Principles. The European Commission issued the Directive on Data Protection to protect the privacy of EU citizens. The Directive states that for those countries outside the EU whose privacy practices are not deemed "adequate," transfers of personal information from Europe to those countries would be stopped. To ensure that personal data flows to the United States are not interrupted, the U.S. Department of Commerce (under the Clinton administration) and the European Commission developed a "safe harbor" framework that allows U.S. organizations to satisfy the European Directive's requirements.

Reston, Va.-based **comScore Networks, Inc**, a provider of data-based Internet infrastructure services, has established a new government solutions division to serve the needs of federal, state and local government agencies by providing Internet analysis and solutions.

The Kantar Group is reorganizing its corporate structure to accelerate the global expansion of Kantar Media Research (KMR) under the leadership of Andy Brown, newly appointed CEO. KMR will operate as an independent division of Millward Brown, reporting to Bob Meyers, a director of Kantar and CEO of the Millward Brown Group.

Acquisitions

Total Research Corporation, Princeton, N.J., has completed its previously announced plan to sell its 51 percent interest in its **Romtec-GfK** joint venture to GfK, a Germany-based research company. Total Research acquired its 51 percent interest in the Romtec-GfK joint venture in its May 2000 acquisition of Romtec plc, a U.K.-based IT and telecommunications market research company. Except for the joint venture, Romtec plc has been fully integrated into Total Research.

Harris Interactive Inc., Rochester, N.Y., has acquired **Market Research Solutions Limited** (MRSL), a privately-owned U.K. company headquartered in Oxford, England. The part-cash and part-Harris stock deal, for an undisclosed amount, was signed in London. As part of the agreement, Harris Interactive will hire approximately 75 MRSL employees and will also take on their offices in Oxford, North London and Newport, South Wales. MRSL is expected to add approximately $8.6 million to Harris Interactive revenues for the fiscal year 2002 which started July 1.

Arbitron Inc., New York, has purchased the RADAR radio network audience measurement service of **Statistical Research Inc.** (SRI), Westfield, N.J., for $25 million, payable over two years. RADAR (Radio's All Dimension Audience Research) is a national radio ratings service that measures audiences to radio commercials aired on 29 radio networks operated by ABC, American Urban Radio Networks, Premiere, and Westwood One.

London-based **United Business Media** has completed the acquisition of **Allison-Fisher International, Inc**. for $45 million. Allison-Fisher is a supplier of pre-purchase syndicated market research to the U.S. automotive industry.

Marketing research group **Taylor Nelson Sofres** has acquired the entire share capital of **Circulo Reider S.A**., its subsidiaries, and Gallup Mexico S.A. (the CR Group), one of the largest market information groups in Mexico. Founded in 1970, the CR Group comprises five companies. Its current activities focus mainly on customized research, principally in the consumer, financial services, telecom and health care sectors. Ian Reider, managing director of the CR Group, will continue to manage the business.

Leemis Marketing Inc., a Chicago research firm, has acquired **Promotion Technology Research, Inc.**, Framingham, Mass.

NOP World, New York, has announced a definitive agreement to acquire **Roper Starch Worldwide**. NOP World will merge Roper Starch with its other consumer research firm Audits & Surveys Worldwide to form a new integrated company - RoperASW. Audits & Surveys Worldwide includes Bruskin Research.

New York-based **CLT Research** has been acquired by **Protocol Communications**, Danvers, Mass. CLT principals Lowell Allen, Leslie Moran, and David Pring will remain as directors of CLT.

Germany-based **GfK Group** has acquired a 51 percent majority holding in **Metris**, a Portuguese research institute. In addition, GfK has signed a letter of intent for the acquisition of a majority holding in Intercampus in 2002. Metris, which was established in 1993, specializes in ad hoc research. The company has 33 employees.

GfK Group has further expanded its majority stake of just over 50 percent in **Intomart Benelux** to 100 percent. The institute group, which joined the GfK Group at the end of 1997 and operates in the GfK ad hoc research and media business divisions, was established in 1962 and has locations in the Netherlands and Belgium.

Alliances/strategic partnerships

SAS Institute, Cary, N.C., and Chicago research firm **MarketTools, Inc.** have announced a joint technology and business alliance. Under the terms of the agreement, SAS and MarketTools will provide preferred customer relationship management solutions to targeted industries.

San Diego-based marketing information firm **Claritas Inc.** has extended its agreement with **Levi Strauss & Co.** to provide customer segmentation and targeting services. Financial terms of the contract were not disclosed.

Ziff Davis Media Inc. has formed a strategic alliance with Internet research firm **Survey.com** to create online panels of subscribers for Ziff Davis Media's 15 publications. The online panels, called ePanels, will be developed from Ziff Davis Media's nearly six million subscribers. EPanels will be developed for all Ziff Davis Media publications, starting with *CIO Insight*.

Market Measures Interactive, Livingston, N.J., and **ePocrates**, San Carlos, Calif., have entered into a strategic alliance to launch ePocrates Honors, a new program to recruit doctors and other health care professionals for Web-based market research.

