QUIRK'S

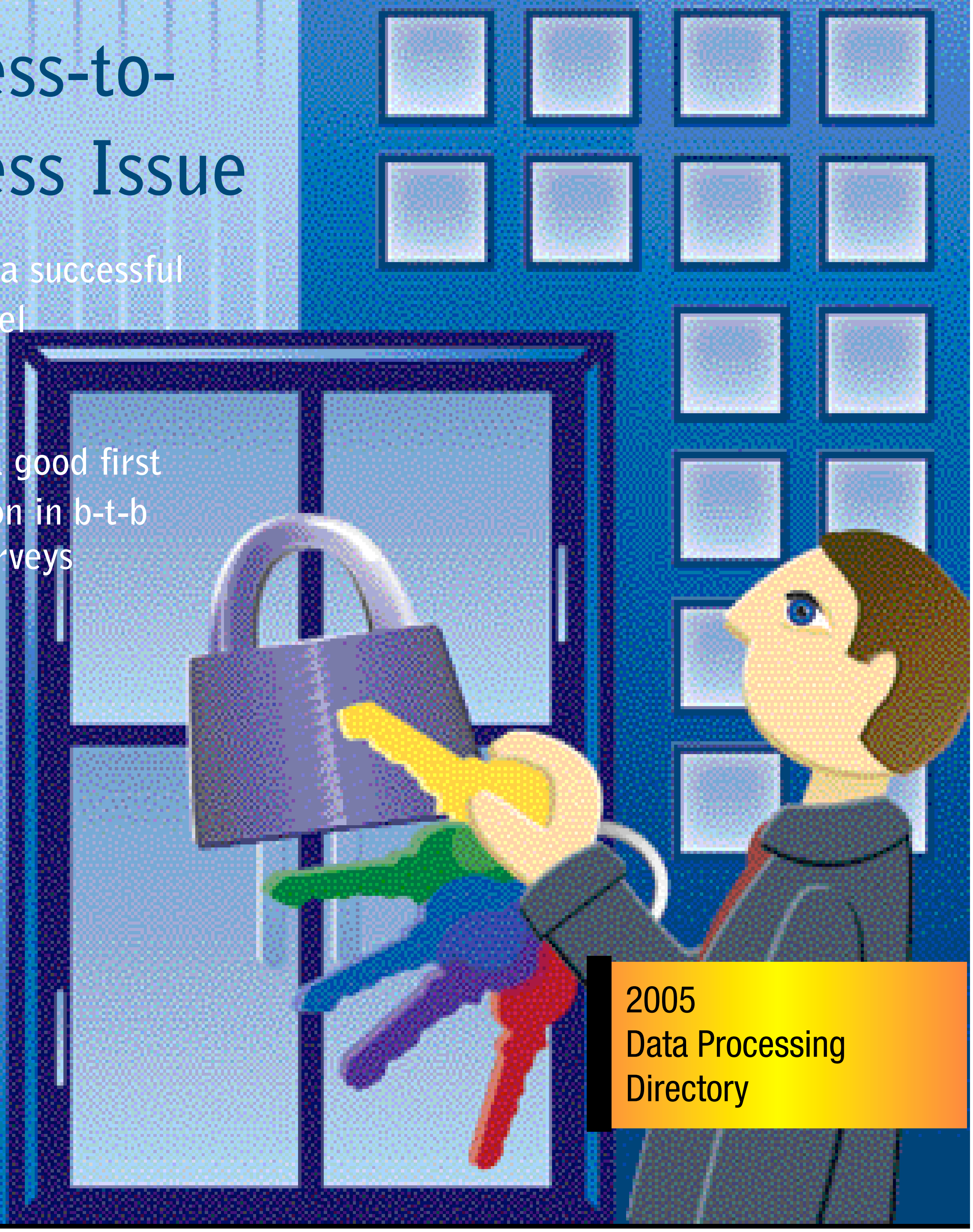
Marketing Research Review

MARCH 2005

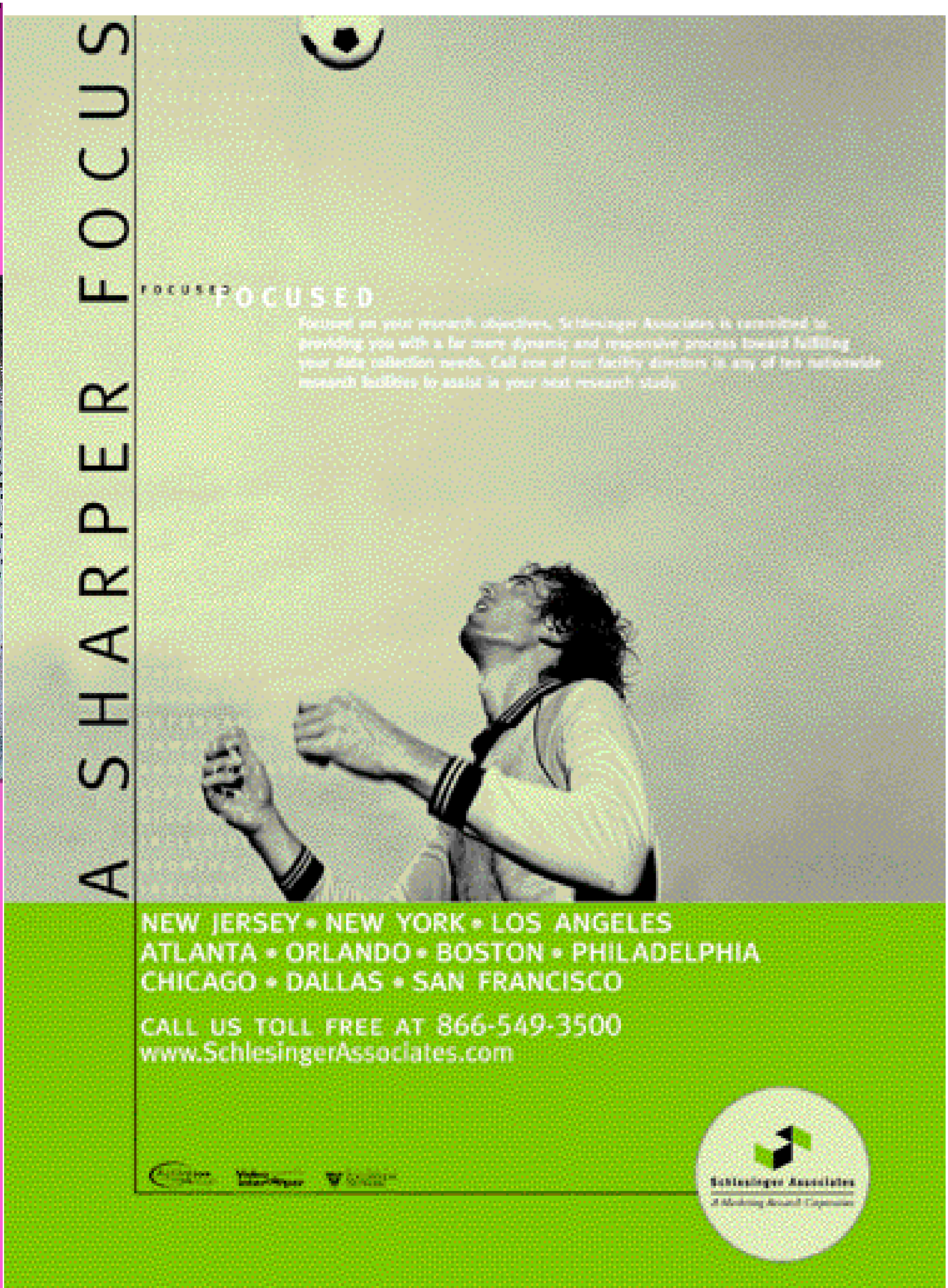
Business-to-Business Issue

> Building a successful b-t-b panel

> Making a good first impression in b-t-b phone surveys



2005 Data Processing Directory



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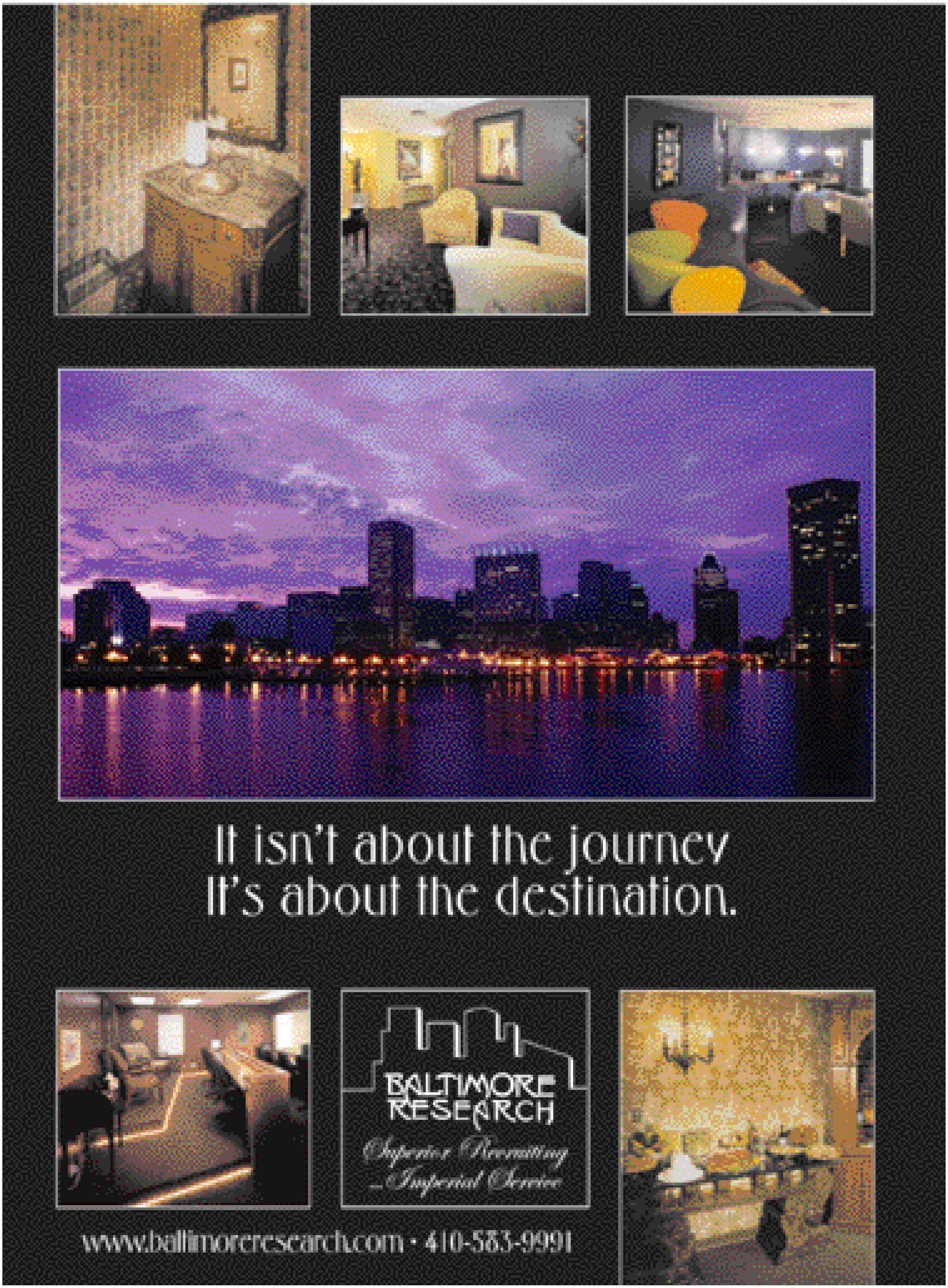

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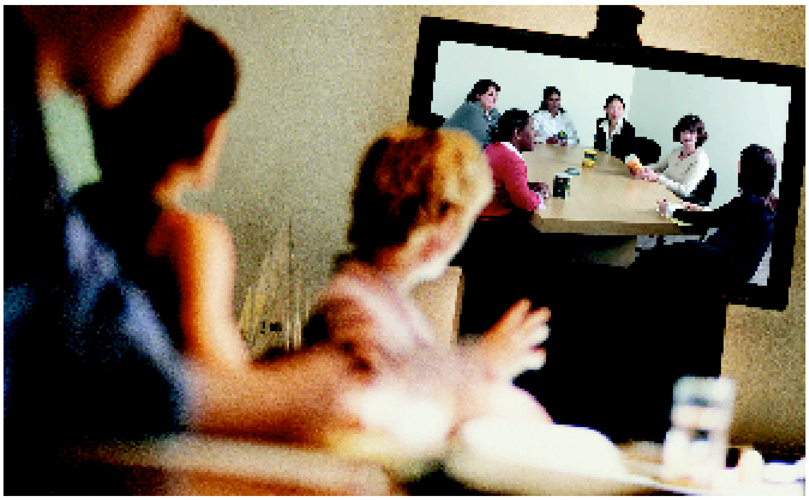

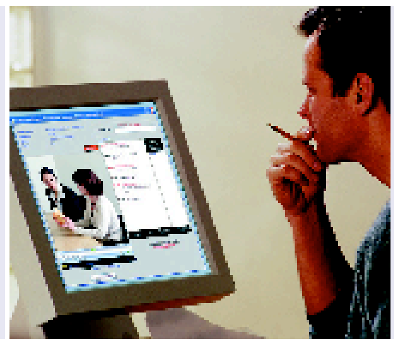

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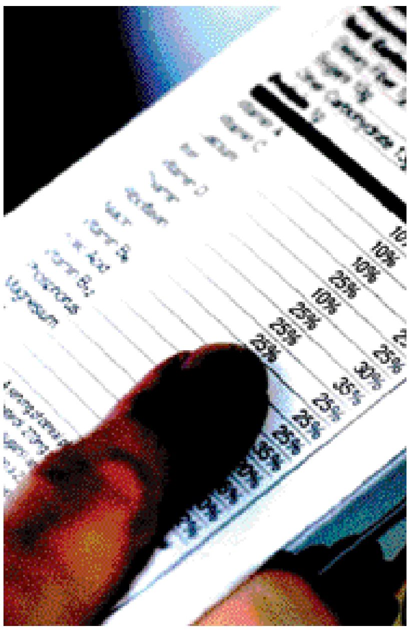
Health concerns cause half of Americans to read labels

According to a report from Chicago research firm Mintel, in both 2003 and 2004, more than half of Americans cited general health as their primary motivation for reading nutrition labels, while a little less than 25 percent show concern about a specific health issue as their motivator. In other words, for every two



people that read nutrition labels because of a specific health concern, five people do so for general health reasons. Clearly, end-products that offer general benefits have wider appeal than those that offer only one benefit.

"As consumers have now begun to think about food as a vehicle for achieving specific health goals, rather than just fuel for the body, the emphasis on food ingredients has shifted," says David Lockwood, senior research analyst for Mintel. Ingredients that fortify (herbals, vitamins and minerals) and ingredients that reduce (low-calorie sweeteners, low-carbohydrate polyols) have become important elements of the product development process and are crucial to creating healthy and popular foods. Researching the levels and patterns of ingredient usage in new products is one way to understand where the food industry is heading.

Mintel's research reveals that two-thirds of respondents report making purchasing decisions based on whether the product has the right amount of fat, vitamins and minerals, sugar, and calories. About half say that they make decisions based on salt, artificial sweeteners and carbohydrates. Women are significantly more likely to read ingredient labels than men when buying food and beverages, and the gender gap for vitamins and minerals, sugar, and herbs has widened since 2003.

A majority of consumers (45 percent) combine vitamin pills and eating right to ensure they are getting the necessary nutrients. An almost equal proportion rely solely on the foods that they eat. Of this second group, 29 percent appear to be consciously eating the right foods to get vitamins and minerals, while 14 percent are simply uninterested in vitamins and minerals.

