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Marketing Research Review

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October 2002

Customer satisfaction issue

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Improving the customer experience through research

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2002 Directory of Customer Satisfaction

QUIRK'S
Marketing Research Review

Volume XVI, Number 9 October 2002

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DTC ads work

One out of four consumers reported that direct-to-consumer (DTC) advertising prompted them to call or visit their doctor to discuss the prescription drug they saw advertised, according to a PharmTrends study. The PharmTrends study, based on a survey conducted among 26,000 individuals by marketing research firm Ipsos-NPD, found that 47 percent of the U.S. representative sample population have seen advertising for prescription medication products in the 12 months prior to the study, which fielded in February 2002.

"The consumers confirmed that direct-to-consumer advertising gives them information to take better control of their personal health care," says Fariba Zamaniyan, director and spokesperson for Ipsos PharmTrends. The study, conducted and paid for by Ipsos PharmTrends, also found that:

• 25 percent of respondents stated that direct-to-consumer advertising educated them of alternate drug options for their condition(s).

• 15 percent of respondents stated DTC advertising prompted them to request the prescription drug they saw advertised from their doctor.

• 6 percent of respondents were prompted to switch from current drug therapy to a different drug that they saw advertised.

"Advertising can be beneficial not only to drive Rx branded drug awareness to ultimately encourage trial but also serves as a reminder for patients to comply with their doctor's instructions to fill or refill their prescriptions," Zamaniyan says. Just over one in 10 of respondents (13 percent) stated that advertising reminded them to refill a prescription for a drug they are currently taking.

"Consumers are telling us that they like receiving information about their health care options. The key to successful Rx advertising is whether or not the ads prompt an action by consumers and generate prescription fulfillment," Zamaniyan says.

Consumers who purchase Rx drugs as part of their treatment regimens report high levels of ad recall for that Rx medication, reports PharmTrends. For example, Viagra tops the list for ad recall among buying consumers. Ninety-five percent of the consumers who purchased Viagra recalled seeing an ad for the brand.

"With more 'blockbuster' brands going off-patent over the next few years, it will be more important than ever for drug manufacturers to raise the bar on awareness for existing and upcoming formulations," Zamaniyan says. "Consumers are receptive to what drug manufacturers have to say about their brands, particularly if they or a family member suffer from the ailment. Drug companies who can use DTC advertising effectively to convert consumers to well-informed buyers and build long-term loyalty and persistent behavior will be most successful in extending the life of their brands. These companies should continue to support the use of DTC advertising in their market."

During the month of February, 2002, Ipsos PharmTrends interviewed a representative sample of over 26,000 adults 18+ years of age nationwide using InstaVue, an omnibus mail survey. The study was conducted and paid for by Ipsos PharmTrends. For more information visit www.ipsos-npd.com.

Awareness of satellite radio high

Less than a year on the market, and with only one service fully operational, satellite radio appears to have captured broad-based awareness among Americans as an alternative to broadcast radio. New findings from Minneapolis-based research firm Ipsos-Reid show that nearly half (47 percent) of the American population aged 12 and over are aware of satellite radio services such as XM or Sirius Satellite Radio. This translates into over 100 million people within the current U.S. population (2000 U.S. Census figures), according to data from the company's quarterly study examining consumer digital music behavior, TEMPO 2002: The Digital Music Tracker.

The two aforementioned companies have spent an estimated $1.5 billion on a complex satellite broadcast network offering both original and pre-packaged digital music, news, sports and talk programming that can be heard anywhere in the U.S. in cars and home radios. The services promise superior sound and transmission quality, and fewer or no commercials. While satellite radio is still very much in the early stages, some industry experts predict that as many as 25 million Americans will be paying for this service by the end of the decade.

Twenty- and 30-something males are most likely to be aware of satellite radio services, as approximately three-fifths of 18-to-34-year-olds report they have heard of these new radio services (60 percent of 18-to-24-year-olds, and 57 percent in the 25-to-34 age group). Other age groups hold strong awareness levels as well, however. Nearly half of both U.S. teenagers and baby-boomers (47 percent of both 12 to 17 and 35 to 54-year-olds), and one-third (33 percent) of Americans aged 55 and older indicate they are aware of this recently launched technology, which requires the purchase of satellite-enabled audio hardware and a monthly subscription fee for operation.

Interestingly, American men are significantly more likely to be aware of satellite radio than American women are: roughly three-fifths (59 percent) of U.S. men aged 12 and older claim to have heard of this new radio broadcasting system, compared to only 34 percent of American women.

"Despite the relatively recent roll-out of satellite radio services in the U.S., awareness levels are surprisingly strong among the general population, especially among men in their 20s and 30s,"

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Andrew Jeavons has been appointed vice president of business development at *PTT Systems Inc*, a North Palm Beach, Fla., research software firm.


Jeavons Haynes

David Haynes has been named president of *Western Wats*, Provo, Utah.

Market Decisions Corporation, Portland, Ore., has announced a number of personnel moves, adding **Christian Seppa** to its IT department


Seppa Simmons

and promoting **Aaron Simmons** to lead day field supervisor, **Mark Marshe** to lead night field supervisor,


Marshe Hogg

and **Christian Hogg** to research analyst.

Peter Daboll, president of Reston, Va.-based comScore Networks' Media Solutions Division, has been named president of comScore's new **Media Metrix Division**.

The Atlanta Chapter of the American Marketing Association has named **Jim Nelems**, president and CEO of Norcross, Ga., research firm *The Marketing Workshop*, as the 2002 Marketer of the Year.

Walker Information, Indianapolis, has promoted **Rob Easton** to vice president, applications development.

Randy Hanson has been named senior vice president, custom research, at *Flake Wilkerson Market Insights*, Little Rock, Ark.

Opinion One, Cincinnati, has named **Thomas Zoretich** president and CEO.

Montgomeryville, Pa.-based research firm *JRA, J. Reckner Associates Inc.* has announced several staff additions: **Marie Strasser** as vice president; **Christi Clark** as senior manager/information and technology services; **Lexy Frazier Sawyers** as senior manager/qualitative research services; **Jason Gamber** as project manager/global healthcare research services; and **Paula Machado**, programmer. In addition, **Melissa Boysen** has been named manager of the firm's new Milwaukee office. **Gail Dreger** has joined the Milwaukee team as project director. **Kari Bugiski**, project manager, has transferred to the Milwaukee office from JRA's Racine Contract Operations group.

James Granger has retired as CEO and president of *Wirthlin Worldwide*, a Reston, Va., research firm. **Dee Allsop** has been named CEO and **David Richardson** has been named president.

Rob Hernandez has joined Westport, Conn.-based *Greenfield Consulting Group* as managing director/moderator, based in Libertyville, Ill. **Rob Batey** has joined the firm's Westport office as director/moderator.

Michelle Carter has been named

Carter

vice president at *Decision Analyst, Inc.*, Arlington, Texas.

Taylor Nelson Sofres (TNS) has named **Stephen Potts** regional director of TNS Healthcare in Asia Pacific. He will be based in Singapore.

Cathy Kneidl has been named president of *Envoy*, the new international data collection division of *Maritz Research*, St. Louis.

CJ Olson Market Research, Inc., Minneapolis, has promoted **Michelle James** to director of data collection.

Cathy Peterson has been named managing partner of Markitecture, a Norwalk, Conn., research firm. In addition, the firm named **Brian Gordon** vice president for business development, **Doug Parent** partner, and **Heather Nelson** director of research.

Charles Ilsley has been named managing director of New York-based research firm *Ziment's* U.K. operation.

Marketing Research Services Inc. (MRSI) has named **Ken Seeger** senior account executive. He will be based at the firm's Chicago office. At the com-

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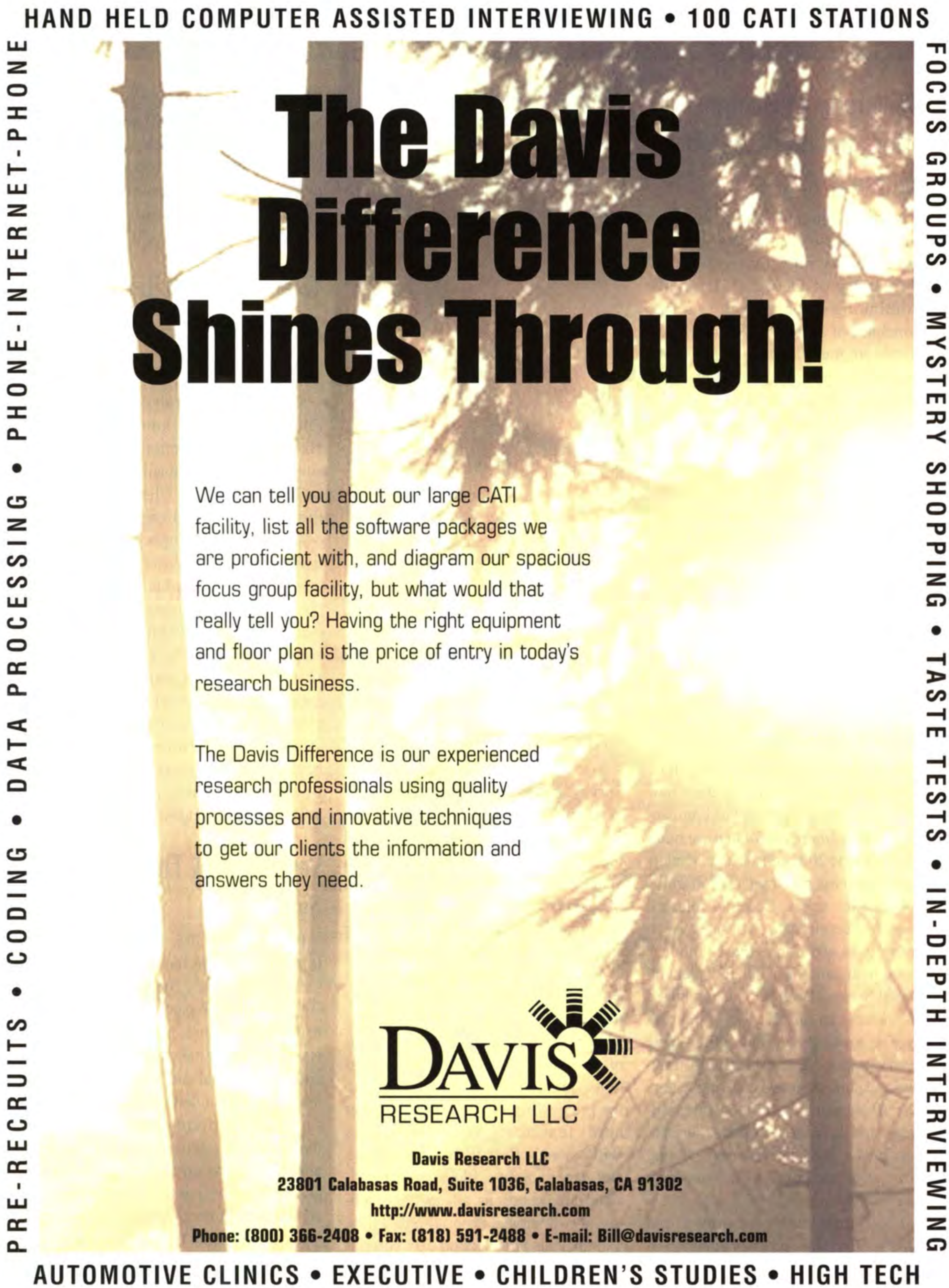

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Product & Service Update

University of Georgia offers online research course

A new online certificate course, Web Survey Research and Data Delivery Methods, is now offered by the University of Georgia Center for Continuing Education through its Principles of Marketing Research certificate program. The new course can be taken as a stand-alone module or as part of the certificate program. The course provides information about the techniques of quantitative and qualitative research, online reporting, approaches to online projects, and primary and secondary Internet research. It concludes with a section on ethics, privacy and data protection. For more information call 800-325-2090 or visit www.principlesofmarketingresearch.org.

Books profile American women, men, and U.S. ethnic makeup

New Strategist Publications, Inc., Ithaca, N.Y., is now offering three new books. *American Men* and its companion volume *American Women* use numbers from the 2000 census to let readers compare and contrast the changes between the sexes. Recently released economic census data on business ownership is an addition to these volumes, along with data from the 2000 General Social Survey. Each book is organized so readers can quickly locate the data they're looking for, data which have been compiled into tables with time-saving calculations and descriptive text. The 10 chapters in each book are: attitudes and behavior, business, education, health, income, labor force, living arrangements, population, spending, and wealth.

The fourth edition of *Racial and Ethnic Diversity* profiles America at the millennium. Presenting 2000 census numbers on race, *Racial and Ethnic Diversity* includes new data that profile minority-owned businesses. It also provides detail on the Asian population, and it gives a look not only at American Indians, but also Native Hawaiians and other Pacific Islanders who, in the past, were lumped in with Asians. For more information visit www.newstrategist.com.

New Web survey software from Perseus

Perseus Development Corporation, Braintree, Mass., is now offering SurveySolutions XP, a family of Web survey software solutions for capturing information from customers, employees, and Web site visitors using Web surveys, e-mail surveys and Palm-powered surveys as well as traditional telephone, fax and paper surveys. Featuring enterprise-wide data storage, SurveySolutions XP offers support for open industry standards such as HTML, XML, and CSS. Additionally, Perseus' newest product line provides DB2 and SPSS support.

Microsoft Office-compatible, SurveySolutions XP does not require Windows XP or Office XP. While SurveySolutions XP offers the look and feel of Windows XP, it also works with Windows 95, Windows 98, Windows ME and Windows 2000. It is also equally compatible with Microsoft Office XP and Office 2000. SurveySolutions XP is available in a standard edition, professional edition, and three enterprise editions. SurveySolutions XP Standard is used for Web and e-mail surveys. It offers multi-page support, table questions, question renumbering, a Web tab for previewing of surveys, and other new features. SurveySolutions Professional offers Web, e-mail, kiosk and paper surveys, along with multi-sided table questions, advanced branching, answer piping, export to SPSS files, gap analysis and Section 508 compliance. SurveySolutions XP Enterprise is used for enterprise-wide survey management. Enterprise offers three editions — Workgroup, Department and Corporate — which vary by the number of users within an organization. For more information visit www.perseus.com.

Telephone omnibus targets Hispanic consumers

Research Data Design, Inc. (RDD), Portland, Ore., has introduced Pulso Hispano, a monthly omnibus telephone survey targeting Hispanic respondents in 10 U.S. markets. Clients can select their markets and questions, and data is delivered in 10 business days. In addition to the client-requested data, RDD captures demographic and psychographic information from each respondent that can be used for further analysis. RDD fields Pulso Hispano on the first of every month, and completes 300 interviews per market with even male/female splits. Respondents are screened for Spanish-language speaking households, age, gender, and security. For more information visit www.researchdatadesign.com.

Version 8 of The Survey System

Petaluma, Calif.-based Creative Research Systems has released version 8.0 of The Survey System, its survey analysis software package for PCs. The latest version comes in three editions — Basic, Professional, and Enterprise — and has optional modules that enable researchers to undertake many types of survey and perform multiple levels of data analysis. The Survey System allows users to create anything from paper questionnaires to computer-assisted telephone interviewing (CATI) surveys. The optional Internet Module lets

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Research Industry News

News notes

London-based **Aegis Research**, a division of the Aegis Group plc, has chosen **Synovate** as the new brand name for its 43-country research network. The full transition to Synovate is expected to be complete by January 1, 2003. In the interim, the individual companies making up the network will retain their original names while endorsing the new brand. In the U.S., Aegis Research companies include Market Facts Inc., Market Facts of Canada, BAIGlobal, Strategy Research Corporation, Tandem Research Associates, Marketing Strategy & Planning, Motoresearch, MarkTrend, Copernicus, and IMR Research Inc.

Opinion Research Corporation, Princeton, N.J., has been named one of Fortune Small Business's 100 Fastest-Growing Publicly Held Small Businesses in America for the second consecutive year. Compiled with help from Zachs Investment Research, the FSB 100 is based on three criteria: earnings growth, revenue growth, and stock performance over the past three years.

Hy Mariampolski of **QualiData Research**, New York, and Pat Sabena of **Sabena Qualitative Research Services**, Westport, Conn., conducted two three-day workshops on qualitative research practices and techniques in Beijing and Shanghai in September. The workshops were hosted by the China Market Research Association and the Pan-Asia Market Research Institute.

Arbitron Inc., New York, will expand its Portable People Market trial in the United States. The company plans to equip a new and separate panel of approximately 1,000 consumers in the Philadelphia Radio Metro Survey Area that will allow direct comparisons to the radio station audience estimates being produced by the existing panel of consumers in the current PPM market trial. Arbitron also announced that it agrees in principle with the radio industry's request for a second Portable People Meter market trial in one of the Top 25 Hispanic markets. The company noted that fielding this second PPM trial market would be contingent on the

Research Calendar

The American Marketing Association (AMA) will hold a conference on applied research methods on October 15-18 at the New Orleans Hyatt. For more information visit www.marketingpower.com.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on telecommunication research on October 20-22 in Oslo, Norway. For more information visit www.esomar.nl.

The Council of American Survey Research Organizations (CASRO) will hold its annual conference on October 23-25 at the Sheraton El Conquistador, Tucson, Ariz. For more information visit www.casro.org.

Anderson, Niebuhr & Associates will hold a workshop on analyzing and reporting questionnaire data on October 24-25 at the Holiday Inn Select - International Airport, Minneapolis. For more information visit www.ana-inc.com.

ExecuSummit will hold a one-day conference on strategic market research in the pharmaceutical industry on October 30 in Philadelphia. For more information contact Robert Daniels at 845-473-0199 or visit www.execusummit.com.

Tragon Corporation will hold a workshop titled "Ensuring Consumer-Defined Product Quality" on November 4-6 at the Sheraton Palo Alto, Palo Alto, Calif. For more information visit www.tragon.com.

The Marketing Research Association (MRA) will hold its education conference and technology forum on November 6-8 at Marriott's Camelback Resort, Scottsdale, Ariz. For more information visit www.mra-net.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on qualitative research on November 10-12 in Boston. For more information visit www.esomar.nl.

The American Marketing Association (AMA) will hold its advanced school of marketing research techniques on November 10-15 at the University of Georgia, Athens, Ga. For more information visit www.marketingpower.com.

The Society of Insurance Research will hold its annual conference at the Hyatt Riverfront Hotel, Savannah, Ga., on November 17-20. For more information visit www.sirnet.org.

GIS Day 2002 will be held on November 20 at various sites worldwide. For more information visit www.gisday.com.

The American Marketing Association (AMA) will hold its 2002 Explor Awards and Forum on November 21-22 at the Hilton Hotel & Towers, Chicago. For more information visit www.marketingpower.com.

The U.K-based Association for Qualitative Research (AQR) will hold its annual conference on November 29 at One Whitehall Place, The Royal Horseguards Hotel, London. For more information visit www.aqr.org.uk.

formation of the proposed joint venture with Nielsen Media Research. The company also reaffirmed its commitment to a thorough examination of radio listening, diary-keeping behavior and PPM compliance during the morning drive-time period and other radio dayparts.

Harris Interactive, Rochester, N.Y., has announced plans to consolidate and realign its various operations in the U.K. to operate under the new brand name HI Europe. HI Europe, a wholly-owned subsidiary of Harris Interactive, will provide integrated, consultative market research, including Internet-based research to its clients.

Research Data Design, Inc. (RDD), Portland, Ore., has been named one of the Top 100 Fastest Growing Private Companies in Oregon by *The Portland Business Journal*. RDD placed 57th on this year's list for achieving a 70 percent revenue increase between 1999 and 2001. To be eligible for the Fastest Growing Private Companies list, companies must demonstrate significant revenue growth for three straight years, be headquartered in Oregon, and have been in business for three years. PriceWaterHouse Coopers verified all results.

Fort Washington, Pa.-based **Marketing Systems Group** is celebrating its 15th year in business.

Market Trends, Inc., Seattle, is celebrating 20 years in business.

Acquisitions

In a deal announced too late for inclusion in our July/August issue, **comScore Networks, Inc.**, Reston, Va., and **Jupiter Media Metrix, Inc.**, New York, reported in June that comScore has acquired certain assets of the Media Metrix Internet Audience Measurement service in the United States and Canada. ComScore simultaneously announced the establishment of its Media Metrix Division, which will sell and service comScore's portfolio of Internet audience measurement services. ComScore's Media Solutions Division will be merged into the Media Metrix Division. The acquisition was completed through a cash transaction of approximately $1.5 million. A number of Jupiter Media Metrix employees will join comScore's Media Metrix Division, and comScore will establish a New York City office to accommodate staff currently employed in that location.

Milpitas, Calif., Internet audience measurement firm **NetRatings** has agreed to acquire a controlling interest in France-based Internet audience behavior measurement firm **NetValue**. Following its acquisition of the controlling interest, NetRatings will initiate a tender offer to acquire the remaining outstanding shares of NetValue. In the agreement signed by NetRatings, NetValue and NetValue's majority shareholders, NetRatings acquired a 52 percent ownership position in NetValue through the direct purchase of 4,603,069 shares of common stock from majority shareholders at EUR 2 per

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Qualitatively Speaking

Videoconferencing of focus groups: a good option if utilized effectively

By Tom Greenbaum

Editor's note: Tom Greenbaum is president of Groups Plus, a Wilton, Conn., research firm. He can be reached at tlg@groupsplus.com.

While most market research professionals will agree that watching focus groups via videoconferencing is not as effective an experience as observing from behind the one-way mirror, it definitely is far better than listening to audio or videotapes after the fact. Videoconferencing does enable the client personnel to observe the proceedings in real time, and therefore have the opportunity to provide input to the moderator. However, many users of focus group videoconferencing do not get as much benefit from this technique as they could, because they do not follow some basic guidelines which would enable them to maximize the use of this very effective new technology.

The following will summarize the most important actions that a client organization can take to leverage the benefits associated with using the videoconferencing technology when conducting focus groups in remote locations.

At the focus group facility

• Before the groups begin — It is very important that the moderator conduct a short briefing with the people in the remote location before the sessions begin. The purpose of this briefing is to outline the approach that will be followed in conducting the groups, and how the moderator anticipates interacting with the people in the remote location. Also, the pre-briefing should review the objectives of the sessions, the composition of the groups, and the structure of the post-group debriefings. This is important, as it sends a message to the people at the remote location that they should stay to the end so they can participate in the discussion with the moderator.

• During the groups — One of the biggest mistakes that organizations make when using videoconferenced focus groups is not to send anybody to the remote location to interact with the moderator while the groups are in session. The assumption is that the moderator will be able to come to the back room during the group and talk to the people at the remote location via telephone about any questions they might have, in much the same way that they might if the observers were located behind the mirror. This arrangement does not work, as it is too difficult and time-consuming for the moderator.

The optimal solution would be for a very senior person on the project team from the client organization to attend the focus group. This person is charged with the responsibility of being the conduit between the people at the remote location and the moderator. Their job is to ensure that any information that the people want to communicate to the moderator can be easily understood in a quick interaction when the moderator comes to the back room for a brief time during the group. This makes the moderator's job of receiving client input both more effective and much more efficient.

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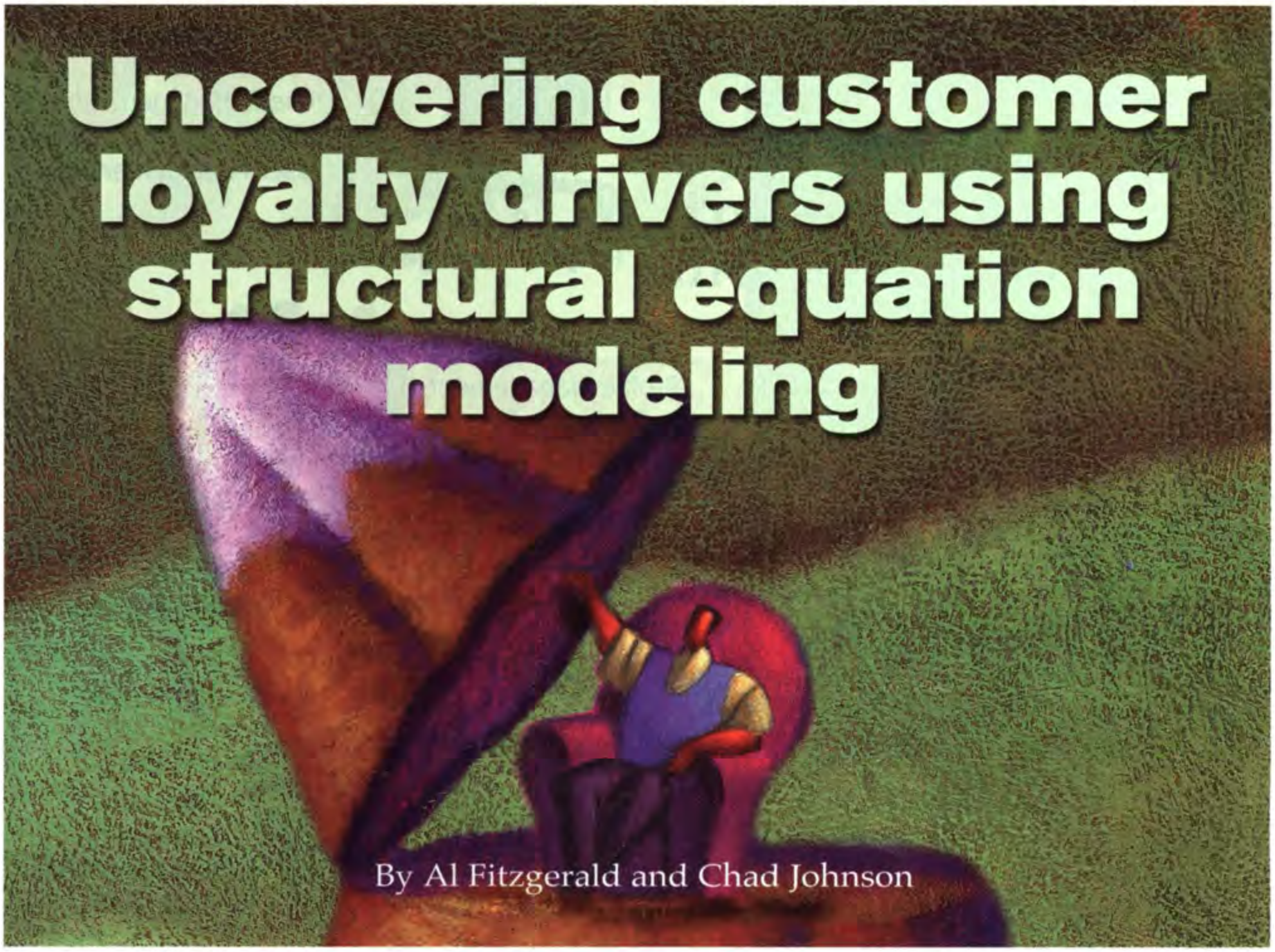

Uncovering customer loyalty drivers using structural equation modeling

By Al Fitzgerald and Chad Johnson

Editor's note: Al Fitzgerald is president and founder of Answers Research, Inc., Solana Beach, Calif. Chad Johnson is a statistician with the firm. They can be reached at info@answersresearch.com.