Chicago-based **Research International USA** and **Active Decisions, Inc.**, a supplier of eCRM decision support applications, have formed a partnership under which RI USA will incorporate Active Decisions' Advisor Suite into its service line. The agreement will also facilitate and expand Active Decisions' distribution of the product.

ACNielsen has formed a strategic direction partnership agreement with **Unilever Bestfoods Europe** under which ACNielsen will provide market research information and services covering 16 European countries. ACNielsen will also provide Unilever Bestfoods Europe with cross-border services to support the business needs of its European Categories/Innovation Centres and senior management.

Itracks, a Canadian online research software and services firm, has reached a global distribution agreement with **SPSS MR**, Chicago, under which Itracks will license its qualitative software to SPSS MR.

GfK eSolutions, the online segment of Germany-based GfK's Ad Hoc Research division, has expanded its competence in online research with three new strategic alliances. **IBEXnet AG** and **CIAO.COM AG** are making their membership of more than 800,000 subscribers throughout Europe available for surveys and thereby allowing GfK access to specific target groups. In addition, GfK and Issaquah, Wash.-based **Global Market Insite Inc.** have concluded a license agreement, as a result of which GfK can access a survey pool of 400,000 Internet users worldwide. IBEXnet AG is a hardware and Internet services provider. CIAO.COM is a German and European consumer portal.

Association/organization news

The Marketing Research Association (MRA) and **Qualitative Research Consultants Association** (QRCA) jointly sponsored the Bridges Workshop, themed "Can We Talk?", at the annual MRA conference in New York in June. The workshop was intended to foster a better understanding of perspectives among focus facility owners, moderators and clients. To continue the dialog, the QRCA Field Committee will offer a similar program at the QRCA annual conference in Chicago on October 25. Due to the room capacity at the hotel, the session will be limited to 80 attendees, including facility owners and field directors from the Chicago area. Facility owners and field directors interested in attending should contact Anndel Martin at amartin@opinions-unlimited.com.

The MRA has elected a new board of directors. Officers installed to the board were: Carl Iseman of Assistance in Marketing/Baltimore, Towson, Md., as president; Peter Van Brunt of ReData, Inc., Bethesda, Md., as president-elect; J. Patrick Galloway of Galloway Research Service, San Antonio, Texas, as treasurer; Michael Mermelstein as secretary; and Judy Hominy of Pat Henry Market Research, Inc., as immediate past president. Installed as directors at large were: Joan Burns of Teradyne, Inc., Boston; Jane Cook of Frank N. Magid Associates, Inc., Marion, Iowa; Stephen Gerzovich of Ziment, New York; Sue McAdams of Herron Associates, Greenwood, Ind.; Joseph Ottaviani of Burke, Inc., Cincinnati; Jane Rosen of Nichols Research, Sunnyvale, Calif.; Merrill S. Shugoll of Shugoll Research, Bethesda, Md.; Scott W. Spain of DigitalBiz Corporation, West Jordon, Utah; Terri Turley of Proctor & Gamble, Cincinnati; and Betsy Peterson, MRA Executive Director, Rocky Hill, Conn.

Separately, Patricia Hatch has joined the MRA as professional development manager.

Lynd Bacon, senior vice president and chief scientist of Knowledge Networks, a Menlo Park, Calif., research firm, began serving as vice president of the **American Marketing Association's Research Council** in July.

In addition, Janet Streicher, vice president and managing director of Knowledge Networks' New York office will serve as the national membership and chapter relations committee chair for the **American Association for Public Opinion Research (AAPOR)**.

The AAPOR gave Norman H. Nie and Douglas Rivers, co-founders of Knowledge Networks, its 2001 Innovators Award at the organization's annual conference. Nie and Rivers received the award for their development of a probability sampling method for Internet-based surveys in the United States.

Awards

An online study conducted using the **Burke, Inc.**, CHOICES discrete-choice approach has garnered Sprint an honorable mention in the 2001 EXPLOR awards. The EXPLOR awards are designed to salute "Exemplary Performance and Leadership in Online Research" and are administered by the University of Wisconsin's A.C. Nielsen Center for Marketing Research and the American Marketing Association.

Primary research for the Sprint study honored was fielded by Cincinnati-based Burke last September. Burke also designed and programmed the Web survey instrument and performed the data analysis the study required. Ralph Hubbard of Breakthru-Strategies, an industry management consultant, designed the overall study architecture and created a five-year forecasting model from the research results.

New accounts/projects

Ottawa-based **Beyond 20/20 Inc.**, a data analysis and visualization software company, has signed a contract worth CAD $2.6 million with France's Institut National de la Statistique et d'Études Économiques (INSEE). The agreement will make Beyond 20/20's software the standard throughout INSEE headquarters and all regional offices, and will be used to analyze, visualize, and publish all national data sources and surveys beginning with France's Year 2000 Population and Housing Census.

U.K. research firm BMRB has selected the **E-Tabs** Reader software to deliver the quarterly results of its TGI (Target Group Index) study. E-Tabs, a U.K. data delivery software firm, has produced a customized version of its E-Tabs Lite Reader designed to improve access for subscribers to the TGI survey.