The ingredient categories that most influence purchasing choices are fat, vitamins and minerals, sugar, and calories. The importance of both calories and carbohydrates has decreased, with the importance of carbs falling from fifth place to seventh. This may be signaling an end to the low-carb craze from a consumer perspective. However, a closer look at the continued importance of sugar and the increased importance of artificial sweeteners suggests otherwise.

Simply put, consumers may be becoming better educated about how carbohydrates work in our systems, focusing on replacing the bad carbohydrates - sugar - with artificial sweeteners. For more information visit www.mintel.com.

They like their TV real in Rhode Island

An analysis of reality television watchers from New York-based Scarborough Research finds that Providence, R.I., is the leader in reality television viewing among the 75 local markets in the Scarborough study. Thirty percent of consumers in that local market "typically" tune in to this type of television program versus the national average of 23 percent. Flint, Mich., (29 percent) and Cincinnati (29 percent) round out the top three markets for reality viewing.

Scarborough Research also examined three sub-categories of reality television: reality-talent, reality-adventure and reality-dating. Providence, R.I., and Raleigh, N.C., lead the U.S. cities in reality-talent television viewing. Fourteen percent of consumers in each of these local markets tune in to the genre, versus the national average of 9 percent. Providence and Cincinnati are the top local markets for reality-adventure television with 21 percent of consumers in these markets watching this programming. Nationally, 15 percent of consumers usually watch reality-adventure. Los Angeles, Grand Rapids, Mich., and Kansas City, Mo., are the leading cities for reality-dating, with 30 percent of adults in each of these markets tuning in to this genre, compared with the national average of 23 percent.

When examining the consumer profile of the reality viewer Scarborough found that they are avid restaurant patrons and intend to purchase a broad spectrum of consumer goods, including cars, sport-

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names of note

London-based research firm *Synovate Healthcare* has named **Jacquelyn S. Ilacqua** head of the Synovate Healthcare Global Tandem Oncology Monitor. She will continue to be based in the U.S. The firm also named **Laurie Harris** vice president, corporate development.

Millward Brown has announced a number of appointments. At Millward Brown Optimor, North America, **Nikhil Gharekhan** has been named senior vice president. **Marco Forato** has been named senior vice president, Millward Brown Optimor, Europe. Promotions: **Letesia Steel** to research director, Sadek Wynberg Millward Brown, UK; **Emma Elder** to research director, Sadek Wynberg Millward Brown, UK; **Mike Ripka** to vice president, Millward Brown, North America; and **Bill Pink** to vice president, Millward Brown, North America.

Dan Coates has been named president of *Voxco Corp*. USA, New York.

Knowledge Systems and Research, Inc., Syracuse, N.Y., has named **Vincent Cama** CEO, **Rita Reicher** president, and **Carl Spencer** COO.

Cincinnati research firm *Marketing Research Services Inc.* has named **Brett Simpson** research analyst and **Wendy Doran** associate research analyst.

Lori Cook has been named senior associate at *Digital Research, Inc.* Kennebunk, Maine.

Cook Lansanah

Cincinnati marketing agency *WonderGroup* has added **David Lansanah** as director of research design and analysis, a newly created position.

Netherlands-based *VNU* has announced that **Michael P. Connors**, a member its executive board and chairman of its Media Measurement & Information (MMI) group, has decided to leave VNU to pursue opportunities as a CEO of a publicly traded company. Connors will remain on the executive board until April 1, 2005, and will continue as chairman and CEO of the MMI group until June 30, 2005. Separately, VNU has named **Harris Black** secretary to the executive and supervisory boards and **Ferdinand Voskens** deputy secretary to both boards.

U.K. research firm *ESA* has named **Tania Maera** field manager in its internal field division and promoted **Kirk Brazier** to project executive in the client service division.

Vancouver-based research software firm *Vision Critical Communications Inc.* has named **Angus Reid** as CEO and added him to its board of directors.

Research firm *TNS* has tapped **Tacis Gavoyannis** to head its new technology sector, which will merge its existing telecom and IT research divisions.

Lightspeed Research, Basking Ridge, N.J., has announced a number of new appointments. At the London office, **Chris Stevens** has been named COO; **Nick Armstrong** has been named vice president, operations; and **Matthew Perkins** has been named director, research technology. In the U.S. office, **William Fernandez** has been named director, online marketing, and **Denise McGrew** has been named director, training and development.

John Humphrey, partner at *J.D. Power and Associates*, Westlake Village, Calif., has been named senior vice president of international operations and managing

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product and service update

Study segments Boomer population

BoomerEyes, a specialized research division of C&R Research, Chicago, has conducted a study of Baby Boomers, individuals born between 1946 and 1964, to obtain a deeper understanding and an up-to-date analysis of this group.

The BoomerEyes Lifestyle and Psychographic Segmentation study reveals four distinct segments within the broad Boomer population. Defined by their attitudes and behaviors versus age, the segments include: Looking for Balance Boomers, Confident and Living Well Boomers, At Ease Boomers, and Overwhelmed Boomers. The survey was conducted online with individuals born between 1946 and 1964. A total of 1,040 interviews were completed in August 2004. For more information visit www.crresearch.com.

Qualitative resource network launched

Minneapolis research firm Market Resource Associates, Inc. (MRA) has introduced the Qualitative Resource Network (QRN). The network was created in response to an increasing demand for field management of qualitative research projects from independent moderators, advertising and public relations agencies and companies with in-house market research departments, said MRA President John Cashmore in a company press release.

QRN is not a part of a chain or co-op; its purpose is to help place projects in the best location(s) and see the fielding through to conclusion. QRN will handle the smallest assignment to the largest in any desired U.S. or Canadian locale. Services are provided a la carte, so clients can decide the range of involvement of QRN in their projects. Study methods for which QRN provides field services include focus groups, mock juries, ethnographies and in-home, office or telephone individual interviews.

If a moderator, ethnographer or interviewer is needed for a project QRN will supply the client with a list of qualitative researchers who have agreed to work with QRN clients. Some may already reside in the location where the study is to be conducted, saving on travel expenses. Knowing the researchers' qualifications, the client can select the researcher with whom he or she is most comfortable. For more information contact Dan Bredahl at 800-795-3056 or visit www.mraonline.com.

Syndicated product for online retailers

New from Nielsen//NetRatings is its MegaView Online Retail service, an online syndicated and custom data product that reports overall shopping traffic and customer purchase data. The research is designed to enable retailers and marketers to improve their online retail strategy for increased online sales through competitive benchmarking, dollar spending insights and buyers' conversion rates. The data measures product category sales by retailer and tracks top referring Web sites.

Retailers and marketers can access syndicated and custom reports, enabling them to:

- track visitor and customer purchasing behavior;
- quantify total dollar spending and drill down by product category;
- assess the referral effectiveness index from top referring Web sites;
- measure visits for comparable sites where purchases were made;
- analyze average retail spending and number of orders across retailers;
- trend retail purchase metrics;
- examine visitor behavior according to demographic profiles; and
- build comparison shopping reports to identify online competitors, gauge loyalty and assess new opportunities.

MegaView Online Retail service is based on the Nielsen//NetRatings' MegaPanel, which provides retailers with intelligence on online consumers by linking past surfing behavior from the panel's sample with current opinions through real-time surveys. By combining these survey results with the actual surfing habits of the respondents, retailers and marketers are able to better understand how consumers are spending online. For more information visit http://netratings.com.

Updated Clementine supports predictive modeling with Oracle Data Mining

Clementine 9.0, the latest version of the data mining product from Chicago-based SPSS Inc. leverages its open, standards-based architecture to offer explicit integration with Oracle Database 10g, the first relational database designed for grid computing. Oracle Database 10g supports predictive modeling with Oracle Data Mining, enabling the building and scoring of models directly within the database.

Clementine 9.0 will enable analysts to use the Clementine interface to build, browse and score models in the Oracle Database 10g using techniques available with Oracle Data Mining. Oracle Data Mining algorithms, including Naïve Bayes, Adaptive Bayes Network and Support Vector Machines, appear as nodes in the Clementine interface. These techniques can be used just

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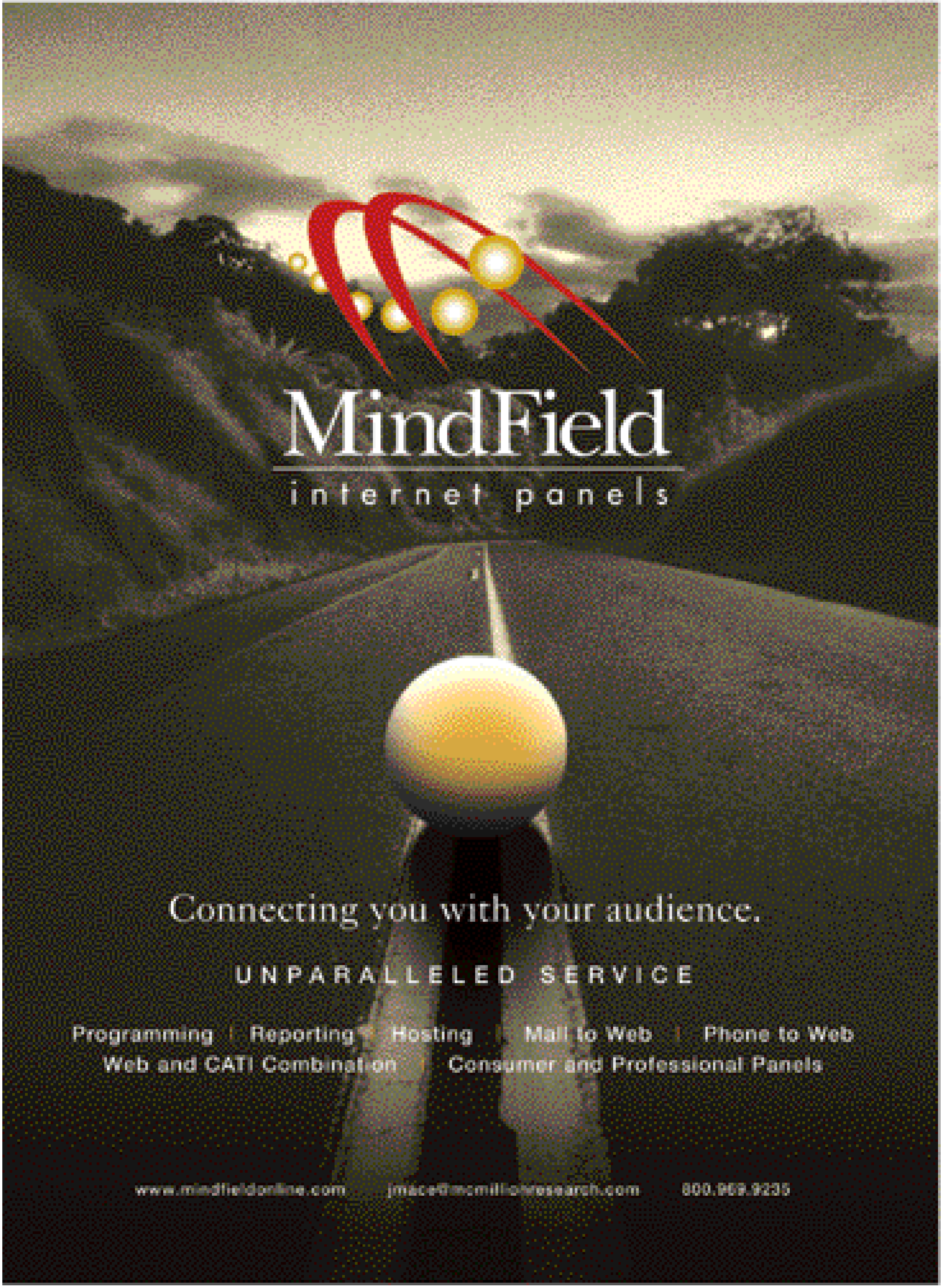
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News notes

The Yale School of Management has opened a new research center devoted to the behavior of customers. The Yale Center for Customer Insights (YCCI) will bring together industry leaders and scholars from multiple disciplines to focus on joint research relevant to the marketplace. Ravi Dhar, professor of marketing at Yale SOM and professor of psychology at Yale University and Dick R. Wittink, the George Rogers Clark Professor of Management and Marketing at Yale SOM and editor of the *Journal of Marketing Research*, will co-direct the new center. William Pace, CEO of consulting firm Kurt Salmon Associates, has been named chair of the YCCI advisory board. Other board members include: David Daniel, CEO of Spencer Stuart; James A. Firestone, president, Xerox North America, and senior vice president, Xerox Corporation; Thomas E. Gage, founding contributor to the YCCI and senior vice president and general manager, Verisign Communications; John L. Lindsey, president, Thomas Publishing International; Tim Love, president, global clients and co-chairman of G1 Worldwide, TBWA World; Anil Menon, vice president, marketing strategy and worldwide marketing management, IBM; and Laura R. Walker, president and CEO, WNYC Radio.

The Dallas-based Mystery Shopping Providers Association (MSPA) announced it now has 25,000 silver- and gold-certified mystery shoppers. The MSPA initiated the certification in November 2002. A shopper can become silver-certified by taking a short online course at the MSPA Web site. After obtaining silver certification, mystery shoppers can achieve gold certification by attending a gold certification workshop, a one-day seminar held in various cities throughout the United States each year. At the conclusion of the seminar, a test is administered, and those shoppers who pass the test are awarded gold certification. The MSPA estimates there are approximately 1.5 million

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Calendar of Events March-June

Salford Systems will hold its Data Mining 2005 Conference on March 28-April 1 in New York. For more information visit www.salforddatamining.com.

The IQPC will hold its Market Research Summit 2005 on March 29-31 at the Pan Pacific San Francisco. For more information visit www.iqpc.com/marketingiq.

Anderson, Niebuhr & Associates will hold a questionnaire design and use workshop on April 7-8 in Minneapolis and on April 28-29 in San Diego. For more information visit www.ana-inc.com/workshops.html.

The U.K.-based Association for Qualitative Research and the U.S.-based Qualitative Research Consultants Association will co-host the worldwide biennial conference on qualitative research, themed "Qualitative Transformations: Creating a New World Map," in Dublin, Ireland on April 17-19. For more information visit www.qrca-aqr-conference.info.

The Advertising Research Foundation will hold its annual convention on April 17-19 at the Embassy Suites Hotel, New York. For more information visit www.thearf.org.

ESOMAR will hold a conference on panel research on April 17-19 in Budapest, Hungary. For more information visit www.esomar.org.

IIR will hold a brand identity and package design conference on April 18-20 at the Plaza in New York. For more information visit www.iirusa.com.

ESOMAR will hold a conference on retail industry research on April 19-21 in Budapest, Hungary. For more information visit www.esomar.org.

Salford Systems will hold a data mining training conference and workshop on May 3-5 in Madrid. For more information visit www.salforddatamining.com.

The Business & Industrial Group will hold its annual business-to-business research conference on May 11-13 at the St. Pierre Marriott, Chepstow, England. For more information visit www.bigconference.org.

The American Association of Public Opinion Research will hold its annual conference on May 12-15 at the Fontainebleau Hilton Resort, Miami. For more information visit www.aapor.org.

ESOMAR will hold a conference on the fragrance industry on May 15-17 in New York City. For more information visit www.esomar.org.

ESOMAR will hold its Global Cross-industry Forum 2 (The Client Focus) on May 17-19 in New York. For more information visit www.esomar.org.

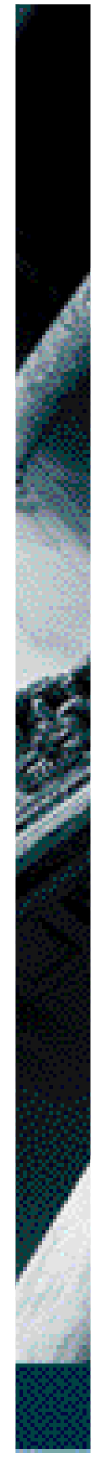
The Marketing Research Association will hold its annual conference in Chicago on June 1-3 at the Marriott Chicago Downtown. For more information visit www.mra-net.org.