In an effort to continually improve a company's product or service offerings while growing a consistent customer base, marketers wisely strive to maximize loyalty and customer satisfaction by deploying loyalty and satisfaction research. Ideally, this type of research will yield the insights needed to achieve a balance between both the amount invested into product development/enhancement and the amount invested in customer maintenance/growth. Unfortunately, while it is imperative to solicit customer feedback to ensure these critical opinions are integrated into product development, it is not as simple a task as merely asking a customer what they like or dislike about a product or service.

Successfully understanding loyalty and satisfaction is a process in which the researcher identifies how overall satisfaction with a company's products and services and loyalty to the brand relate to all specific areas affecting these key issues. Determining this relationship allows researchers to uncover perhaps the most important facet of this kind of study — the drivers of overall loyalty and satisfaction. Gaining a clear understanding of this relationship is most thoroughly achieved using structural equation modeling (SEM). Largely due to its robust modeling capabilities and easy-to-understand graphical output, it is a technique that allows marketers to keep companies informed, and customers contented.

Other methods

Before looking at how SEM approaches the objective of determining the drivers of loyalty and satisfaction, it is a good idea to look at ranking and regression modeling — two of the more common approaches that have been utilized in the past. Ranking modeling is a fairly straightforward and simple method, and regression modeling is a more complicated statistical modeling approach.

• *Ranking model*

Typically, a customer satisfaction survey includes a series of questions in which respondents rate several attributes of a product or service on a Likert (one-dimensional) scale. This is done twice. First when the respondents rate the attribute's importance in a gener-

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Editor's note: Lucy Klausner is vice president of Polaris Marketing Research, Inc., Atlanta. She can be reached at 404-816-0353 or at lucy@polarismr.com.

Ever since Alcoa Aluminum founder Arthur Vining Davis took the first two letters of his three names to create Arvida in 1958, the Boca Raton, Fla.-based real estate development company has focused its mission on planning, developing, building, and operating master-planned residential and resort communities for customers seeking a superior lifestyle. Arvida's first undertaking was the renowned Boca Raton Hotel and Club. Since then, it has developed more than 60 master-planned communities in five states. These communities serve individuals and families with varied income levels, from first-time buyers to retirees, providing amenities, services and programs aimed at addressing the needs of all residents.

Now owned by the St. Joe Company, Arvida is known for its commitment to quality and excellence, with a goal of making every facility and service the finest of its kind. To reach that goal, Arvida's management began conducting in-house satisfaction surveys of its home buyers at closing, starting in 1992. In 1995, Arvida established infrastructure groups charged with maintaining the company's five core strengths:

• master planning, for creating exceptional communities;

• recreation and leisure, for rejuvenating residents through programs and facilities;

• education, for enriching residents through onsite lifelong learning opportunities;

• community safety, for connecting and protecting residents; and

• customer relationship, for caring for customers through strong communication and feedback.

In 1998, Arvida hired an independent consultant, Lee Harkins of Harkins and Associates, to work full-time on improving Arvida's processes

Measuring customer feedback helps real estate development company build strong relationships

By Lucy Klausner

as they impact customer relationships. Harkins, in turn, brought in Atlanta-based Polaris Marketing Research, Inc. in 1999 to develop a feedback program that would give Arvida the data it needed to help develop positive, lifelong relationships with its customers.

Ample opportunities for customer feedback

Polaris surveys each Arvida home buyer throughout the sales, construction, and ownership processes to provide Arvida with a full understanding of the entire home buying experience from the customers' perspective.

When they first contract for a home, customers fill out a written buyer's profile that tells Arvida who they are and what they want in a new home and community. A second questionnaire addresses their experience with the sales process and design selections. Arvida first offered customers the option of responding to subsequent surveys via e-mail or interactive voice response calls, but now uses only telephone interviewing because it provides the extensive probing necessary for uncovering hidden complaints.

After closing, home buyers answer questions on the construction and closing process. About 90 days after closing, they complete a survey on warranty service. Finally, one year after their purchase, customers are asked to rate their home on topics such as satisfaction with the floor plan and their community on such issues as quality of life and amenities.

This comprehensive program allows Arvida to track each customer touchpoint so that opportunities for major and incremental improvements can be implemented and tracked.

Critical to the feedback program are Polaris' action reports. These allow Arvida to intervene promptly with homeowners who report serious problems and ask for direct contact. "We have learned by reading action reports and listening to our customers throughout the home building experience that setting clear expectations throughout each process is key," says Lee Harkins. "By tracking home buyers across the

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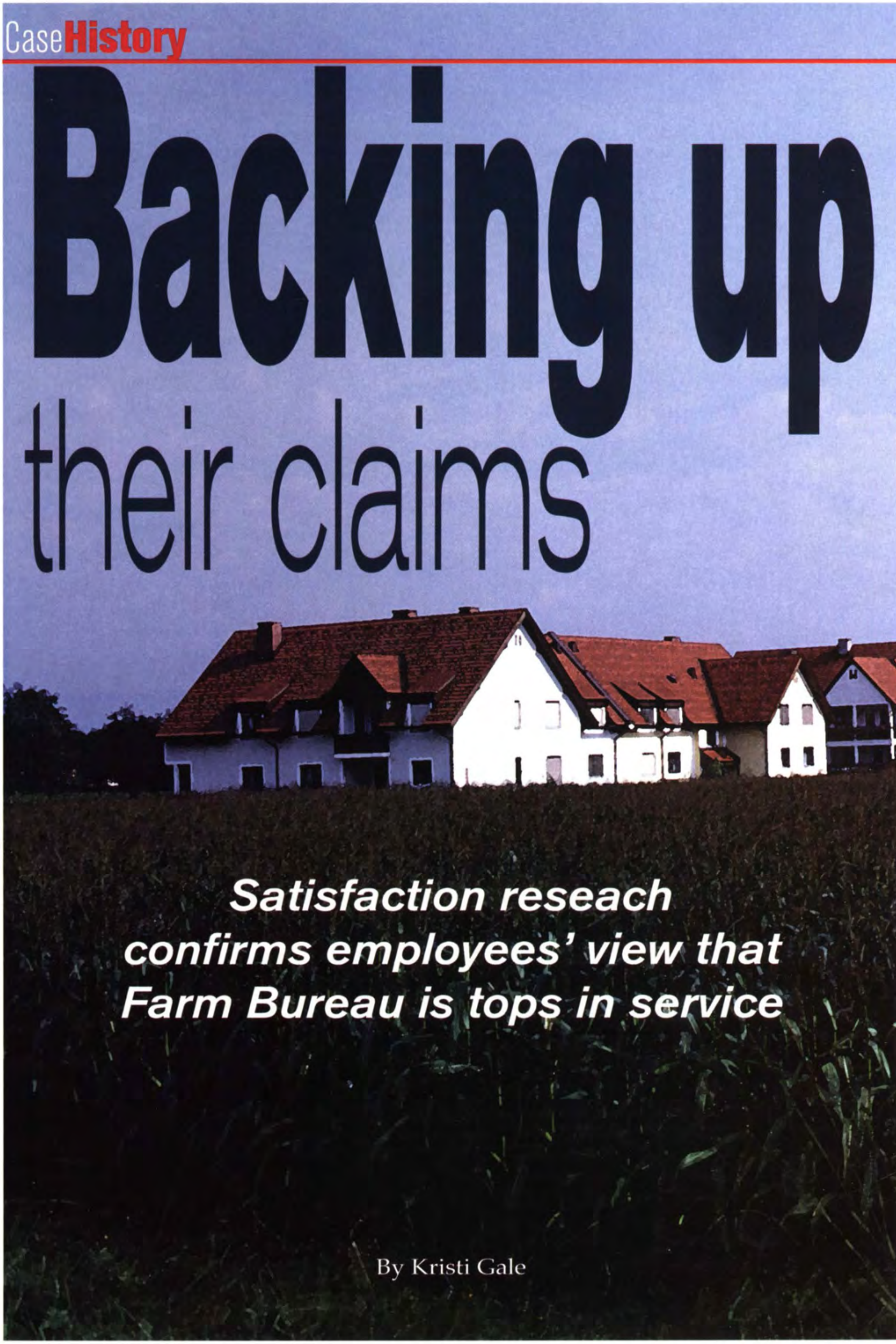
Backing up their claims



Satisfaction reseach confirms employees' view that Farm Bureau is tops in service

By Kristi Gale

Editor's note: Kristi Gale is senior marketing research analyst at Farm Bureau Financial Services, West Des Moines, Iowa. She can be reached at kgale@fbfs.com.

If a person were to ask several employees in the claims department at Farm Bureau Financial Services (FBFS) about their customers' level of satisfaction, you would probably get the same answer, "Farm Bureau Financial Services provides excellent claim service to its insureds." There has always been universal internal belief that FBFS does a good job of providing claim service to its property and/or casualty insurance customers. But however justifiable, this employee pride wasn't enough proof for FBFS management. A more structured evaluation was necessary – and this is just what claims management asked of the marketing research and analysis department.

Farm Bureau's claims management approached Dan Koster, director of marketing research and analysis, and commissioned a study on property and casualty claims satisfaction. All involved were eager to find out what FBFS customers thought of the claims process. If indeed Farm Bureau's claims process produced high marks from insureds, the company would definitely want to get the word out to potential clients!

Farm Bureau Financial Services is an insurance and investment company doing business in a 15-state marketing region. In a typical year, the claims center receives approximately 72,000 calls on claims for automobile, homeowner, and farm insurance. The company processes property and casualty insurance claims in six states: Iowa, Minnesota, South Dakota, Utah, Arizona, and New Mexico. Most of the processing is conducted through its home office in West Des Moines, Iowa.

Farm Bureau had confirmed the influence of the claim experience on customer satisfaction and loyalty in past marketing research studies. FBFS management also knew that a reputation for good claim service is a major draw to attract new customers.

Several claims satisfaction research studies had been conducted in the past, but most resulted in simply an overall read of satisfaction — which provided a useful benchmark but didn't explore or quantify what drives satisfaction from a customer's point of view.

The task of managing the study fell to Kristi Gale, Farm Bureau's senior marketing research analyst. She partnered with Grapentine Inc., a marketing research firm located in Ankeny, Iowa, and Larry Constantineau, a marketing and research consultant with MarketViews, Inc., Traverse City, Mich. Together they began developing the three-stage claimant satisfaction study.

Determine issues

The first stage began with in-depth interviews conducted among claim department management and employees and FBFS claimants to determine all the issues associated with claimant satisfaction. The objective of the initial management interviews was to provide an overview of claimant needs and expectations along with standard corporate procedures that were designed to meet those needs. It also clarified management's interests and goals regarding claimant satisfaction. The employee interviews explored their perspectives on claimant satisfaction and dissatisfaction. Finally, claimants were queried about their needs and expectations, sources of satisfaction and dissatisfaction, and any problems and complaints that had arisen.

Telephone interviews were then scheduled with recent claimants (those who had had a claim in the previous six months) by the research team. Claimants from each line of business — auto, farm, and homeowner — were interviewed. The significant issues from this qualitative phase were then condensed into processes and subprocesses, and subsequently formulated into a quantitative survey.

Develop a model

The second stage consisted of a mail survey, which was used to develop a model that would help the claims department understand and identify the most important satisfaction drivers for claimants. Within the survey, customers evaluated FBFS claim service on 62 attributes that described various characteristics of company claim performance.

The quantitative study was also intended to develop a baseline measurement of Farm Bureau claimant satisfaction and to identify the levels at which claimant expectations and needs were being met. The marketing research and analysis department used the information gained from this study to provide insights and suggestions to management on how Farm Bureau Financial Services could best serve its customers in terms of claims service.

The analysis

The third stage consisted of analyzing the data. Several multivariate techniques were utilized:

• factor analysis was conducted to determine the underlying fundamental constructs of customer satisfaction and loyalty;

• multiple regression analysis was used to determine the relative impact of each of the constructs or dimensions on the customers' perception of the claims process in general and satisfaction with their most recent claim;

• path analysis was used to quantify the various factors of customer loyalty;

• discriminant analysis was conducted to validate the results.

Farm Bureau discovered several important findings. First, the results indicated the constructs that were most important to customers in a claim situation. They are (in order of importance to the customer): settlement and repair

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Measuring satisfaction isn't enough

Use research to improve the customer experience

By Dinyar Chavda

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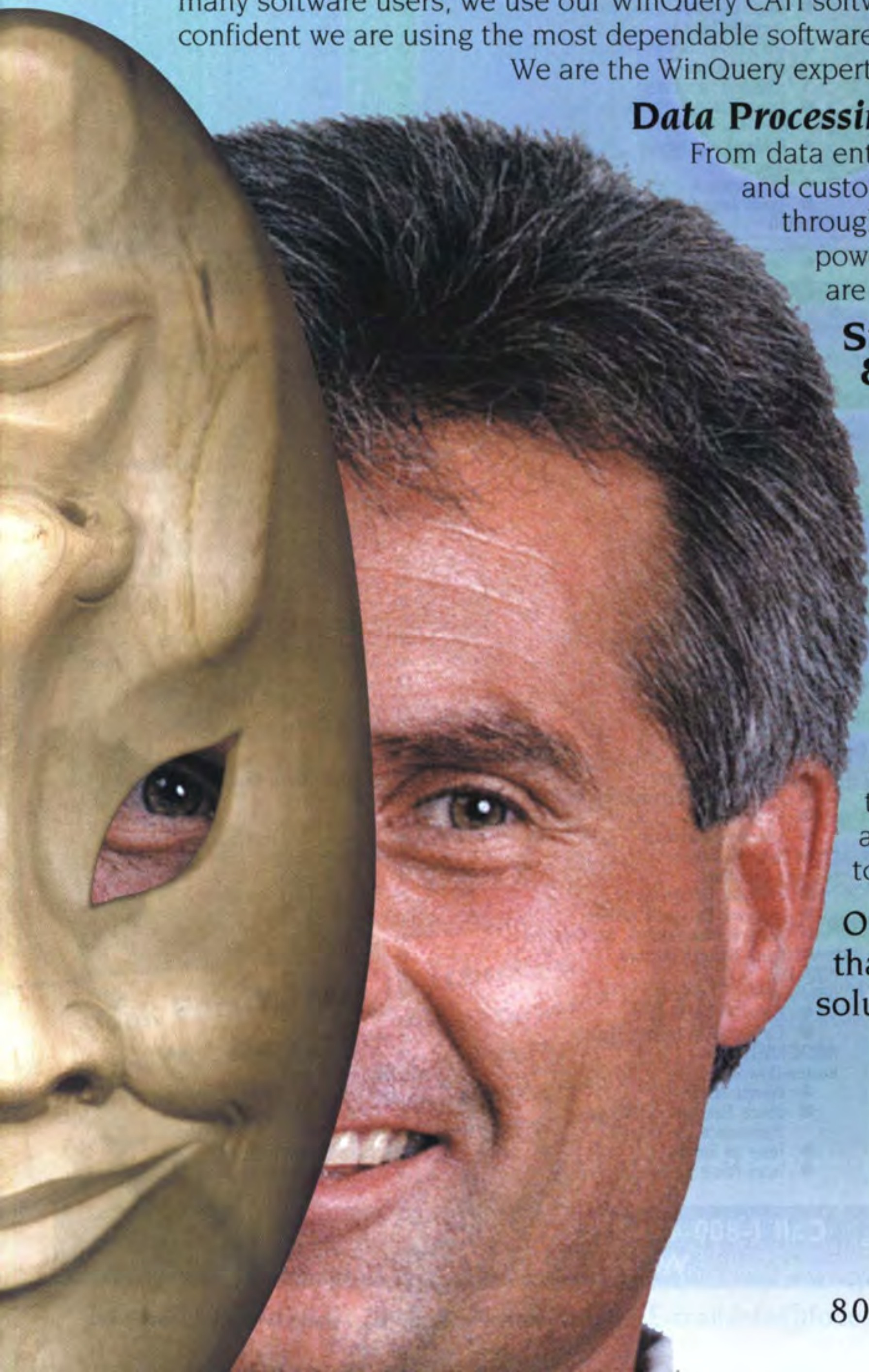
Customer satisfaction measurement (CSM) has cost companies millions of dollars and months of manpower. In addition, attempts to improve satisfaction, including trying to change employee behavior, exhortations to the front line, and linking satisfaction to compensation have resulted in more expenditures of both money and time. Research companies and research departments have used a variety of statistical techniques to understand the drivers of customer satisfaction either for the company as a whole, or for specific departments, such as call centers. These analyses purport to show the key levers (such as responsiveness, courteousness, speed of resolution, etc.) that, when manipulated, should result in improvement.

Despite all these efforts, most graphs of satisfaction scores resemble what one client called "the monitor of a patient on a life-support system," i.e., random squiggles around a norm. (And researchers spend a lot of time trying to analyze and explain these random variations!) In fact, it is remarkable that companies still persist in collecting and trying to improve their satisfaction scores, using the same approaches from year to year.

So why do companies bother trying to improve customer satisfaction? The cynical may say that it is not PC to cancel a customer satisfaction study, or to stop customer satisfaction enhancement efforts. However, there is actually a very good business reason for trying to improve customer satisfaction — in most industries, the product (or service) of a company is at parity with that produced by its competitors. Even if a company develops something that gives it a competitive advantage, in most cases this is only short-lived, as others will reverse-engineer similar products. What does differentiate one company from another is the customer experience it provides, or, in the words of Michael Hammer, whether the company is easy to do business with. These days, it is how a product or service is delivered, not the product itself, that can lead to loyalty and commitment on the part of customers. In other words, it is all about execution. As Vince Lombardi once said, "You can look at my playbook, but you still have to meet me on the field."



Thus, it is logical for companies to persevere in measuring and trying to improve their customer satisfaction. Measuring it is not difficult. The problem lies in just how to improve it.

Why satisfaction is difficult to improve

There are several reasons why customer satisfaction remains unchanged:

a. Obliquity

Customer satisfaction and its drivers obey what Michael Hammer calls the "principle of obliquity." This is a wonderful term which means that, while we can measure them directly, we can only influence them indirectly. For example, it should not surprise anyone that one of the key drivers of satisfaction for a restaurant is courteous service. One way to improve the customer experience could be to provide more courteous service. How does one go about doing it? It is impossible to do it directly — one can only alter things that employees do that result in a perception of courteousness on the part of the customer. And therein lies the rub!

Even when it comes to more direct issues, there are still problems in fixing problems. Consider the effect of putting someone on hold in a call center. If you decide to improve perceptions on this, what should you tell your CSRs to do? Should they never put anyone on hold? Is it acceptable to put someone on hold as long as permission is obtained? Do they also need to explain why the person is being put on hold? Or is it an issue of how long the person is kept on hold?

b. Management opinion drives company behavior

Take a restaurant company where the research has shown that courteous service is a driver, and that there is room for improvement. How does the company act on this? Usually, there is a meeting where someone presents the research, and then people brainstorm about ways to increase courteous service. There is usually no dearth of ideas of how this can be done, and a long list is generated, some of which target specific behaviors and others are imagery-related. At this stage, an argument often ensues about which of the actions will have results that are really desired

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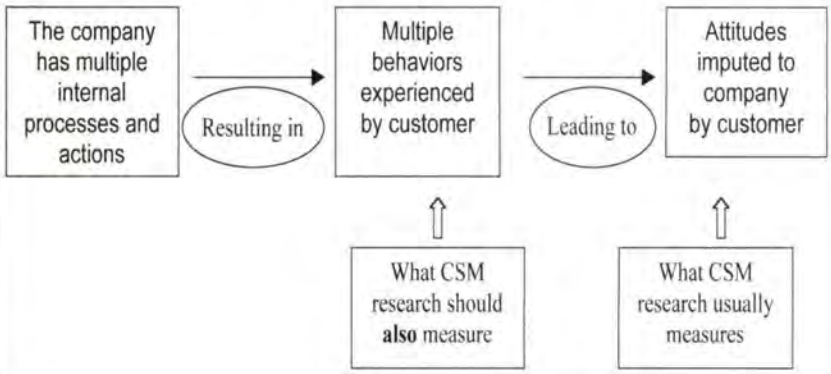
by customers. The list of actions is winnowed down based on "management judgment" (or feasibility) until a final compromise list is arrived at. Then, attempts are made to institutionalize this. However, there is very little evidence to support the choices, and, therefore, little reason to persevere when things don't improve quickly.

in setting standards for service, and so it is not surprising that measurable improvements rarely occur.

c. CSM measures only part of what is needed

The schematic in Figure 1 may best represent the predicament that companies face. For example, a bank may have several work processes for deal-

Figure 1



It is also highly likely that many of the issues that are important to customers will never be considered, because the company is looking at courteousness from its own viewpoint, and not from that of the customers. For example, they may not consider the process by which telephones are answered and reservations made, or the wait time when a person arrives or speed of service. Even if these things are taken into account, what becomes the standard for courteous service may be a function of where the company is headquartered, as that forms their mindset. If you go to an upscale restaurant in New York for lunch, you expect to be seated very quickly, with the waiter there immediately at your table to take your order and rush you your food, then deliver your check almost while you are chewing your last bite! The thinking here is that your time is very valuable, and so, unless otherwise instructed, the restaurant is going to make this a fast experience for you. The same kind of treatment in the Midwest would be considered extremely rude, and people would think that you were trying to get rid of them! Variations in desired behaviors like this are rarely taken into account

ing with customers at the teller's window. These work rules that the bank has (e.g., greeting a customer by first name or last name, asking how they can help the customer, explaining procedures, etc.), result in behaviors that the customer experiences, based on which the customer develops an impression of the bank and the attitude that the bank has towards him or her. Current CSM methodology does a fine job of measuring these final attitudes (courteousness, responsiveness, speed, knowledge, etc.), but falls short in identifying the specifics of what to do to improve, as it does not know which of its multitude of actions are responsible for each of the final attitudes that the research measures.

d. CSM measures the wrong things

Companies tend to measure what is easy to measure ("courteousness," as opposed to the specific behaviors experienced by the customer), what they have always measured (one telecomm client insisted on using the same highly technical terms in their small-business customer satisfaction study as they used when dealing with telecommunication specialists in large companies), and what matters to them, not necessarily the customer. For example, many doctors measure and attempt to control the amount of time between when a patient comes to their office, and when the patient is admitted into an examination room. The fact that the patient then waits for 30 minutes or longer for the doctor to enter the room is ignored!

Figure 2

Issue: Placing you on hold							
Rate the desirability of each outcome	Very Undesirable			Neutral			Very Desirable
The CSR:							
Did not put me on hold	1	2	3	4	5	6	7
Put me on hold after asking my permission and telling me why	1	2	3	4	5	6	7
Put me on hold for several minutes without telling me why	1	2	3	4	5	6	7
Put me on hold so long I had to hang up	1	2	3	4	5	6	7
How important to you is this entire issue?	1- Not at all	2	3	4	5	6	7- Extremely

Choose how (company) usually performs (circle one)	
The CSR did not put me on hold	1
The CSR put me on hold after asking my permission and telling me why	2
The CSR put me on hold for several minutes without telling me why	3
The CSR put me on hold so long I had to hang up	4
Don't know/No Experience	9

An alternative approach

One approach that has been advocated and used by companies is to build a model that links the various actions that the company can take to resultant customer perceptions and on to levels of satisfaction. While these have reportedly been successful, they tend to be complex, difficult to develop, and often have a "black box" element to them.

a. The basic concept

The alternative that we have used takes a much simpler and more direct approach. Our approach involves measuring performance and needs in terms of the actual behavior experienced by the customer. So for the earlier call center example of placing someone on hold, instead of determining ratings of "being put on hold" on a 5-/7-/10-point scale, we first create a list of the possible levels of performance that could occur (see Figure 2).