Kraft Foods has reached a series of agreements to make **ACNielsen** the company's primary provider of marketplace measurement throughout most of the world. In addition, Kraft Foods North America has a new long-term agreement with **Information Resources, Inc.** (IRI) for select, strategic research services for all Kraft's brands in the United States.

Under the new agreement, ACNielsen will now provide retail measurement, consumer panel, decision support, and modeling and analytical services to Kraft

Foods International in approximately 50 countries within Europe, Asia Pacific and the Middle East/North Africa. In addition, ACNielsen will create a separate client-service organization dedicated solely to working on the company's international business. The agreement covers all of the company's core categories, including beverages, snacks, cheese, convenient meals and grocery.

Opinion Research Corporation, Princeton, N.J., has been awarded a new $7 million contract by the Centers for Disease Control and Prevention (CDC) to support the new, "Healthy Passages" initiative, a longitudinal study of health behaviors.

New companies/new locations

Stanford Klapper Associates is now SKA Division of Mediafax Inc. Its offices are located at 1606 Ponce de Leon Ave., Santurce, P.R., 00909. Phone 787-721-1101. Fax 787-725-1340. E-mail data@ska-pr.com.

Research firm **Desrosiers Automotive Consultants** has moved to 80 Fulton Way, Suite 101, Richmond Hill, ON, L4B 1J5. Phone 905-881-0400. Fax 905-881-7456.

Smithmark Corporation has relocated its headquarters to an expanded location at 4136 N. Keystone Ave., Indianapolis, Ind., 46205. Phone 317-541-9165. Fax 317-541-9291.

International Communications Research, Media, Pa., has opened an office at 388 Market Street, Suite 500, San Francisco, Calif., 94111. Phone 415-296-2502. Fax 415-296-2504. The new office will be headed by Gale Wallmark.

DataPrompt International, a market research field collection and tabulation firm, has opened at 360 North Michigan, Suite 1610, Chicago, Ill., 60601. Phone 312-423-4100. Fax 312-423-4101. E-mail mdent_dataprompt@bgchicago.com. For more information contact Marilyn Dent.

U.K.-based research software firm **E-Tabs** has opened a new office in Chicago. Tom Schlak will head up the sales division for the new office.

Communique Partners, a new firm specializing in building and managing proprietary advisory online panels for research purposes (e-panels), has opened at 824 E. St., San Rafael, Calif., 94930. Phone 415-453-9030. Web www.communiquepartners.com. For more information contact Chris Yalonis.

Goodmind, LLC, a new technology-focused research consultancy led by Peter Mackey, has opened at 1202 Lexington Ave., Suite 341, New York, N.Y., 10028. Phone 212-744-7438. Fax 212-656-1854. E-mail info@goodmind.net. Web www.goodmind.net. The firm also serves as a strategic partner to Netpoll, Ltd., a European firm measuring user attitudes towards digital communication platforms.

Company earnings reports

For the second quarter ended June

30, **Arbitron Inc.**, New York, reported revenues of $50.3 million, an increase of 10.1 percent over revenues of $45.7 million for the second quarter of 2000. Earnings before interest and taxes (EBIT) for the second quarter were $12.8 million, compared to $13.2 million for the second quarter of 2000, a 3.1 percent decrease. Net income for the quarter was $4.7 million, compared with $8.0 million reported during the same period of 2000, a decrease of 41.1 percent. Net income per share was $0.16 (basic and diluted), compared with $0.27 pro forma net income per share in 2000. The 2000 earnings per share amount has been adjusted to reflect the one-for-five reverse split, which became effective following Arbitron's reverse spin-off from Ceridian. Arbitron reported EBITDA of $13.9 million for the second quarter, a 2.0 percent decrease compared with EBITDA of $14.2 million reported during the second quarter of 2000.

For the second quarter of 2001, revenues for **Opinion Research Corporation**, Princeton, N.J., were $45.2 million, an increase of 11 percent compared to $40.7 million in the second quarter of 2000. EBITDA was $4.2 million compared to second quarter 2000 EBITDA of $4.5 million. Operating income for the current quarter was $2.1 million compared to $2.8 million a year ago. Net income for the quarter was $354,000 compared to second quarter 2000 net income of $834,000. Cash earnings per share (net income plus goodwill amortization expense after-tax) for the second quarter were $0.17 compared to second quarter 2000 cash earnings per share of $0.28. Diluted earnings per share for the second quarter of 2001 were $0.06, compared to $0.18 in the second quarter of 2000. Diluted EPS and cash EPS in the current quarter reflect a 32 percent increase in shares over the comparable period last year due primarily to common equity issued in the third quarter of 2000.