The Travel and Tourism Research Association will hold its annual conference, themed "The 3 R's: Research, Results and Rewards," on June 12-15 at the New Orleans Marriott. For more information visit www.ttra.com.

The American Marketing Association will hold its annual Advanced Research Techniques forum on June 12-15 at the Coeur d'Alene Resort, Coeur d'Alene, Idaho. For more information visit www.marketingpower.com.

Canada's Professional Marketing Research Society will hold its annual conference and trade fair on June 19-21 in Halifax, Nova Scotia. For more information visit www.pmrs-aprm.com.

ESOMAR and the Advertising Research Foundation are co-sponsoring the Worldwide Audience Measurement conference (online, outdoors/out-of-home, print, media mix, radio, TV) on June 19-24 in Montreal. For more information visit www.esomar.org.



By Larry A. Zaback

Is gender an issue for the ethnographic researcher?

The December issue of *Quirk's* included a most interesting article that likely drew the attention of many qualitative researchers. The article, "Can we do better screeners? Of course!" was written by Chris de Brauw.

As a long-time ethnographic researcher, I took exception to the following sentence from the sub-section on ethnographies (found on page 49): "Finally, never send a man (or men) to a woman's home, unless there is a woman on the interviewing/observation team."

I called de Brauw after I read the article and we concluded that the issue of gender of the ethnographic (in-home) researcher is worthy of further discussion.

I am urged to say straight out, and de Brauw agreed during our conversation, that the well-trained ethnographer who routinely engages in best practices in the preparation and execution of this endeavor can be highly effective, regardless of gender. Therefore, de Brauw's remark, "…never send a man (or men) to a woman's home, unless there is a woman on the interviewing/observation team" requires a bit of context.

Should a man, or a woman for that matter, show up unannounced at a respondent's doorstep to conduct an ethnographic project? Certainly not. But de Brauw assured me this occurs with some frequency, a shameful fact that has to be addressed.

Privacy

As researchers we cannot forget we are entering a consumer's home, not a research facility. You have to be welcomed in, and to expect otherwise is absurd. The best way to merit that "welcome sign" is to follow a sensible introductory process (I always have an introductory letter sent to the respondent's home with my business card, and I call in advance of my visit). Although this point was raised in de Brauw's article, I assert this fervently to my colleagues. If you are not prepared to do this, do not consider conducting research in a respondent's home. Above all else, you jeopardize the validity of your research (the respondent will likely be ill at ease until you can make them feel more relaxed - that is, if you get the chance). Secondly, you will make it more difficult for recruiting agencies to get the full cooperation of qualified respondents to participate in this research practice. Effectively trained ethnographic researchers can do well without this roadblock.

Security

By introducing yourself prior to conducting the research, the respondent can establish a sense of comfort or safety. This is true of the typical female head-of-household when meeting a male researcher who is unaccompanied (my case, more often than not). I have never had a concern with this issue, and to generalize that men cannot be effective interviewers (when working alone) is not the message that de Brauw intended to convey, he assured me. On the other

Editor's note: Larry A. Zaback is founder and chief research strategist of Consumer Dynamics and Behavioral Analysis, LLC, a qualitative research consulting firm based in Newton, N.J. He can be reached at lzaback@cdandba.com.

hand, my female counterparts may wish to decide if working solo is in their best interest, with regard to security, when asked to interview male respondents who are home alone.

Ethics

The topic I address here is one of disclosure. On the one hand, we continually protect the identity of the respondent, assuring that her (presuming female head-of-household, in this case) name is not disclosed when project findings are reported. On the other hand, the respondent deserves to know that the individual who is going to work with her for the next several hours (this varies, of course) is a legitimate researcher. Keep in mind also, the only contact the respondent will have when the project ends is with the recruiting agency. It is in the recruiting agency's best interest to insist that the aforementioned introductory process be policy. Respondents should be assured that researchers visiting their homes practice sound ethical standards.

In this regard, I am reminded that research staff members who represent our nation's major industrials (including packaged goods and durables) exemplify two camps. Some announce their company affiliation during their introduction, others are reluctant to do so. No matter how one represents their affiliation, what is paramount is that the researcher has made a legitimate effort to introduce him/herself prior to engaging the research. As a general practice, when I am accompanied by a client representative, I simply introduce the individual as a colleague.

Product focus

Are there any limitations to what products men (or women) can effectively research, particularly when discussions take place in the home, or in the natural environment in which the products would ordinarily be used? We all have likely formed opinions on this issue, and "drawing a line in the sand" is probably unfair. In the interest of objectivity, I will simply address a brief sampling of my personal experiences in what is approaching 28 years in this business.

In the late '70s, the company with which I was employed requested its (all-male) research team to observe women shaving, under controlled conditions (not in their homes), so that we could assist the engineers in the finalization of a specific blade and razor handle design. This company was the first to successfully introduce a wet-shaving product specifically intended to meet the needs of women.

Since that initial experience I spent seven years on a skin-care research team. Our focus was to formulate an optimum body lotion specifically designed for women. I worked with several consumer panels across the country, comprised of women targeted for this category. In many cases they shared experiences with me that, they volunteered, "I've never told my husband."

My skill-set occasionally had me engaged in more "sensitive" research endeavors. I have designed behavioral research for pregnancy tests, evaluated consumer input for a vaginal moisturizer, and another product concept whose design focused on the absorption of odor, similar to sanitary pads.

My area of concentration in research psychology, human perception and performance, has consistently opened doors for me to work with men and women without any exclusion to product focus. Currently, as an independent researcher, I have found myself working in consumer health care, an extension of my previous career in industry.

What little wisdom I can pass on to my veteran colleagues, as well as interns in our industry, can be summed up in a few sentences:

Routinely place yourself under the proverbial microscope that measures your own ethical standards and integrity. Do it, because it is in your best interest to do so. With experience, and that includes making occasional mistakes and learning from them, others will respect you for the same standards you hold for yourself...and you will confront few barriers, gender or otherwise. | Q

By Steven Hokanson

Another way to assess satisfaction drivers

When a child asks "Why is the sky blue?" there are several answers you could give. One would describe the energy from the sun in the form of visible light and how the atmosphere of the Earth transforms it into the color blue. A second answer would describe the human eye and how it perceives visible light, especially the color blue. Yet a third answer would discuss the evolution of words and the word for blue in different languages. All of these answers would be both valid and informative, depending on how good your explanation is and how bright the child is. As the adult, it is up to you to decide on the appropriate answer.

Similarly, when a client wants to know what drives customer satisfaction ("Why aren't all my customers satisfied?"), there are also different answers you could give. One answer would be to focus on the client's product or service, the features and aspects of what the client is providing to customers. A second would focus on the customers, their needs, desires, perceptions and expectations. Yet a third would focus on what is meant by the word satisfaction; its different meanings or the relationship between expectations and actualization. All these answers would be good and worthy of detailed analysis and explication. As the market research analyst, it is up to you to decide on the appropriate answer.

Most often what clients want to know is where they should spend their time, energy and money in order to increase their customers' satisfaction. Analyses that focus on where to expend resources fall into the first category of answers listed above: features and aspects of the product or service. Qualitative research (e.g., focus groups) helps identify the more subtle aspects of the client's product and service while quantitative research (e.g., closed-ended surveys) measures what percentage of customers rate the client's offerings at different levels. The quantitative data is usually rich enough to permit assessments of the relationships between overall customer satisfaction and detailed aspects of the product or service.

It is here, in assessing the relationships between overall satisfaction and detailed variables, that I believe there are opportunities for improved analytical methods. With better methods we can give our clients better answers and improve the efficiency and effectiveness of both their marketing and operations.

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Background

For the analysis of relationships between variables what I see most often in market research literature is regression analysis. Usually this is multiple linear regression though there is frequent mention of a related methodology, principal components analysis. Both of these methodologies have several major flaws when applied to customer satisfaction and the limitations of these linear methods have been described in detail in numerous other papers, journals, articles and books. However, I feel I


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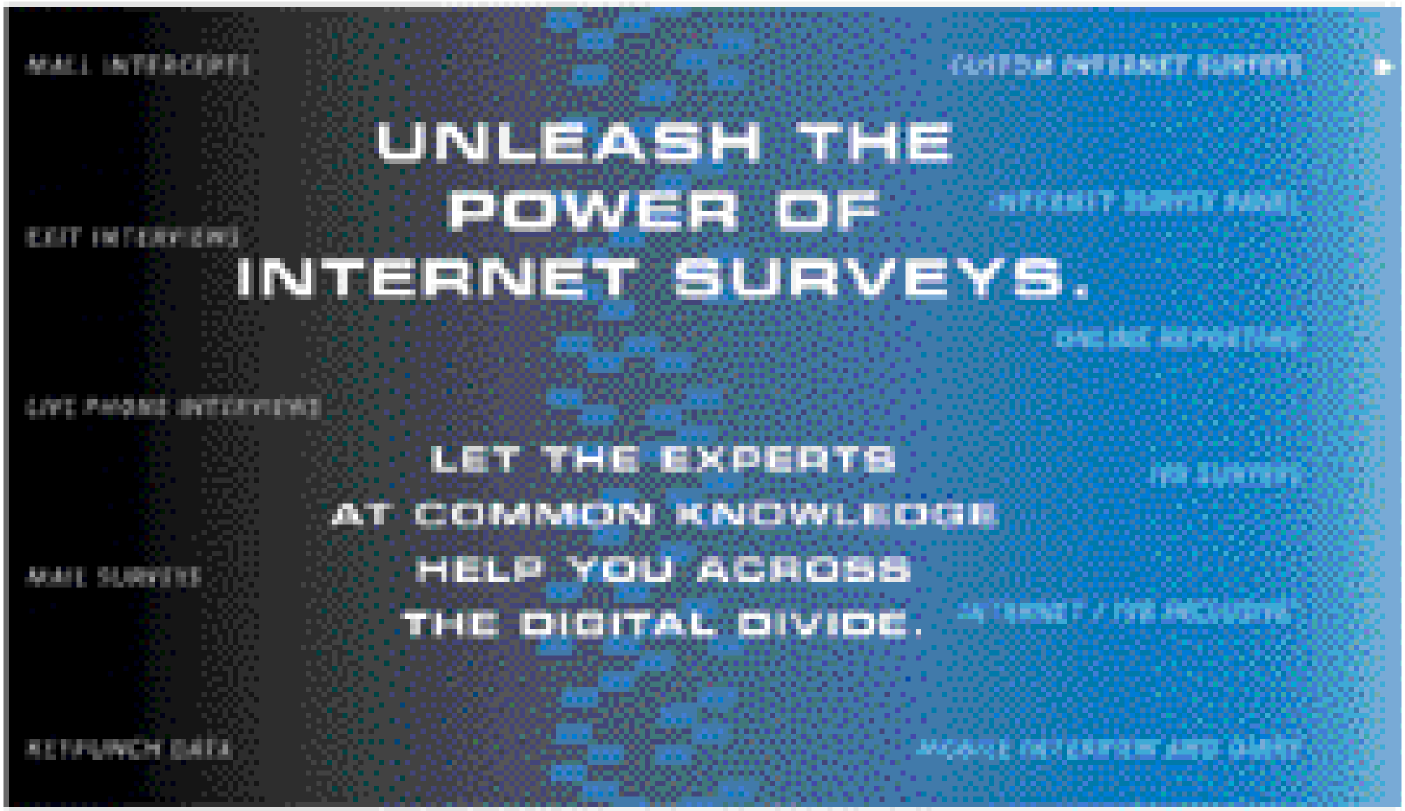


need to touch on their primary weaknesses in order to contrast these older methods with the new one I want to introduce for your consideration.

Linear methods are based on several assumptions: the data are numeric (or more precisely, interval), there is no missing data, the relationships between the independent variables and the dependent variable are linear, and there are no (or inconsequential) interrelationships between the independent variables. None of these assumptions is valid for most customer satisfaction data.

Interval data

The measure of customer satisfaction is predominantly ordinal. One example of a commonly used scale is: completely satisfied/very satisfied/satisfied/dissatisfied/not at all satisfied. This scale typically has numeric values running from 5 down to 1 associated with it. However, the use of the associated interval scale (i.e., 1, 2, 3, 4, 5) does not mean the data is intervally scaled. The amount of difference between "satisfied" and "very satisfied" might be more or less than the difference between "not at all satisfied" and "dissatisfied." I have seen no compelling explanation as to why these differences should be assumed equal. Usually the assumption that the data is intervally scaled is dictated as necessary by the linear methods.

Missing data

A second major difficulty with using linear methods to analyze customer satisfaction data is missing data. For products, some customers do not purchase all the optional features. For services, some customers do not experience the full range of services. In both cases the customers who do not participate fully leave answers blank on the survey (e.g., "does not apply," "no opinion"). Linear methods require values to be provided for all answers for all customers in order to perform the analysis. How values for the blank questions are determined is less important than the fact that the values are filled in by the analyst instead of the customer.

Linear relationships

A third major flaw in using linear methods is the assumption of linearity itself. Very few of the independent variables have a linear relationship to the dependent variable. This is especially true at the end points of the scale. Eventually, the customers do not want the service to be any friendlier; the customers don't care if the product is yet even more clean or bright or new or colorful or better packaged. At the other end of the scale, if the product is dirty, tarnished, old-fashioned, dull colored or poorly packaged, doing any of these things even worse isn't going to decrease the customers' satisfaction any more. They have already decided to never buy it again. In actual practice, the relationship between satisfaction with a detailed aspect of a product or service to overall customer satisfaction is usually a curve with several threshold points.

Customer satisfaction changes sharply once certain threshold values

are reached. A simple example is how hot to serve coffee. Cold coffee is usually unacceptable and small increases in temperature do not change the customer's overall satisfaction. At some point the coffee reaches lukewarm and customer satisfaction goes up a notch. At the threshold where it becomes warm (and later hot) satisfaction will increase another notch. Note that increasing the temperature to scalding causes satisfaction to decrease. Basically, the assumption of linearity is wrong for the vast majority of variables because of 1) non-linear jumps at threshold points, 2) the drop-off in sensitivity at end points, and 3) the downward slope at the extreme upper end. Money is the primary exception to this non-linear rule, because people usually measure satisfaction as inversely linear to cost. Almost everything else is non-linear.

Interdependency of detailed variables

In customer satisfaction data many strong relationships exist among the detailed aspects of the client's product or service. Indeed, it can be argued that the most distinguishing characteristic of customer satisfaction data is the tremendous interaction among the detailed variables (usually referred to as correlation). Though questions about a service representative's friendliness, helpfulness, courtesy and product knowledge are almost always strongly interrelated, each of these questions concerns a unique aspect of the customer's experience. To omit any one of them from the questionnaire would leave a hole for which the other questions could not fully compensate. For clarity's sake, and to reinforce the point of this section, I use the label "detailed" instead of "independent," as the later description can be quite misleading. Linear methods go to great lengths to work around the inherent correlation between detailed variables. They expend the effort because a fundamental basis for linear methodologies is that the detailed variables be truly indepen-

dent. Practitioners of linear methods believe the tools they use work around this problem. However, all of them understand that the high correlation between the detailed variables is a problem they always need to worry about.

Impact! Analysis

Impact! Analysis (IA) was specifically developed for analyzing customer satisfaction surveys. It evolved over a period of six years (1992 to 1998), and we have been using it in its current form for clients over the last seven years (1999 to 2005). The primary benefit of Impact! Analysis is that it measures performance as "percentage of happy customers" and it measures impact as the rate of change in performance. That is, impact is the increase (or decrease) in the percentage of happy customers. We feel these units of measurement are superior to those of correlation and regression coefficients.

IA is performed in four steps and it is reasonable to view each step of the analysis as an assumption. Your judgment as to the utility of IA depends primarily on your evaluation of the reasonableness and validity of each step. In overview, the steps are: 1) reduce all multi-point scales to three-point scales, 2) calculate performance scores for all variables based on the three-point scale, 3) calculate the impact of each detailed variable on the aggregate variable using the three-point scale and the performance scores, and 4) set priorities based on the relative impact of each detailed variable on the aggregate variable. Each of these steps is described more fully below.