We then determine which one actually occurred, as well as the resultant satisfaction of each level of performance, which allows you to compute the impact of changing behavior (as explained below).

b. Data collected

Continuing the call center example, Figure 2 shows a typical questionnaire that gets at desirability, importance and performance:

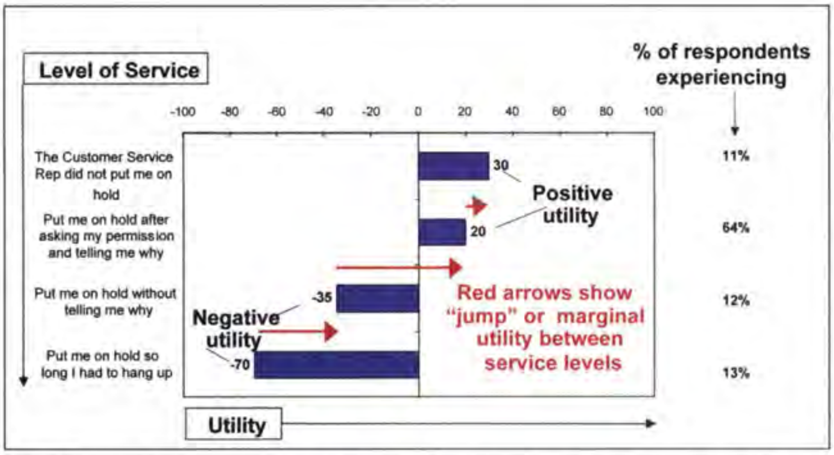
c. Analysis method

Using a self-explicated conjoint approach (as originally proposed by Paul Green), we compute the utility of each level of performance, and the marginal utility of improving your performance from one level to the next. In other words, what would happen to satisfaction if you were to change the customer experience?

d. Interpretation of results

Using the example of being put on

Figure 3



hold, Figure 3 shows a hypothetical result.

The horizontal bars show the utility for each level of the behavioral scale. The scale has a zero point, corresponding to neutral. Bars to the left show actions which customers deem negative; bars to the right show actions that are considered positive. The arrows show how much marginal utility is gained or lost by changing performance from one level to the other.

By analyzing this in conjunction with actual performance, companies can determine exactly how they are performing, and the effect of changing their actions.

In this example, it is apparent that, while not being put on hold is optimal, customers do not mind too much if they are put on hold as long as their permission is obtained and they are told why. However, they get extremely annoyed if the reason is not given. Also, this company is not performing at acceptable levels in about 25 percent of the calls it gets.

Similar charts are created for each behavioral issue experienced by the customer.

e. Actions to be taken

Using the chart above, this company could try to improve by not placing the 64 percent on hold at all, but that would probably be very difficult to do, and would not lead to much higher satisfaction for this group, as the marginal utility of improvement is low. Also, it is possible that this would also increase the total call time.

Instead, it should focus on the bottom 25 percent. Of these two groups, the 12 percent who are not told why they are put on hold can be satisfied fairly easily — just tell them why they are being put on hold. In all likelihood, this company has a policy of doing this, but it is not being universally followed, and should be emphasized in future training sessions, together with the reason for doing so.

For the 13 percent who are put on hold for so long that they hang up, further internal investigation is required to determine why they are encountering this treatment (root cause analysis).

f. More examples of results and actions

In Figure 4, if the results were as shown in "A," the company does not have to be quite as vigilant in ensuring delivery at the highest level on that issue, so long as it does not drop to the lowest level. However, if the results were as presented in "B," there is no margin for error. Knowing where you can afford to relax your standards allows you to reallocate your resources more efficiently.

In the example shown in Figure 5, customers want one-call resolution but it does not have to be on the original call made by the customer; so long as the customer does not have to make a repeat call, he is quite content. While this may seem like a minor difference, it can result in a large operational saving for the company if it does not have to install systems to ensure that the problem is resolved while the customer is on the initial call.

This approach, which isolates the impact of changes that a company can make on each issue, requires a lot more work up front, but results in a much clearer picture of the various actions that a company needs to take to make improvements.

The actual research process encompasses the following steps:

1. Review current research, conduct extensive, in-depth interviews with key management, frontline workers and, optionally, external qualitative — used to develop behavioral scales and levels.

2. Scales and levels reviewed by operational personnel to ensure that they are actionable (and get buy-in).

3. Quantitative data collected.

4. Analysis and presentation to management and operations.

How companies have used this technique

Companies have productively used this approach to:

1. Improve customer satisfaction. Because the technique is based on very specific actions that the company can

Figure 4

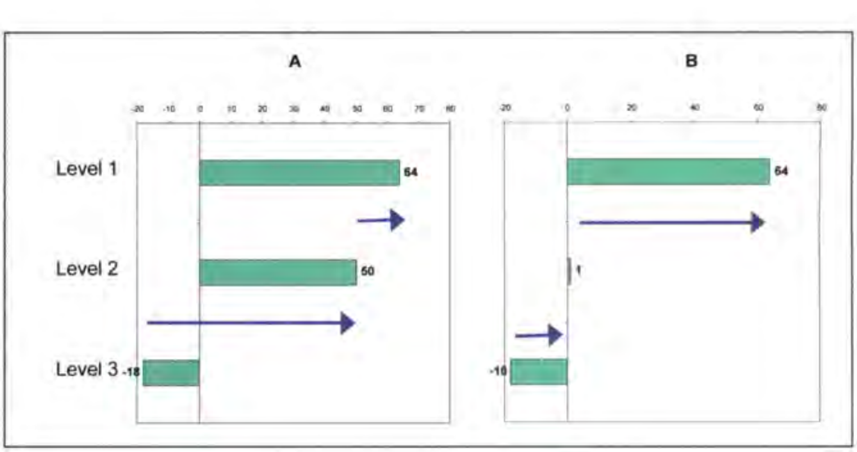
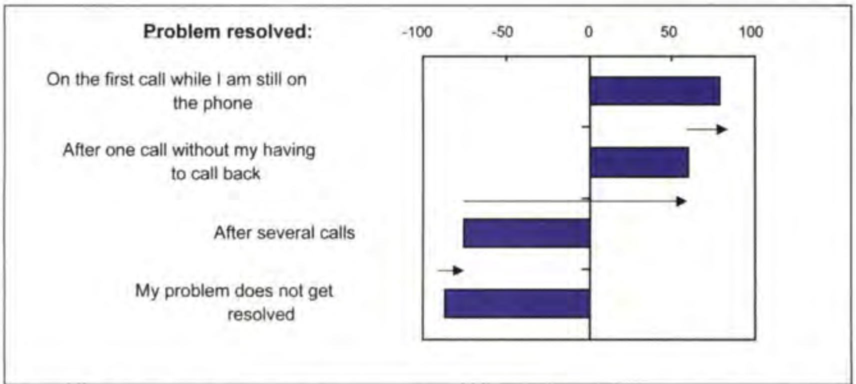


Figure 5



take, it is relatively easy to determine what needs to be done in order to make improvements.

Shortly after a study on their call center was completed, other circumstances led our client to institute a spending freeze. Using the results of our study, the client made improvements on every issue which did not require any expenditures. For the first time in years, customer satisfaction went up.

Another client was unwilling to share the results of the research with the front line until management had developed "the appropriate presentation." However, operational employees obtained a copy of our presentation, and, unbeknownst to management, started to make changes in their procedures. Satisfaction, which had been flat, went up significantly and substantially.

2. Determine how to cut costs with minimal negative effect. An Internet retailer had to make large cuts in its operating costs. In collaboration with various groups in the company, we made a list of the various actions that management could take which would result in cost savings, and the expected impact that these actions would have on the customer. These included specific areas of reduced service, impact on delivery time, the way items would be delivered, number of items stocked, etc., as well as imagery-related issues. All of these were expressed in very specific terms, and a study was conducted using this method. It showed clearly the changes that would have the most negative effect on the customer, as well as others that would have minimal impact, as long as certain minimum standards were maintained on that issue. In fact, in some cases, the change, while resulting in lower costs to the company, was actually preferred by the customer.

The company made many of the changes that the research indicated would have no negative effect, but also had to make some that were predicted to have negative fallout. Subsequent research validated our predictions.

3. Reallocate resources to get the most bang for the buck. A call center kept emphasizing courteousness in their monthly training and the CSRs focused on this issue to the point where it was not yielding additional benefits. Obviously, while no one wanted rude CSRs, the research showed that customers were more desirous of additional information than more courteous behavior.

4. Convince frontline people to sell. Many companies are under tremendous pressure to reduce or eliminate the cost of the call center. In response, some have tried to make their CSRs sell additional products or services to customers who call in. This is usually met with tremendous resistance from the CSRs who believe that customers do not want them to do so.

In many cases, our research shows that customers actually welcome attempts to sell them additional products or services, as long as they are appropriate to their specific needs. This has helped overcome CSR reluctance, particularly when coupled with subsequent qualitative research where they can watch customers discuss this.

5. Reengineer work processes. One

study we conducted showed (to no one's surprise) that one-call resolution was a key satisfier. The company instructed its employees to try to do this as much as possible. So, when a customer called to say that they had lost their membership ID card, the CSR sent out a new one the next day. A week or so later, the customer called again, requesting the same ID card, as they had not received it, and the CSR immediately sent out a new one. It was only after the irate customer called three or four times that it was discovered that the customer had moved, and the replacements were being sent to the wrong address. The work process had to be changed so that the CSR now confirms the address before sending the card.

Other problems have required simple changes, such as introducing two employees to each other and requiring them to communicate on certain issues. Yet others have necessitated major investments in computer systems in order to be able to consolidate information and provide it where needed.

6. Reorganize the company to be able to deliver services better. Many companies are organized in a manner that may make sense from an internal viewpoint, but often does not from a customer's. Typically, they force customers to deal with multiple departments, many of which do not communicate with each other, thus requiring the customer to have to do so.

Occasionally, one sales department cannot access information regarding the customer's business with other sales departments, and therefore treats large customers of other departments as though they were strangers to the company.

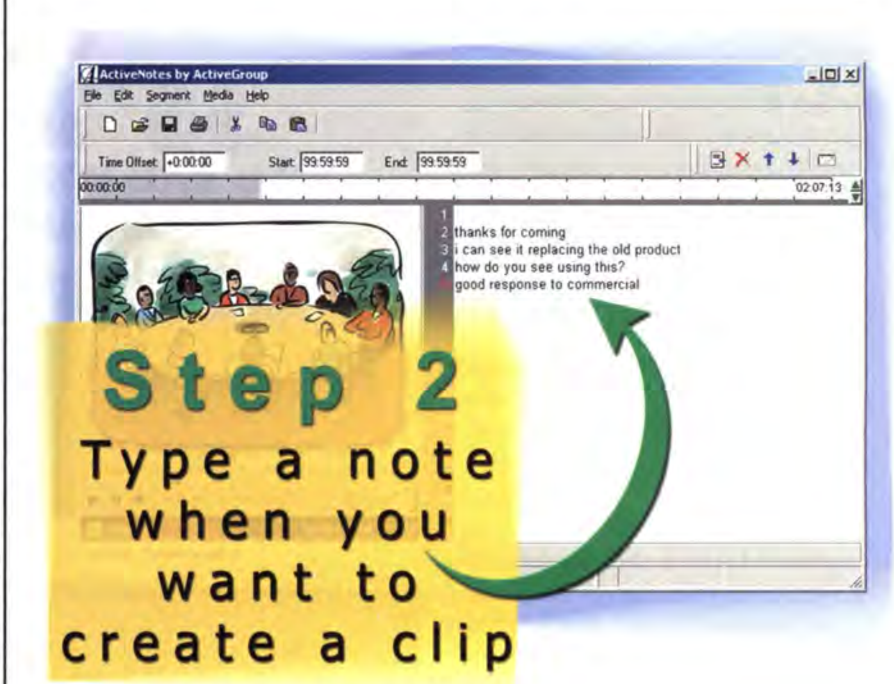
Finally, the responsibility for the quality of the customer experience often resides in no one individual or department, and, as a result, can fall through the cracks.

While making organizational changes to better serve the customer is a huge undertaking, some clients have started to do so.

7. Increase acceptance of customer satisfaction research by frontline employees. The typical CSM study is viewed by the frontline, justifiably, as a tool used by management to beat up on them — they are told to do better, but are either not given specific direction, or given conflicting instructions. The approach outlined in this article gives clear guidance as to the actions that are required. In fact, part of the process is to obtain buy-in from the operational groups prior to conducting the research to ensure that the questions are worded in a way that gives them information they can use.

One of the additional outcomes of the research is that it often reveals how what the customer wants may conflict with other objectives the company has and the inconsistencies between customer experience requirements and how the operational people are evaluated and rewarded. These have to be reconciled.

8. Improve relationships within the company. Relationships within the company can improve because the operational people are not made to feel as though management is harassing



them to improve without providing direction.

Further, by sharing the results across the company, clients create a common language to describe what customers want, as well as agreement regarding what the customer wants.

Easily overwhelmed

One of the concerns that is often expressed by management is that they can easily get overwhelmed by the amount of information contained in these studies, and do not know how to develop solutions to meet customer needs. The approach expresses customer needs in terms of their experiences; there are often a multitude of ways and processes that can result in the desired end. It is here that the workers on the front lines can be of most use, as, after all, they are the ones closest to the customer. They are often most creative in developing ways to solve problems in simple, often inexpensive ways. In this regard, the following quote from General George S. Patton is useful for management to remember:

"Never tell people how to do something. Tell them what you want accomplished, and they will surprise you with their ingenuity."

The role of management

In order for the above processes to work, and for the changes to occur, senior management has to be fully engaged. They need to become and stay visibly involved in the whole process. The CEO of one of our clients has attended the presentation of the results of this study several times to show how important it is to him, and because he claims to get new ideas every time he attends.

Cost of change

It is certainly possible that attempting to implement some of the changes indicated by this type of research can be expensive (e.g., installing a computer system to keep track of every interaction with a customer is a major capital cost). However, our clients have also informed us that they have often been able to make many of the changes at no additional cost, or have actually saved money by doing things the way the customer wanted.

For example, one client had a large number of P.O. boxes for clients to send different forms to. The original reason was that this would be more efficient for the company, as the forms from each P.O. box would go to the appropriate department in the company. However, when they eliminated the vast majority of the box numbers in order to be more in line with what the customer wanted, their total costs actually went down, as they were able to eliminate the positions of those whose prior job was to ensure that the form had been sent to the right box, and return it if it was not.

Observational, not remedial

In many companies, the current CSM system is an observational tool, but not a remedial one. By following the methods outlined in this article, firms can determine which activities will lead to results desired by customers, thus uncovering the true drivers of customer satisfaction.

Measuring consumer attitudes: what is your scale really telling you?

By Tim Glowa

Editor's note: Tim Glowa is president of North Country Research Inc., Calgary, Alberta. He can be reached at tim.glowa@ncresearch.com.

One of the fundamental purposes of market research is to understand a targeted audience. More specifically, many firms want to understand the basic attitudes of existing or prospective customers. Attitudes are based on the information respondents have, perceptions, past experience, their feelings (liking and disliking), and their intended behavior.

Beyond this, most firms really want to understand – and ultimately influence – consumer behavior. Rather than examining behavior directly (through techniques like discrete choice modeling or conjoint), many firms are more likely to examine attitude measures instead of behavior. There are several reasons for this:

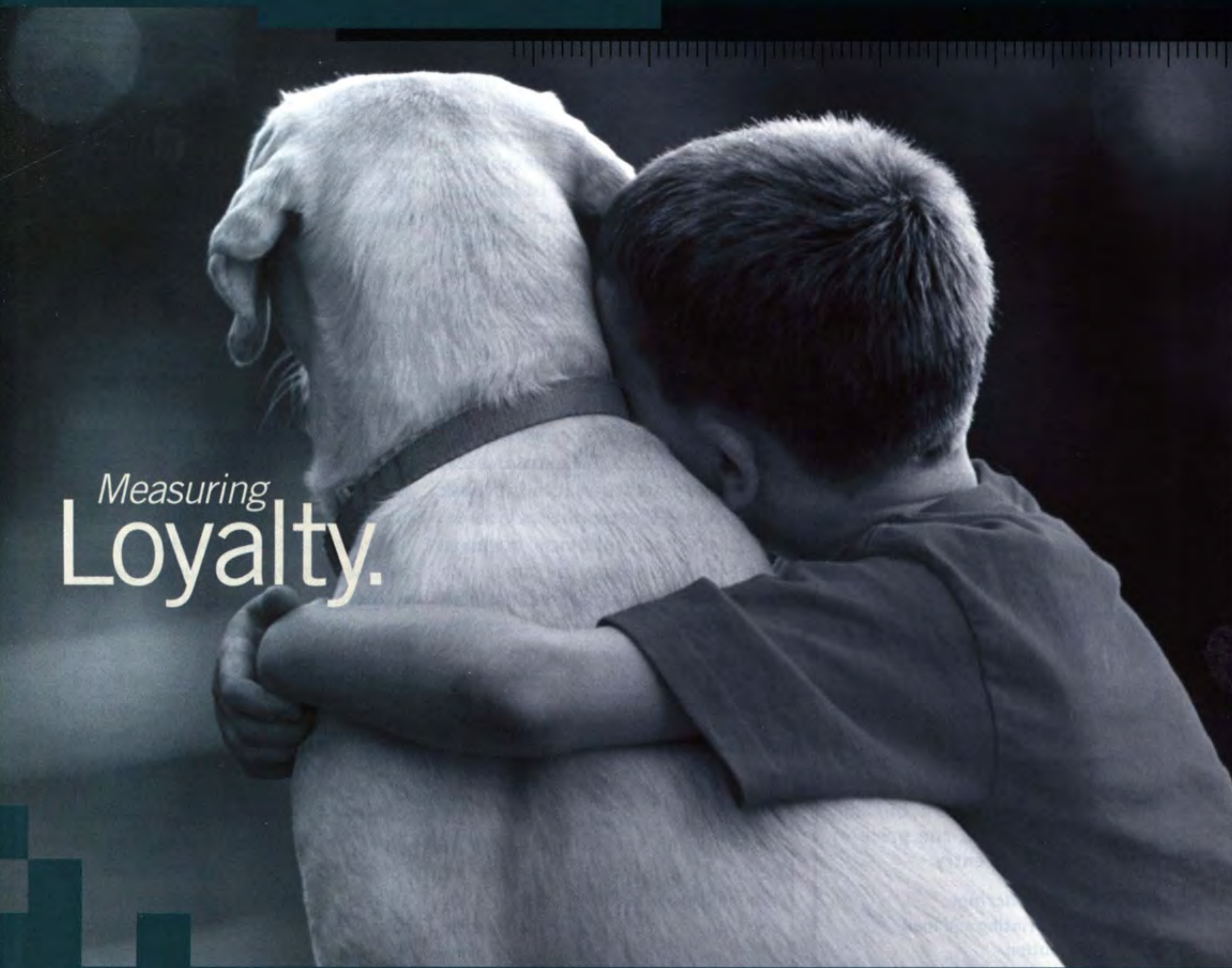
First, it is easier to measure attitudes than it is to observe, measure, analyze, and interpret actual consumer behavior.

Second, there is a belief, and a good one, that attitudes influence behavior. This is especially true when thinking about brand equity. If a customer likes Westin Hotels more than Hilton Hotels, there is a good chance they will choose the brand they prefer.

Although attitude measures can be used to help understand how a product or competitor is positioned in the minds of consumers (or to understand the latent needs, desires, wants, and therefore uncover a potential opportunity) it has limitations. It is very difficult to extrapolate consumer behavior from understanding consumer attitudes. If the real goal is to understand behavior, attitude measurement itself may hinder this objective entirely. The reason for this is that attitude measurement itself, taken in isolation, can provide very conflicting conclusions depending on how the question is asked and what scale is used. Other techniques, such as discrete choice modeling or conjoint analysis, might be more useful (see Struhl, "Understanding a Better Conjoint than Conjoint," *Quirk's Marketing Research Review*, June 1994 or Glowa and Lawson "Discrete Choice Experiments and Traditional Conjoint Analysis," *Quirk's Marketing Research Review*, May 2000).

It is because of these limitations that I am very skeptical of research that relies entirely on attitude measurement and the attempts to directly link this to an understanding of consumer behavior.

For market research to be valuable, the user must have confidence in the validity and reliability of the results. I hope to illustrate, through the use of a



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Measuring Relationships That Matter.

Customer Loyalty Measurement ▮ Employee Commitment ▮ Business Ethics ▮ Focus Groups ▮ Online Reporting Systems ▮ Full Service Call Center real example directly comparing several alternative scales, that this may not always be the case.

This article discusses how several alternative attitudinal scales were tested on over 1,000 respondents measuring the same attribute yet they provided radically different empirical results. While not intending to be critical of existing practices employed by my colleagues in the market research industry, I am simply illustrating a potential problem, and recommending solutions to a situation that could be more widespread than we believe.

Background

A major Canadian airline measures customer satisfaction of its passengers on a monthly basis. This information, collected from about 1,000 respondents from across Canada traveling on a range of flights (short-haul versus long-haul), is compared to historical data to measure and track how passenger satisfaction is changing over time, and to identify any shortcomings in the product offered.

From the thousands of passengers traveling with the airline each month, a representative sample is pulled from the database of customer records and used for the CATI interview. Interviews are conducted in both English and French (this is Canada, after all). Each interview covers a range of topics measuring satisfaction with the entire flight process (check-in, boarding, in flight, claiming baggage), and lasts about 15-20 minutes. The results presented below are from the April 1999 tracker and are used with permission.

The results

Respondents were asked to rate a variety of attributes using the standard scale of excellent, very good, good, fair, and poor. In this test, the same respondents were also asked to provide a rating of the same attribute using alternative scales. The attitude that was measured in this case related to the satisfaction with the courtesy and professionalism of the flight attendants.

Each of the scales used in this study, with the corresponding question and a brief discussion, is presented below.

• Standard scale – excellent to poor

For the question "Please rate the courtesy and professionalism of the flight attendants on your most recent journey," 70 percent gave the airline either excellent or very good marks.

The first observation relating to this scale is that it is not balanced; there are three "good" measures compared to only two "not so good" measures. Many researchers believe it is important to have a balanced scale (Dillman, 2000).

There has been much discussion about the merits of this scale, both in this journal and in other market research publications. One of the best criticisms of this scale appeared in *Quirk's* in 1997 from Joseph Duket (Duket, 1997):

According to Funk & Wagnalls, the term excellent means "being of the very best quality." ... One person or company can not be more excellent than another. If you're doing the best job or providing the best quality, no one can do better. For the word "poor," however, Funk & Wagnalls uses the synonyms inferior and unsatisfactory in its definition. Confusion arises when the word inferior is described as "lower in quality, worth or adequacy; mediocre; ordinary." Mediocre is then defined as "of only average quality." So, taking this exercise in interpretation to the extreme, poor performance could actually mean an average rating.

• Completely satisfied to completely unsatisfied

An alternative six-point balanced scale with only the two end-points defined was also used to measure satisfaction. In response to the question "Using a scale of 1 to 6, where 6 is completely satisfied and 1 is completely unsatisfied, how satisfied were you with the courtesy and professionalism of the flight attendants?" 82 percent selected the top two boxes.

This scale is attractive because of the definitiveness of the two end-points; if a customer is completely satisfied, it is not possible to improve satisfaction.

This approach, suggested by Steven Lewis in a previous article in *Quirk's* (Lewis, 1997), argues that the intermediate rating terms used to describe satisfaction variables have different meanings in other countries, and proposes using a dichotomous adjective scale where only the definitive end-points are defined (e.g., such as "totally satisfied" to "totally unsatisfied"). This scale represents a tremendous improvement over the prior scale.

• Asking respondents directly

The third scale tested in this study simply asked the respondents if they were satisfied. In response to the question "Overall, were you satisfied with the courtesy and professionalism of the flight attendants?" 95 percent of the respondents replied "yes."

This approach is certainly the most direct; the researcher gains a very clear understanding of how a customer feels about the service. There are no questions about combining the top two boxes (or should it be the top three?) to represent those who are satisfied. This scale provides a very real measurement of a firm's performance.

Propositional descriptive

The final scale tested is the propositional descriptive scale. This scale not only provides an assessment of the degree of satisfaction with a given product, but also quantifies what steps are needed to make an improvement. This scale requires respondents to select the appropriate descriptor corresponding to their level of satisfaction (Glowa and Lawson 2000b). In response to the question "Please rate the courtesy and professionalism of the flight attendants towards serving you. Were they...", customers selected from a series of statements. These statements, with the percentage of passengers who selected each, appear in the chart.

Although the previously described scales all provide, to some measure, an assessment of how satisfied customers are at a particular point in time, they are difficult to act on strategically. The propositional descriptive scale goes beyond these traditional scales by providing a quantifiable, non-subjective measure of satisfaction that can easily be understood and made actionable, if desired, by senior management.

Unlike a scale that measures flight attendant satisfaction as "good" or "very good" this scale provides both a very clear measurement of performance, but also a ruler against which future satisfaction can be measured. The vice president of in-flight operations for the airline might struggle with how to improve satisfaction beyond "good" to "very good" or "excellent." Is it the friendliness of the flight attendants? Are they not smiling? Are there not enough flight attendants? Are they being rude to passengers? Conversely, if the same vice president is provided a customer satisfaction report using the propositional descriptive scale, and wanted to improve satisfaction among passengers, he has a greater understanding of the problem, and the

Statement	% responding to
Made you feel that they were genuinely pleased to serve you and happily provided assistance	47%
Were pleased to serve you and provided assistance when required	41%
Made you feel like they were just doing their jobs when serving you	12%

ammunition to correct it.