Harris Interactive, Rochester, N.Y., announced financial results for the fiscal 2001 fourth quarter and for the entire fiscal 2001 year. The company reported total revenue of $17.7 million for its fiscal fourth quarter ended June 30, versus $15.8 million in the third quarter and $15.3 million a year ago, representing increases of 12 percent and 16 percent respectively. Revenue for the entire fiscal year was reported at $60.1 million, up 17 percent from the $51.3 posted the previous fiscal year. These results include revenue from Yankelovich custom research group acquired effective February 2001. Internet revenue for the year was reported at $32.6 million — up 55 percent versus fiscal 2000. The net loss before restructuring charges for the quarter was $3.9 million, or ($0.11) per share, down from a loss of $5.9 million or ($0.17) per share in the third quarter. One-time restructuring charges increased the total loss to $4.5 million for the year or ($0.13) per share — an improvement of 32 percent from a year ago. Net loss before restructuring charges for the year was reported at $23.4 million or ($0.68) per share.

Miyago

continued from p. 21

Miyago overall is twice as likely to repurchase from Miyago as is a customer who says they are "somewhat satisfied" with Miyago overall. Likewise, that same "totally satisfied" customer is 3.5 times more likely to recommend Miyago to a business associate than is one of its "somewhat satisfied" customers.

In a separate analysis, we discovered that those customers claiming they are "totally satisfied" with the company overall are indeed a firm's most loyal customers. Since loyalty can really only be assessed after the fact, once the repurchase intent has been actualized, measuring total overall satisfaction is the most effective method for determining loyalty.

Once we realized that "totally satisfied" customers have different purchasing decision habits than "somewhat satisfied" customers (and, obviously, "dissatisfied" customers), we needed a way to focus in on the key drivers of overall satisfaction. We needed to identify what attributes drive satisfaction and the level of impact each attribute has upon increasing or decreasing overall satisfaction.

Optimum use of resources

The most important conclusion that can be derived from Miyago's customer satisfaction survey, then, is to understand the optimum use of resources to increase overall customer satisfaction and drive the "somewhat satisfied" customers into the "totally satisfied" corral. To do so has a direct impact upon revenue. In Miyago's case we identified that for each $1 a "totally satisfied" customer spent, a "somewhat satisfied" customer spent 38 cents, a "somewhat dissatisfied" customer spent 8 cents, and, a "totally dissatisfied" customer cost Miyago $3.10. Thus, moving his customers up the scale became Matoba's top priority.

Several years ago we used to ask survey respondents to rank "importance" with various attributes. Invariably, it was noted that every attribute was "extremely important." This method is ineffective because context and recent experiences influence the responses to importance ratings. To illustrate that point, ask a recent automobile buyer to rate the importance of service in relation to the product's various performance and style attributes. In all probability, service will rank fairly low. Ask the same question after the car breaks down, and the answer will be very different. In specific situations, people also do not always act in accordance with what they claim is important to them in the abstract. We gave up asking.

Instead, we began to play around with a technology called neural network analysis. Neural networks are a type of system that simulates many of the abilities of the human brain. By using the same architecture as your brain, but on a smaller scale, artificial neural systems work much the same way your brain does. Human abilities, such as noticing patterns and trends, finding hidden relationships in data, and learning by studying the past, can now be performed by a computer. Neural networks combine our ability to analyze and learn with the computer's ability to process a great deal of data quickly, easily, and dispassionately. Just like people, neural networks learn from experience, not from programming. They are fast, tolerant of imperfect data, and do not need formulas or rules.

We developed a technique for employing this technology in a way that enables our clients to identify, prioritize and quantify the relative impact that improving various attributes (e.g., sales, service, billing, pricing, delivery, etc.) will have on overall satisfaction. This technology can give a fundamental but otherwise unavailable level of understanding of the customers' thinking and priorities. We moved from the "what" customers think to the "why."

The neural network analysis identified for Miyago the key drivers for its "totally satisfied," "somewhat sat-

isfied," and "dissatisfied" customers. Thus, management and the remediation teams could evaluate the drivers for the customer segments, note similarities and differences, and base future policies and improvement spending upon only those attributes that have a direct impact upon improving overall satisfaction.

Considerable impact

In 1997 the neural network identified three attributes that had considerable impact upon the satisfaction levels of Miyago's customers. One of the categories, "commitment from Miyago management," however, had an impact level that was more powerful than the others. The other two key attributes were "quality of services" and "the ease of doing business with Miyago."

When Matoba saw that his customers did not feel that Miyago's management was committed to their success, he took immediate action. He spent the next three months visiting each of the 180 customers to discuss the results of the survey and to personally commit his team's dedication to Miyago's customers. By the way, in 1997, the percentage of Miyago's "totally satisfied" customers was 11 percent.

We measured this same customer group one year later and identified that after Matoba's tour, the "totally satisfied" group increased to 48 percent. Using Miyago's 1997 revenue as a baseline, the reported income for 1998 increased by 9 percent. There was only one key driver identified in 1998: the ease of doing business with Miyago. However, it was about half as significant as in the prior year. Matoba persisted with his customer visits.