Three-point scale

Perhaps the strongest influence on me to use a three-point scale came from Roland Rust of Vanderbilt University. In the early 1990s, I read several papers written by Rust that recommended the use of a three-point scale for customer satisfaction data. IA does not use the scale precisely the way Rust espoused. Instead of his dissatisfied/satisfied/delighted, IA uses the labels low/medium/high. The low, medium, and high labels refer to how a customer rates the product (or service or attribute).

In actual practice, surveys typically use five-, seven-, or 10-point scales. IA doesn't really care what kind of scale is used on the survey. Given a choice, we recommend a seven-point scale because it provides flexibility. In any event, IA reduces all the scales to low, medium, high. How the values are converted depends on the individual survey. In an industry that is very competitive and where the client is surveying its existing customer base, a five-point scale will usually be converted as 5 = high, 4 = medium, and 1-3 = low. This is because the scale is going to be heavily skewed to the high end. In an industry that is fairly non-competitive, a conversion of 5 = high, 3-4 = medium, and 1-2 = low would be more appropriate. When surveying all potential customers (including those who currently buy from a competitor), a conversion of 4-5 = high, 3 = medium, and 1-2 = low might be best. The primary criteria in choosing how to convert to the three-point scale are: 1) to convert all questions that have the same scale on the questionnaire in the same manner, and 2) to achieve performance scores (described in the next section) in the range of 40 to 70.

We want to be as uniform as possible in converting scales, so that all the questions are treated equally. At the same time, we want performance scores to be in a middle range to leave room for both improvement and deterioration.

To complete this section, a discussion of some exceptions to using the three-point scale is warranted. Binary variables are converted to high and low, with no medium responses. Some four-point scales are quite intractable to conversion to three-points. For example, "likelihood to buy again," with a scale of definitely will/probably will/probably will not/definitely will not, is tough to convert if each value has 20 percent or more respondents. To handle these difficult cases, a four-point scale is acceptable for performing IA: high/medium high/medium low/low. This four-point scale is avoided if possible because it violates the goal of uniformity.

Performance scores

My motivation for how to calculate performance scores comes from the common practice in market research to measure performance as the percentage of the customers answering in the "top two boxes." For example: "75 percent of the customers rated us in the top two boxes" (on a five-point scale). This is a fairly standard industry practice and is easily understood by all levels of management. I have changed this slightly to give full points for high, half points for medium, and no points for low. For example, if 50 percent of the respondents rate a variable high, 40 percent medium, and 10 percent low, the performance score would be 70 (50 + 40/2). The basic philosophy is that high ratings are the goal and that medium ratings are partial success. When using the four-point scale described in the immediately preceding paragraph, medium high is worth .67, and medium low is worth .33.

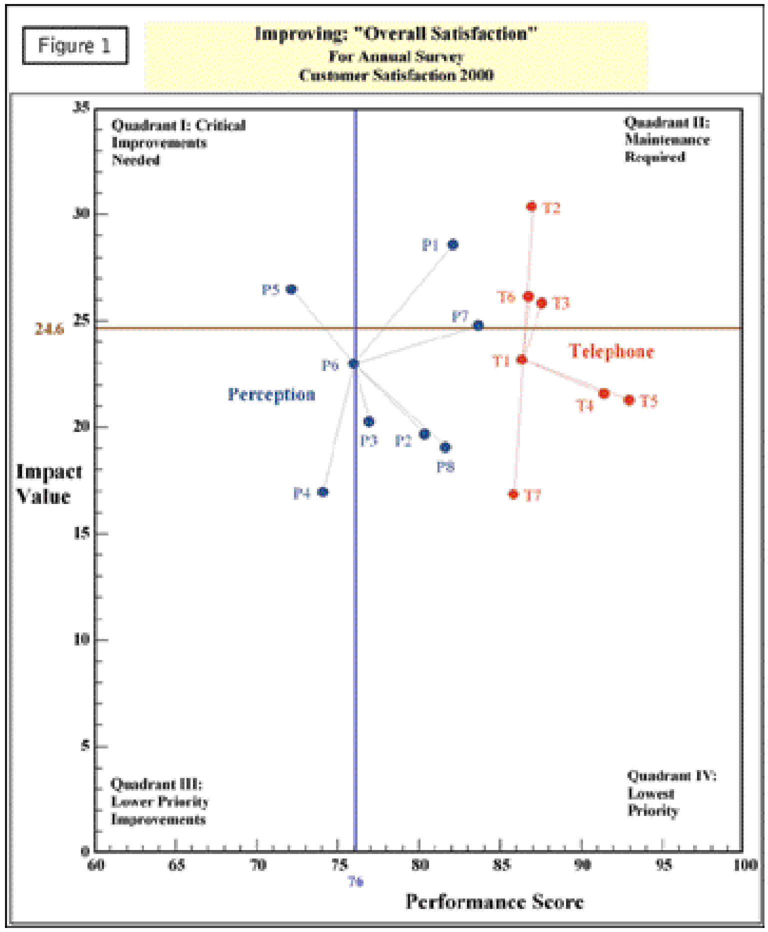
Performance scores are calculated for all variables but they are most important for target (or aggregate) variables. Target variables are most easily described through example: overall satisfaction, likelihood to recommend, likelihood to buy again, value for the money, frequency of purchase, and quantity purchased. All other variables are considered suspect variables. This label is used to convey the meaning that the other variables are suspected of impacting the target variable(s). The analysis will bear out whether they do impact the target variable, and if so, by how much.

Impact! calculation

The previous two steps prepare the ground for calculating the impact of each suspect variable on each target variable. For convenience sake, let's limit this discussion to a specific target variable: overall satisfaction.

The impact value of each suspect variable on the target variable is calculated by splitting the respondents into three groups based on how they answered the suspect variable: low (SL), medium (SM) and high (SH). For each group the performance score for the target variable is calculated. For example, the SL group might have an overall satisfaction score of 35. The SM group might have a score of 60, and the SH group a score of 75. These would be fairly typical numbers and after some reflection you should see why. The customers who are unhappy about the suspect variable are likely to have low overall satisfaction, and conversely for the upper end of the scale. Indeed, what these numbers reflect mathematically is that the suspect and target variable are somewhat correlated.

The impact on overall satisfaction when the suspect variable is improved can now be measured. Moving customers from the SL group to the SM group results in an improvement to overall satisfaction of 25 (60 - 35). Moving customers from SM to SH results in an improvement of 15 (75 - 60). We call the first change “fixing mistakes” and the second change “achieving excellence.” In this example, fixing mistakes (FM) will have a greater impact on overall satisfaction than achieving excellence (AE). IA also calculates an average impact = (FM + AE) / 2. We refer to the average impact as Impact

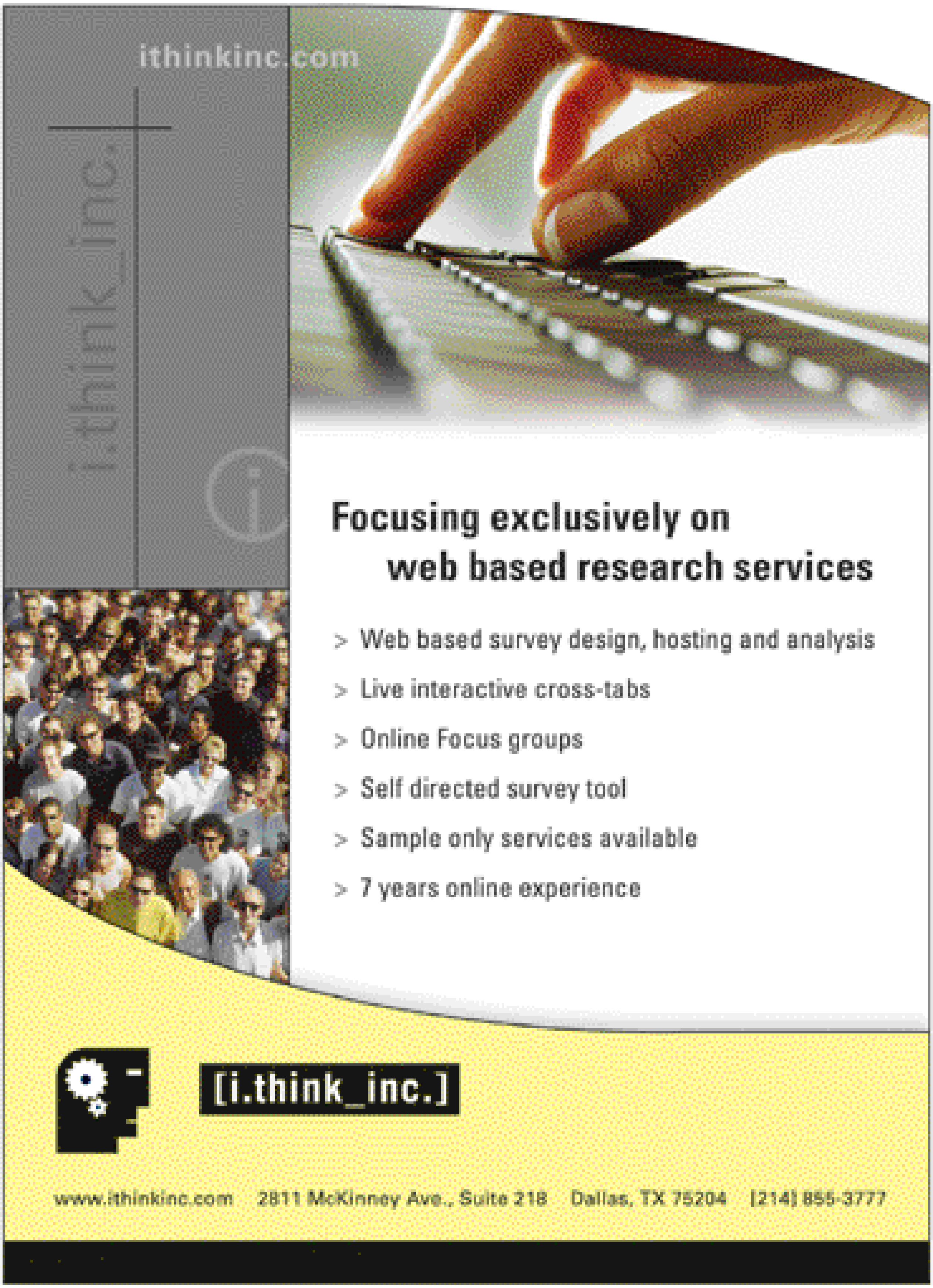


and it is our primary measure of the relative importance of each suspect variable on the target variable.

Setting priorities

The Impact of each suspect variable is calculated and then they are all compared. However, instead of setting priorities solely on the basis of Impact a second criterion should also be considered: the performance score for each suspect variable. To make this discussion more coherent, examine the quadrant graph shown in Figure 1.

The X axis is the performance score and the Y axis is the Impact value. Each point on the graph represents a suspect variable’s performance score and Impact on the tar-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get variable. The target variable name is displayed at the top of the figure and the performance score for the target variable is displayed as a vertical line separating the quadrants on the left from those on the right. The average of the Impact values for all the suspect variables is displayed as a horizontal line separating the upper quadrants from the lower ones.

The vertical and horizontal dividing lines create four quadrants which have been numbered I, II, III and IV. The numbers refer to the upper left, upper right, lower left and lower right respectively. The numbering scheme reflects IA's recommended priority. Thus, quadrant I is labeled "critical improvements needed"; quadrant II is labeled "maintenance required"; quadrant III and IV are labeled "lower priority improvements" and "lowest priority."

The reasoning behind these priorities is that improving a suspect variable that has a high Impact value will produce more improvement in overall satisfaction. This is why quadrants I and II come first. Looking at the suspect variables, it is clear that there is more room for improvement for those with low performance scores. By giving variables in quadrant I a higher priority than those in quadrant II, we are taking advantage of the additional opportunity for large improvements offered by those in quadrant I. Similar logic applies to the ranking of quadrants III and IV.

Based on Figure 1, our recommendation to the client was to work on P5 as the highest priority (Quadrant I). P1, P7, T6, T2, and T3 should be maintained at their current levels (Quadrant II). If there is any deterioration in the Quadrant II variables, then that will have a marked negative impact on overall satisfaction. The other variables are lower priority. Note the grouping shown in the figure. The perception questions were relevant to all respondents and related to their perception of several attributes of the corporation. The telephone questions were only asked of respondents who had recently placed a phone call to the corporation. The graph shows the similarities and dissimilarities within and between the groups.

New vocabulary

This article has introduced the methodology Impact! Analysis. IA was developed specifically to work within the restrictions imposed by market research data. Because it is different from the linear, polynomial methods commonly used in market research, it requires the reader to learn a new vocabulary, and to take a different view of the both the problem domain and the possibilities available for understanding customers. While Impact! Analysis has as its foundation very simple mathematics, the methodology addresses the complexities of market research problems and generates conclusions that are easily understood by all levels of management. | Q

By Amanda Durkee

First impressions are everything in b-to-b telephone surveys

Picture yourself sitting at work. Your phone rings. On the other end, a voice tentatively says, "Hi, this is Bob from Masterful Research. I'm conducting a survey today on widgets. Is this a good time for me to ask you a few questions?"

What would you do?

For many purchase decisionmakers at businesses, such as IT managers, this type of call is an everyday occurrence. Unless there's a compelling reason to participate from the very beginning, it's very likely that they'll pass on the opportunity.

There is no replacement for a good survey introduction to hook a respondent's interest. Unfortunately the introduction is often inserted as an afterthought – perhaps it's even part of a questionnaire template. The introduction to the survey is often not given the necessary time and attention to assure interviewers can effectively establish rapport and garner interest to encourage participation. Time spent carefully wording the perfect questionnaire will be wasted if you don't spend time figuring out how to get in the door.

A good introduction needs to be coupled with good interviewer training. Though they are instructed to follow a script, interviewers will often encounter questions from respondents, as well as different levels of interest, confusion, even argumentativeness. Interviewers need to be trained to respond to these different moods and situations. Having a set of responses to common questions will also help make sure they're not put on the spot. Otherwise, interviewers may find themselves not only unsuccessful and discouraged, but your research study will suffer for it.

The following are some guidelines to increase the persuasiveness of your survey introduction.

• *Keep the intro short and natural.* Interviewers are trained to read introductions and questions verbatim, so keep the scripted introduction short and simple. The longer or more comprehensive it is, the more likely you are to have interviewers stumbling over the words, ad-libbing, or reading without emotion – a sure turn-off to the person on the other end of the line.

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• *Make sure to say why you're calling.* Identifying the subject of the survey will not only help generate interest but also will avoid confusion and result in more direct, informed responses.

• *Tell them how much time you need.* If the survey is under 20 minutes, disclose the length up front. A survey conducted in 2000 by the Marketing Research Association shows that cooperation rates drop off sharply after 20 minutes, so if your survey is longer you may want to consider shortening it! However, if asked, interviewers should always respond with a realistic estimate such as, "Most people finish the survey in xx minutes."

• *Take time to establish rapport.* A follow-up to being realistic about

the time is to train interviewers not to rush. They should consider the introduction as an opportunity to make the initial connection with the respondent. Interviewers should be encouraged to speak calmly and with enthusiasm in their voice. They should be definitive with their instructions, but not sound rushed. They should also be cognizant of rushing the respondents – typically the people who are willing to take the time to answer a survey want time to think about and voice their opinions. If the interviewer cuts them off or indicates they should rush, the respondent is more likely to become disillusioned and hang up.