Attitude measurement

This article identifies several different attitude measurement scales, and reveals how the same respondent can reply to each unique scale. All measure the courtesy and professionalism of flight attendants, although the resulting satisfaction level varies widely depending on the scale used.

Attitude measurement is useful to uncover perceptions and opinions, but not necessarily to provide a strategic linkage to actionable understanding of consumer behavior. To act on this information strategically, two things need to happen:

• The researcher needs a clear understanding of what steps are needed to move from one rating scale to the next.

• The researcher needs to understand whether change will affect consumer behavior (i.e., will it make any difference, and if so, by how much?).

By having both of these pieces of information, the firm can, through a cost/benefit analysis, determine whether or not the improved satisfaction rating is worth it. It is easy to improve satisfaction; a company can always provide more training for staff, or have more staff on hand to assist customers, but the difficult question remains whether a firm should implement improvements at all. Unless the relationship between attitudes, performance, and customer behavior is correctly identified, the costs associated with an improved attitude measurement may exceed the benefit.

There are several methods available for quantifying the relationship between satisfaction levels, price, and future behavior. The most common are conjoint analysis, and the more improved technique of discrete choice modeling. For a discussion on these techniques, please see Glowa and Lawson, 2000a; Glowa and Lawson, 2000b; Orme, 2000; McCullough, 1999; Orme, 1998; Struhl, 1994.

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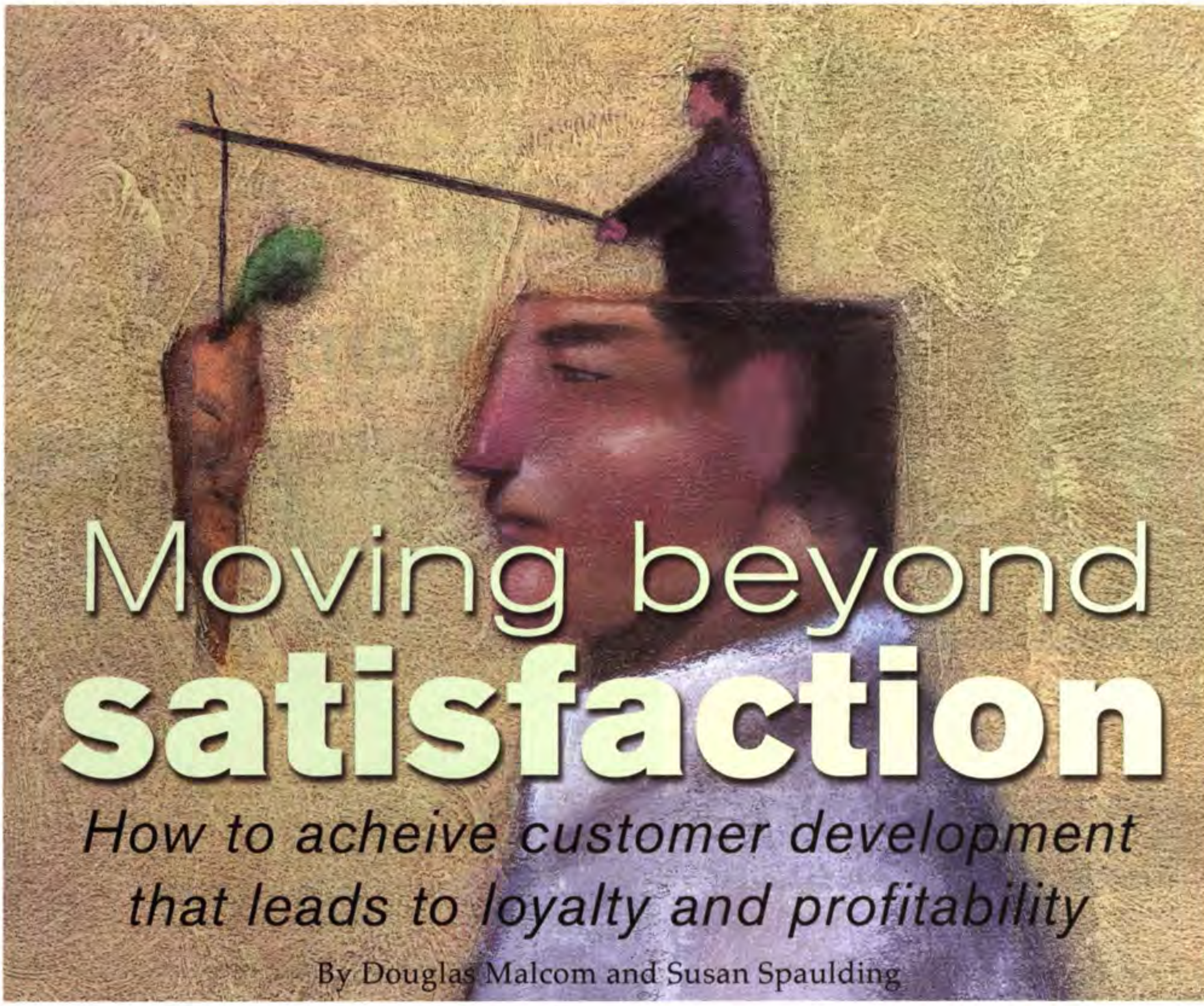

Moving beyond satisfaction

How to acheive customer development that leads to loyalty and profitability

By Douglas Malcom and Susan Spaulding

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Jones and Sasser (1995, Harvard Business Review) teach that satisfaction is only one component of a sound, holistic assessment of a company's relationship with its customers. There are satisfied customers who in fact defect. At the same time, there are dissatisfied customers who stay with a company. So, while tracking satisfaction levels definitely has a role in developing customer loyalty, these measures alone cannot help companies create long-term, profitable relationships with their customers.

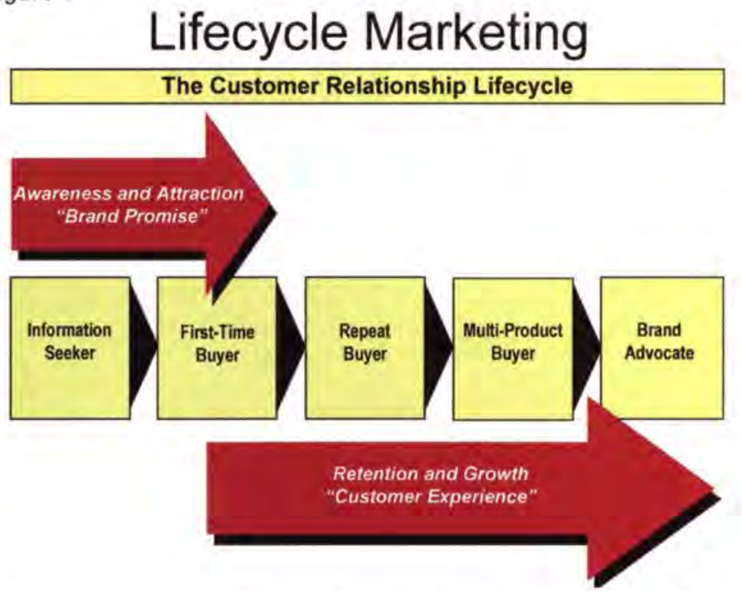
For companies to be successful in the Information Age, they must move toward an integrated customer development approach that combines customer lifecycle marketing and comprehensive customer development processes. Identifying the myriad factors influencing loyalty, utilizing the appropriate tools to evaluate those factors and knowing how to implement research results are essential to developing satisfied, loyal — and most importantly — profitable customers.

Beyond satisfaction: customer lifecycle marketing

Understanding the customer relationship lifecycle is a critical first step in unlocking the profit potential of a company's customer base. It is a well-established fact that a majority of a company's profits come from a minority of its total customer base. Given shrinking marketing dollars and a tight economy, it is imperative that companies move customers along the relationship lifecycle more effectively (see Figure 1) by carefully examining the evolution of their customer base as well as targeting areas for customer development improvement.

Customer relationship marketing is based on the premise that customers move through a consistent pattern of development from information seekers to users and finally to loyalists. During the early stages of the lifecycle, companies have to focus on awareness and customer attraction, while during the

Figure 1



latter stages, customer retention and increasing share of wallet are key. Assessing the company/customer relationship at each lifecycle stage can provide fundamental insights for the creation and maintenance of strategic customer development processes.

• Brand promise. The behavior of information seekers is one the best ways companies can gauge their level of brand awareness and consideration. At this stage, marketing communications efforts need to be evaluated for their ability to effectively inform and attract new customers, as well as deliver new brand positioning messages. In short, companies need to know if a clear value proposition has been communicated and whether it has made a connection with customers' needs.

• Brand experience. Many important barriers have been overcome when a consumer tries a company's product or service. However, moving a first-time buyer further along the relationship lifecycle hinges upon the company's ability to minimize flight at any number of defection points. During these retention and growth stages, it is vital that companies identify whether their brand promise is in alignment with what the customer experiences. Therefore, brand equity and brand value measures must be evaluated along with satisfaction and advocacy diagnostics. These measures combined give companies a multidimensional view of how seekers, users and advocates progress through the relationship lifecycle, and can help identify issues associated with the company's brand promise and/or brand experience.

• Ongoing performance evaluation. Key brand, loyalty, and satisfaction metrics tracked over time give companies a competitive advantage and help them avoid the "reactionary" marketing trap. By contributing sound and thorough customer interaction information, these metrics also play a central role in the creation and enhancement of a company's customer development processes.

Customer development: customer relationship strategy and execution

Using customer lifecycle marketing as a road map, a company's customer development strategies can be evaluated within a defined context, and altered or enhanced accordingly. Customer development strategies should be oriented around a validated value proposition relevant to each target market. Strategy execution should then be customized for consumers according to their position in the relationship lifecycle.

• Strategy development. One of the first initiatives in strategy development needs to be the identification of target markets and the segments within each market. Companies should not only carefully examine their existing markets, but those where customers might be reached through brand alignment or cross communications efforts. Even though a company's target markets may seem obvious, different psychographic and demographic subgroups likely exist within each market structure and should not be ignored.

Another primary step in strategy development is setting marketing and sales objectives. While this is a common practice in most organizations today, its focus is often misguided. The prevailing approach has been to capture the most dollars from each transaction rather than the greatest share of wallet through the lifetime of each customer. Consequently, sales goals should be set with the idea of advancing customers toward greater lifetime spending and overall value.

Communications objectives are also an important component of developing a comprehensive customer development strategy. Because the vast majority of interactions with customers are communications rather than transactions, companies need to commit resources to every customer touch point and establish service goals and metrics.

• Communications planning. Integrated marketing principles hold that the execution of all types of advertising and promotion should support a common objective as well as the positioning of the company or brand. As Larry Percy notes in his 1996 book *Strategies for Implementing Integrated Marketing Communications*, advertising, public relations, purchasing, sales promotion, and employee communications must work in concert to effectively sway customers and important category influencers. In the Information Age, this means blending the use of traditional communications tactics with those available through the Internet. E-mail and direct mail should be used to maximize reach. Web site creative needs to be consistent with print, television and radio campaigns. Banner advertising should carry the same messages as billboards and bus signs.

At the same time communications tactics are being aligned, companies should focus equally on crafting and/or validating their value proposition. The composition and attractiveness of offers must also be carefully considered. Now more than ever, it is imperative that companies communicate a unique business rationale that connects with customers' values and needs.

• Strategy implementation. Effective execution of a customer development strategy requires a communications master plan designed to reach prospects, largely through indirect channels, and customers through direct channels. Print, Web site, electronic media, public relations and point-of-sale channels should create awareness and attract information seekers by delivering the brand promise. Sales force contacts, e-mail and e-newsletters, direct mail, retail store and customer service efforts need to center on retention and growth by building customer confidence and satisfaction.

The foundation for effective strategy implementation requires that a company's data and technology infrastructure be viewed as an investment and a valuable tool for marketing decision-making. Transaction data, contact data, campaign response data and third-party intelligence should be captured on an ongoing basis. These data must then be integrated and evaluated, and most importantly maintained in a multifaceted marketing database. Information extracted from this disciplined approach can help companies identify prospects' specific needs, the habits of their existing customers, as well as the communications channels and specific offers that achieve the best results. Furthermore, a properly designed system allows for a higher degree of marketing automation though consistent message management and content organization.

Deployment that delivers: making the relationship work

Lifecycle marketing combined with strategic, well-executed customer development systems still aren't enough to create long-term, profitable relationships with customers. Making the relationship work means companies have to reach out to customers in each market structure, listen closely to their feedback, and improve processes to meet their needs. Companies also need to recognize the critical role their workforce plays in achieving customer loyalty and profitability.

• Customer constituencies. The best firms know that their existing customer base offers a rich resource for communications and process improvement initiatives. However, a number of other important customer constituencies need to be considered.

One example would be customers who have chosen to take their business elsewhere. Getting to the bottom of why they defected can provide significant insight into company processes, but getting to the true causes for defection can often be difficult. Prospects offer a different set of insights. Their external views of a company or its brand render valuable information concerning areas of untapped growth potential. Customers of competitors offer yet another important point of view. Already category users, they have chosen to not do business with the company. Their feedback can provide key learnings about competitive positioning and market-share potential.

• Listening to customers. Paying attention to what the various customer constituencies are saying is not a novel concept. However, listening to the customer about sales and service as well as marketing and product issues is not quite as common, as David Stowell notes in his 1997 book *Sales, Marketing and Continuous Improvement*. Having a customer focus that moves beyond mere satisfaction requires an integrated approach to listening to customers. At every customer touch point, from sales to service to billing, companies must ensure their representatives are trained to assess customers' needs. Customers want to be heard and it is up to companies to listen.

• Expectations and requirements. Companies should listen just as closely to customer expectations and requirements. For example, customer satisfaction scores can appear flat over a period of time despite a company's process improvement efforts. One cause may be that the company is not attuned to rising service or product expectations. Identifying whether customer expectations are increasing, holding steady or falling in an industry or category can significantly affect the strategy of any number of customer loyalty efforts.

Requirements are generally information about the company's product or service that the customer needs in order to buy. However, customers can have different levels of requirements. A customer's so-called latent requirements are those unspoken assumptions about the nature of the product, service or company interaction. Therefore, it is up to a company's sales and marketing staff to listen carefully to what customers are saying so that stated and latent requirements are clearly understood and customers' needs are met.

• Feedback mechanisms. There are numerous methods companies can use to gain feedback from their existing customer base, prospects and other constituencies. One-on-one interviews, focus groups, telephone and Internet surveys, customer complaint systems, mystery shopping, and sales force questionnaires are among the many tools available. Companies that stand to learn the most utilize a combination of these feedback mechanisms to gain a holistic point of view from across their customer constituencies.

• Continuous process improvement. Companies cannot overlook how vital their employees are to advancing customer loyalty and profitability. Firms committed to best practices and continuous quality improvement recognize that their employees are the agents of change. As such, these companies foster a collaborative work environment with mechanisms in place that invite input from every job function and level. Quality improvement processes are also measured and outcomes evaluated so that results communicated to employees are actionable and lead to further problem solving.

• Management commitment. Management's top job in the customer-development equation is to set the tone and expectations for the company's customer focus. Management needs to continually emphasize the company's vision and its mission, and interact with employees in ways that reinforce core values. By the same token, management should have feedback mechanisms in place to recognize when employees become disconnected with the company's vision and mission. The same goes for employee satisfaction and loyalty. Management must remember there is a fundamental link between employee loyalty and customer loyalty. The relationship is mutually reinforcing; satisfied customers contribute to employee satisfaction and vice versa.

Complex interactions

Developing satisfied, loyal and profitable customers involves a myriad of complex interactions between a company, its target markets and its employees. Companies that hold a unique view of their customers and use information to interact with them across all channels in a personal, relevant and timely way have a big edge in advancing each customer to greater lifetime spending and overall value.

Companies wanting to move toward an integrated customer development perspective have to move beyond customer satisfaction metrics. These companies must embrace a multi-dimensional approach to understanding the evolution of their customers. They must also recognize that creating strategically sound communications and loyalty-development processes require a commitment to an ongoing research discipline. Finally, these companies have to invest in technology that supports all strategic decision making through data collection, integration and evaluation.

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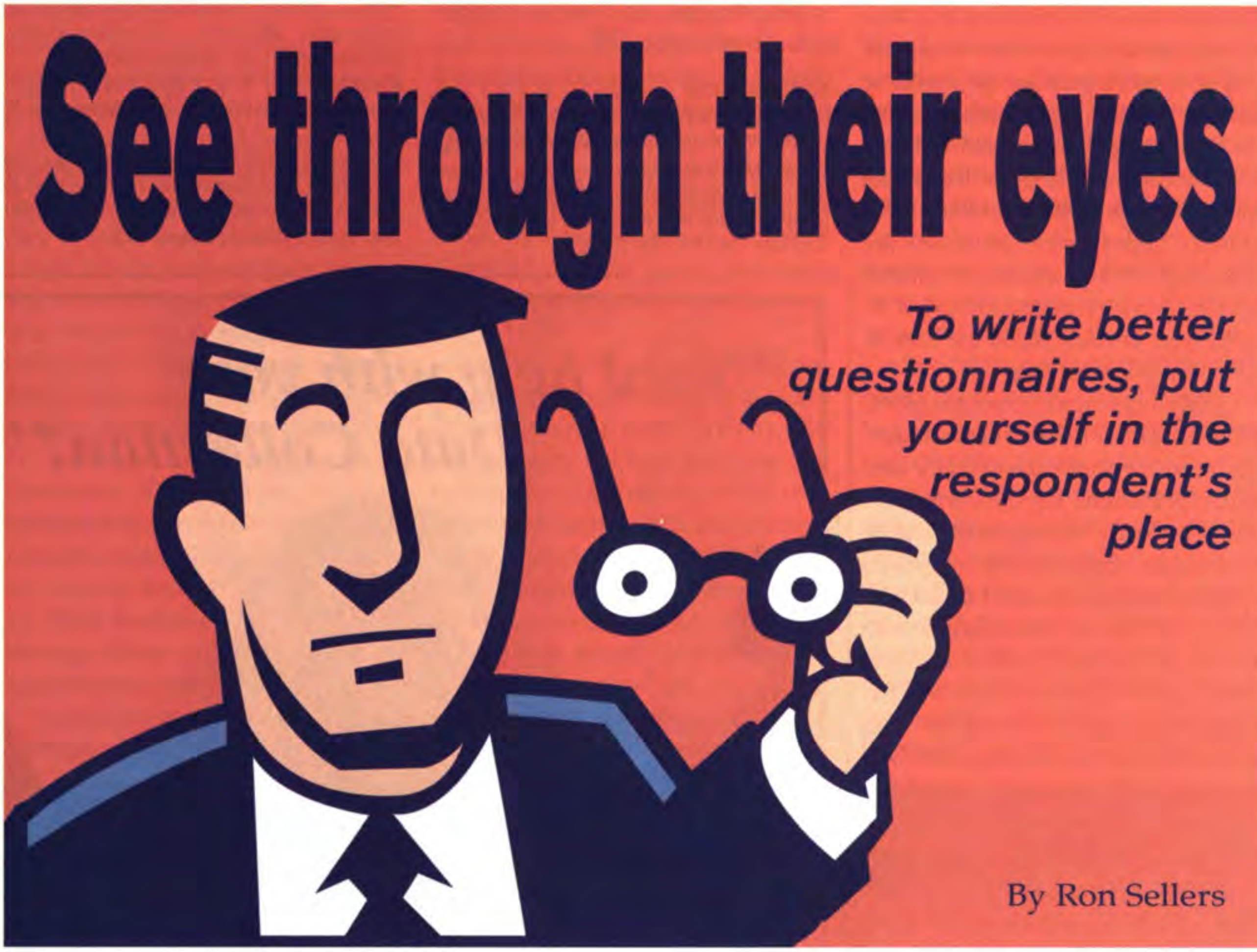
See through their eyes



To write better questionnaires, put yourself in the respondent's place

By Ron Sellers

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One of the most valuable exercises for professionals in the marketing research world isn't writing questionnaires — it's answering them.

Many studies, of course, screen researchers out with an up-front security question. Others don't. When given the opportunity, try playing the respondent. Doing this a few times will lead you to a conclusion that is difficult to escape: researchers often don't ask very good questions.

Think about it: we often ask people to remember things they did six months or a year ago. We expect them to give us exact numbers on the spur of the moment on questions such as how much television they watch each month or how much they paid for their last set of tires. We put them in unrealistic hypothetical situations and ask them how they are likely to react.

And why do we do this? Because we want information. Information is obviously the lifeblood of the research industry. But do we ever stop to think whether the information is viable?

Researchers spend time strategizing about what statistics to glean from the data, what scales to use on the questions, and how to order the questions so as to avoid bias. Do we ever ask ourselves whether the questions can be fairly answered at all?

I travel a tremendous amount. I recently received a questionnaire asking me how many times I've rented a vehicle in the last 12 months. Not only that, but for each time I rented a car, the research company wanted to know what size I rented, what company I rented from, what city I rented in, and how much I paid.

Now, that may be fine for someone who rents a car once or twice a year. But for someone who has rented about 30 cars this year, just how likely is it that I would remember all of that information – or take the time to fill it all out if I did remember?

This is not a one-time problem. I've been asked the same types of questions about hotels (do they really expect me to recall whether last February I stayed in the Hyatt or the Marriott in Atlanta?). I've been asked

to recall to the penny and to the tenth of a gallon just how much fuel I put in my car in the past week. I've been asked to recall how many days I spent on a cruise five years ago.

I'm a researcher. I live and breathe this stuff. And *I* couldn't answer any of those questions. Why do we think respondents, who are donating a few minutes of their time, will be able to do any better?

One of the most effective ways of checking for this downfall is very simple: once you've designed a questionnaire (or had one designed for you), answer it yourself. Go through each and every question and answer it as if you were the respondent. It's a simple task, but one that too few researchers undertake. If the questionnaire confuses you, it will confuse respondents. If it bores you, it will bore respondents. If you can't remember the kind of information it asks for, neither can respondents.

Better yet, administer the questionnaire to a few non-research people — your boss, your spouse, your mother, it doesn't matter, as long as they're people who have the ability to stare at you and say, "Now how am I supposed to remember how much I spent on closing costs when I bought my house eight years ago?" When you get a response like that, pay attention to it.

Bad questions come in all forms, but there are a number of things we need to remember. These might seem incredibly basic, but from many of the questionnaires I receive, it's painfully obvious that researchers aren't paying attention to them.

People don't remember things in the level of detail you wish they would.

Just because you want to know how much money people spent on fast food last month doesn't mean they can accurately tell you that information. Although your world may be revolving around that fast-food project for the next month, to respondents it's a minor detail in their busy lives.

People don't remember things for as long as you wish they would.

Ask people about how much they've spent on gasoline in the last week and they might be able to tell you. Ask them how much they've spent in the last month and they may be willing to go through a few mental exercises to give you a reasonable answer ("Let's see, I typically spend 20 bucks on gas each week...four weeks in a month..."). Ask them how much they spend in gas each year, and you're liable to get a wild guess just so they can move on to the next question.

Similarly, we have to be reasonable with our time frames. One client wanted us to contact people and ask them about a donation they had made to a non-profit organization six months ago. Six months after the fact, we can't expect people to remember why they gave (or even to remember that they did, in fact, give).

People will give you answers you're not expecting.

This is particularly a problem with self-administered questionnaires. It's frustrating to be asked to circle all the reasons I no longer shop at a particular store, only to have my particular reasons not listed anywhere on the questionnaire, with no place to write in answers. Hint: if you're getting mail questionnaires back with all sorts of scribbled notes from respondents, you're probably not giving them sufficient response options.

One telephone interviewer asked me to name all the brands I could of a particular consumer product which happened to relate to one of my hobbies. After giving her about 15 brands (including a number of lesser-known brands which I had to spell out for her because they weren't on the list), I was already tired of the questionnaire after the first question. How much better it would have been for the researchers to ask for the first few brands that came to mind.

Remember: every possible answer needs to have a place to go. That's the purpose of options such as "other" and "unsure." One of the most common and annoying mistakes is the lack of a "don't know/refused" response on telephone questionnaires. Do we want to find out what people really think, or force them to think along the lines of the responses we wrote into the questionnaire?

Just because we want 40 minutes' worth of information doesn't mean people want to give us 40 minutes' worth of time.

I've thrown away a number of questionnaires just because I wasn't about to spend half an hour answering the questions. One mail survey I got last year asked me to rate 40 different hotels on a series of 12 different image attributes. Sorry, but I'm not going to answer 480 questions, particularly since they took up just two pages of this eight-page questionnaire. I would love to know what their response rate was on that study!

Questionnaire length may be the area where researchers battle with clients more than just about any other. The client attitude is too often "I want the information, so ask it." We need to do more to communicate with clients (internal or external) that overly lengthy questionnaires end up promoting respondent fatigue, lower response rates (both on this study and on all others), and response bias.

The overall questionnaire isn't the only thing that gets too long. Individual questions, particularly those with a lot of attributes, also promote respondent fatigue. You may want to have your company rated on 30 different attributes, but that doesn't mean they can all be shoved into one question.

People can't answer some questions because they really don't know.

Not all questions can be asked directly. In at least a third of the advertising-related focus groups I've moderated, the client has insisted we ask "Would seeing this advertising make you more likely to buy this product?" There are two basic facts about advertising. One is that advertising works — good advertising literally can increase sales. The other is that consumers either don't recognize this fact, or deny it outright. The typical response to a question like that is "I don't buy products based on whether I like their ads!"