The survey results in 1999 showed substantial increases. The "totally satisfied" segment rose to 67 percent and revenue increased by 18 percent. The key drivers of satisfaction reverted to quality of services and a new attribute, billing. The fact that quality became an issue again after two years is not surprising. After the first year, Miyago paid close attention to its quality program, its customers became used to a new level of service and eventually expected more. Billing became an easily correctable issue.

In 2000 total satisfaction hit 78 percent, a number rarely ever achieved and one that places Miyago in a world-class category. Not unexpectedly, revenues increased by 5 percent.

By paying attention to his customers' complaints, visiting each one to discuss the survey results, committing Miyago's employees to his customers' success, and following up with the results, Matoba increased his company's revenues by 35 percent in four years. Stay tuned for 2001!

Product & Service Update

continued from p. 12

ArcEditor, and ArcInfo — are built on a common interface and core capability, with each product offering a different level of functionality. Users of *Getting to Know ArcGIS Desktop* can gain an understanding of ArcView, which they can put to work immediately or use as a foundation for learning ArcEditor and ArcInfo. The book is available at bookstores or online at www.esri.com/esripress or by calling 800-447-9778.

New online focus group service

KL Communications (KLC), a market research firm based in Eatontown, N.J., has introduced a new online focus group service, FocusOutreach, which combines an online meeting with a telephone conference call. The discussion, conducted over the phone, is recorded and developed into a transcript, similar to traditional focus groups. Using WebEx technology, KLC uses the online meeting room to conduct polling questions, present visuals (such as advertisements), and take respondents on live Web tours. FocusOutreach is best suited for B2B groups, as two phone lines are required. For more information call Kevin Lonnie at 732-935-9200 or view a demo at www.klcom.com/WebExPPTdemo/Slide01.html.

Group Dynamics adds usability facility

Bala Cynwyd, Pa., research firm Group Dynamics in Focus has added a new room to its facility at 555 City Line Avenue that will provide Web site usability testing for clients who design software. Web site designers can observe respondents from behind one-way mirrors on a real-time monitor. Observation begins from the time the computer is turned on through the entire navigation process. The new space is equipped with T1 lines. For more information call Tracy Leahy at 610-668-8535.

StatSoft adds to STATISTICA line

Tulsa, Okla.-based StatSoft, Inc. has released STATISTICA Web Server, an add-on to its STATISTICA line of data analysis, data mining, and quality control software. STATISTICA Web Server adds functionality for full Internet enablement to STATISTICA, including the ability to run STATISTICA from a Web browser, and enables users to access data and analytical tools from virtually any computer in the world as long as it is connected to the Web. The product is provided with a selection of Internet browser user interfaces allowing users to specify the analyses and review the results. Also, tools are provided to customize these dialogs and set up new, customized user interfaces. For more information visit www.statsoft.com/webserver.html.

Communique offers host of online research services

Communique, a San Rafael, Calif., research firm, is now offering a variety of online research-based products and services, including Sat-Trak, an annual subscription program of quarterly online surveys of customer base on satisfaction, loyalty, product/service/Web site usability; Test-Trak, a virtual test lab for testing product concepts, naming, positioning, ads, pricing, and product features; Discussion eForums, which combine online focus groups with teleconferencing and discussion boards; Market-Trak, which provides regular (quarterly/monthly) online reporting and trend analysis of client-defined market metrics. For more information contact Chris Yalonis at 415-453-9030.

Category planner from ACNielsen

ACNielsen U.S., Schaumburg, Ill., has launched Category Business Planner, an information intelligence system designed to foster greater collaboration between manufacturers and retailers in the category management process. Accessed over the Internet, Category Business Planner offers product sales information according to retailer category definitions. Analysis of that information is provided in the form of "news headlines," from which users can drill down for more details. For more information visit http://acnielsen.com.

Briefly

Western Wats Center, Provo, Utah, has opened a business-to-business market research call center in Rexburg, Idaho. The center is equipped with 48 Web-enabled stations that will be used for business-to-business research and customer relationship management via telephone and the Internet. For more information call 801-375-0636.

LearningWare Inc. has introduced Quiz Rocket, a Web-based quiz, test and survey product utilizing Macromedia's Flash 5. The product contains six question formats and offers customizable audio, picture and video fields. Results are available immediately. A free online demo is available at www.learningware.com/quizrocket.

MarketResearch.com and **Packaged Facts** are now offering "The Young Adult Market: Generation X Grows Up," a new report highlighting the buying habits of young adults, as well as the influence they have on the spending habits of others. For more information visit www.marketresearch.com.

Pharmaceutical companies now have real-time, desktop access to study libraries, news alerts, project updates and more through Livingston, N.J.-based **NOP World Health's** new On-Sight Virtual Office. The product lets users initiate, search, store and track research from all of the NOP World Health companies on their PCs, through customized, password-protected Web sites. For more information visit www.nopworld.com.

NPDFashionworld, Port Washington, N.Y., an online information source for the fashion industry, has launched a dedicated fashion footwear presence on its Web site. Subscribers to www.npdfashionworld.com can now get answers to their business and marketing questions 24 hours a day, seven days a week.