• *Offer an incentive.*
If the length is over 15 or 20 minutes and/or if the audience has a particularly low incidence among the population, it is very possible that you will need an incentive to gain participation. This recommendation comes with the caveat that you should offer incentives judiciously – you don't want to offer money and unnecessarily increase the overall cost of your study, nor do you want to up the ante for future studies. If you do need to offer an incentive, state right up front that respondents will "have the chance to receive $xx if you are qualified and complete the survey."

• *Distinguish yourself from telemarketers in a non-salesy way.*
Telemarketing is often confused with marketing research. The confusion has been reinforced by an illegal practice used by telemarketers called sugging or selling under the guise of research, in which they mask sales calls as independent research studies. Therefore, using the phrase "this is not a sales call," up front may set off alarms with a savvy respondent. The way around this is to have a script handy for interviewers for the event that someone asks what the call is about. An example response is "We are very interested in the opinions of companies like yours so that manufacturers of [product] can continually improve the products and services they provide. Would you help me with my research?"

• *Identify the client, if possible.*
Tell respondents who is conducting the survey, particularly if you or your client is a well-established, well-regarded brand and disclosing sponsorship won't bias answers.

• *Offer confidentiality and respect for respondents.*
Last but certainly not least, remind respondents that their responses will be held in confidence, and that they will not be placed on any mailing lists or receive any sales solicitations as a result of their participation.

Remind them also that their opinions are valuable! Encourage interviewers to put themselves in the respondents' shoes, and treat them no differently than they would want to be treated if they were completing the survey themselves. To encourage this self-awareness, have interviewers practice role-playing to see what it is like to take the survey.

First impressions do count. Make a good one with a good introduction! | Q

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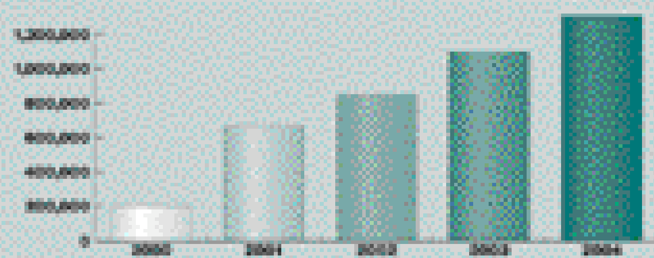

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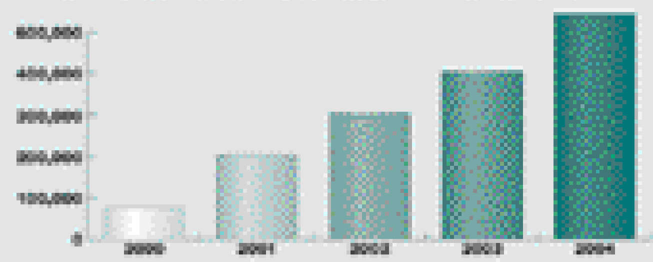

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By Laura Patterson

Work your plan

Pre-research planning helps Texas tech firm put findings in motion

Getting the corner office to buy into and approve market research can be tough going, especially when measuring ROI for market research is difficult. With today's tight budgets, every expenditure request requires a good justification. The best way to secure buy-in is to tie the market research to an organizational priority and relevant business objective. This might include research to define new products, to identify ways to improve customer service, to determine buying requirements, and so on. Research related to new products is especially important. For most business-to-business (b-t-b) companies, new products are essential to survival. According to a late-1990s study by Abbie Griffin, new products account for about 32 percent of a company's sales. Profits from new products account for almost one third of the bottom line. The fast rate of technology enhancements can often make existing products quickly obsolete. And for many b-t-b companies, innovation is a critical ingredient for achieving and/or maintaining leadership. While thousands of new products are developed annually only a few succeed. In fact, a Booz Allen Hamilton study on new product management found that for every seven new product ideas, about four enter development, one-and-a-half are launched, and only one succeeds. Good research can help ensure that your new product is one that succeeds.

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This article recommends five steps to help you get more out of your research investments and help secure easier and faster budget approval. A project for our client Motion Computing that used qualitative research to determine key product attributes illustrates how to put these ideas to work for you.

Formed in 2001, Motion Computing, Austin, Texas, focuses on ultra-mobile computing and wireless communications. The company integrates world-class technologies into the latest mobile-enabled technologies to adapt to the way people work - so people don't have to compromise their work styles to accommodate a machine.

Motion Computing is dedicated to driving innovation based on the market and customers' needs. As a result, current products were designed based on direct market input. Motion Computing's product development efforts generally include exploring market reactions, perceptions and preferences for several key aspects associated with a next generation platform. While the company has product and marketing expertise internally, members of the product and marketing teams use a third party to provide some important benefits in terms of objectivity, process and analysis.

Key decisions

In general, the purpose of the research was to provide truly material information that enabled the organization to make key decisions in regard to the product platform and capabilities. As with any technology product, mistakes are costly, not only in terms of actual product costs, but in market acceptance and time-to-revenue. Our recommended approach for these efforts was to deploy qualitative research methodologies using both focus group and in-depth interviews conducted by phone and using Web technology. This approach provides good guidance regarding market requirements and yields key information about existing products, company reputation, market perception and customer satisfaction.

Key outcomes of this type of research include being able to discern the most important attributes for a new product, as well as the trade-offs between these attributes, plus insight into how and where the customers tend to use the product, and their other product needs. The process used in this case study can be employed by any firm wanting to validate its product development efforts.

Using a collaborative process, VisionEdge Marketing guided the research effort employing the following five steps to ensure Motion Computing's product validation efforts paid off.

1. Clear objectives.

Any good research must have a clear

set of objectives. In the case of Motion Computing, the objective was to secure key facts needed to make important business decisions about feature sets and functionality priorities. Before conducting any research, it helps to answer two primary questions. The first question is, "As a result of this research, what will we know?" The second question is, "As a result of this research, what business decisions will we be able to make?" The outcome of this step is to ensure the research will yield "need to know" information that is actionable.

This step is critical because it serves as the foundation for selecting research participants and the development of the discussion guide and survey instrument.

2. Well-defined scope.

Because it can be hard to secure buy-in for research, it is not atypical for marketers to try and pack everything they ever wanted to learn into what may be the only research study they will be able to deploy during the year. We advise against this.

Because companies have so few opportunities to conduct research, the urge to overload is common. For example, it's typical when we start working with a company that they want to cover every question, from market plans to various revenue breakouts, key purchasing attributes, and so on. While it may seem more cost-effective to conduct one very large study that answers a host of questions, this approach can actually reduce the overall effectiveness of the research, raise the costs of completing the survey, and potentially make the instrument too long, thus reducing the number of completes.

You'll have greater success if you craft smaller studies to target specific issues. Build on your successes. If the research pays off, the management team will be more receptive to additional research efforts.

A key factor of success in the Motion Computing example was having a very specific scope of the study to address several key design and technology decisions for a particular product. The discussion guide and the additional handout completed by each participant kept the research focused. This requires a lot of collaboration between the company and research firm so that everyone inside the company is clear about the research purpose and desired outcomes.

3. Use research to avoid costly mistakes.

Good research helps an organization avoid costly mistakes. Developing a new product or service and bringing it to market is generally one of the largest investments an organization makes. Research on new products suggests that solid upfront homework drives up new product success rates by 43.2 percent. Yet in a survey of companies by Cooper and Kleinschmidt, only 7 percent of the money and 16 percent of the work effort goes into this step. Other big investments include major changes to tech support or customer service processes. Mistakes in these areas are not only costly, they can also result in major setbacks. The window to bring a new product to market for most b-t-b companies is very narrow and few such firms can afford more than one product failure. Research is a good way to gather insight before making an extensive investment only to find out later the decisions weren't the right ones. While the research may appear to cause delay, the exact opposite is actually true. Products that hit the mark are more likely to achieve faster time-to-revenue because they are better developed to fit the needs of the target market.

Identifying and recruiting the right participants and developing and asking the right questions are the two most important components to ensure the information learned will facilitate the decision-making process. For this type of work, we always recommend testing any instrument prior to using it and using the same discussion leader for the entire project.

In the Motion Computing project, the survey instrument was designed collaboratively and tested. We included an additional handout component to collect written responses to key questions, which let participants respond to questions and put their responses in writing. This approach provided a particularly useful way to gather and compare key input for several aspects of the product concept. For these types of projects, record the focus groups and individual interviews to help ensure accuracy and provide context.

Lastly, it is important to have the needed props for any discussion. If the purpose is to test feature and functionality of a new product, then models with options need to be created and be available for participants to experience. How someone reacts to something drawn on paper may not be the same way they react to a product they actually hold in their hands. For a company such as Motion Computing where size, shape and weight are being tested, we used models that accurately represented these options.

4. Make the research count.
Many marketers are finding themselves relegated to sales support rather than leading the charge to improve the company's competitive advantage and market position. Research can provide valuable data points to demonstrate the impact of marketing efforts on business initiatives. The best way to assess your impact and spot changes is to conduct before-and-after studies, benchmarking studies and tracking studies.

5. Use the research results.
It is somewhat baffling to hear that companies invest their time and money to conduct research and then ignore the results. It is important to reconcile what you believe with what you learn from the research. Setting aside the results merely because they don't sync up with your company's assumptions and instincts isn't the best course of action.

Uncovering issues and identifying unmet needs is a core component of marketing. The purpose of conducting research is to enable us to make recommendations with a degree of confidence rather than rubber-stamping what we think we already know. In an example from a Motion Computing project, the company held an opinion regarding the location of the batteries. In one model, the battery looked aesthetically more pleasing in one location than another and the research participants provided insight into why the alternative approach would be more suitable.

Worth it?
As you can see from the example used in this article, conducting research to define and refine new products is not effortless. To yield results from your product research undertakings, you will need management commitment, a well-defined set of objectives, a process to ensure that all efforts are linked to your business objectives, a culture that fosters innovation, and a high-quality systematic process for evaluating new products prior to commercialization.

Is the effort worth it? In 1995, R.G. Cooper and E.J. Kleinschmidt conducted research showing that 50 percent of successful products achieve a 33 percent or better return on investment, have a payback period of two years or less, and achieve a market share in excess of 35 percent. For most any b-t-b company, these would be considered great results. | Q business-to-business research

Worth the effort

Guidelines for building a successful b-t-b panel

By Steve McCurdy

As a business-to-business marketer, you must overcome significant challenges in order to develop and implement winning strategies for your company. Typically, you must identify the proverbial 20 percent of customers that supply 80 percent of the opportunity, create value propositions that lead to competitive advantage within this group, and implement programs to establish the value proposition and ultimately increase market share. Equally important, you must be able to track metrics that evaluate the company's performance in each of these areas so that resources can be reallocated if necessary. Further, you must have processes in place to provide timely input to guide making adjustments to your strategies as new challenges emerge and the market environment changes.

Providing insightful, timely and cost-effective input to help management make informed decisions and track key performance metrics can be quite difficult to accomplish in many business-to-business markets. Syndicated data or data from industry trade groups is often inadequate, particularly at the segment level, and ad hoc research can involve long lead times and high costs. Ideally, research can provide not only the metrics that show the relationship between marketing programs and market share, but also metrics that forecast market share trends so that strategies and programs can be adjusted before revenue suffers. In reality, however, it can be very problematic to obtain the right metrics in the first place, let alone to make reliable forecasts or provide timely input on emerging challenges.

In many cases, establishing your own proprietary panel of stable research participants has strong advantages over relying on syndicated sources or conducting ad hoc research studies: 1) it provides better information from which to identify cause-and-effect relationships; 2) it provides more timely feedback; 3) it can be more easily managed as an ongoing process (as opposed to the "fire drills" that can happen once a need for ad hoc research comes across management's radar); 4) it is less expensive in the long run; and 5) it helps to reinforce market focus throughout the organization.

Research challenges

There are many research challenges, some of which apply generally to b-t-b research and some of which are particular to ongoing measure-

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3720 DaVinci Court . Norcross GA 30092 . 800.793.3126 . www.activegroup.net ment. One obvious difficulty is the logistics of identifying, contacting and engaging people who can give valid answers. In b-t-b markets, the number of customers and prospects tends to be much smaller than in consumer markets, greatly limiting the pool of potential research participants. This constraint is often exacerbated by a heavy concentration of purchasing power among a small subset of companies. Further compounding the challenge is that those key decision-makers and influencers whose input is most important to gather are often high-level executives and managers who can be extremely difficult to recruit as research participants. In the particular case of an ongoing panel, building the trust and confidence of the participants is critical to obtaining accurate information and gaining long-term participation.

Case study

In 2002, our client, a division of a large industrial equipment manufacturer, faced these challenges. Several years earlier, research had highlighted the 80/20 challenge - in this case 60 percent of the opportunity was controlled by 10 percent of the companies. The heavy concentration of purchasing power is expected to increase as the industry continues to consolidate, and purchasing decisions are typically made at the senior management level. After we helped the client identify and define this segment, senior management prioritized achieving success within this 10 percent as critical to the company's long-term growth. Historically, the company had underperformed in this critical segment. Further research led to the development of a unique value proposition that could create positive competitive differentiation in the minds of the decision-makers, and programs to establish it were defined and enacted.

Despite a heavy initial investment in developing the company's strategies for targeting the "large company" segment, ongoing efforts were continually undermined by two factors. One was the high cost and long lead-time for gathering input from this segment to help guide ongoing decision-making and stay abreast of emerging issues. The second was the absence of any well-established processes for tracking changes in market share and other key performance metrics specifically within this segment. In particular, senior management lacked the means to evaluate the success of its strategies and programs, much less make adjustments or respond to newly emerging challenges and opportunities. Since the time when the segment was first targeted, sales were up, but there was no way from existing sources to determine actual market share or track the value proposition's progress. With the advent of the value proposition initiative, it became clear that a systematic way to collect market share data within this segment was needed, as well as a method to track progress and guide efforts toward establishing the value proposition. Armed with both sets of data, the client could assess the impact of the value proposition on market share over time and redirect resources as necessary to maximize results.

Working with the market research director, we identified a single solution to address these shortcomings: the establishment of a proprietary research panel made up of several hundred decision-makers exclusively from among the "large company" segment. We would have to focus on getting a high participation rate from a small group of purchasers, as well as focus on how to retain them. Even within the top 10 percent of purchasers, purchase volume was concentrated in a smaller segment, and we would have to ensure a minimum number of extremely large companies in order to accurately estimate market share. Considering that we needed to get information about competitors' market share and an unbiased assessment of performance on value proposition elements, we could not use the client company's name as a recruiting tool.

The initial recruiting was conducted by phone, but all interviewing has been conducted via Web-based surveys for which panel members are e-mailed links and unique passwords approximately eight times per year. Some of the surveys are metrics-based, asking for extensive purchase data, satisfaction ratings and/or competitive performance evaluations. Other surveys are used to gather input on emerging issues and challenges within the industry or to provide guidance for particular management decisions. The main incentives provided to panel members are cash honorariums and the opportunity to receive feedback on how their peers are addressing key challenges within the industry. The panel is kept "double blind" to protect members' confidentiality and avoid potentially biasing survey results.

Benefits achieved

Overall benefits of establishing the proprietary research panel have been numerous and substantial. They include shorter cycle times for getting answers from this segment, increased cost effectiveness for surveying them, access to reliable information on performance, and a means to predict future market behavior:

• *Greater access to market input*

Since it is known within the organization that periodic panel surveys are already budgeted, managers have easy access to a means of gathering market input that does not require them to make painful trade-offs in their own budgets. Where past decisions were often made without the benefit of a market perspective, management now has greatly improved access to timely input to help revise strategies and direct tactical initiatives.

• *Timely, accurate feedback*

Management now has access to periodic feedback to accurately track changes in market share, as well as other key performance metrics that are critical to assessing the company's progress within its most important target segment. Armed with this information, management is much better able to determine whether the organization is making the required progress toward achieving its goals and, if not, where resources need to be redirected.

• *Reduced costs*

Ongoing survey costs have been drastically reduced. The initial investment in recruiting the panel was only 20 percent more than it would have been to recruit a single independent survey of similar sample size from among the same audience. Factoring in the ongoing panel maintenance costs, the direct cost of the panel (not including incentives and interview programming) represents a savings of close to 70 percent compared to what it would have cost to recruit six surveys as independent projects.