In doing research for product names, it's the same thing. People won't go buy the new Buick because it's called the Rendezvous. The name may contribute to the image of the vehicle, form the basis for some clever promotion, or help position the vehicle in consumers' minds. All of those factors can lead to increased sales. But don't ask people whether naming it the Rendezvous will make them more likely to purchase the vehicle, because that's a question they just can't honestly answer.

Similarly, advertising recall studies often suffer from this. Clients sometimes demand that respondents receive a battery of questions about where they saw certain advertisements. When in doubt, people tend to answer "television" because they assume they must have seen it on television. When they're bombarded by hundreds of advertising messages a day, as some estimates show, is it really realistic to expect people to remember exactly where and when they saw the advertisement?

Pricing studies also fall victim to this. It's easy to describe a new product to someone over the phone, then ask "How much would you pay for this?" or "If this were available for $19.95, would you buy it?" Respondents may give you an answer, but is it an answer based in reality? Companies often don't want to go through expensive methodologies such as conjoint studies, discrete choice analysis, or other techniques which can more accurately address the issue of price, so they just toss in a simple question or two and rely on the resulting data. Unfortunately, the resulting data often has no relation at all to what will actually happen in the marketplace.

What is reasonable?

It is up to researchers to understand what is reasonable to ask in a study, and what isn't. We cannot fall victim to the mindset that the client (or the boss) gets whatever they want, regardless of whether it is realistic. It's the researcher's responsibility to communicate the pitfalls of that approach in language that will make sense to the client, without relying on industry jargon. (Hopefully, this will avoid the response of one client who, when we suggested that he raise his sample size from his planned-for 100 people, objected that "You're too worried about doing this scientifically. I don't need it done scientifically, I just need it done right!")

The next time you finish a questionnaire, take one more step: answer it yourself. If you struggle with it, then it should be obvious that it's not really finished.

Discounting "blue light special" research

Don't depend on transaction data to get the full picture

By Robert Passikoff

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"We maintain a database of eight million transactions a month. Our K-trends tell us everything we need to about our customers and how to better serve them."

That's a direct quote from a senior marketing research person at Kmart. I won't mention the name. Not because it's confidential; it's just a professional courtesy in case that person's résumé is out on the street. The quality of mercy is not strained, even in our business.

Under other circumstances I might have thought that the statement was, at worst, wishful thinking in the face of declining market share, reduced profits, and increasingly skeptical looks from Wall Street. But it wasn't wishful thinking. It was a measured and confident statement, the grand finale to a conference call that had already been awash with this kind of arrogance. This is the brand of hubris that leads directly to serious — often lethal — difficulties so many companies are lately facing with increasing frequency.

The above episode happened some months before Kmart saw its stock plummet, before it was forced to circle the wagons into Chapter 11 protection mode. But, astonishingly, the arrogance continues: Marketplace realities evidently don't matter much to these folks. After all, what is a mere marketplace compared to billions of bits of research data? Kmart seems comforted — maybe "lulled" is a better word — by their trend data. Tons of statistics to slice and dice to their hearts' content.

Never mind that the insights and findings they ended up with — and ultimately acted upon — were statistically reliable, perhaps even excellent answers to meaningless questions. The past 30-days transactions data might have even been helpful in addressing inventory control issues, but it would give no clue at all as to what consumers really valued or what made them feel valued. Or what would make them come back to the store. It would not help Kmart marketers to understand how their customers actually "shopped" the category. It would not tell them how customers viewed the category, compared offerings, and, ultimately bought — and bought again.

"But wait," I hear you cry, "a big company like that must have conducted some sort of research besides looking at trend data!" One would

hope so, but likely it was the kind of research that provided them with comfortable and easy answers, generally with large sample sizes. You know, they asked questions like "Would you like to pay less for [fill in product/brand]?" and "If we provided [fill in product/brand] at a lower price would you buy it from us?" and "Are we conveniently located?"

Clearly the data they continue to base their decision-making upon does not reflect the way the customers are going to behave in the near future. If it had, their "Blue Light Specials" would have had a brighter effect on their bottom line. Their "Stuff of Life" would have resulted in more animated sales.

Don't get me wrong. I'm all in favor of conducting research. It's how I earn my living. But ultimately, knowing what your customers did last week isn't much help when what you really need to know is what they are going to do two and three weeks down the road. Not only that, you have to know why. More often than not, multi-gigabyte databases offer only a highly accurate historical perspective. But so what? That refers only to previous transactions, not to the future ones your business depends upon. When you are dealing with 21st century customers, rear-view-mirror research just isn't enough!

Asking meaningless questions and sifting through the resulting data can be interesting. So is chess. So is medieval history. But, just like the wrong research approach, neither deals with your customer's shifting values. Old-style research doesn't take into account how fast customer values are moving. It doesn't provide an early warning system to guide planning. It doesn't reveal what people really think, or more importantly, how they are going to behave.

It's unfortunate that outmoded research is the foundation upon which many companies still base their brand and strategic planning processes. Even worse, it is usually the companies' only attempt to translate data analyses into actionable and strategic information. You know — information you can actually use to position a brand, correct a marketing misstep, or just plain get a jump on the competition.

To do that effectively, you need research that paints a realistic picture of your target audience's values. You need to understand what they are prepared to believe about your brand, and how they are prepared to act upon those beliefs. To succeed and be profitable you need to understand what drives loyalty in your category and clearly Kmart didn't have a clue as to what was happening in their own category.

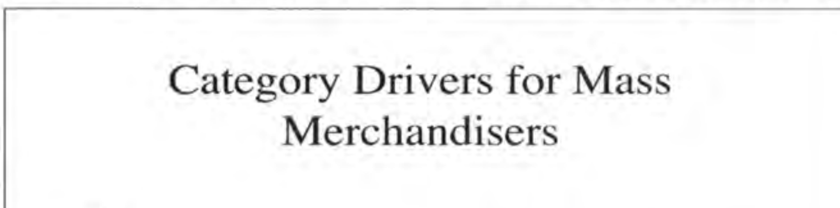
The assessment system we recommend: customer loyalty metrics. They are highly correlated to sales and are a leading indicator of profitability. "Loyalty" is where you exceed expectations and customers come back to purchase more of what you sell, and are resistant to the competition – even in the face of tempting price points.

Annually, our firm conducts two waves of these kinds of assessments in our Customer Loyalty Index. We use a proprietary methodology that combines psychological inquiry with factor and regression analyses, and causal path analysis. This is a customer-listening system with metrics that provide leading-indicator assessments, which is why we knew months ahead of time that Kmart was doomed to fail.

Our participants include a nine-census region, nationally-representative sample of 16,000 men and women 21-59 years of age. They are customers of specific brands. We define "customer" as a user of a specific brand within a category at a specified usage/consumption level. Brand usage/consumption criteria are different for each category. Generally speaking, however, the assessments are made by the group accounting for the highest levels of profitability, i.e., the "Top 25 percent" of consumers of the product or service.

"Mass Merchandisers" is only one of the categories we measure. In the case of the Kmart assessments, respondents had to spend at least $75 annually at Kmart.

Had Kmart the kind of insights customer loyalty metrics provide, it would have known that the four drivers for its category are "location and value," "the shopping experience," "merchandise range," and the "store reputation." I've listed them in their order of importance to the consumers.



But to really develop customer loyalty (and attendant profitability) you need to know what consumers expect from each of the category drivers. If you know that, you know exactly how high is "up" for consumers and what consumers are actually willing to believe about the brand. Take a look at the chart, because it reveals a lot about the mistakes Kmart continues to make.

More often than not, the first-most important driver is really the price-of-entry into the category, the way "reasonable rates and fees" are to the banking category, or "availability of different grades of fuel" are to the gasoline category.

Had Kmart actually thought about developing a loyal customer base, it would have recognized that "location and value" and "merchandise range" were the price(s) of entry to the category. Using those as the basis for your brand positioning required that the word "commodity" appear in parentheses below the actual store name. What's more — surprise, surprise — they are the category drivers that have the absolute lowest levels of consumer expectations, because that's the store's raison d'être: to provide lots of stuff at the very nearly lowest prices possible at a convenient location!

"Shopping experience" and "store reputation" is where Kmart failed dismally. Probably because those kinds of customer values didn't show up anyplace in their "past 30-days transactions" analysis, which is why the Kmart folks couldn't have possibly realized that it is in each of these drivers that the highest customer expectations reside.

Why is it that I can easily envision Kmart executives sitting at home sniggering at the Wal-Mart commercial that focused only on how friendly the Wal-Mart employees are? You know the one. It didn't talk about products or low prices (they had other commercials for that). This one had some guy who looked to be 75 years old telling you that he was personally going to make sure you and your family have a really good day because you shopped at Wal-Mart.

Ultimately, Kmart created the unenviable situation for itself of "promises made, promises broken." Kmart advertised that it had the same stuff that the competitors had. But when suppliers realized that they were in danger of becoming creditors in a bankruptcy suit and stopped deliveries, shelf inventory dwindled. It doesn't do you any good to actually get folks to come to the store when the shelves aren't stocked! Doesn't matter how low your prices are if you can't actually deliver the goods.

Combine that with a worried work force that answers customer queries with a surly "What do you want?" and "Why are you bothering me!?" instead of a smile, and it doesn't take 30 seconds worth of transaction analysis to know that you have a brand and marketing fiasco in the making. Not actually caring about the customer resulted in long check-out lines at the register and, well, you get the picture. In the end, none of that could have helped "store reputation" either. It was only the Stuff of Life if you were currently living in downtown Moscow.

That was, of course, the second quarter's debacle. At the time of this writing, the most recent madness was Kmart's newest campaign in July. An attempt to actually change their audience. Its raison d'être was ostensibly to attract the 14-to-34-year-old age segment by borrowing brand equity from the flagging Joe Boxer clothing line. One industry expert likened the actual TV ads to campaigns run by Ralph Lauren and Abercrombie & Fitch. This struck another industry expert as a mistake. "It doesn't matter how good the ads look if people aren't treated civilly. Even more so if they come to a store and they can't find what they want. It's kind of a 'hitch you wagon to a falling star' scenario."

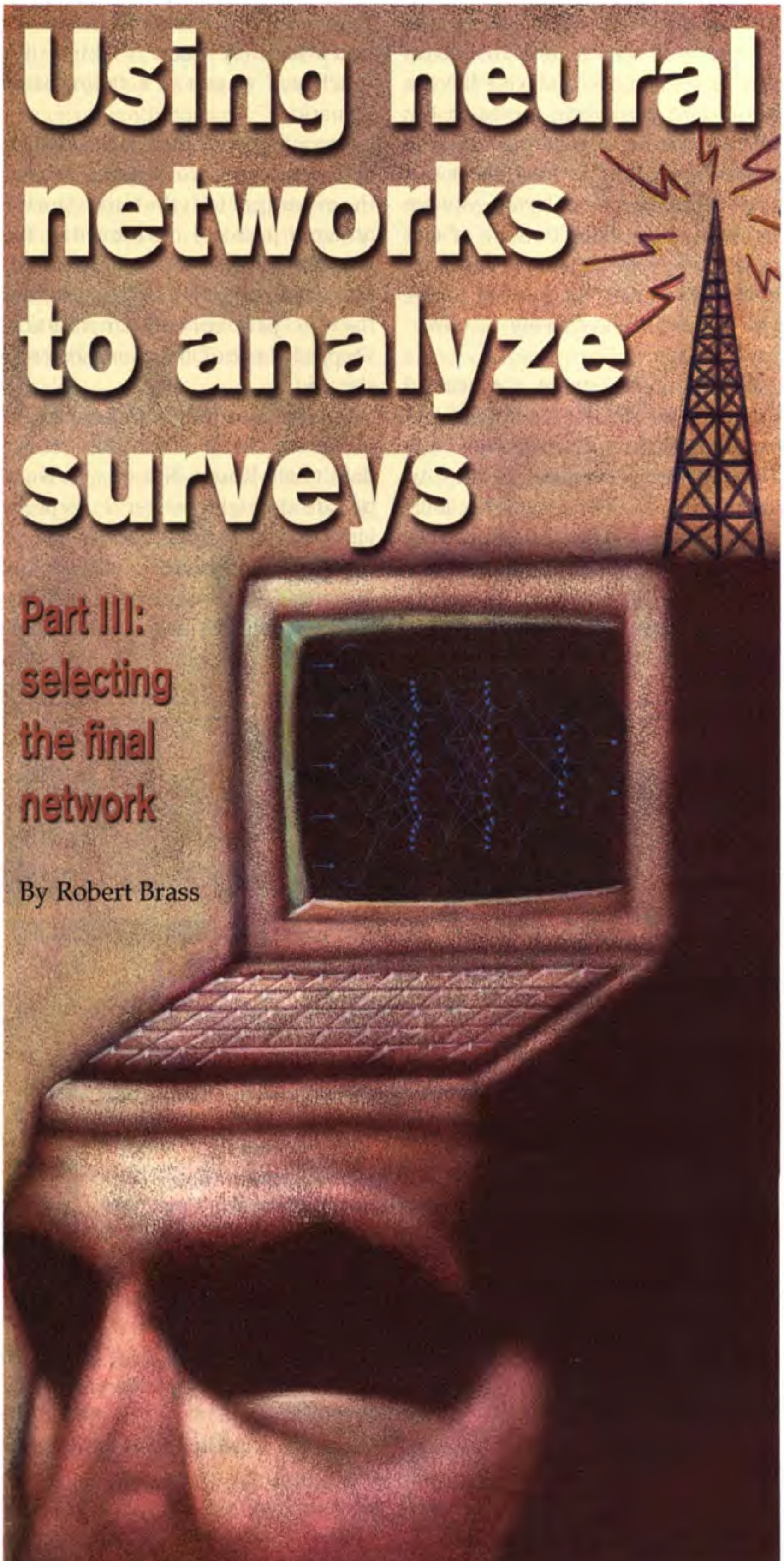
I was discussing the Kmart situation with a group of colleagues. One of them suggested that the senior research person I mentioned at the beginning of this article wasn't actually arrogant at all. "It's just that they've probably never actually shopped at one of their stores before," she said.

Studying the trends of those "eight million transactions a month" clearly didn't help Kmart. Nor was the Stuff of Life the right answer to its problems, and borrowing equity is always a dangerous game. If Kmart had only "listened" to its customers with the right tools in the first place, it wouldn't be in the trouble it's in now.

Using neural networks to analyze surveys

Part III: selecting the final network

By Robert Brass



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This is the final article in a three-part series describing the use of neural networks for analyzing a survey. The previous two segments were published in the June and July/August issues of *Quirk's Marketing Research Review*. The focus of this serialized article was to present a "cookbook" approach for using an extremely powerful tool to define the decision process of respondents to a survey. Sprinkled between the various rules of thumb and process descriptions are periodic discussions of the theory.

In order to gain the most from this final article it is important to have read the second installment (the July/August issue). In fact, it is not a bad idea to have it conveniently available for reference. While there will be some review of the highlights of the previous installments, it will not cover all key aspects of the prior discussions.

As previously defined, the goal of this particular analysis was to determine the most effective actions that can be taken to create Totally Satisfied customers from those who weren't Totally Satisfied with the results of a service call to repair their computer. Since there were only a very small group of Dissatisfied customers the focus of the analysis is exclusively on the Somewhat Satisfied customer group.

In the previous installment the sensitivity of the five selected inputs was tabulated for each of 12 different neural networks (Figure 9). This table describes the impact that each input has on the output of the neural network for the group of customers who were Somewhat Satisfied with the service call. A table with the same format and associated contents is usually also

developed for the Totally Satisfied and for the Dissatisfied customer group. In the example used in this article, the Somewhat Satisfied customer group is the most critical and will be the sole basis of the discussion.

Figure 9 documents the results of 12 different neural networks derived from the same survey data. Each entry in that table describes the change in the output (Overall Satisfaction) to a corresponding change in the input. For example, in Run 1, if the satisfaction level of the input "Arrival" increased by 1 percent and all other inputs remain unchanged, the Overall Satisfaction would increase by .41 percent. By examining the sensitivity of the five inputs in all of the 12 networks, it is apparent that there are very different conclusions that could be drawn, depending upon the choice of the network. The primary goal of this final discussion is to describe the process that can be used to identify the specific network that is most representative of the survey respondents decision process.

Figure 9

Impact (Sensitivity) of Inputs on Output

Somewhat Satisfied Respondent Group

				Question		
NN Run		Request	Appointment	Arrival	Conduct	First Time
Run 1		0.20	0.08	0.41	0.23	0.34
Run 2		0.16	0.08	0.14	0.32	0.22
Run 3		0.24	0.32	0.29	0.34	0.21
Run 4		0.30	0.27	0.32	0.22	0.71
Run 5		0.33	0.13	0.18	0.16	0.40
Run 6		0.29	0.25	0.32	0.24	0.72
Run 7		0.35	0.15	0.26	0.62	0.32
Run 8		0.34	0.19	0.18	0.52	0.42
Run 9		0.28	0.18	0.15	0.22	0.51
Run 10		0.30	0.21	0.29	0.16	0.61
Run 11		0.31	0.15	0.32	0.21	0.53
Run 12		0.19	0.12	0.24	0.11	0.33

The pervasive theme in this series of articles is that when a neural network is used to analyze a survey with a limited number of respondents there will be major variations among neural networks derived from the respondent data. The underlying cause of this problem is twofold:

First, there are usually only several hundred surveys that document the results of a market research program. To effectively develop a neural network, the survey data must be split between two groups, one group to train the network and the other to test it. In many cases, this split is approximately equal. This obviously can create a bias, so to minimize the impact of the small groups, the training/testing process is repeated many times with a new randomization of the split between the training and testing survey data.

Second, the order of the surveys used for training a neural network, the architecture of the neural network (the number of neurons in the hidden layers) and the training strategies all interact to produce different networks. While all of the optimally trained networks may give approximately the same statistical accuracy in developing outputs corresponding to similar input sets, the sensitivities of any single input can vary significantly.

The key then is to have a process by which the neural network that most represents the decision logic of the survey respondents is identified. This is the primary subject of this final installment.

Selecting the "runs" to populate the impact table

Figure 9 contains the results of 12 trained networks. This is used for illustrating the process. In the best of all possible worlds, instead of 12 alternatives to choose from there would be 50 to 100 or more. With an increasing number of choices, the process that will be described for calculating the quantitative relationships becomes potentially more accurate. However, as will become somewhat apparent with further discussion, the identification of the one or two most sensitive inputs can almost always be characterized even with a limited number of choices.

Part II of this article (July/August issue) presented the table in Figure 9 without discussing the method used for selecting the specific runs that were chosen to populate it. The process is quite straightforward. Each of the randomizations of the respondent data, split between training and testing, develops about 700 separate networks. Each individual network is defined when the progress of training is suspended and the current state of the neural network is statistically tested. Each of these tested alternative networks then is examined with the goal of selecting those that could potentially be the "Most Representative" network.

There are three important statistics that are available for each neural network.

1. The average error between the predicted output and the actual output.

2. The RMS (root mean square) between the predicted output and the actual output.

3. R^2 (a measure of the amount of change in the output that is predictable by the changes in the input).

In order to be precise in the definition, the R^2 calculated using the results of the neural network is an approximation and not exactly equivalent to that terminology as used in formal statistics. It is, however, a reasonable alternative.

The selections of the specific runs (1-12) that populate this table follow a very simple rule of thumb. All selected runs must have been derived with at least 60 cycles of training. That is, the training deck must have been completely examined at least 60 times. Then, three networks are selected from the alternatives derived from each randomization of the survey data.

• First select the run with the highest R^2.

• Second, select a different run with

the lowest average error. However, the architecture of this network must be different than the one already associated with the highest R^2 selection.

• Third and finally, select a third alternative with the lowest RMS error but with the similar restriction that the architecture must be different from the network selected for the optimum average error or R^2.

The bottom line is that each of survey data randomizations, which develop 700 tested networks, contributes a maximum of three networks. Therefore, the table in Figure 9 consists of the best three choices from each of four randomizations of the survey data. While it is possible to select more than three networks from each randomization, the similarities that would exist among some of the networks would detract from the value of increasing the number of choices.

How do you select the most representative network?

As a basis for explaining the process, let us abandon reality and slip into the ideal world. Assume that we do have a table with 100 potential "Most Representative" networks. How do you find that needle in the haystack? Just as a survey uses a sample to predict the opinions of the "universe," the same philosophy for identifying central tendencies could be used to formulate the process for the "Most Representative" selection.

Often survey data is segmented to create a small number of groups that share common characteristics. The goal of this type of analysis is to characterize each group separately to identify and classify their uniqueness. Since we are dealing with the world of neural networks, there is a methodology called Kohonen network analysis that will do exactly that. It basically can divide survey information into a small number of segments that share similar characteristics. Usually there is one dominant group and a few smaller alternates. If the central tendencies of the characteristics (in this case the sensitivities of the inputs to the outputs) of the dominant group are identified, this would be a reasonable choice for of the "Most Representative" network.

Figure 10

Impact (Sensitivity) of Inputs on Output
Somewhat Satisfied Respondent Group

NN Run		Request	Appointment	Question Arrival	Conduct	First Time
Run 1		0.20	0.08	0.41	0.23	0.34
Run 2		0.16	0.08	0.14	0.33	0.22
Run 3		0.24	0.32	0.29	0.34	0.21
Run 4		0.30	0.27	0.32	0.22	0.71
Run 5		0.33	0.13	0.18	0.16	0.40
Run 6		0.29	0.25	0.32	0.24	0.72
Run 7		0.35	0.15	0.26	0.62	0.32
Run 8		0.34	0.19	0.18	0.52	0.42
Run 9		0.28	0.18	0.15	0.22	0.51
Run 10		0.30	0.21	0.29	0.16	0.61
Run 11		0.31	0.15	0.32	0.21	0.53
Run 12		0.19	0.12	0.24	0.11	0.33

Reality, on the other hand, presents us with 12 networks and using Kohonen or another sophisticated segmentation program would certainly be overkill. As a substitute, we offer the following simple process.

The process to identify the most representative neural network

The overall strategy is to graphically segment the data by highlighting key factors. The first step is to identify the highest two sensitivities in each of the runs. In Figure 10, the highest is outlined in bold and tinted with gray. The second highest is outlined only. As is obvious, a pattern has now emerged.

The second step is to eliminate those runs that are at odds with the largest group. Figure 11 displays the now reduced table. Runs 2, 3, 7 and 8 were eliminated. There is a reasonable argu-

Figure 12

Overall Satisfaction	Percent Totally Satisfied in Each Category Request	Appointment	Arrival	Conduct	First Time
Totally Satisfied	59%	39%	56%	64%	84%
Somewhat Satisfied	44%	18%	24%	38%	20%
Dissatisfied	17%	0%	0%	0%	10%

ment to either toss out Run 1 or keep it, so for interest it was retained. The average of the remaining runs was then derived and is listed in the bottom of Figure 11.

This set of averages could be used by itself as the representative sensitivities, however it is more helpful to identify the run that is most similar to those averages. Having a working neural network instead of abstract averages offers the potential of using that network to examine various strategies obtained by selectively changing the inputs to observe the corresponding changes in the output. In this case, Run 11 was chosen as the Most Representative.

Figure 11

Impact (Sensitivity) of Inputs on Output

Somewhat Satisfied Respondent Group

NN Run		Request	Appointment	Question Arrival	Conduct	First Time
Run 1		0.20	0.08	0.41	0.23	0.34
Run 4		0.30	0.27	0.32	0.22	0.71
Run 5		0.33	0.13	0.18	0.16	0.40
Run 6		0.29	0.25	0.32	0.24	0.72
Run 9		0.28	0.18	0.15	0.22	0.51
Run 10		0.30	0.21	0.29	0.16	0.61
Run 11		0.31	0.15	0.32	0.21	0.53
Run 12		0.19	0.12	0.24	0.11	0.33
Average		**0.27**	**0.17**	**0.28**	**0.19**	**0.52**

What do these numbers mean? Are they good, bad or indifferent? Empirically, we can offer the following experiences based on hundreds of neural networks. If the sensitivities (impact) are .1 or less, for all practical purposes they can be ignored. Inputs with a .1 to .2 sensitivity are relatively low but in some circumstances that still might characterize a potential key driver of the output. The maximum sensitivities in most situations usually lie between .2 and .4. Anything over .4 is relatively high. In this example, .53 raises a red flag. It is very high and points to a potentially important input. The sensitivity, or the impact it has on the output, however, is only half of the story.

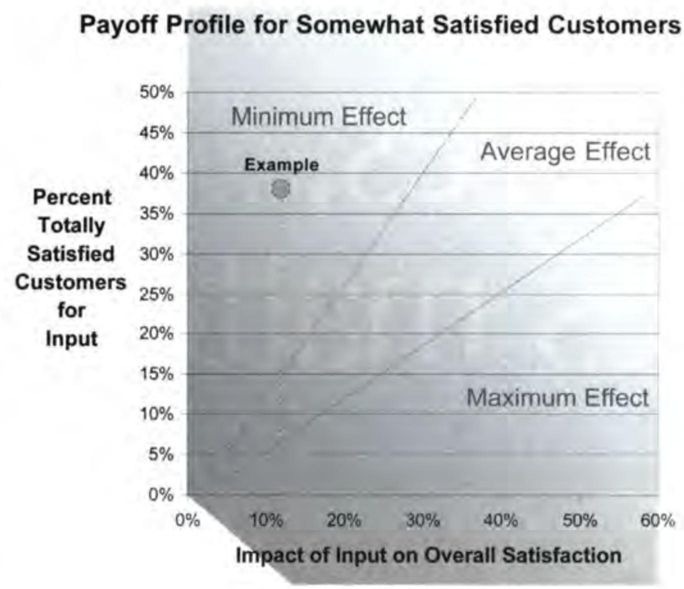
The other half

The objective in this particular example was to determine the most effective actions that could be taken to transition the service call customers who were Somewhat Satisfied to Totally Satisfied. The neural network identifies the impact or change that occurs on Overall Satisfaction by changing any specific input. To determine the appropriate actions, however, the current level of satisfaction of each input must also be considered.