Wayne, Pa.-based **PCRS, Inc.,** a pharmaceutical research firm, has launched RapidTrials.com, a research service that brings together pharmaceutical companies and physicians for development of new products. For more information visit www.rapidtrials.com.

SPSS is now available as a software development kit for analytical Web applications. SPSS WebApp Framework enables companies to build customized Web-based applications for predictive analysis. SPSS WebApp-built applications bring analytics to tasks such as forecasting sales figures and processing survey results from any computer with access to the Internet, with no need for additional software or browser plug-ins.

Yahoo! Inc. and **ACNielsen** have launched the Yahoo!/ACNielsen Internet Confidence Index. Designed to measure and trend U.S. consumers' attitudes toward online services, the Index will provide a barometer for general consumer confidence in Internet offerings.

Names of Note

continued from p. 10

management team of *Galloway Research Service*, San Antonio, Texas, as a project supervisor for the firm's recruiting department. The firm also announced that **Rosa Gutierrez** has completed 20 years of service as a Spanish-language interviewer.

Genactis, Ltd., has named **Karen Hyver** CEO of its American subsidiary Genactis, Inc., Fort Washington, Pa., and **Larry Levin** has been named senior vice president of Genactis Group, its new division for syndicated marketing research.

Levin Hyver

Arbitron Inc. has promoted **Ronald Kolessar** to vice president of technology, worldwide Portable People Meter (PPM) development.

Greenfield Online, Wilton, Conn., has named **John Polich** vice president for analytic services and **Pieter Coenraads** director of panel management and operations.

Aegis Communications Group, Inc. has named **Herman M. Schwarz** president and CEO. Schwarz will continue in his role as president of the firm's Elrick & Lavidge marketing research division.

Opinion Research Corporation, Princeton, N.J., has named **James C. Fink** CEO of worldwide market research.

Concord, Mass., research firm *MORPACE Pharma Group, Ltd.*, has named **Robert Schumaker** to the newly created position of managing director, North American sales and marketing.

As part of the acquisition of U.K.-based *Market Research Solutions Limited* (MRSL) by *Harris Interactive*, Rochester, N.Y., **Greg Smith**, currently vice president of European international development at Harris Interactive, has assumed the duties of group managing director for MRSL and is in charge of MRSL's day-to-day operations. Smith reports to **David H. Clemm**, president and COO of Harris Interactive. Clemm has become chairman of a new board of directors for MRSL. He has been joined by Smith, **David Vaden**, vice president of corporate finance for Harris Interactive, and **Roger Landells**, who has become a non-executive director and will be retained as a consultant to both MRSL and Harris Interactive. At the same time, **Martin Callingham**, visiting professor at Birkbeck College, University of London, and formerly group market research director for Whitbread plc., continues as a non-executive director of MRSL. In addition, a new executive committee has been formed, comprising Smith and MRSL founder directors **Tim Baker**, managing director of Magenta, **Jon Darby**, managing director of group operations, and **Bernard Hudson**, development director. Of the other founding directors, Roger Landells has moved to a non-executive director role and **Joy Reynolds** will retire.

Crestwood Associates, a Kirkland, Wash., research firm, has named **Stephen Jensen** as its research director. In addition, **Terry D. Roberts** has joined the firm as a senior consultant.

David Hernández has been appointed managing director of *RTA Claritas España*, a Madrid-based company of VNU Marketing

Information Europe.

Millennium Research Inc., an Apple Valley, Minn., research firm, has named **Terry Solom** data processing manager.

Jay Wilson, chairman and CEO of *Roper Starch Worldwide*, has been inducted as the 59th member of the Market Research Council Hall of Fame.

Caroline Thomas has rejoined the staff of *Consumer Pulse*, Birmingham, Mich., where she will resume her responsibilities in the client service area.

MAXimum Research, Inc., Cherry Hill, N.J., has named **Beth Malmud-Dworkin** vice president of client services.

Ipsos-Reid, a Washington, D.C., research firm, has named **Thomas Riehle** president and COO of the company's new U.S. public affairs division.

Encino, Calif.-based *E-Poll* has named **Kurt Bensmiller** vice president, research.

Bensmiller **Goodpaster**

Bob Goodpaster has been named senior vice president and team leader of the Grand Rapids, Mich., office of *Wirthlin Worldwide*.

Ottawa-based data management software firm *Beyond 20/20 Inc.* has named **Anne-Marie Vinet** marketing communications coordinator; **Bill White** account executive; **Daniela Ignea** quality assurance team member; **Huanliang Xia** developer - nightly build and setups; James Wu developer - WDS team member; **Ken Lin** developer - builder browser team member; and **Sharmistha Chatterjee** quality assurance team member. The firm has also welcomed back **Janet Smith** after her maternity leave.

NFO WorldGroup has named **Terry Schweizer** vice president and general manager of NFO North America's Chicago marketing office. In addition, **Bridget Armstrong** has been named senior vice president of NFO North America.

Schweizer **Armstrong**

Moderator MarketPlace™

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 952-854-5101. Fax 952-854-8191. Or visit www.quirks.com/mod_market/index.htm.