• *Reduced cycle time*

The typical time required to conduct a comparable survey within the "large customer" segment has been reduced from up to eight weeks to only two, and in particularly urgent cases a survey can be turned around within one week.

• *Predictive metrics*

Analysis of time-series data from repeat panel participants has enabled the identification of a small set of questions that can be effectively used to predict customers' future behavior. This analysis has provided the organization with a meaningful customer loyalty metric that serves as a leading indicator of future market share changes. In addition, this analysis has provided the basis for developing a short set of questions that can be used tactically in the field to identify potentially at-risk customers from among the company's own customer base, as well as those of competitors who are most likely to be vulnerable.

Keys to success in establishing a proprietary panel

Tracking these metrics is like monitoring the vital signs of your marketing strategy. There is no single key to successfully create, maintain and utilize a proprietary panel. There are several practices that will help to ensure its success:

• *Find an experienced partner*

To handle recruiting, find a firm with solid experience working within your industry and with the types of decision-makers being targeted. Recruiting members for a b-t-b panel can be considerably more challenging than in consumer markets, and the plan of attack and skill sets of those involved need to appropriately address the unique characteristics of your desired targets.

• *Over-recruit*

Plan on recruiting a panel with at least twice as many members as the number of participants you are targeting for a typical survey. Response rates in the case described here have typically been in the neighborhood of 50-55 percent for a survey that is open for two weeks. Most who participate in a particular survey respond within the first week, with the additional week used to maximize the sample size when time permits.

• *Offer meaningful incentives*

Be prepared to provide panel members with meaningful incentives. This can include cash honorariums and/or charitable donations as well as information-based incentives such as newsletters that provide highlights of results from previous surveys. Feedback on how other panel members view important emerging trends within the industry or are dealing with common challenges is often highly valued. Even so, some sort of meaningful cash incentive will likely be required. Whatever type or combination of incentives you decide to use, you always have the option to vary the level between different control groups to find the amount that provides the desired participation rate. In our case, we found that increasing the cash incentive from $50 to $75 had a negligible impact on the response rate, but dropping below $50 caused a substantial drop in participation.

• *Maintain participant interest*

Keep the surveys as interesting as possible for the panel members. Recurring surveys that focus heavily on mundane details or repeat tedious question sets are likely to bore panel members and potentially undermine your participation rates.

• *Minimize intrusions*

Avoid the temptation to overuse the panel. In our case, the number of surveys in which each panel member is invited to participate is limited to six to eight per year. In this regard, it can be very helpful to establish and communicate clear guidelines internally within your organization as to how often and when the panel will be utilized.

• *Manage internal expectations*

In many organizations, it may also be necessary to establish clear guidelines and expectations with the sales department that the panel is not intended to provide sales leads and inside information on specific customers and/or prospects. As with the previous two points, it can be helpful to establish a charter for the panel that clearly lays out how it will and will not be used, and get management buy-in before any temptations to misuse the panel arise. Set your guidelines and adhere to them strictly.

• *Treat participants as members*

Perhaps most importantly, adopt the mentality of treating your panel members as just that: members of an organization with whom you are trying to build a long-term relationship. That means placing a premium on customer service and attention to details, such as providing a dedicated 800-number when members have questions or encounter problems with a survey, making sure that incentives are sent out in a timely manner, periodically asking members for their feedback on ways to improve the experience and keeping your promises and commitments.

• *Budget for replenishment*

Lastly, be sure to budget for panel replenishment. No matter how well you treat your panel members, a certain level of attrition will be inevitable. By tracking who has and has not participated over time you can identify those who have effectively dropped out and need to be replaced. In our case, those who do not participate at least once within a calendar year are removed from the panel, resulting in an annual attrition rate of approximately 20 percent.

Manage and adapt

With a solid plan and effective implementation, developing a proprietary panel can substantially improve the quality, timeliness and cost-effectiveness of the market information you are able to provide your organization. While the challenges and the commitment can be great, the reward is essential to your business: the means to effectively manage and adapt your marketing strategies. | Q

business-to-business research

To last a lifetime

By Albert Fitzgerald

Developing a customer value model to maximize profitability

Today's companies are expending great efforts to retain current customers and win new ones. After all, it is cheaper to keep a current customer than it is to acquire a new customer. But what if some customers are actually costing your company money instead of contributing to the bottom line? Not all customers are profitable. That is why it is beneficial to estimate the lifetime value of a customer. If you can predict the lifetime value of current and prospective customers, you can make educated decisions on what efforts should be made to retain or recruit these customers, if any.

Start with your customer data

Transactional data can be used as a starting point to estimate the lifetime value of each customer in your database. By transactional data, we mean the information that most firms have about their customers - how much they buy, which products they have purchased, how often they purchase, the date of their last purchase, etc. While this is useful information when evaluating current customers, it provides minimal information to identify potential customers and what their value might be. Transactional data tells us what happened but not why it happened. Supplemental research can provide rich insights into why customers buy and provide the insights needed to estimate the value of current and prospective customers.

Limitations of customer data alone

Past behavior tends to predict future behavior. A company's current database of transactional data can be used to estimate the current value of a customer. This is done by calculating the customer's past purchase behaviors/patterns and using them to project future purchase behavior. Included in this is what the customer purchased (contributed to the bottom line) minus what the customer returned/rejected (subtracted from the bottom line). These results are extrapolated and projected over time. The end result is an estimate of the value of a customer. We can calculate this for each customer.

While this gives some estimate of our best customers, it does not tell us if there is a customer who should be buying more from us. This

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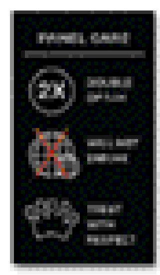

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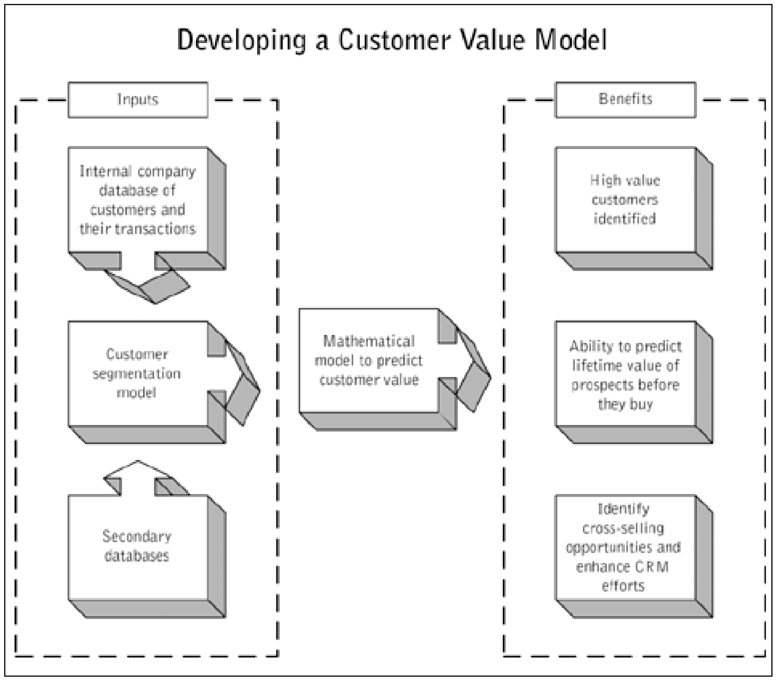
■ United States ■ Toronto ■ London ■ Munich approach only tells us what the customer did and projects that into the future. It does not explain why the customer is buying from us. They may be buying from us because they like our features, we have an attractive price, our service and support meet their needs or they are loyal to our brand. Transactional data alone cannot give us this insight.



Estimating the long-term value of a customer

To estimate the value of current and potential customers, we can develop a model that estimates the lifetime value of current customers and prospective customers. To accomplish this:

1. Identify the characteristics of customers that make them highly profitable. This is typically accomplished by conducting a segmentation study to group customers and non-customers into value segments (such as high-value and low-value segments).

2. Once a detailed profile of high- and low-value customer segments is established, we need to develop a model that will allow us to mathematically predict segment membership for both customers and prospects. We typically are NOT able to do this using only our transactional data alone. However, by appending additional, supplemental data (such as from Dun & Bradstreet or other secondary data sources) to transactional data in our database we will have the necessary raw data to develop predictive models.

3. Using our mathematically derived predictive model, we can now tag all of the customers in our database to predict the value segment into which they fall. We can also predict into which value segments prospective customers fall. We maximize revenue by focusing on customers and prospects that fall into our most profitable segments.

Group customers into segments

Ideally, we would like to understand why a customer is buying from us rather than our competitor. An ideal method to start is to conduct survey research to classify customers into groups using a segmentation methodology. Asking customers about their needs and attitudes helps us understand their motives and understand why they buy what they buy. Don't forget to interview non-customers as well. When you interview customers and non-customers, you can see which segments most of your customers fall into.

How segmentation helps determine customer value

Let's say that we conduct a survey of that includes both customers and non-customers. We segment our customers and prospects based on their purchasing attitudes and user needs. As an example, let's pretend that we uncover three main segments: Price Seekers, Feature Seekers, and Brand Loyalists.

• Price Seekers are driven to get the best value. We find that they have little brand loyalty and often buy from not only us but from our competitors as well. When looking at these customers, we find that they tend to buy from us when our products are on sale and will not buy unless they can negotiate large price discounts. They are unwilling to pay for support contracts but still take a great deal of our sales personnel's time asking support questions. By looking at our historical transactional data, we see that customers who fall into this segment have not been very profitable.

• Feature Seekers tend to focus on the most advanced features in a product. They are much less price sensitive and will buy from whichever firm has the most cutting-edge technology. We tend to sell our more advanced products, which often have higher margins, to these customers. However, they rarely buy our profitable service contracts. There are also relatively few Feature Seekers - this is a small segment. By looking at our historical transactional data, we see that these customers primarily buy only a limited number of our more advanced products. While these products are highly profitable, the Feature Seekers make up only a small percentage of our overall sales.

• Brand Loyalists tend to buy from the same firm. Price and features are much less important to these customers. Instead they seek excellent service and support and are willing to pay a premium to get it. These are our most profitable customers. They consistently re-order and often sign up for highly profitable add-on service contracts. By looking at our historical transactional data, we see that these customers order from us regularly and tend to buy our full line of products, not simply those that are on sale or have the latest feature set.

The average lifetime value of customers for each segment is then calculated. This is done by using the data from current customers in each group. Each segment is evaluated for its profitability per customer and by the size of the segment. Using these customer lifetime value results, we can target the profitable segments. Some segments may have profitable customers but they are not large enough to warrant expending resources to target them. We now have a more effective and efficient way of identifying which customers to target and retain – those that fall into the most profitable segments with a sufficient size.

From this example outcome, we determine that we want to focus most of our attention on the Brand Loyalist customer; our second focus is on the Feature Seekers. By looking at the purchases and profitability of our Brand Loyalist customers we can tell they have the highest customer value, followed by the Feature Seekers. However, our customers who fall into the Price Seeker segment are fairly unprofitable.

Developing a model to predict segment membership

After the segmentation model has been developed and average lifetime values have been estimated for customer segments, the segments can be profiled. For example, what are the characteristics of our most profitable segment (the Brand Loyalists) that distinguish them from our least profitable segment (the Price Seekers)? Looking at transactional data alone is usually not sufficient. While our historical transactional data may give insights into our current customers, we do not have any transactional data for new prospects. Therefore, we want to add additional demographic data.

There are many sources from which we can buy demographic data on our customers and prospects. One such source is Dun and Bradstreet, but there are many others. Since we know the address of our customers, we can purchase additional data about these customers such as what industry they are in, the number of employees in the firm, their credit scores, the type of office building they occupy, etc. Literally hundreds of pieces of data are available to be purchased. This is true whether our customers are consumers or businesses.

After purchasing the additional data, we append them to the database of transactional and segmentation data. We now have a rich source of descriptive data to use to differentiate between high-value and low-value segments. Mathematically, we can determine which of these descriptive data points is most useful in predicting segment membership. Typically a mathematical model is developed using either discriminant analysis or another data mining technique. Suffice it to say that a highly accurate predictive model can be developed. While we may have surveyed only a few hundred customers and prospects, we are now able to develop a mathematical model that will predict segment membership even for customers who did not take part in our survey. As long as we can gather the descriptive data needed for our model, we can accurately predict the lifetime value of a prospect before they make their first purchase!

Maximize revenue – target potential new customers

Profiles from the new database can be used to target non-customers in the desired segments.

• We can use our new predictive model to mark all customers in our database so that we can focus on those of greatest value.

• We can use our new profiling to purchase lists of specific types of customers that are more likely to be high-value customers but who have never purchased from us.

Additional benefits of developing a customer value model

• We can identify if purchasers of certain products are decision-makers for other purchases to identify potential cross-selling opportunities. It is easier to sell new products to someone who already purchases products from our company. Therefore, CRM efforts can be enhanced.

• We can see how customers differ from non-customers in attitudes and purchasing behaviors and identify how likely non-customers are to purchase from our company and also understand channel preferences of customers versus non-customers.

• We can improve targeted promotions and messaging by identifying which ones have the broadest appeal among target segments.

• We can identify opportunities for new product development. There may be related products that our company could easily produce.

• And we can determine how to treat/approach each customer. It is unprofitable to treat all customers the same. For example, the Price Seekers are interested in sales or discounts while the Feature Seeker customers are interested in the latest innovations. A custom newsletter or promotional piece can be created based on the attitudes and needs of the identified segments. | Q marketing analysis research

A new horizon for marketing accountability

By Raymond Pettit

An examination of marketing investment management

The traditional view of marketing as an art form with a mysterious language to describe its success is rapidly disappearing. In its place, a new model is evolving that combines the science of marketing with performance measures from the world of finance. Marketing expenditures have become investments, and the tools of the trade - advertising and communications - are now being tracked for their ability to provide a satisfactory return to the organization and its shareholders.

The time has come for a careful reexamination of the status quo in advertising and marketing. We need to refuse to accept advertising waste; we need to fix broken or incomplete measurement models; and, we need to demonstrate more clearly the impact of marketing dollars on the bottom line. This challenge calls for bold, thoughtful and innovative action.

Marketing investment management (MIM) is an approach that fuses technology, a keen understanding of how marketing works, and the tools and disciplines of measurement science to deliver breakthrough results. This article will present the principles, processes and science of MIM, and suggest how to overcome inertia, plan for success and realize the potential of this powerful approach to maximizing marketing results.

The beauty of marketing science is that a broad, rich and powerful set of analytical techniques and methods already exist to support precision business and marketing decision-making. Highly valuable and essential information is being collected every day and stored in various operational and business information systems (including CRM, ERP, HRM, SFA and others), yet is lying unconnected, unused or misused across the enterprise. To make matters worse, the marketing data that exists is often chopped into separate, distinct pieces of information linked to specific templates that have been defined and developed independently. In most cases, the available body of marketing knowledge provides an incomplete picture and insufficient analytic guidance to help marketers ensure maximized returns on advertising and communications investments.

Sadly, the power of technology to support and enable sophisticated marketing measurement has not been very well exploited. In fact, most software vendors and business intelligence tool vendors are still focused on single domain solutions that, while delivering marketing guidance in a limited or specific area, perpetuate a fragmented approach. As a result, in spite of vast sums invested in acquiring and implementing software-based enterprise marketing information systems, most businesses still face critical hurdles in

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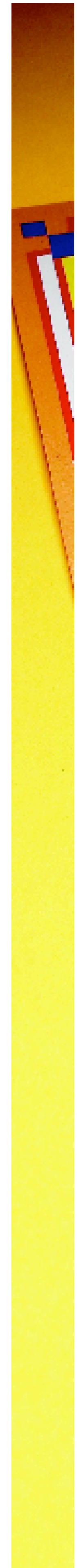


Figure 1: Weaknesses of Current Approach to Marketing Process Management

- Can't learn from past successes and failures
- Can't coordinate and synchronize marketing investments
- Can't establish and manage profitable customer relationships
- Can't support real-life integrated campaign decisions across media and distribution channels with diverse product lines and audience segments
- Can't deliver precision-guided marketing communications
- Can't readily apply sophisticated analytics in conjunction with timely measurement and testing
- Can't integrate disconnected but interrelated marketing investment metrics to value, improve and build more effective, productive advertising and communications

their efforts to optimize marketing returns on advertising and communications investments (see Figure 1).