The table in Figure 12 shows the percentage of the customers who were Totally Satisfied with each of the five key inputs for the three basic groups: Totally Satisfied Overall, Somewhat Satisfied Overall, and Dissatisfied Overall. A combination of the data from the Somewhat Satisfied Overall group associated with the corresponding sensitivity (Run 11) will be used to clarify the appropriate actions.

A presentation format called the Payoff Profile is used to graphically combine both aspects, plotting the level of satisfaction for each input and the impact that the input has on the output (Overall Satisfaction). Figure 13 illustrates this. The vertical axis measures the percentage of customers who are Totally Satisfied with each specific input. The horizontal axis measures the impact that each input has on the Overall Satisfaction.

Figure 13

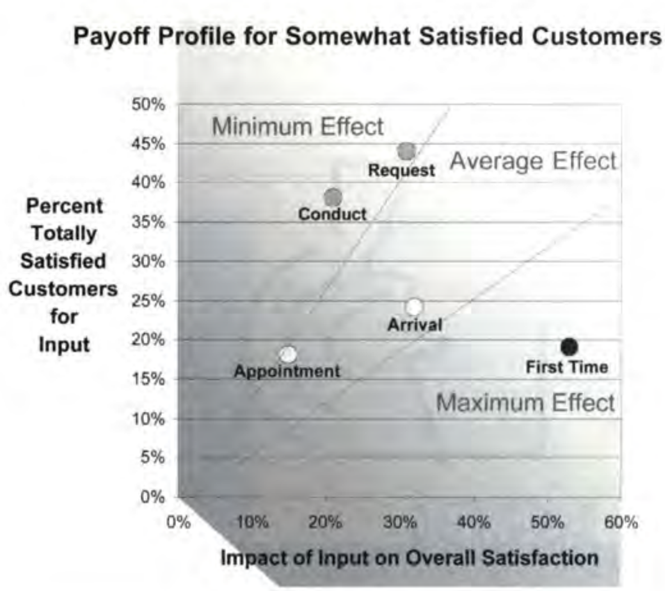


The maximum leverage occurs when there is a high impact (sensitivity) and a low satisfaction (the lower right-hand portion of the plot). The least leverage is when there is a relatively high satisfaction and a low impact (upper left-hand portion). The single input plotted as an example illustrates that 37 percent of the respondents were Totally Satisfied with that particular input and that its impact on Overall Satisfaction was relatively small at approximately 12 percent. This would not be a good candidate for action.

It is clear from Figure 14 that fixing the computer problem the first time is the most critical action that can be taken. The second possibility is assuring that the service person arrives at the customer's premises on time. These two actions would be the key strategy to convert the Somewhat Satisfied Overall group to Totally Satisfied.

Normally Payoff Profiles for both the Totally Satisfied group and the Dissatisfied group are also developed and can sometimes impact the choice of the appropriate corrective actions. The Totally Satisfied group rarely has an input with an impact that is greater than .2 and typically all inputs have very high satisfaction ratings. For this reason, the Totally Satisfied Payoff Profile usually does not impact the decision for choosing the most effective actions. The Dissatisfied Overall group, on the other hand, almost always has a very low satisfaction rating with all of the inputs and often has a corresponding high impact for some of those inputs. The impact of the Dissatisfied on the final decision for selecting the appropriate actions will depend upon the percentage of customers in each group. In this example, there were very few Dissatisfied customers; consequently the improvement strategy is based solely on the Somewhat Satisfied Overall group.

Figure 14



The final subtlety

An initial step in the process of creating a neural network was to calculate a correlation matrix to determine if there were any strong relationships between the various inputs. In the example, there were several. If we create a network using inputs that are highly correlated this could lead to a very inaccurate result. Therefore, "proxy" inputs are typically selected to represent the correlated input groups. This process was described in detail in the previous installment of this article.

In the example, there were originally eight questions on the survey that served as inputs to the customer's decision process in determining Overall Satisfaction. Three were eliminated for the final derivation of the neural network because they were highly correlated with several of the five that were finally used. The three were:

• The ease of requesting service (Request)

• Effectiveness of the service representative in informing the user about the repair (Result)

• Communication from the service representative after the repair has been completed (Communication)

It is now necessary to go back to these correlated inputs to see if there are additional elements to consider in the final analysis. A correlation matrix should be developed again with all of the inputs (see the July/August issue), however only the data from the survey respondents who were Somewhat Satisfied Overall should be used in calculating it. In the example, there was only one highly correlated relationship to "First Time" and that was "Result." There were no highly correlated inputs to "Arrival."

Therefore the advice to be given, as a result of the analysis, is that the most critical action that can be taken is to assure that the repair of the computer was correct the first time. In addition, there should be an ongoing discussion during the service call to keep the customer up to date with the progress. A secondary but important element is to make sure that the service personnel arrive on-time.

The test of time

This technology is extremely powerful and it has withstood the test of time. It effectively accommodates the non-linearity and complexity of the human decision process. It has also been our experience that often the results that are obtained by using a neural network to analyze a survey are quite different than those developed by traditional methods. We have gained considerable respect for the value of neural network analysis: The outcomes that our clients have had by following the recommendations developed by this technique have been almost exactly as predicted.

The example used to explore the use of neural networks was based upon a customer satisfaction problem. We had a case study also based on customer satisfaction published in the October 1998 issue of *Quirk's Marketing Research Review* entitled "A Strong Connection." We have also used it for employee satisfaction, product design, medical analysis, characterizing ideal bank branch locations, defining buying factors, and many other areas.

Neural networks have become an accepted and very useful technology during the last decade. Their use is pervasive in many elements that impact our lives. They run elevators, fly airplanes, identify financial fraud, are used in medical analysis and in thousands of other applications. However, in our discussions over the years, it is apparent that there is very little active use of this technology in market research. It is our hope that this series of articles will stimulate interest and discussions about the value of using neural networks for survey analysis. There is an initial learning curve and a clear complexity that needs to be understood to effectively use this methodology and obviously there are areas that were glossed over in these articles for the sake of brevity. However, we would be glad to share our experiences with any interested individuals.

Author's note
There are two people who were very influential in convincing me to write this article. I would like to thank Chuck Kenney of Research Data Inc., who became a believer many years ago and tried to convince his clients of the value of neural networks. I am also indebted to Renee Rogers of Sulzer Orthopedics, who, in addition to being one of the first clients to use neural networks, had the patience and tenacity to sit through a long explanation of the minute details of the process and to encourage me to document the methodology for others.

Research Industry News

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share. Payment was to be approximately 80 percent cash and approximately 20 percent NetRatings' common stock, evaluated on the basis of the weighted average U.S. dollar closing price for NetRatings common stock as quoted for the 10 trading days preceding August 2. Upon the acquisition of the controlling interest, NetValue's board was to be reconstituted to provide NetRatings with majority control. Lennart Brag will continue to serve as chairman of the board of directors.

Taylor Nelson Sofres has acquired Sweden-based research firm **Svenska Gallup AB**. Founded in 1941, Svenska Gallup operates in two locations in Sweden and employs a staff of 14.

Separately, Taylor Nelson Sofres has acquired the business and assets of **Evaliant Media Resources LLC**, a provider of online advertising data and analysis tools. The business will be combined with the online ad tracking division of TNS CMR. Evaliant employs 17 people and the senior management team will remain with the business.

New York-based software firm **MetaSource Group** has acquired **PFA Research**, a U.K.-based business-to-business research firm.

Germany-based **GfK Group** has taken over the activities of **I+G Nürnberg** and its subsidiaries **GPI Kommunikationsforschung** and **I+G Suisse** from the existing joint venture with NFO Europe, called I+G Gesundheitsforschung, which was terminated on June 30. Business operations will continue under the name GfK HealthCare.

Separately, wholly-owned GfK subsidiary **Intomart GfK Belgium NV** has acquired 51 percent of the shares in **Significant**, a Belgian research company.

London-based **Aegis Research** has acquired **Sample Surveys Limited**, a U.K. research firm. Sample Surveys is the second addition to Aegis's research acquisitions in the U.K., the first being Pegram Walters last year.

Paris research firm **Ipsos** has signed a letter of intent to acquire **F-Squared**, a custom research company operating in Central and Eastern Europe. According to this agreement, Ipsos will acquire 100 percent of F-Squared's holdings.

Alliances/strategic partnerships

Martin Hamblin GfK Inc., the U.S.-based health care operation of international research agency GfK, has signed an agreement to partner with New York-based **WebSurveyResearch** and gain access to WebSurveyMD, a dedicated Internet panel of physicians and other health care professionals.

ComScore Networks, Inc. and **CMR** jointly announced the extension of their strategic alliance through their respective acquisitions of Media Metrix and Evaliant. In June, Taylor Nelson Sofres (TNS), parent company of CMR, acquired the business and assets of Evaliant Media Resources LLC, a provider of online advertising data. Media Metrix now operates as the comScore Media Metrix division of comScore Networks; Evaliant now operates as a division of CMR/TNS.

Following these acquisitions and subsequent developments, including the recent introduction of the next-generation comScore Media Metrix 2.0 audience measurement service, comScore and CMR have elected to expand their alliance to include several new elements. As part of this expanded alliance, comScore Media Metrix will co-market Evaliant services to marketers across a range of industries. CMR will also co-market new comScore Media Metrix products. Further, CMR and comScore will collaborate to integrate comScore Media Metrix audience measurement data with CMR's Evaliant ad tracking data to provide the convenience of uniform reporting to clients who purchase both services.

Arbitron Inc. and **IBOPE Media Information** have announced an agreement to cooperate in the testing of Arbitron's Portable People Meter (PPM) technology in Latin America. The agreement will give IBOPE access to operational data from Arbitron's U.S. market trial. IBOPE and Arbitron will work jointly with radio and television broadcasters, advertisers, and advertising agencies to help them evaluate the PPM technology. The two companies will also cooperate in an effort to introduce the PPM into a number of Latin American countries.

Association/organization news

The European Society for Opinion and Marketing Research (ESOMAR) has for the first time appointed two representatives with joint responsibilities in the U.S. They are Daphne Chandler and Michael Kenyon. Together they will represent ESOMAR in the U.S., with Chandler active east of the Mississippi and Kenyon west of the Mississippi. Kenyon is vice president-consulting at Gartner Primary Research, Portland, Ore. He can be reached at 503-241-8036 or at michael.kenyon@gartner.com. Chandler is president/partner of Global Focus, an Oyster Bay, N.Y., research firm. She can be reached at 516-624-7378 or at daphne@globalfocus.com.

Canada's **Professional Marketing Research Society** (PMRS) has announced its support of the Principles of Marketing Research certificate program, which was developed by the Marketing Research Association in conjunction with the University of Georgia Center for Continuing Education. "PMRS currently offers over 40 courses across Canada for its members and others with an interest in market research. PMRS is pleased to be able to include the Principles of Marketing Research program as another way for members to take an active role in the education process," says PMRS President Cam Davis.

The Southwest Chapter of the **Marketing Research Association** has announced the recipients in its third annual scholarship program. The program, which offers monetary awards to members and employees of chapter members, was developed to encourage and assist educational pursuits among those employed in the market research industry. Coursework eligible for assistance was left broad to allow applicants to enhance or develop skills primary as well as ancillary to market research. Education could include such topics as software applications, moderator training, writing techniques, and the Principles of Marketing Research, sponsored by the national MRA. The eight 2002 Southwest Chapter MRA Scholarship Award recipients are: Jennifer Adamson, Saurage Research, advanced authoring, The Art Institute of Houston, $500 award; Lisa Benson, CCS Research, computer programming and problem solving, Pima Community College, $500; Donald Carroll, Clearwater Research, access programming, Executrain, $500; Daniel Hernandez, Galloway Research, Principles of Marketing Research course, University of Georgia, $500; Kamilah Garcia, Galloway Research, principles of management, Education Direct, $500; Aaron Lerwill, Discovery Research, business marketing, Harcourt Learning Direct, $500; Dr. Gayla Smutny, Clearwater Research, focus group moderator training, Riva Training Institute, $500; Louie Valdez, WestGroup, statistical elements, Arizona State University, $378.

Awards

IMS Health, Fairfield, Conn., announced that Graham Lewis, vice president of IMS Consulting, has received the Mary Clement Lifetime Achievement Award from the Pharmaceutical Business Intelligence and Research Group (PBIRG). The award, named in honor of researcher Mary Clement, a respected PBIRG member who died of cancer last year, was presented to Lewis by Nancy Wilkerson, PBIRG vice president of programs and education at the agency's recent annual conference in San Antonio, Texas.

Clementine, the data mining product **SPSS Inc.**, Chicago, was ranked as the No. 1 data mining tool used by the readers of KDnuggets News, a data mining and knowledge discovery industry e-newsletter.

Eli Lilly and Company presented Rochester, N.Y.-based **Harris Interactive** with a 2002 Global Supplier Award. Harris Interactive is the first market research company to be issued this award by Lilly. The company has been recognized for its work in consulting, designing, and implementing market and clinical research studies. The award recognizes suppliers for performance in quality, speed and service for support. Lilly selected 18 suppliers as honorees for 2002 among its global supplier base.

New accounts/projects

The Center of Automotive Research contracted with Birmingham, Mich.-based **Amplitude Research, Inc.** to conduct Web-based marketing research to assess the e-business readiness of the automotive supply chain. The research was sponsored by SupplySolution, Inc., a supply-chain execution firm.

Procter & Gamble has signed a three-year global license to use **SPSS MR's** Dimensions market research software, including the SPSS MR Data

Model for handling survey data. The agreement follows a technology review by Procter & Gamble's Consumer and Market Knowledge (CMK) division, in which potential solutions from both established and emerging players were considered.

New York-based **Arbitron Inc.** has signed contract extensions with **Infinity Broadcasting Corporation** and with **ABC Radio**, which gives the firms' stations access to quarterly radio ratings up to the release of the Spring 2003 radio survey as well as access to additional services currently provided.

Simmons Market Research Bureau, New York, has signed a long-term service agreement with **Omnicom Group, Inc.** Included in the Omnicom agreement are OMD, a media specialist company, PHD Network and global agencies BBDO, DDB, and TBWA.

Separately, **Hachette Filipacchi Media U.S.**, Inc. and Simmons Research Bureau signed a service agreement providing 18 Hachette magazines and seven special interest publications with access to the Simmons National Consumer Study.

New companies/new locations

Sharpen the Focus Institute, a qualitative research training facility, has been created as a spin-off of Executive Solutions, a Syosset, N.Y., research firm. It will be headed by Elizabeth Hurlow-Hannah.

Star Data Systems in Chicago has moved to new offices at 401 South Milwaukee Avenue, Suite 170, Wheeling, Ill., 60090. Phone 847-239-7900. Fax 847-239-7907.

Denver Qualitative Research Solutions has changed its name to **INgather research**.

Sunbelt Research Associates, Jupiter, Fla., has changed its name to **SRA Research Group, Inc.**

Dan Lee has founded **EyeQ Research**, a firm focusing on Web site testing and analysis, at Fontana Center, 4928 S. 79th East Avenue, Tulsa, Okla., 74145. Phone 918-742-3937. Web www.eyeQresearch.com.

Oliver Karp has opened **Karp Data Services**, a data processing firm, at 4426 Ensenada Dr., Woodland Hills, Calif., 91364. Phone 818-999-2701. Fax 530-267-5354. E-mail okarp@prodigy.net.

Kissel Consulting Group has moved to 3404 Woolsey Drive, Chevy Chase, Md., 20815-3923. Phone 301-941-8001. Fax 301-941-8005.

Millward Brown Colombia has opened as a fully-owned company headed by Liliana Baena. The company will serve the Andina region, which is made up of Ecuador, Colombia, Peru, and Venezuela. Millward Brown's former licensee, Market Research de Colombia, will continue to be the fieldwork for the next three months.

Focus on Food, a Norcross, Ga.,

facility dedicated to the development and testing of menus and food products, has been opened by Ron Marks at 6679 Peachtree Industrial Blvd., Suite M, Norcross, Ga., 30092. Phone 770-300-0168. Web www.focusonfood.com.

Company earnings reports

Opinion Research Corporation, Princeton, N.J., announced results for the second quarter and first half of fiscal 2002. For the second quarter of 2002, revenues were $44.8 million compared to $45.2 million in the second quarter of 2001. EBITDA was $3.9 million compared to second quarter 2001 EBITDA of $4.2 million. Operating income for the current quarter was $2.8 million compared to $2.1 million in the second quarter of 2001. Net income for the current quarter was $977,000 compared to second quarter 2001 net income of $354,000. For the second quarter of 2002, diluted earnings per share were $0.16 compared to diluted earnings per share of $0.06 in the comparable period last year. Compared to December 31, 2001, the company's borrowings have been reduced by $2.2 million during the first six months of 2002.

For the first half of 2002, revenues were $87.2 million compared to $91 million in the first half of 2001. EBITDA for the first half of 2002 was $7.5 million compared to $9.6 million in the first half of last year. Operating income for the first six months of 2002 was $5.3 million compared to $5.4 million in the first six months of 2001. First half 2002 net income was $1.8 million, or $0.29 per diluted share, excluding the cumulative effect of a change in accounting principle in the first quarter resulting from the adoption of FASB Statement 142. After the change, first half 2002 net income was $1.5 million, or $0.24 per diluted share. For the first half of 2001, net income was $1.4 million, or $0.24 per diluted share.

NetRatings, Inc., Milpitas, Calif., announced revenues for the second quarter of 2002 and for its second quarter ended June 30 of $7.3 million, up 69 percent from $4.3 million reported in the first quarter. Pro forma net loss for the second quarter of 2002 was $3.3 million, or a loss of ($0.10) per share on approximately 32.6 million weighted shares outstanding. This compares with pro forma net loss for the first quarter of 2002 of $2.3 million, or a loss of ($0.07) per share on approximately 32.9 million shares outstanding. (The pro forma results exclude the amortization of non-cash stock-based compensation and intangible assets, and one-time charges.) In accordance with generally accepted accounting principles (GAAP), net loss for the second quarter of 2002 was $6.5 million, or a loss of ($0.20) per share. This compares with a net loss of $14.6 million, or a loss of ($0.45) per share in the first quarter of 2002. (The GAAP results include the amortization of non-cash stock-based compensation and intangible assets, and one-time charges.)

Second quarter gross margins were 47 percent, up 9 percentage points from the 38 percent gross margins the company reported in the first quarter. The improvement in gross margins is due to the effect of the recent acquisitions and management's ongoing cost control program.

IMS Health, Fairfield, Conn., reported diluted earnings per share from recurring operations of $0.23 for the quarter ended June 30, up 5 percent from last year's second quarter. Net income from recurring operations was $66.0 million, essentially unchanged year over year. Recurring results exclude certain pre-tax gains and charges totaling $6.2 million. During the 2002 second quarter, revenue totaled $353 million, up 5 percent constant dollar year over year and 6 percent on a reported basis. Operating income was $105 million, down 2 percent on a reported and constant-dollar basis from the year-earlier quarter. Net income of $66 million was essentially unchanged from the same period last year. Diluted earnings per share was $0.23 in the 2002 second quarter, compared with $0.22 per share in the second quarter of 2001.

IMS Health's first-half 2002 revenue rose to $684.4 million, up 5 percent constant dollar and 3 percent on a reported basis. This compares with revenue of $663.9 million in the 2001 first half. Operating income for the first six months of 2002 was $196.3 million, down 4 percent on a reported basis and unchanged on a constant-dollar basis from the year-earlier period. Net income rose 2 percent to $124.8 million, or $0.43 per share, compared with $122.2 million, or $0.41 per share, in the first half of 2001.

St. Petersburg, Fla.-based **Catalina Marketing Corporation** today reported first quarter results for the period ended June 30, including a revenue increase for the quarter of 16 percent to $109.1 million, compared to $94.4 million in the first quarter of the prior fiscal year. Quarterly net income was $10.7 million, or $0.19 per diluted share, versus $9.4 million, or $0.16 per diluted share, for the comparable prior year period. Revenue in the company's research operations, which are conducted by Alliance Research, was approximately equal to revenue in the first quarter of the prior year. Catalina Marketing Research posted a nominal profit this quarter.

For the second quarter 2002, New York-based **Arbitron Inc.** reported revenue of $56.5 million, an increase of 12.4 percent over revenue of $50.3 million during the second quarter of 2001. Earnings before interest and taxes (EBIT) for the quarter were $15.0 million, compared with EBIT of $12.8 million during the comparable period last year. Net income for the quarter was $6.6 million, compared with $4.7 million for the second quarter of 2001. Cost and expenses for the quarter increased by 11.0 percent, from $40.4 million in 2001 to $44.8 million in 2002. Interest expense declined $1.0 million from 2001 as a result of significant reductions in debt. Net income per share for the quarter was $0.22 (diluted), compared with $0.16 per share (diluted) during the comparable period last year. Effective January 1, 2002, the company discontinued the amortization of goodwill in accordance with generally accepted accounting principles. Had the company been required to adopt this accounting effective as of January 1, 2001, net income and net income per share (diluted) for the three months ended June 30, 2001 would have been $5.1 million and $0.18, respectively.

For the six months ended June 30, 2002, revenue was $122.4 million, an increase of 10.8 percent over the same period last year. EBIT was $42.6 million, compared to $40.1 million in 2001. Net income for the six months was $20.9 million or $0.70 per share (diluted), compared with $21.0 million or $0.72 per share (diluted) last year. Had the discontinuation of amortization of goodwill been in effect in 2001, net income and net income per share (diluted) for the six months ended June 30, 2001 would have been $21.9 million and $0.75, respectively.

Harris Interactive, Rochester, N.Y., reported positive quarterly net earnings for the first time as a public company as it released its financial results for the fiscal 2002 fourth quarter and for the entire fiscal 2002 year. The company reported total revenue of $29.8 million for its fiscal fourth quarter ended June 30, versus $28.3 million in the fiscal third quarter and $17.7 million a year ago, representing increases of 5 percent and 68 percent respectively. Revenue for the entire fiscal year was $100.0 million, up 66.4 percent from the $60.1 million posted the previous fiscal year. Internet revenue for the year was $40.6 million — up 25 percent versus fiscal 2001.

Net income for the fourth quarter was $169,000 ($0.00 per share), an improvement from a net loss of $1.2 million ($0.02 per share) in the third quarter and a net loss of $4.5 million ($0.13 per share) a year ago. Net loss for the 2002 fiscal year was $14.8 million or ($0.32) per share, compared to a net loss of $24.0 million or ($0.70) per share a year ago.

Paris-based **Ipsos Group** reported revenues for the first half of 2002 of EUR 244.5 million, a 13 percent increase over the same period last year. On a like-for-like perimeter and exchange rate basis, Ipsos revenues increased by 7.3 percent during the first six months of 2002. For the second quarter of 2002 alone, consolidated revenues stood at EUR 136.1 million, a 12 percent increase. Organic growth accounts for 7.7 percent, slightly higher than during the first quarter (7 percent).

Growth has been satisfactory in all Ipsos sectors of specialization, except for media research (which accounts 9 percent of total Group revenues), which is still negatively affected by the drop in advertising revenues among media companies. The firm's advertising research division (23 percent of total revenues) had an organic growth increase of 15 percent. The marketing research (53 percent of total revenues) and opinion and social research divisions (6 percent of total revenues) respectively increased their organic growth by 7 percent and 9 percent.

In the first six months of 2002, Germany-based **GfK Group** increased its sales by 17.7 percent from EUR 225.3 million in the same period in the previous year to EUR 265.1 million. EBIT including income from participations rose from EUR 8.5 million to EUR 19.1 million, while consolidated total income before minority interests increased from EUR 2.6 million to EUR 10.2 million.

Data Use

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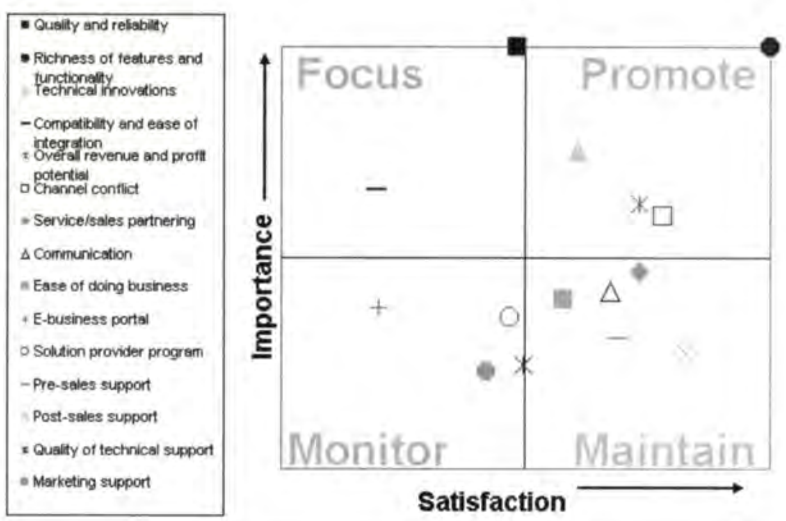
al context, and then again when respondent rate their satisfaction with attributes in the specific context of the product/service. Because the researcher explicitly asks the respondent for this information, the importance ratings provide what is called "stated importance."