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Marketing Advantage Rsch. Cnslts.
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2001 Customer Satisfaction Directory

This directory was developed by mailing forms to firms that we identified as actively marketing their customer satisfaction services.

A Service Excellence Group, Inc.
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Ph. 800-888-9189
Fax 314-878-1818
E-mail: servicex@aol.com
www.serviceexcellencegroup.com
Marci Bikshorn, President

A/M Employee Research Services
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Fax 314-726-2503
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Stephen Lemon, Sr. Manager of Data Collection

ACG Research Solutions, a full-service market research company, provides clients with customer satisfaction/loyalty studies using a proprietary model. Our data center includes 40 computer-equipped stations using Ci3 CATI software. Our qualitative capabilities include experienced moderators on staff and a state-of-the-art focus group facility. In addition, we offer clients wireless interactive audience measurement studies.
(See advertisement on p. 84)

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Scott Segrin, V.P. Operations

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(See advertisement on p. 85)

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Fax 651-452-9820
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www.allianceresearch.com/1119.htm
Clint Brown, President

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(See advertisement on p. 87)

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(See advertisement on p. 43)

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(See advertisement on Back Cover)

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(See advertisement on p. 32)

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(See advertisement on p. 66)

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(See advertisement on p. 90)

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Index of Advertisers

Trade Talk

continued from p. 110

world. How can you be proud of a country that does so many horrible things?

Probably because it's a country that also does so many wonderful things. It gives us freedoms unmatched anywhere in the world. It allows us to worship – or not to worship – the god of our choice. It cares about the health and safety of its residents and takes time to care about the needs of those outside its borders.

Tuesday evening, as I sat on the couch, wishing my fiancée was safe beside me instead of finishing up a lengthy trip to South America, I scanned TV stations to get the latest news. I happened upon coverage of members of Congress as they met on the steps of the Capitol to display their unity in the face of the day's events.

After the speeches ended and the groups dispersed, the cameras pulled back. Quietly, almost imperceptibly, the strains of "God Bless America" rose from the assembled crowd. As the melody grew more audible, I found myself singing along, blinking to see through the tears streaming down my face.

For a few moments, I was unashamed to be proud of my country. I felt no need to utter caveats and qualifiers to leaven my display of national pride.

In the hours and days afterward my patriotism grew as I saw and heard tales of heroism, self-sacrifice, and endless toil.

If anything good comes from this nightmare, it will be that the country rediscovers its ability to be proud of itself. To be sure, expressions of nationalism can be ugly and divisive. But it's been so long since we've seen that they can also be beautiful and unifying. What better way to soothe a country so rent by sadness and pain than with a reinvigorating of our national pride? Pride for all the good things we do, the generosity, the compassion, the hard work, the tolerance. The things that make us Americans.

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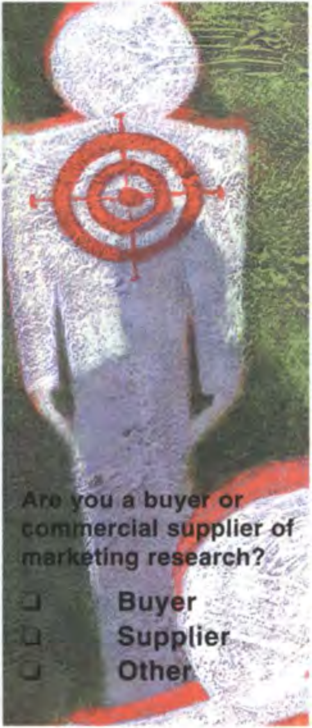

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Trade Talk

By Joseph Rydholm, QMRR editor

From the mountains to the prairies

At press time in mid-September, we are just days removed from the attacks on New York and Washington. I was on my way to work here in Minneapolis that Tuesday morning, listening to a local wacky FM morning radio show. It was my second work day back after a long vacation and I was absorbed in planning the coming week so I had tuned out the typically raucous drive-time chatter.

The words "plane crash" and "World Trade Center" brought me to attention.

My God, I thought, some poor commuter pilot must have had a heart attack...

Referencing their in-studio TVs, the now-serious DJs began describing the disaster-in-progress. Minutes later the second plane — a commercial airliner — crashed into the other tower.

I could scarcely comprehend what they were describing.

I rushed to get to work, bounding up the stairs of our office building, eager to find out if my co-workers knew more about what was going on.

The rest of that day is a blur. We spent part of the morning in an office down the hall, riveted to a small TV set and the seemingly endless series of calamities it displayed.

I didn't think I could be shocked further, but when the towers of the Trade Center collapsed, I was truly astonished. In some terrible way, it wouldn't have been so awful if the towers had withstood the attacks. But seeing these two pillars falling almost weightlessly yet inexorably earthward, I felt very vulnerable — just how the terrorists wanted me to feel, I'm sure. If they can knock those buildings down, and fly into the Pentagon for God's sake, no one and no place is safe.

Hurried calls and e-mails were sent to friends in New York and Boston, making sure people weren't on any of the airplanes or at Ground Zero, as the Trade Center site would come to be called. The replies bore good news — welcome comfort on a day when so little could be found.