There is no doubt that technology is changing the way we go to market. But early customer relationship management concepts created a confused perception that strategic marketing - like sales, accounting, and customer contacts - could be automated for efficiency. The truth is that even the largest users of marketing automation technology still struggle to make sense of the information their companies pay so dearly to acquire.

As a result, the real power of a CRM, sales or marketing effort is dissipated and unknown because of the complexity of understanding how communications strategies and tactics affect customers and ultimately, the corporate bottom line. When that is achieved, true progress will be made in improving the effectiveness of marketing efforts, as well as determining the value and profitability of campaigns and customer segments.

"You can't manage what you can't measure."

This time-tested adage from management guru Peter Drucker applies more than ever to the need for implementing full accountability for marketing expenditures. Leading companies know this all too well and are positioning themselves to capitalize on the power of integrating scientific marketing measurement with process management technology (see Figure 2). They are seeking to create competitive advantage through reduced advertising and marketing waste, by improving the precision and value of their measurements vis-à-vis which strategies and tactics consistently deliver more of the right customers more profitably.

Precision marketing, ultimately, is about improving business results.

Figure 2: Elements of Forward-Thinking Organizations

- Strive for clean and complete historical data on marketing results
- Match strategy and tactics to financial performance metrics
- Creatively enhance development, planning and deployment in conjunction with marketing, sales and client service efforts
- Explore and use sophisticated experimental designs (for testing)
- Leverage robust, technology-driven campaign and communication management tools
- Collect timely data on marketing investments, in real time, if possible
- Use statistical prediction, classification and ROI optimization techniques
- Reach for a new level of marketing planning precision that truly mirrors the reality of the marketplace and helps eliminate surprises

Success depends on a solid balance of process control, information technology, marketing science, results measurement and competitive business leadership.

Marketing investment management

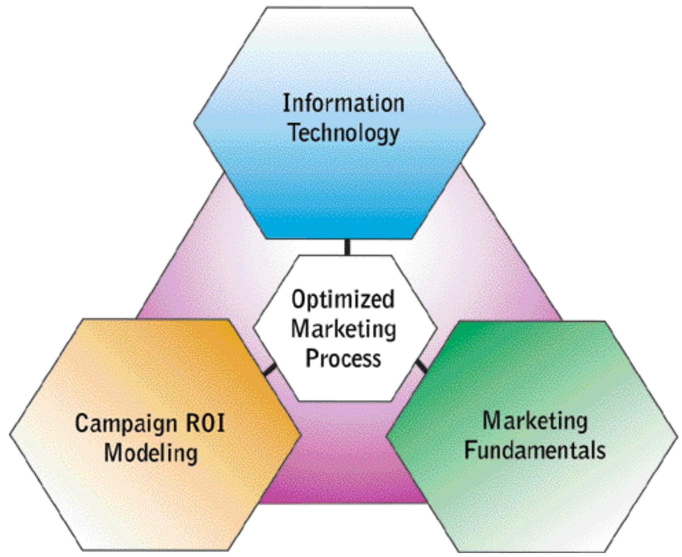
Marketing investment management (MIM) is the science of managing advertising and communications strategies and tactics for optimal business impact. MIM increases overall business profitability and incremental return on investment (ROI).

Recent innovations in information technology and in directed excursions beyond traditional marketing measurement have defined the tools and techniques necessary to evolve beyond the status quo. MIM is a best practice fusion of technology, marketing, ROI measurement and systems (see Figure 3) that makes continual marketing process improvement a reality.

To embrace MIM, businesses need to focus exploration, analysis, measurement and reporting technologies on the full range of data available regarding the impact of communications on customer actions. This includes not only the transactional or financial data generally stored in data warehouse and operational data stores but also attitudinal, behavioral, syndicated and secondary data. Thus, an integrated approach to effective customer understanding requires both a technology infrastructure and measurement and analytic components that work together.

Due to the presence of data warehouses and other large data repositories across the business landscape, businesses are accumulating an increasing amount of information about customers including: account information, transaction history, service requests, satisfaction surveys and channel purchase preference.

Figure 3: A Marketing Process Best Practice Fusion



Companies believe that by exploiting this mass of data, significant opportunities to increase revenues and enhance customer satisfaction can be realized. Further, companies that can effectively analyze this data know they should be able to develop important insights into the matching of marketing strategies to customer behavior.

However, just because data can be gathered and stored does not mean companies know what to do with it all. There is a significant management and strategic planning dimension to measurement and customer intelligence that is lacking in most organizations. Many people are doing important things with customer data - but in a quasi-vacuum.

What is missing, in most cases, is a holistic and incremental perspective showing which strategies and tactics work best for the most profitable customer segments. To achieve this, companies must align the breadth of customer and campaign measurements spread throughout the organization and transform disconnected marketing data into richer and broader intelligence that is actionable and results in more effective, efficient and profitable sales and marketing activities. In short, companies need the holistic marketing ROI perspective and continual marketing process improvement made possible through the successful implementation of marketing investment management.

The three legs of MIM

If MIM were a stool, it would have three legs: process controls, financial metrics and technology support (Figure 4). And like any three-legged stool, if one leg, or element, of the MIM discipline is missing or weak, it is of little benefit.

For example, even the most perfectly implemented marketing management processes backed by state-of-the-art software would do little to improve the overall profitability of a company's advertising and communications without the financial metrics to compare the relative performance of different strategies. Likewise, if the right processes are not in place, software and metrics would add no value. Finally, without the holistic view enabled by MIM software to help users audit, understand and apply the insights hidden in the volumes of marketing data flowing through their organization, individual processes and their financial metrics would be next to impossible to correlate and apply to improving marketing ROI.

Marketing investment management is first and foremost a disciplined approach to managing marketing budgets with a focus on bottom-line performance. While a truly successful implementation of MIM relies on a solid knowledge base of data on customers, transactions, competitors, suppliers, employees, distribution, sales and communications, at its core, marketing investment management is about one simple truth: If an organization wishes to continually improve the ability of its marketing programs to generate profitable revenue, its advertising and communications resources must be managed like an investment portfolio, with measures of success and failure calculated in terms of risk and return.

MIM is most successful when a

Figure 4: The Three Primary Elements of MIM

Process Controls	Marketing management processes with built-in controls to ensure that advertising and communications expenditures are held accountable for their ability to help the company achieve its business and financial goals
Financial Metrics	Company-wide benchmarks developed by finance and agreed upon by strategic, operational and analytic teams to be used to compare the performance of marketing strategies and tactics
Technology Support	A unified view of the results of marketing campaigns in process and planned for future rollout in the context of the performance of previous advertising and communications programs targeting the same audience

Figure 5: Five Key ROI Modeling Variables

Revenue per unit sale
The average value per sale which will be declared as revenue on the balance sheet (adjusted for the cost of goods sold)

Contact base quantity
The quantity of prospects assumed to have received the campaign communications (through all media channels)

Response rate percentage
The percent of contacts and impressions responding that they are interested in learning more

Conversion rate percentage
The percent of respondents converting to warm prospects, hot leads and customer sales

Expenses
The costs associated with the campaign launch, handling responses, and closing sales (divided into up-front investments at risk and selling costs)

detailed knowledge of the financial implications of each incremental investment made in identifying, understanding, contacting, converting and cultivating customers is at hand. In essence, MIM provides the hard data needed to analyze a campaign's strategic and tactical execution, including the many technical and statistical techniques creative teams need to better understand and target customers.

While the importance of the role that branding plays in positioning a company and its products in the minds of prospects and customers has not diminished, the communications created for this purpose can no longer avoid the inclusion of one or more tracking elements necessary for gauging its contribution to marketing returns. When the corporate branding team incorporates MIM principles into its marketing planning and creative development process, measures of awareness, preference, mind share and recall readily translate into specific incremental changes in corporate profitability.

Marketing process controls

A process-based marketing framework is built upon a complete understanding of the marketing, advertising and communications processes and how they all fit together. It includes the forms of customer and marketing intelligence that are necessary to drive the creative development, testing and application of communications and campaigns, as well as the ability to measure branding, satisfaction and loyalty effects. In addition, it aligns them in a universal process that matches the specific marketing and financial needs to the objectives of the organization.

Financial metrics for marketing

A credible and accepted set of financial measures by which to gauge marketing performance is critical to the successful implementation of MIM. Though there are many options for comparing the performance of one element versus another including the cost per sale, the expense/revenue ratio, the break-even point, and more, the most useful indicator of the performance of a marketing investment is return on investment.

ROI is commonly used to assess and guide many different forms of corporate and personal investments. It provides a deeper understanding of the value that an initiative, strategy or investment can deliver. Increasingly, best-practice companies use ROI to compare and prioritize marketing options, make informed marketing and communications decisions and effectively spread customer, business and marketing insights throughout their organizations.

MIM technology support

The third leg of the MIM stool is the technology that supports and enables the profitable management of marketing investments. This requires a system of software applications working in concert to provide strategic, operational and analytic teams with the tools they need to apply what has been learned in the past to maximize returns from present and future marketing investments. It is vital that the technology platform be built from an intimate understanding of the marketing and advertising process and incorporate the best-practice financial analysis techniques available. It is also of equal importance that the solution integrates easily with internal and external sources of marketing performance data and that it not be yet another island of enterprise expertise.

MIM emerges from the balanced fusion of the above three elements: intelligent marketing processes, holistic financial analysis and marketing-savvy technology solutions.

The successful measurement of MIM

To successfully measure and apply marketing knowledge to improving returns from present and future campaigns, every element of the marketing mix must be measured, tracked and rated for its ability to deliver incremental profits - in real time wherever possible. This includes all available advertising and communications resources including communications through: mass media marketing (TV, radio, print, outdoor, PR and Internet); database marketing (direct mail, e-mail, telemarketing, fax and wireless); face-to-face marketing (direct selling, seminars, trade shows and in retail environments).

To satisfy this requirement and successfully establish and optimize the full power of MIM, we need to understand and apply financial analysis principles such as measures of ROI to all marketing investments.

ROI (literally return/investment) means that if one invests money or resources, they should earn a return greater than the investment. The actual ROI metric is a ratio or percentage, where gross profits less the investment is divided by the investment ((ROI=r*gm%)-i/I, where r=revenue, gm=gross margin [adjusted for the cost of goods sold and selling costs], and i=investment). Since most investments impact results over time, ROI also represents a forecast that determines the incremental value of one investment over another. This makes it of great value as a management tool that can be used to allocate limited resources to the places where they will produce the greatest benefit to the business.

A quality ROI calculation forms a road map that will help identify whether investments are on track, and provide some guidance as to what to do if they are not. Marketing ROI is meant to function as a discipline that creates accountability within the marketing organization. Properly and expertly developed, ROI establishes a fundamental, well-defined and accepted path to MIM.

While a detailed discussion of marketing ROI is beyond the scope of this article, excellent books are beginning to appear.[1] It is important to know the five essential measures that are required for ROI calculations. These are presented in Figure 5.

Determining ROI (and other important measures, such as incremental customer value and profit optimization) requires aggregating a lot of data, modeling that information and then running calculations. Technology has advanced in the form of campaign management, business intelligence, executive (dashboard) reporting, and marketing sales force automation to make this a somewhat less onerous task. In fact, the race is on to provide enabling technology and software automation that captures marketing data at an increasingly detailed level. In addition, and this is a big step, software systems must assist the marketer in managing the entire process through planning, implementation and results. Indeed, the seeds of MIM have been planted, and the emergence of powerful solutions is at hand. |Q

[1] An excellent and thorough treatment is found in: Lenskold, J. D. (2003). *Marketing ROI: The Path to Campaign, Customer, and Corporate Profitability.* NY: AMA/McGraw-Hill.

Survey Monitor

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ing events tickets and cellular services. Half of these consumers have been to a Chinese/Asian restaurant and one-third ate at a Mexican restaurant during the past month. They are 23 percent more likely than all consumers to have been to a coffee house/coffee bar during the past month. Fourteen percent of reality television viewers plan to buy or lease a new car during the next year. They are 26 percent more likely than all consumers to plan to buy or lease a new SUV and 13 percent more likely to plan to buy or lease a new van or minivan. More than one-third (35 percent) intend to purchase tickets to sporting events during the next year. In addition, these consumers are 33 percent more likely than the national average to switch their cell phone carrier during the next 12 months.

Reality television is drawing a young audience. Reality television viewers are 40 percent more likely than all consumers to be ages 18-34 and 12 percent more likely than all consumers to be white-collar. Fifty-one percent of reality TV viewers have at least one child in the home (compared to the national average of 42 percent) and 30 percent have at least two children in the home (compared to the national average of 24 percent). They are 12 percent more likely than all consumers to be blue-collar and 20 percent more likely to be single.

The data in this report is from Scarborough Research's USA+ study, a national study of consumer shopping, media and lifestyle behaviors. The database examines a range of television genre programming, covering most types of shows currently available. For more information visit www.scarborough.com.

Study segments Boomer consumers

BoomerEyes, a specialized research division of C&R Research, Chicago, has conducted a study of Baby Boomers, individuals born between 1946 and 1964, to obtain a deeper understanding and an up-to-date analysis of this group.

The BoomerEyes Lifestyle and Psychographic Segmentation study reveals four segments within the broad Boomer population. Defined by their attitudes and behaviors versus age, the segments include: Looking for Balance Boomers, Confident and Living Well Boomers, At Ease Boomers, and Overwhelmed Boomers.

These segments demonstrate how different Boomers are from one another and provide insights into the mindset of this broad group. Some key lifestyle and psychographic traits of each segment:

<u>Looking For Balance</u>

• Represent 27 percent of all Boomers.

• Have average household income.

• Most likely to have kids and

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have more grandchildren than fellow Boomers.

• Worry about future finances, education for their children and job security.

• Eighty-seven percent say convenience is key. In fact, 88 percent are driven to find ways to do things faster and more efficiently. And, 40 percent say they feel inundated by all they have to do.

• Early adaptors to new products and services - 96 percent say they like to try new things.

• Strong advocates of technology.

• Slightly older and index higher on the 51-55-year-old age group.

<u>Confident and Living Well</u>

• Represent 23 percent of all Boomers.

• Highest income of all segments.

• Index above average for being married but only half of this segment has kids.

• They budget money wisely (68 percent agree) and as a result are not concerned about their financial security or worried about job security.

• Most active of the Boomers and, most importantly, feel that they are in control of their lives (91 percent say so).

• Travel is one of their favorite pastimes.

• Technologically savvy, they own nearly all the mainstream, and some of the latest, digital and tech products. Ninety-five percent like to try new things.

• Index higher on the 56-58-year-old age group.

<u>At Ease</u>

• Represent 31 percent of the total Boomer population.

• Have average household income.

• Have average debt and retirement savings.

• Fifty percent have kids still living at home. Have grandchildren as well.

• Don't worry about the future, job security or financial security.

• Unlike other segments, not searching for convenient solutions or ways to do things faster.

• Twenty-six percent say technology is not important.

• Index slightly higher on the 57-58-year-old age group.

<u>Overwhelmed</u>

• Represent only 19 percent of Boomers - fewer than one in five Boomers.

• Lowest income of all segments.

• Only group not happy about where they are today.

• Not in control of their lives, they worry about the future and their financial security (86 percent say so).

• They are more likely to be looking for work.

• The least active segment: Health is their biggest concern.