Once the data has been collected, mean scores are calculated for each of the attributes for both importance and satisfaction. The scores are then paired together by attribute and plotted on a scatterplot (Figure 1).

Figure 1: Quadrant Map



In this way, the key strengths and vulnerabilities are displayed. The x-axis measures importance and the y-axis displays satisfaction. If we divide the plot into quadrants, it provides insight into courses of action that can be taken. Attributes that appear in the upper-right quadrant are items that have both high importance and high satisfaction. These are attributes which should be maintained to hold their current position. Attributes appearing in the upper-left quadrant are items that have high importance but low satisfaction. Customers feel that these are important, but yet they are not being satisfied. These attributes would be considered a high priority to improve customer satisfaction.

Although this approach can provide some useful insight, it has limitations. Ranking models do not take into account the combined effect of all the attributes, but only looks at them individually. Further, they do not incorporate overall loyalty or satisfaction (which is the metric of our focus) into the analysis. Also, this approach utilizes stated importance rather than derived importance, which many researchers prefer.

• *Regression analysis*

The second approach is to model the relationship between overall loyalty or satisfaction and the causal attributes using multiple regression. The survey questions remain the same as in the ranking model with the exception that the importance rating of the attributes is not needed. In a regression model, overall loyalty or satisfaction is the dependent variable, and the list of causal attributes are the independent variables. The results show how changes in the attributes affect the overall loyalty or satisfaction score. In fact, the model allows us to predict overall loyalty or satisfaction scores using the ratings on the individual attributes. This is a significant improvement on the ranking model.

The regression model addresses many of the limitations of the ranking model. The combined impact of all the attributes is accounted for in the model and all of the attributes are modeled simultaneously. Overall loyalty or satisfaction is incorporated into the analysis. Further, by modeling the data, we have now obtained derived importance scores from the model rather than stated importance. If all of the data is on the same scale, then the coefficients on each attribute can be interpreted as an importance score by dividing each attribute's coefficient by the sum of all the coefficients. The derived importance scores are percentages that add to 100 percent.

Despite these improvements, the regression approach also has criticisms. There are data issues. Regression assumes that the variables in the model are ratio-scale data. Rating data on a Likert scale is close to but not quite at the ratio scale. Regression also assumes the data has a normal distribution. Rarely is that the case with rating data. Also, there can be a problem with the importance scores themselves. If an attribute has a very low true importance, then its estimated importance will be close to zero. Because this is an estimate (and an estimate, no matter how good, has some degree of error) the sign on the attribute may be negative. This is counterintuitive. It implies that as satisfaction with the individual attribute increases, overall satisfaction decreases. This is a very difficult point to sell to management when presenting research results, and often results in distrust of the findings.

Structural equation modeling

Similar to regression, structural equation modeling is a statistical modeling technique that examines the relationships among several variables simultaneously. However, SEM is a much broader analysis that encompasses many specific types of models including regression and factor analysis. SEM models the variance and covariance structure of the data. The


1
ABC 2
DEF 3
GHI 4
JKL 5
MNO 6
PRS 7
TUV 8
WXY 9
*
OPER 0
#

data needed for the model is similar to that of a regression.

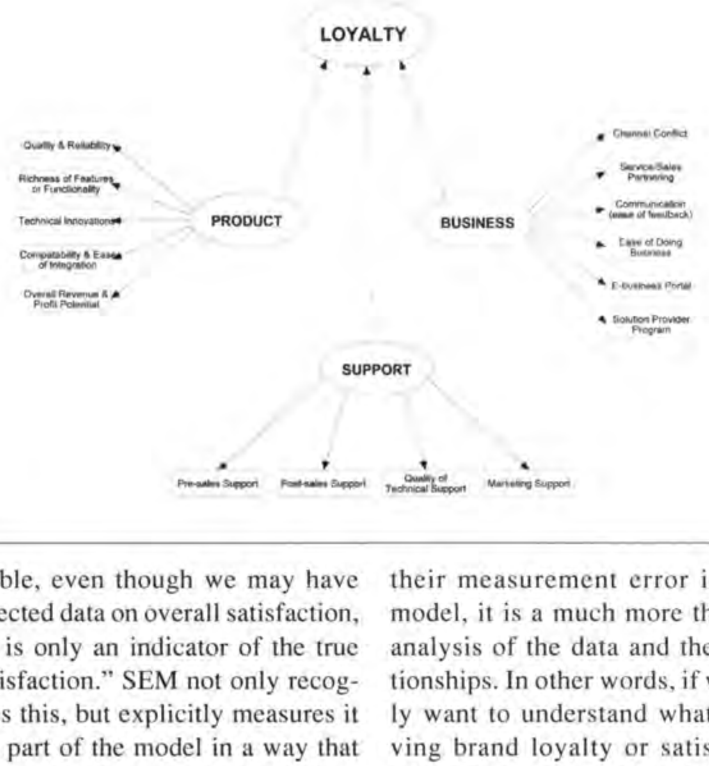
One of the main advantages that SEM has over regression and other models is that it also includes the ability to handle latent variables in the analysis. Latent variables are intangible concepts such as intelligence, loyalty or satisfaction. Measurement of these types of variables is considered difficult and error-prone because there is no exact measurement scale for these issues. Because these intangible concepts are inherently indefinable, even though we may have collected data on overall satisfaction, this is only an indicator of the true "satisfaction." SEM not only recognizes this, but explicitly measures it as a part of the model in a way that other methods cannot accomplish.

SEM addresses most of the limitations of the other two approaches. Since it is a model, the attributes are analyzed simultaneously, overall loyalty or satisfaction is a component of the model, and derived importance scores like in a regression are estimated. However, SEM is not vulnerable to the data considerations that can affect regression. SEM models the variance-covariance structure of the data which makes it a very robust modeling technique. Having ratio-scale data that is not normally distributed does not adversely impact the results.

We see this all the time. If we print out the rating scores, they tend to be highly skewed toward positive ratings both because respondents are reluctant to give highly negative ratings and because there are typically more satisfied than dissatisfied customers! This is a very significant advantage because it results in more true and valid results. Also, because SEM handles intangible variables such as loyalty and satisfaction and their measurement error into the model, it is a much more thorough analysis of the data and their relationships. In other words, if we really want to understand what is driving brand loyalty or satisfaction with a product or service (Figure 2), we need to a methodology that understands that we are dealing with perceptions and feelings — loyalty and satisfaction. SEM can also handle the fact that many issues that we use to predict satisfaction and loyalty are highly correlated. Further, we are not restricted to a single dependent variable. Multiple variables can be used as indicators of the latent variable "satisfaction" including overall satisfaction and overall loyalty. This allows for the analysis to be extended beyond just satisfaction, but also to loyalty by including variables such as "likelihood to repurchase" and "likelihood to recommend" as indicator variables. Also, the fact that the analysis is graphically oriented is a simple yet powerful advantage. SEM uses path diagrams to graphically depict the relationships of the variables. This makes it very easy to explain the results to clients and management who are often not statistically savvy.

SEM is not a technique without limitations. One disadvantage is that SEM tends to need large sample sizes. Because latent variables and complex relationships among the variables are incorporated into the model, it typically needs more information than other simpler models to calculate estimates. This can add significant cost to a research study. Also, although there are some easy-to-use software packages available, SEM is a complex modeling technique that requires a trained and experienced statistician for deployment.

Figure 2: Key Drivers of Loyalty



Understand and identify

Most marketers would agree that understanding what truly drives brand loyalty and customer satisfaction is essential to maintaining a strong customer base. By using structural equation modeling, researchers are able to identify the attributes that predict overall satisfaction or loyalty. By uncovering the key drivers of satisfaction, marketers are in a position to provide products and services addressing the specific needs of their customers.

SEM is able to model the latent variables, key attributes, and satisfaction metrics (e.g., satisfaction, likelihood to repurchase, recommend, and value) simultaneously. Using other modeling techniques, researchers are forced to create many independent models without the capability of seeing how they relate to one another. SEM provides a single comprehensive model of all variables and graphically displays the model in a path diagram that is easy to interpret and communicate to management.

Names of Note

continued from p. 10

pany's corporate headquarters in Cincinnati, **Amie Steiner** has been named research analyst and **Sharyl Strunk** has been named account manager. At MRSI's Jersey City, N.J., office, **Brandt Griffin** has been named senior account executive.

Global Market Insite, Inc., Seattle, has named **Mark R. Houston** vice president of marketing and **Mitchell Eggers** vice president of operations. In addition, the company has opened two new offices. **Suresh Subbiah**, director of sales and marketing, leads the new Minneapolis office and **Harry Klintebring**, director, Europe, will lead the new Stockholm office.

Research industry expert **Jack J. Honomichl** was inducted into the Market Research Council's Hall of Fame at a ceremony on June 21 at the Yale Club in New York City. Founded in 1927 to foster growth of the advertising/marketing/public opinion research industry, the Market Research Council in 1977 started annually recognizing those who have made extraordinary contributions to the industry. Previous inductees include Arthur C. Nielsen Sr., George H. Gallup Sr., David Ogilvy, Marion Harper, Daniel Yankelovich, Daniel Starch, Ernest Dichter, Alfred Politz, and Elmo Roper.

Group Dynamics in Focus, a Bala Cynwyd, Pa., research firm has named new corporate officers. **Merle Holman**, founder and president, is now chief executive officer. **Robin Kaplan**, is now president. The promotions were effective June 10, the 21st anniversary of the firm's incorporation.

Harris Interactive, Rochester, N.Y., has promoted **George Terhanian** to president, global Internet research. In his expanded role, Terhanian will support the existing London team headed by **Gareth Davies**. Terhanian will be assisted in London on a part-time basis by **Humphrey Taylor**, chairman of The Harris Poll.

Interviewing Service of America, Inc., Van Nuys, Calif., has named **Tony Soares** account services manager. He will be based at the firm's newly established Dallas/Fort Worth client service office.

Chicago-based *Research International, USA* has named **Soumya Roy** head of the group customer relationship management business practice. The firm has also named **Larry Buchsbaum** senior vice president, telecommunications, in its Cambridge, Mass., office. At the Stamford, Conn., office, **David Scowcroft** has been named vice president.

Research Data Design, Inc., Portland, Ore., has added **Ron Leeds** to its national sales team.

John Day, founder and managing director of *Strategies Unlimited*, a

Mountain View, Calif., research firm, retired on July 31. Succeeding him as managing director is **Peter Farmer**, formerly director of the firm's optical networking practice.

John S. Watts has joined *Opinion Research Corporation*, Princeton, N.J., as global managing director, decision sciences.

Genactis, Inc., a health care market and communications research agency based in Fort Washington, Pa., has named **Scott M. Appel** associate director of advanced methods. Also joining the advanced methods team are **Nathalie D'Esquermes**, senior statistical consultant; **Charles (Chuck) Clapper**, data consultant; and **Valentina Shorter-Hearn**, analytical project director.

Denver marketing segmentation system provider *Cohorts* has promoted **Mike Fitzpatrick** and **Maro Casparian** to vice president.

Elizabeth Hurlow-Hannah has been named head of the newly formed *Sharpen the Focus Institute*, a Syosset, N.Y., qualitative researcher training facility.

Jatinder (Ronny) Bindra has been named senior vice president of *Information Management Solutions*, a division of Management Science Associates, Inc. (MSA), Pittsburgh. He will be headquartered in MSA's New York City office.

Bala Cynwyd, Pa., research firm *Strategic Marketing Corporation* has named **Christine Corner** research director at its London office, Strategic Marketing Europe.

David F. DeRose has been named vice president of sales at *InsightExpress*, a Stamford, Conn., research firm.

Taylor Nelson Sofres has appointed **Grant Bertoli** as managing director, TNS Singapore.

Pat Molloy has been appointed a director of U.K. research software firm *Pulse Train* and has been named CEO, taking over for **Geoffrey Roughton** who remains as chairman.

Market Strategies, Livonia, Mich., has named **Ellen Koronet** vice president of the pharmaceutical branch in the firm's Healthcare Research & Consulting Division.

Landis Strategy & Innovation, Palm Beach Gardens, Fla., has named **Patrick Seidell** senior vice president. The firm has also named **Aaron Hamilton** project leader in the market research department.

Montgomeryville, Pa., research firm *J. Reckner Associates, Inc.*, has added **Christina Clark** to its senior management team and named **Marie Strasser** vice president.

Survey Sampling, Inc.'s **Joanne DiNapoli** received the *Marketing Research Association* (MRA) Chapter Service Award in June. The award was presented in appreciation of her contributions to the New York/Northeast MRA Chapter.

In other SSI news, **Andrew Moffatt** has been promoted to senior account executive, and **J.J. Cramer** and **Agnes Borko** have been named account executive.

Irwin Research Services, Jacksonville, Fla., has promoted **Angela Parrish** to vice president of telephone operations.

Peter Meyler has joined U.K. research firm *MORI* as an associate director in its human resources research team.

Simmons Market Research Bureau, New York, has promoted **Chris Lubniewski** to vice president/top 50 agency sales and named **Joseph Wolff** and **Diane DeWindt** to the newly created positions of corporate controller and senior technical project director, respectively.

The NPD Group, Inc., Port Washington, N. Y., has named **Susan DeFife** vice president of software business and general manager of NPD's Reston, Va. office. In addition, the firm named **Mainak Mazumdar** vice president, research, and **George Ziegler** vice president, information technology.

Steve Crane has been named senior vice president, new business development at *Clarion Research, Inc.*, New York.

At *Cheskin*, a San Francisco research firm, **Tim Plowman**, **Aly Johnsen**, and **Carlos Santos** have been named strategic director. **Stacey Purpura** has been named research manager. And **Lauren Hirshfield** has been named research director.

Design Forum, a Dayton, Ohio retail design and branding firm, has named **Adrienne Anderson** director of research.

Market Strategies, Inc., a Livonia, Mich., research firm, has named **Tammi Deming** research director in its Portland, Ore.-based Information Technology & Telecommunications Division.

Dan Coates, former director of sales for *SPSS MR* North America, has been named vice president of Chicago-based SPSS MR Online. In his new role, Coates joins SPSS MR's global management team. In addition, **Mike Billingsley** has joined the company as senior director of operations and **David Biernbaum** has been promoted to director of sales SPSS MR for North America. **Joe Marinelli** left his post as vice president, SPSS MR Online at the end of June to pursue other opportunities.

Portland, Ore.-based *Research Data Design, Inc.* has named **Arturo Coto** vice president of sales and marketing.

Survey Monitor

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says Matt Kleinschmit, a senior research manager for Ipsos-Reid and the TEMPO research initiative. "Moreover, this awareness exists despite the fact that there's only one provider fully launched and heavily advertising. With Sirius scheduled to be fully operational nationwide in early July, we anticipate further gains in the awareness levels regarding the technology in general — as well as regarding the individual providers — as competition for consumers' attention and wallet increases."

Not surprisingly, Americans who frequently purchase music are significantly more likely than non-music purchasers are to be aware of satellite radio. Roughly half of recent CD purchasers report being aware of satellite radio (53 percent of Americans aged 12 and older who have purchased two or more prerecorded compact discs, and 49 percent of who have purchased one compact disc in the past 6 months), compared to only 35 percent of Americans who have not purchased any compact discs in the past six months.

Data on Satellite Radio awareness was gathered from TEMPO 2002: Keeping Pace with Online Music Distribution, a quarterly Ipsos-Reid shared-cost research study examining the ongoing influence and effects of digital music around the world. Data for this release was collected between April 25 and May 1 via a nationally representative U.S. sample of 1,113 respondents aged 12 and over.

"Whether the currently strong awareness levels will translate into subscriptions for both XM and Sirius remains to be seen, but certainly the pump has been primed," says Kleinschmit. "Clearly, many in the general population — music enthusiasts in particular — are aware that this new radio service exists, and as new automobiles with satellite-enabled audio systems move from the showrooms to the streets, many may become de-facto subscribers through bundled leasing agreements and financing plans." Related data can be found at Ipsos-Reid's Digital Music page at www.ipsos-reid.com/us/services/syndicated/dsp_tempo.cfm.

Teenagers fuel sports drinks brand wars

Brand name does make a difference when it comes to choosing a sport drink. Since the arrival of sports drink beverages, consumers have seen the overwhelming presence of market leaders such as Gatorade. But the past few years have showed that more than one product can make an impression. This recent market invasion allows younger consumers to have choices when selecting their brand, while older consumers might be accustomed to what they are used to. According to The Sports Drinks Market report from Chicago-based Mintel Consumer Intelligence, when comparing attitudes of adults to those of teens, only one third of adult respondents said that they see different benefits between brands while half of teen respondents felt that this was true. Another industry movement in this market is the consumption of sports drinks as an "anytime" drink rather than just for exercise. Nearly 60 percent of adults and three-quarters of teens see the beverage as being in the refreshment arena.

Consumers have reacted to the increase in product development in the drinks industry by now constantly looking for novelty and variety in beverages. As the sports drinks category matures and evolves, a host of related products are coming out and new categories are being created. Energy drinks appeal to many of the same core of young male consumers, although offering a much different package of benefits. New flavors and enhanced water products are blurring the line between bottled water and sports drinks with sports drink giant Gatorade one of the leading manufacturers of these new water brands. These new products will help further broaden the appeal of sports drinks, or certainly that of sports drink-like beverages, both in terms of usage occasions for existing products and helping bring new consumers (especially women) into the larger sports drink environment.

The most promising element of research regarding future growth of sports drinks, then, is the relatively high levels of interest in the category among female teens. They are not heavy consumers, but unlike the adult market, where women are not significantly attracted, female teens are only slightly behind their male contemporaries. Another positive sign is that teen girls say that they like the new flavors that have hit the market in 2001-2002 at rates much higher than for teenage boys.

Teen results for sports drinks are substantially higher than that for adults: while just about half of adults surveyed have consumed sports drink, 79 percent of teens say that they have used the product. Heavy users — who take sports drinks four times per week or more — are almost three times more likely to be *found in the teen sample than in the adult* one. In the medium category (one to three times per week), teens are again three times more likely to consume than adults. And while 54 percent of adults have never consumed sports drinks, only 21 percent of teens respond similarly. Finally, those age 12-17 are also substantially more likely to be users than the youngest adult group, age 18-24, indicating that the core user group is age 12-24, and possibly younger.

Given the long-term marketing strategies of the major players, it should be no surprise that research finds this category to be heavily skewed towards male consumption. A huge 60 percent of men have ever consumed the products, almost twice as high a rate as for women. Men are also much more likely to be frequent consumers (once per week or more) while women have barely started to register with the category. Indeed, a large majority of women users do so less than once a week. These results imply that the easiest way for the category to grow is by appealing to women, as market penetration among men is probably approaching a practical limit, though certainly current users are prime targets to increase usage.

Mintel estimates that the retail market for sports drinks will near $3 billion in 2002, up 8 percent from 2001. By the year 2007, Mintel projects that the market will be worth over $4.1 billion. This is a significant rate of growth compared to other foods and beverages, but it is down from the spectacular growth rates notched by the category in prior periods. For more information visit www.mintel.com.

College students spend $200 billion per year

Findings from the 360 Youth/Harris Interactive College Explorer Study demonstrate the power of the U.S. college market, with spending at nearly $200 billion dollars a year. It is a large and influential market, with over 15.6 million students, and is a vital segment for marketers concerned with serving the needs of young consumers.

The national study, fielded online by Rochester, N.Y.-based Harris Interactive during the spring 2002 semester, measured spending among college students aged 18-30, a group that represents 72 percent of all college students. The sample included all types of students (full-time, part-time, two-year, four-year, graduate) and looked at a range of consumer behaviors and category buying habits. The study covered technology, entertainment, travel, transportation, telecommunications, personal care products, financial services, snack foods and beverages.

According to the study, college students spend an average of $287 a month on discretionary items (spending on anything other than tuition, room/board, rent/mortgage, books/school fees). A *spending on entertainment and leisure* activities represents a significant portion of discretionary spending.

Technology, and, therefore, spending on technology, plays a central role in the lives of college students. With 93 percent accessing the Internet, college students are the most connected segment of the population. Ninety-two percent own a computer, and 13 percent say they plan to buy one in the next year. Cell phone ownership is at 69 percent, with 18 percent of students planning to buy one in the next year. Fifteen percent of college students say they are among the first to buy a new technology device or gadget, and another 53 percent say they are likely to buy one after seeing others try it. Only 32 percent say they tend to wait a long time before purchasing a new technology.

Spending by College Students on Beverages and Snack Foods

	Projected Yearly Spending (in millions)*
Soda	$3,129
Bottled Juice/Fruit Drinks/Lemonade	$1,445
Bottle Water, all types	$1,421
Coffee, prepared and not prepared	$998
Chip Snacks	$630
Sports Drinks	$429
Packaged Baked Goods (e.g., cookies, cupcakes, brownies)	$423
Granola/Nutrition Bars	$329
Candy Bars	$328

**Projections based on Spring 2002 360 Youth/Harris Interactive College Explorer Study; this represents a partial list of categories for beverages and snack foods*

good portion of that discretionary spending is on beverages and snack foods, with total spending on those categories projected at $11.4 billion per year.

Including weekend days, college students average 11 hours per day of unscheduled time (when they're not sleeping, working, studying or attending class). It is not surprising then, that

Car ownership is another important consumer behavior among this group. Whether they live on or off campus, 80 percent of college students have a vehicle for their personal use. Seventy-one

Participation/Spending by College Students on Entertainment and Leisure Activities

	Projected Yearly Spending (in millions)*	% Students Participating in Past Year
Vacation Travel	$4,607	61%
Purchase Videos/DVDs (not including equipment)	$2,754	70%
Purchase Music CDs, Tapes, etc.	$2,746	76%
Purchase Video Games (not including equipment)	$2,284	37%
Purchase reading material (not for use in school)	$1,009	83%
Going to Movies	$887	91%
Attending Music Concerts	$791	49%
Going to an Amusement Park	$456	41%

**Projections based on Spring 2002 360 Youth/Harris Interactive College Explorer Study; this represents a partial list of categories for entertainment and leisure activities.*

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percent of those that have a car either own it individually or jointly with a spouse, with only 29 percent using a car owned by a parent or other relative. Seventeen percent of students say they plan to buy a vehicle before the end of 2002.

The 360 Youth/Harris Interactive College Explorer Outlook Study is an online college survey from 360 Youth, Inc. and Harris Interactive. The study is conducted online twice yearly (fall and spring semesters) completing a minimum of 6,000 interviews annually with both college students (two-year/four-year, full-time/part-time, undergraduate/graduate) and 18-24 year-olds not enrolled in college. Data in this release were collected in April 2002. Complete data from this study are available on a subscription basis. For more information visit www.360youth.com or www.harrisinteractive.com.

Canada's credit card mail volume hit all-time high in 2001

2001 was the biggest year ever for credit card solicitations sent to Canadian households, reaching a record high of 208.3 million offers. This represents a 6 percent jump over Canada's 2000 annual mail volume of 196.7 million, according to Mail Monitor, the direct mail acquisition tracking service from BAIGlobal Inc., Tarrytown, N.Y.

"This is the highest mail volume we've seen since Mail Monitor first began tracking Canadian credit card offers three years ago," says Andrew Davidson, vice president of competitive tracking services for BAIGlobal.

The record high volume in Canada followed a similar trend in the U.S., where 2001 mail volume hit an all-time high despite terrorist threats, anthrax fears and an economic slowdown.

According to Davidson, Canada's record-breaking mail volume is the result of several factors, primarily a renewed emphasis on platinum card offers and a high number of mailings from U.S.-based monoline companies now operating in Canada. (Monoline companies offer credit products, yet do not have retail banking locations, and include such firms as MBNA and Capital One, among others.)

The majority of mailings offered platinum credit cards to Canadian households. "Most Canadian cardholders now own either a standard or gold card. Yet most of the new credit cards solicitations were for platinum cards," says Davidson. "Out of 208.3 million offers received by Canadians in 2001, 67 percent were for platinum bank cards, compared with 14 percent for gold bank cards, 11 percent for standard bank cards, and 8 percent for other types of offers, such as Diners Club and American Express cards."

While the majority of Canadian cardholders now own cards through their local retail banks, most of the card solicitations mailed in Canada were from U.S. monoline companies. "U.S. monolines accounted for 64 percent of all offers to Canadian households during the fourth quarter of 2001. This was up from 51 percent for the previous quarter," says Davidson. Among these solicitations, the majority of offers were for platinum cards, which supported the overall trend towards platinum as issuers attempted to upgrade standard and gold cardholders.

The average response rate for 2001 was much higher in Canada than in the U.S., with a 1.4 percent annual response rate for Canada compared to 0.6 percent for the U.S. Davidson attributes this to several factors: the lower level of clutter in Canadian mailboxes, consumers' continuing need for credit and attractive pricing. "Typically, as the volume of mail increases and mailboxes become more cluttered with offers, response rates drop," says Davidson. "The Canadian market is still much less cluttered than the U.S. For instance, in the fourth quarter of 2001, 63 percent of Canadian households received an average of 2.6 offers per month, compared to the same period in the U.S. where 79 percent of households received an average of 5.4 offers each month. The lower level of clutter in Canada helped make the full year response rate much higher than the U.S."

In addition, there was a fourth quarter surge in response rates in Canada. "Often consumers seek out additional credit in anticipation of holiday shopping, and as the Canadian prime rate dropped, offers with variable APRs became very attractive," says Davidson. "These factors, plus the ongoing demand for credit in a slow economy, made quarterly response rates peak in the last months of 2001." For more information visit www.baiglobal.com.