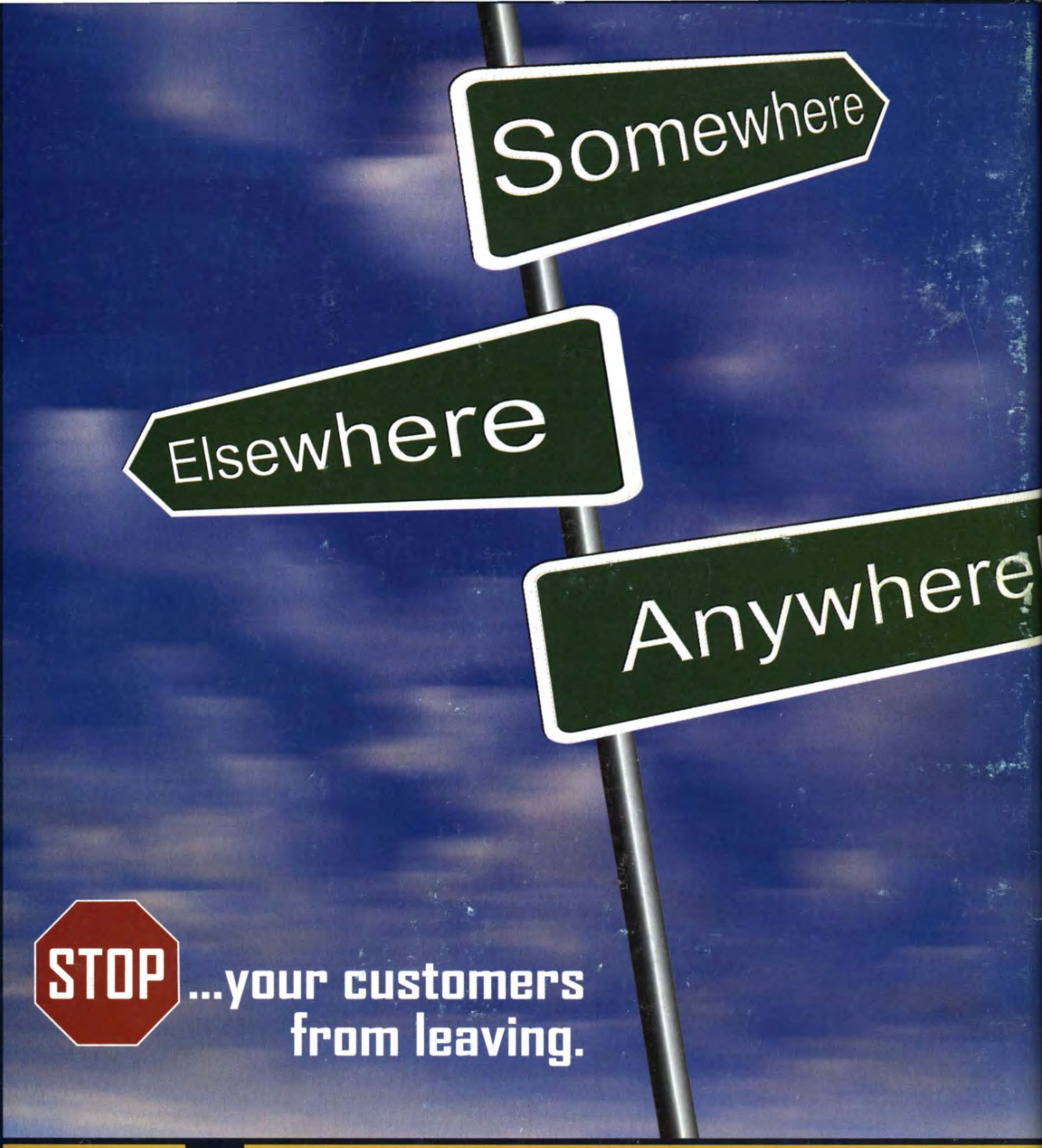
In the days afterward, friends and members of the research community sent mass e-mails full of encouragement and pleas for togetherness. I must have received five or six copies of Canadian commentator Gordon Sinclair's editorial in support of the U.S. (It's a mystery how something produced in 1973 in response to anti-U.S. sentiment during the Vietnam War suddenly found its way into the Internet's collective consciousness as a response to the terrorist attacks.)

I don't know what the future holds. A lengthy conflict looms. More lives will be lost. The pain isn't over. Our nation surely will never be the same.

But I am confident we will survive.

Though I am proud of my country, I am not the flag-waving type, probably because patriotism has become kind of unfashionable in my lifetime. Some associate it with right-wing extremists, angry white men who drape themselves in the flag and spout hateful rhetoric and long to close our borders to preserve the "purity" of our nation. For others, to be pro-U.S. is to be naïve at best and hopelessly ill-informed at worst. After all, these people scornfully say, we're racist, we exploit people and natural resources, and we inflict capitalism on the rest of the

continued on p. 109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