Arvida

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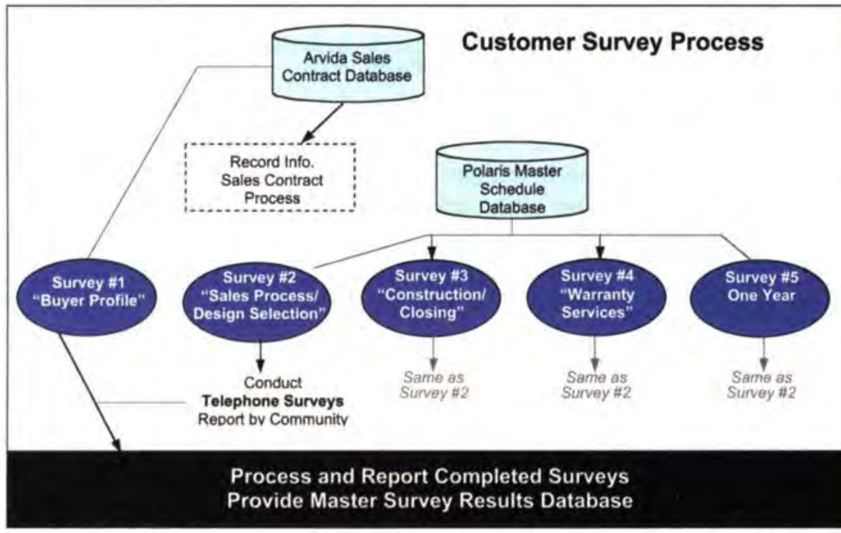
entire experience, we can better pinpoint inconsistencies in our communication process. As we have oftentimes learned the hard way, inconsistent communication creates home buyer remorse."

Align internal processes with what matters to customers

Customer ratings on specific issues provide Arvida with crucial intelligence needed to make timely business decisions, and allow Arvida to maintain a customer-focused environment by holding employees accountable for client feedback. Under the leadership of Harkins and Arvida Vice President of Sales and Marketing Dick Larsen, Arvida's customer relationship core group meets regularly to study Polaris' monthly and quarterly reports, as well as periodic driver analyses so they can identify ways to improve the issues that have the highest impact on customer satisfaction. Core group members include key managers for each property and function relating directly to home buyers (sales, design selection, home financing, construction, warranty service and community service).



Before Harkins became involved, Arvida had few structures in place to analyze the results of the admittedly belated data it received from mail surveys, and it had no system for addressing improvement opportunities that the information might have indicated. "You can collect all this data, but if you don't do anything with it, it's wasted," Harkins told Arvida's management team. "You've got to take what you've learned from that data and align it with your internal process measures. For example, in the sales questionnaire, we found that explaining features of a home is a key thing to our customers. We are focusing on putting a process in place that motivates sales personnel to communicate features more effectively and makes home buyers feel comfortable with decisions made during the feature selection process. We have been able to better satisfy home buyers in this particular area by working with our salespeople and bridging the gap between what customers say they need from sales reps and what sales reps actually provide."

Arvida has found the stronger connection between its research and its internal processes to be good for the bottom line. "We felt that if we could improve our processes, our customer satisfaction levels would improve dramatically, and they have," Larsen says. "We knew that, if we got them high enough, there would be significant financial benefits. Our referral rates would go up, and word of mouth would have far greater impact on our sales, so fewer marketing dollars would need to be spent. And most importantly, if we could improve our processes, customers would enjoy living in our communities even more."

Give employees the power to resolve issues

Early driver analyses told Arvida that good communication was the most important quality to highly satisfied customers, while poor communication was strongly impacting customer evaluations of every aspect of the home-building experience. Since the longest part of the building process is the actual construction, Arvida developed a special communications plan for that portion of the process. "The customer relationship core group decided that the construction supervisors should call the customers once a week, every week, to report on the progress of their house. The supervisors resisted, saying they'd be on the phone all the time. But we made them do it anyway," Harkins says. "The only thing we changed that quarter was the communication, but every single measure improved over that quarter. It had a dramatic effect on everything, including the customer's perception of the quality of workmanship and materials. Now we have the supervisors at every property call their customers once a week."

The improvement in customer satisfaction was so obvious that supervisor resistance disappeared. The weekly calls were welcomed particularly by the many out-of-town Arvida customers buying investment, vacation, and retirement homes. Ted Watts, a senior vice president with Bank of America in Charlotte, N.C., and his wife had built three custom homes over a 20-year period before purchasing an Arvida home at Hampton Park in 2001. "In each case we lived in the city in which the home was located and were able to inspect the progress on a routine basis. Because we were not currently living in Jacksonville, as we began the process for the fourth time with Arvida, I was very concerned about how the construction process would go and the quality of the product that would result," Watts said in an e-mail letter to Arvida. Not only was Watts impressed when the construction superintendent said he would call every week (and then kept his word), but Watts said he was gratified that the superintendent "spent the time required to patiently answer my sometimes very detailed questions. My concerns as a 'remote' homeowner quickly disappeared."

Carefully tie pay to performance goals

With the communications bear under control, Arvida's management continues to focus on quality improvement. Process management teams for each individual community meet monthly to look at issues found in customer comments and to implement change before problems actually occur. Process teams consist of a cross-section of employees representative of several areas (sales, design, construction, closing, warranty, land development and marketing). Ideas are generated in a team environment focused on sharing ideas and best practices.

Using the reports provided by Polaris as benchmarks, Arvida has developed annual goals, initiatives and commitments for land development, sales, design, closing, and warranty. The goals involve target ratings on specific questions in the Polaris questionnaires, and management compensation is tied to customer satisfaction in each area. The key to success is that the staff sets the goals it expects to achieve. Annually, the various core group members present their goals to management in a formal setting and talk candidly about their successes as well as future opportunities for improvement.

The research program has triggered "a dramatic cultural change within Arvida," Larsen says. "Our training of employees has expanded extensively and most of it is directly related to the customers. The whole organization is far more engaged in serving the customer than it was five years ago. All these goals continue to put the focus on the customer and we've seen dramatic improvements in their satisfaction levels."

Continue to live the Arvida vision

As Arvida continues to build world-class homes, its infrastructure relies on customer feedback throughout the process. "The process that people go through to buy a home in an Arvida community provides them with a clear understanding of what we're trying to do, thus enhancing the livability of their home and the community," Larsen says. Arvida is able to meet its vision of creating a superior way of life for customers by providing multiple opportunities for customer feedback; aligning internal efforts for improvement with the issues most critical to customers; giving employee teams the power to drive improvement, and letting employee teams set their own performance goals.

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Product & Service Update

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users take conduct Web and e-mail surveys. The program also provides for data entry and tabulation, creation of reports and graphs, and it offers advanced statistical tools. New features include video in both Web and desktop surveys and tracking interviewer time in telephone surveys. For more information call 707-765-1001 or visit www.surveysystem.com.

New online survey platform

Seattle-based NetReflector, Inc. is now offering InstantSurvey 4.0, its online survey platform. Based on open XML standards, InstantSurvey 4.0 combines functionality with an easy-to-use interface and enables distributed workgroups to collect information in a short period of time. InstantSurvey 4.0 is accessed through the user's Internet browser. Surveys utilizing survey features such as multiple languages, randomization, matrix tables, branching, piping and multiple response types can now be developed and distributed to an unlimited number of recipients.

Enterprise teams can now share themes and other reusable survey components to ensure a consistent look and feel in all their surveys, while creating and editing a survey concurrently and securely. And distributed analysis needs can now be satisfied with shared access to survey results so that multiple team members can create/run the reports that fit their particular needs.

In addition to a list of standard graphical reports, InstantSurvey 4.0 lets users build custom reports, create executive-level presentations, or perform interim data downloads to other applications such as spreadsheets and databases, for further analysis. For more information visit www.netreflector.com.

Polk offers e-mail survey enhancements

Southfield, Mich.-based R. L. Polk & Co. has launched Polk eSolutions, a suite of products designed to help direct marketers and researchers optimize their marketing campaigns and research studies by electronically communicating with millions of consumers who are pre-disposed to receiving offers and surveys through the Internet. Polk eSolutions enable businesses to select from a variety of automotive ownership, age, gender, income characteristics and modeled data to target their desired audience, create counts and deliver their message. These products enable marketers and researchers to deliver e-mail messages tailored to their audience. Marketers and researchers can track campaign effectiveness and make changes, if needed.

The eSolution product suite also offers e-mail appending and reverse e-mail appending options. The e-mail appending option enables users to append millions of e-mail addresses to their customer databases. The reverse e-mail appending option enables users to append address, demographic, lifestyle and automotive data so companies can fully understand their customers. For more information call 888-225-1434 or visit www.polk.com.

Weekly retail sales tracking product from ShopperTrak

ShopperTrak RCT, a Chicago retail intelligence firm has launched a weekly national sales tracking product for the retail industry, the National Retail Sales Estimate (NRSE), which provides a nationwide benchmark of retail sales, offering information on consumer trends. ShopperTrak RCT's NRSE provides the retail industry with a Monday snapshot of the previous week's sales, enabling retailers to see how they are performing against the market and act upon the data to impact future sales. It is published at the beginning of each week to reflect U.S. retail sales from the previous week. The NRSE sales statistic is the weekly counterpart of the U.S. Commerce Department's broad-based monthly retail sales data for general merchandise, apparel, furniture and other related store sales (GAFO). It is derived from ShopperTrak RCT's proprietary industry intelligence on shopper movement and sales statistics. For more information visit www.shoppertrakrct.com.

Summary File 3 (SF3) census data now available

Tetrad Computer Applications Inc., Bellingham, Wash., is now shipping first 12 states of the Summary File 3 (SF3) census data to PCensus users. The data is organized into 63 tables. The original census bureau tables are also included. Free data for the state and county level can be downloaded with a demo copy of PCensus for MapInfo. Summary File 3 consists of approximately 5,300 Census 2000 variables covering social, economic and housing characteristics compiled from a sample of approximately 19 million housing units (about one in 6 households) that received the Census 2000 long-form questionnaire.

The census data is presented in a hierarchical sequence down to the block group level. Also included are Zip Code Tabulation Areas (ZCTAs) which are approximate representations of United States Postal Service ZIP Code service areas.

Population items include basic population totals; urban and rural; households and families; marital status; grandparents as caregivers; language and ability to speak English; ancestry; place of birth, citizenship status, and year of entry; migration; place of work; journey to work (commuting); school enrollment and educational attainment; veteran status; disability; employment status; industry; occupation, and class of worker; income; and poverty status.

Housing items include basic housing totals; urban and rural; number of rooms; number of bedrooms; year moved into unit; household size and occupants per room; units in structure; year structure built; heating fuel; telephone service; plumbing and kitchen facilities; vehicles available; value of home; monthly rent, and shelter costs. Many tables are repeated for nine major race and Hispanic or Latino groups.

With PCensus, SF3 data can be used at the block level. Having more census data points allows much greater resolution for calculating profiles of user defined areas (circles, polygons, drive times). For more information visit www.tetrad.com.

CPE satisfaction benchmarks from Sage

Sage Research, Inc., Natick, Mass., has introduced the Sage CPE Customer Satisfaction Benchmark Program. The program is a research initiative defining satisfaction benchmarks for the CPE industry (CPE, or customer premises equipment, includes communications and networking equipment that is physically located at customer sites). The CPE Customer Satisfaction Benchmark Program consists of three components: a free industry-wide benchmark report, detailed product category-specific reports, and custom reports (with which a company can compare its unique scores against the industry benchmarks). To receive the free report visit http://sageresearch.com/CPEform.htm.

Briefly...

INgather research, Denver, is now offering **10 different focus group room configurations**, allowing clients to tailor their research environment based on their respondent demographics. Rooms include youth-based designs for kids, tweens, and teens as well as a living room setting, a bar setting with pool table, courtroom for mock juries, and an auditorium loft seating 100 respondents classroom-style. For more information call Christine Farber at 303-980-2262.

Montgomeryville, Pa.-based research firm JRA, J. Reckner Associates Inc., has opened a new office in Milwaukee offering **market and sensory research**. The facility includes a focus group suite and product testing center, which includes a commercial test kitchen, multipurpose room, eight fragrance/product evaluation rooms, and a kitchenette with client viewing capabilities. For more information call 414-768-6040.

Maritz Research, St. Louis, has launched a **new international data collection division** called Envoy, which will offer a range of quantitative fieldwork services and will be linked to Maritz Research. Envoy will initially operate in the U.S. and Europe, offering telephone, mail, Web, face-to-face (Europe only), mystery shopping, and interactive voice response surveys. For more information visit www.yourenvoy.com.

Doane Marketing Research, Inc., St. Louis, has established a **new service ventur**e offered in cooperation with Katie Thiemann and her company, Ag Advantage Consulting, Inc., St. Louis. Thiemann will be working with Doane's agronomic project and service staff to offer a new supplemental service level to the support services already offered as a part of the annual subscription package to Doane's AgroTrak, GolfTrak, and syndicated seed studies. For more information call Marypat Corbett or Roy Cleveland at 314-878-7707.

Star Data Systems, Chicago, is now providing telephone data collection services through its **new call cente**r. The center features virtual monitoring over the Internet, which enables clients to click on any interview within their project and see each screen as it appears to the interviewer and hear the conversation between the interviewer and the respondent. For more information visit www.mrsurvey.com or call 561-842-4000.

New York publisher Kalorama Information has launched a new Web site providing access to **market intelligence covering the life sciences**. Built upon the same search applications as the publisher's parent company MarketResearch.com, www.KaloramaInformation.com provides details about each report in the Kalorama portfolio and the ability to view sections of reports prior to purchase.

Worldbridge Language Services, Los Angeles, has unveiled a **new Web site** for companies seeking more information about its survey translation services at www.worldbridgeservices.com.

Global Market Insite (GMI), Cunningham Research, and Field Facts Worldwide have **expanded their global network of central location testing facilities**. The expansion increases the number of U.S. mall locations to more than 125 sites across the U.S., and extends the network globally via Field Facts' Worldwide offices and partner sites. Cunningham Research and Field Facts Worldwide have licensed GMI's Net-MR suite of software tools for market research management.

Ford Consulting Group, Minneapolis, has introduced Ford Answers For Analysts, an **information service** that enables **CPG manufacturers** to extract insights and action initiatives from standard IRI/ACNielsen syndicated data. Through knowledge, definition, graph templates and support, Ford Answers For Analysts offers hints, tips and advice for analyzing store data. For more information visit http://knowledge.fordconsultinggroup.com or call David Ford at 612-333-1111.

Simmons Market Research Bureau will now provide the **Cohorts household-based market segmentation system** in its National Consumer Survey (NCS) for all existing and new clients.

Customer Perspectives, a Hooksett, N.H., mystery shopping firm, is now offering an **electronic reporting option** allowing clients to access both individual shopping reports and a variety of data summaries from a secure Web site. Clients can also specify triggers so they are automatically e-mailed if scores are above or below a specified level. For more information call Judi Hess at 800-CPSHOPS or visit www.customerperspectives.com.

New York-based CMR has **added Mediamark Research Inc. ratings data** to its Stradegy2 online media intelligence system. The addition of MRI magazine ratings data provides demographic, lifestyle, product usage and exposure information.

Qualitatively Speaking

continued from p. 16

At the remote location/client observation room

• Invitations and guidelines — When people are invited to attend the focus groups in the remote location, they should be provided with the "rules" of the research that are required in order to participate. While these may vary by organization, some of the suggested rules that make for very effective observation sessions are:

-- All observers must be seated at least 10 minutes before the groups begin. Latecomers will not be permitted to enter, as that is distracting to the others.

-- People will not be permitted to leave the room during a session.

-- There will be no use of telephones during a session, and no interruptions from outside the focus group room from secretaries, other colleagues, etc.

• Room arrangements — It is very important that a remote viewing room be arranged so that attendees have a good view of the focus group proceedings. Therefore, it is essential that sufficient monitors, ideally very large wide-screen versions, are available in the room for people to use during the session.

• Pre-group briefing — At the remote location, there should be a pre-group briefing by one person who is in charge of the activities at this end. They would provide each attendee with copies of materials needed to observe the groups (i.e., discussion guides, other stimulus materials) and would review the rules regarding leaving the room and using phones. They also would emphasize the need for quiet during the session.

• During the group — Once the group begins at the facility location, all lights are turned off in the remote area, to encourage people to focus on the monitors. This is a vital part of a successful remote viewing experience, as the dark environment will discourage talking and interaction among the various people in the room. If people require some light for note-taking, arrangements should be made for very low wattage lights to be available to them.

The local chairperson should serve as the conduit between the people in the remote observation area and the client contact at the focus group facility. Therefore, if someone has an important question that must get to the moderator, this should go through the chairperson to get to the facility. This provides some degree of control on the quantity and nature of the material that ultimately gets asked of the moderator during the group.

Here to stay

Videoconferencing of focus groups is a trend that is here to stay. There are many benefits of using this technology, not the least of which is the very significant cost savings that companies can realize from reduced travel expenses. However, if the technology is not utilized properly, its benefits will not be worthwhile, as the value organizations get from their focus groups will be significantly reduced. Hopefully, the information in this article will help users of videoconferencing make the technique work more effectively for them, and encourage non-users to try videoconferencing, now that they know how to get the most out of the technique.

Farm Bureau

continued from p. 23

work conducted; the claims adjuster; company accessibility and communications; the role of the agent; claim service representatives (800-number); company service rates.

With this information, FBFS now has guidelines for managing claims department functions based on customer-defined drivers of satisfaction. Farm Bureau also discovered through this research that customers' satisfaction with the claims process is quite high. In fact, customers seem to have an even greater level of company loyalty and satisfaction after a claim — a significant finding.

Sharing the good news

With tangible evidence on the level of claims satisfaction, the next steps included presenting findings to claims management, the FBFS management team, claims employees, and the field force to: provoke discussions about key issues; develop specific action plans linked to key drivers of satisfaction/loyalty and establish goals for improvement in the next year; identify and develop proactive communication tools for claims employees; continue tracking customer satisfaction and loyalty with additional research.

Farm Bureau realized the research findings indicated great news for the company, but now the question became how to let the general public (i.e., prospective customers) know about FBFS's top-notch service. The answer: advertise it.

"The results of our claims satisfaction research seemed a natural fit for advertising," says Scott Shuck, FBFS vice president of marketing services. "But one obstacle we faced was how to best communicate the information from the research study. To keep them credible, we wanted the ads to have a 'realness' to them. Any company can make an advertising statement that they've got a good claims process, so we wanted to address that we truly had a reason to make such a statement — our customers are telling us so."

Under the guidance of Nancy Doll, director of advertising and public relations, ads were developed using a customer testimonial approach. The headline in one print ad, "When is it right to claim fast, fair service? When we're not the only ones talking," was used to serve up actual customer quotes praising how FBFS handled their claims. Photos representing the customers' damages were used to help tell the story.

Other advertising focused on the quantitative research findings. Newspaper and radio ads for each multi-line state were developed and placed.

"These ads really illustrate the great work our agents, adjusters, and claims offices are doing on the front lines," says Shuck. "And they also indicate that Farm Bureau Financial Services employees are doing a great job behind the scenes to enable those folks to consistently meet and exceed our customers' expectations in a claims situation."

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/media/moderator.htm.

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Supplier Side

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One was CASRO itself, whose offices had been destroyed by fire. Through good planning, they had off-site electronic data backups and were able to restore their office systems and operation within the timeframe required by their members. Another was a full-service client of mine, whose professional offices and main phone center were obliterated by a thunderstorm-caused flash flood. The flood was so severe that it washed several BMWs from a dealer's lot, which in turn clogged up a huge culvert and put an entire business district under six feet of water in a few hours. This company survived because its backups also worked — and because (by luck) it was able to move back into a call center that it had just vacated recently. The revenue and expense impacts, however, were still substantial.

What lessons can you take from the misfortunes of others? First, data system backups need to be done, be complete, be off-site, and be tested frequently. Your IT and operations people need to be in regular communication, to make sure that critical information is not being stored on non-backed-up hard drives or other at-risk locations. Second, you need to plan for an alternate location at which your systems can be reestablished. If your main office is a smoldering ruin, how will your researchers (perhaps then working from home) gain access to the almost-completed tables and reports on your backup tapes? Even more problematically: if your CATI, tab, or accounting software is highly customized or uniquely patched, where will you find an alternative operating location at which you can restore your data? If you will need to reinstall software, are all the software files and instructions current and off-site? For companies with multiple locations connected by a wide area network, a lot of protection can be obtained at very low cost by making sure that software and data are copied around from one location to another. If top management makes business continuity a priority, it will happen. If you are always pushing production or R&D to the exclusion of more basic activities, you may be in for an ugly surprise when adverse circumstances knock on your door.

The growing overlap between CRM and research

I have a hard time truly understanding the meaning of "customer relationship management" (CRM). The term seems to mean very different things to different solution providers. The CRM label is applied to everything from mainframe software systems to call centers to consulting programs. At its core, though, CRM means integrating all sources of customer information and all customer interaction opportunities in a way intended to maximize profitability.

An excellent session at the Technology Conference focused on CRM and its overlap with research. CRM providers see research as just one part of the whole CRM process. To them, the ability to ask questions of customers and use their responses to target specific offerings is very basic. Given CRM's emphasis on integrating information sources and acting on that data, the logic of doing so is obvious.

From the research tradition, however, the idea of surveying customers and then using the information gained to target offerings to those specific customers is anathema. On its face, it seems to violate industry ethical codes, including CASRO's own Code of Standards. Researchers feel that respondent cooperation will drop even further from its already low levels if respondents think that the survey process is really a means to target them with more accurate direct mail or telemarketing. CRM practitioners respond with the assertion that there is already no expectation of privacy – that consumers expect companies to act on the information they give them. These perspectives are at odds in part because most commercial survey research is carried out by research agencies that are independent of their clients, and is often done without naming the client. CRM often represents the acts of the corporate client itself, so its identity is disclosed at the outset.

The new privacy laws that affect a number of industries — most notably financial services — represent a convergence of thinking. Their focus is on disclosing to consumers how information will be used.

What's in this debate for research companies? First, we need to realize that the broad term CRM means many different things, and that research companies are particularly good at some of those things. The conference session distinguished between operational CRM — which the client usually carries out directly — and analytic CRM — where many research companies have strong capability. If the client collects the data, it has responsibility for disclosure and permission concerning its use.

Second, we should realize that research has a place in the CRM process. If we gain respondents' consent to sharing the information we collect with clients, then that information can be integrated and used to everyone's benefit. The most common example of this is when a respondent reports a bad service experience in a survey, and we get their permission to notify the client company so that someone can follow up with the respondent to resolve the problem.

Finally, we need to remember that CRM's focus on the customer is a limitation as well as a strength. Many corporate activities — and thus the research that supports them — must take into account the needs of the people who are not yet customers! To develop new products, enter new markets, and replace inevitable attrition within any customer base, a healthy company must look outward to its non-customers while at the same time tending to the needs of existing customers. Traditional market research is essential to keeping this balanced focus.

The CASRO Technology Conference is held every June in New York. If you want to learn more about CASRO events, check its Web site at www.casro.org or send an e-mail to casro@casro.org and ask to be put on the events mailing list.

Supplier Side

Report from the Technology Conference: CYA and CRM

By Michael Mitrano

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I had a chance to participate in the CASRO 2002 Technology Conference in New York City in June. If technology is important to the operation of your research company, you should send someone senior to this annual meeting. There is no better way to see all the major vendors, hear what other companies are doing, and learn about new technologies that are in the works. For those of you who are unaware of the conference or couldn't attend, I would like to use this month's column to fill you in on the highlights.

Web interviewing is routine

Sometimes, what's not touched on in a meeting tells as much as what is. I participated in a panel discussion early in the conference, and noted that the ability to recruit respondents via e-mail to a Web-based interview had become routine. By this I meant that most quantitative companies now have this capability — either by using software and staff they have in place or by using a Web interviewing subcontractor. This is not to say that every company is really doing Internet surveys, or doing a lot of it. It is to say that this capability is no longer something special — it is expected.

I didn't really anticipate that anyone in the audience would jump up and disagree with me. Who would stand up in front of this group and confess that they lacked the capability to do a basic Web interview? However, I did note that not one conference session was devoted to standard Web interviewing software or methods. In past conferences, there were typically several presentations on different Web interviewing technologies. By now, these technologies have become part of the woodwork.

If you do quantitative work and they aren't part of your woodwork, you should think about whether you are keeping up with changes in the industry.

A focus on business continuity

The September 11 attack has focused a lot of people's attention on the risks to businesses of an unexpected catastrophe. We all anticipate certain kinds of business interruptions — power failures, computer breakdowns, perhaps even a fire or flood. With the right combination of backup equipment, service agreements, business practices, and insurance, we all try to minimize the impact of an adverse event or mitigate the financial damage that results from that impact.

September 11 showed us that inconceivable disasters are indeed possible. Given the location and extent of the damage resulting from the New York attack, it's really amazing that the country's financial systems were able to resume operation so quickly and with so little data loss. There's nothing lucky about this, though — it's due to huge investments that the Wall Street firms have made in redundant data centers, backup systems, and contingency plans. If there were a business center of market research that had been similarly targeted, I doubt you would see our industry bounce back so creditably.

In fact, most disasters affecting individual businesses are much more mundane. At the 2001 CASRO Technology Conference, coincidentally, I heard of two organizations that had just experienced such disasters.

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