• They are intimidated by technology and are well below average on using electronic, digital and tech products.

• Index slightly younger than other segments (more likely to be 46-50 years old).

The survey was conducted online with individuals born between 1946

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and 1964. A total of 1,040 interviews were completed in August 2004. For more information visit www.crresearch.com.

U.K. households happy to participate in market research

Research by U.K.-based GfK Martin Hamblin has revealed that one in five Britons who are happy to take part in market research surveys have also signed up for the Telephone Preference Service (TPS), which, like the U.S. Do Not Call Registry, allows consumers to request that their number be removed from certain sales and marketing lists.

Nineteen percent of people interviewed in a recent survey said their household was registered with the TPS, yet they had happily completed a full market research interview.

According to current information, one in four British households is registered with TPS. By registering, households request that they should not receive unsolicited direct marketing calls; legislation now deems this unlawful if the consumer has indicated such a preference.

The legislation currently excludes market research. However, there have been concerns that respondents are not able to tell the difference between telemarketing and genuine market research. These latest findings suggest that consumers do understand the difference and are still happy to respond to market research enquiries.

"This is good news for both the market research industry and for their clients," says David Finney, head of telephone operations at GfK Martin Hamblin. "Some companies are now asking us to screen their sample to remove households registered with TPS. This finding suggests that, whilst we are happy to accommodate them, they need not be concerned about doing this. There are a small number of respondents who are confused about what TPS covers but we have found that by explaining the difference between direct marketing and market research, most respondents are happy to continue with the survey.

"It would be a shame if the market research world accepted TPS screening, thereby removing one in four potential respondents, when this research suggests it is unnecessary. The fewer people that are screened out in this way, the more representative research will be." For more information visit www.gfkmh.com.

Many willing to buy foreign wine

A Harris Poll finds that American wine drinkers would be willing to try wines produced in many countries in addition to the countries whose wines they normally drink.

For example, 73 percent of wine drinkers say they would consider buying Italian wine but only 44 percent say that they ever do so. Similarly, 52 percent say they would be willing to buy Australian wine although only 32 percent do so now. Substantial numbers of wine drinkers also say they would be willing to try drinking wine from countries which sell relatively little wine in the United States such as Poland, Bolivia and Israel.

These are some of the findings of a nationwide Harris Poll of 1,323 U.S. adults aged 21 and over who buy or drink wine who were surveyed online by Harris Interactive, Rochester, N.Y., between December 8 and December 15, 2004.

Most Americans who buy wine do not do it often and they do not spend very much per bottle. Fully 73 percent of wine purchasers say that they, or people in their household, only buy a bottle of wine once a month or less and, in most cases, the wine costs less than $15 a bottle, with fully 31 percent saying that the last bottle of wine bought cost under $10. Only 36 of wine pur-

Creating Connections

In this high-tech world, it's easy to forget that face-to-face interaction is still one of the best ways to learn about people's experiences and impressions. Even though technology is playing an increasing role in data collection, we know it will never replace direct conversations with customers in a focus group setting.

At Delve, we help you find creative ways to connect with your customers. Whether it's a traditional group or one that requires a more adventurous approach, we are experts in recruiting the right respondents to ensure your feedback is reliable and insightful.

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chasers have ever bought a more expensive bottle of wine costing $30 or more.

Almost all American wine drinkers (91 percent) sometimes buy or drink American wine. Fewer people drink wine from other countries, with 44 percent sometimes buying or drinking Italian wine and 40 percent buying or drinking French wine.

Other wines which are consumed by substantial proportions of wine drinkers include Australian wine (32 percent), German wine (23 percent) and Chilean wine (16 percent).

The survey strongly suggests that there are big opportunities for many wine-producing countries to increase their sales in the United States. Many more people say they would consider buying wines from other countries than actually do so.

The most interesting finding in this survey may be that many Americans would consider buying wines from countries which currently sell relatively little in the United States. For example, fully 25 percent and 24 percent of wine drinkers say they would consider buying wine from Poland and Bolivia, respectively, even though hardly anybody has ever actually bought or drunk wine from those countries. Even more people would be willing to try wine from Israel (28 percent).

These big differences between those who would be willing to consider buying from a country and those who have actually bought or drunk it are found for most other countries.

The gap between those who have ever bought and those who would consider buying are substantial for each of the following countries:

Australia - 32 percent (who have bought or drunk it) compared to 52 percent (who would consider buying it);

Germany - 23 percent compared to 48 percent;

Chile - 16 percent compared to 36 percent;

New Zealand - 10 percent compared to 41 percent;

Argentina - 9 percent compared to 35 percent;

South Africa - 6 percent compared to 29 percent; and

Greece - 5 percent compared to 36 percent.

For more information visit www.harrisinteractive.com.

Broadband drives online purchases

Nielsen//NetRatings, New York, reports today that 69 percent of retail purchases transacted online were conducted via a broadband connection, compared to 31 percent transacted via narrowband or dial-up access during November 2004. The finding was derived from the Nielsen//NetRatings MegaView Online Retail service, which tracks online consumer retail activity and purchasing behavior and offers marketers competitive benchmarking, dollar spending insights and buyers' conversion rates.

Custom research from MegaView Online Retail found that broadband consumers spend on average $158.21 per person, 34 percent higher than the $117.89 average spent by narrowband users. In addition, a broadband shopper showed a higher likelihood of converting to an online buyer; the conversion rate for broadband users reached 26 percent, compared to the conversion rate of narrowband users at 21 percent.

"With 55 percent of online surfers utilizing broadband and broadband users spending more money online than narrowband surfers, there should be less concern about alienating the narrowband shopper," says Heather Dougherty, senior retail analyst, Nielsen//NetRatings. "Increased broadband penetration rates should encourage retailers to maximize the customer experience and rethink their online business strategies to integrate rich media into Web site design and advertising campaigns."

The findings showed that broadband users connected to the Internet an average of 59 times, 34 percent more than narrowband users, who averaged 44 visits during November 2004. In addition, broadband users visited online retail Web sites more frequently, averaging 18 visits as compared to 14 visits by narrowband users. Broadband users also spent more time online, averaging more than 22 hours while narrowband users spent nearly 18 hours online. For more information visit http://netratings.com.


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Product and Service Update

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like any other techniques that are native in Clementine. For more information visit www.spss.com.

Version 9.0 of The Survey System now available

Creative Research Systems, Petaluma, Calif., has released Version 9.0 of The Survey System, its survey software package for Web, paper or phone surveys. The package includes a new drop-out analysis feature which shows where people abandoned a survey. Drop-outs are a major problem in Web-based research, and this feature enables researchers to see which questions caused the most difficulties and prompted respondents to abandon the survey. This analysis can include demographic breakdowns.

The software can also import questionnaires from Word documents directly without modification while preserving the original formatting. This can save time since many questionnaires are originally drafted in Word or similar programs and have to be retyped or cut and pasted into question files.

Other new benefits include the ability to: save results in PDF; produce a questionnaire form summarizing all results; use right-to-left-reading languages (Hebrew, Arabic); create respondent panels for repeated polling; embed Windows Media Player and Apple Quick Time into Web surveys to play video; and drag and drop questions into new positions in a questionnaire. For more information visit www.surveysystem.com.

Markitecture offers multi-sponsored studies

Marketing consulting firm Markitecture, Norwalk, Conn., is now offering Markitecture Syndicated Studies, co-sponsored studies aimed at helping marketers understand the influence of intermediaries in both consumer and b-t-b purchasing decisions. These studies are designed to help marketers develop strategies to encourage these "influencers" to purchase more of the marketer's products.

The studies are customized for each co-sponsor's individual brands and market research needs. The co-sponsors participate in designing the studies to insure that the studies obtain data on their individual brands, markets and competitors, including ranking each brand in its own product category in order to develop best-in-class rankings. For more information contact Kevin Moran at 480-595-4754 or at kmoran@markitecturesyndicated-studies.com.

New Factiva products provide company-level data

New York information firm Factiva is now offering Factiva SalesWorks and Factiva Companies & Executives, which combine Factiva's collection of global news and business information with information about company executives and industries from publishers around the world.

Factiva SalesWorks is a role-based application created to provide users with a snapshot of a particular company or executive and allows them to identify and qualify prospects with in-depth company information, executive biographies, prospecting lists, relevant competitor analysis and targeted news coverage.

Factiva Companies & Executives provides access to the same content collection as Factiva SalesWorks, and is designed for business, marketing and information professionals who require more flexibility and control over their searching. Through a single interface, this tool delivers the information sources organizations need to identify business opportunities, understand risks and threats, and monitor emerging markets, competitors, customers and prospects. Factiva Companies & Executives, a standalone product, links to Factiva.com.

Both products also provide automated monitoring and alerting, and advanced searching, and allow RICS, ticker symbols or D-U-N-S numbers to be used interchangeably. Factiva's proprietary taxonomy, Factiva Intelligent Indexing, enables these fields to be mapped, resulting in only relevant information being returned in search results. For more information visit www.factiva.com.

Research Industry News

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mystery shoppers in the United States and 250,000 internationally. Currently, there are more than 23,000 silver-certified shoppers and more than 2,000 gold-certified shoppers.

Acquisitions/transactions

Germany-based **GfK Group** has sold its 50 percent participation in IHA-IMS Health, Switzerland, to **IMS Health**. The positive net effect for the income from participations of GfK Group in 2005 will amount to approximately EUR 22 million. GfK has also acquired the remaining 20 percent which IMS Health held in GPI Kommunikationsforschung, Germany. IHA-IMS Health provides services to the health care industry in the areas of market research, sales research and customer relationship management. It has a staff of 70. GPI Kommunikationsforschung, now a 100-percent GfK subsidiary, covers two business areas: communication research and self-medication.

Separately, GfK has added Beyen Marktforschung GmbH to its retail and technology division. Based in Düsseldorf, Beyen Marktforschung GmbH conducts pricing research.

Also, GfK Group and Chicago-based Information Resources Inc. (IRI) signed agreements on the basis of which GfK will transfer its shares in the German and Dutch subsidiaries of Information Resources to the parent company and acquire the shares in GfK Panelservices Benelux held by the Information Resources, Inc.

In recent years, the GfK Group has gradually reduced its involvement in its joint ventures with IRI. The move was based on a management board resolution to focus on GfK's core competence in FMCG market research and therefore concentrate on panel research involving end user households. Prior to signing the agreements, GfK held 19.9 percent of the shares in Information Resources GfK in the Netherlands and 17.7 percent in Information Resources GfK in Germany. The two companies will be wholly owned by IRI.

In other news, GfK has taken over the remaining 7.6 percent stake in GfK Panelservices Benelux, Netherlands, which is now wholly owned by GfK.

Stamford, Conn., research firms **Gartner, Inc.** and **META Group, Inc.** have reached an agreement under which Gartner will acquire META Group in an all-cash transaction valued at $10 per share, or approximately $162 million. The boards of directors of both companies have unanimously approved the agreement.

In 2003, Gartner generated $858 million in revenue from 76 locations around the world, while META Group generated $122 million in revenue from 52 locations. Gartner intends to finance the acquisition through the use of cur-

rent cash, as well as borrowings under the company's existing line of credit. The transaction is subject to customary closing conditions, including regulatory approvals, and approval by META Group's stockholders. The transaction is expected to close in the second quarter of 2005.

Bacon's Information, Inc. has acquired **Delahaye Medialink**, a public relations-focused media evaluation and consulting services firm with offices in Norwalk, Conn., Portsmouth, N.H., Washington, D.C., and London. Delahaye, with annual revenue of $9 million, will be acquired from its parent Medialink Worldwide Incorporated.

Informa Research Services, Inc., Calabasas, Calif., has acquired **Moorthy, Riggs and Associates, Inc.**, a Tiburon, Calif., research firm serving the financial industry.

Atlanta loyalty marketing firm **Vesdia Corporation** has acquired rights to a family of patents held by **Source, Inc.**, Newhall, Calif. Key among the inventions is a U.S. Patent entitled "Centralized consumer cash value accumulation system for multiple merchants," which includes 21 claims on methods and systems related to retail point-of-sale transactions. Combined, the group of patents provides specific coverage for several inventions related to the electronic tracking of shopping transactions for the purpose of providing consumers rebates from multiple retailers.

Association/organization news

The Marketing Research Association (MRA) is currently seeking individuals from across the profession to participate in various committees associated with its Professional Researcher Certification program. The committees are open to individuals based upon their knowledge, skills and backgrounds and are not limited to MRA members. Chair of the certification workgroup is Joan Burns, corporate marketing specialist for Teradyne. There are three subcommittees within the workgroup: the certification development committee, chaired by Ken Roberts, president of Cooper Roberts Research, Inc.; the certification review committee, chaired by Rich Boone, senior director of consumer research for E & J Gallo Winery; and the certification ethics committee, chaired by Don Marek, former executive director of customer service quality for SBC. Readers interested in participating can contact Linda Schoenborn or Elyse Gammer at 860-257-4008 or at linda.schoenborn@mra-net.org or at elyse.gammer@mra-net.org.

The Council for Marketing and Opinion Research (CMOR) has retained PR firm KCSA Worldwide to help raise awareness of the importance of consumer participation in legitimate market and opinion research. Henry Feintuch, managing partner, and Yin Chang, managing director of KCSA's global technology and business-to-business practice, will manage the CMOR public relations program.

Awards/rankings

Arbitron Inc., New York, was named to *Fortune's* "100 Best Companies to Work For" list in 2005. Recognized for the third time as a top employer, the company was ranked number 60 in the business magazine's annual listing and was selected from a pool of approximately 1,000 companies.

Millward Brown Australia was recognized for its excellence in client service at the 2004 Walker Information Annual Conference. The company was awarded an honorable mention for its results in the annual international stakeholder client relationship survey.

Separately, Millward Brown has been awarded a prize for being the best market research company in Mexico. The "Trofeo a lo mejor de 2004" was awarded to Millward Brown Mexico by marketing magazine *Merca2.0*.

New accounts/projects

U.K.-based oil company **Total UK** has retained research firm **ESA** to conduct its national mystery shopping campaign for the eighth consecutive year. The contract will run for the duration of 2005 and will involve regular visits by ESA's mystery shoppers to Total's nationwide network of forecourts.

Greenfield Online, Inc., Wilton, Conn., announced that **GfK Arbor, LLC** has signed a new agreement appointing Greenfield Online as its exclusive supplier of full-service Internet survey research services and sample research data, subject to certain limited exceptions. The companies have worked together since 2002. The agreement with GfK Arbor has an initial term ending on December 31, 2005 and it will automatically renew for successive one-year periods unless cancelled by either party prior to the expiration of each term. During the term, Greenfield Online will provide GfK Arbor with Internet-based survey services, which include the programming and hosting of surveys, as well as survey respondents for sample research from its panel of 3.4 million survey takers. Greenfield Online will also provide marketing support services to GfK Arbor.

New companies/new divisions/relocations/expansions

FocusVision Worldwide has opened a new office at 16133 Ventura Blvd., Suite 650, Encino, Calif., 91436. It will provide sales, technical and project coordination services. Staffing will include two employees who will relocate to the new office: Michael Brooks, sales manager – West region; and Judith Kaufman, business development analyst.

Millward Brown has debuted Millward Brown Optimor, its global brand investment unit, and tapped senior vice presidents Marco Forato and Nikhil Gharekhan to work with the current Millward Brown team to help take the initiative forward.

Research firm **TNS** has created a single technology sector which will merge its existing telecom and IT research divisions. The newly-created sector will be headed by Tacis Gavoyannis.

J.D. Power and Associates, Westlake Village, Calif., has expanded its operations in China, opening a new office in Shanghai at 3515, CITIC Square, 1168 Nanjing West Road. John Humphrey, partner at J.D. Power and Associates, has been named senior vice president of international operations and managing director of the new Shanghai office.

Company earnings reports

Firm, an Oslo-based research software firm, reported $13.3 million in revenue for 2004, an increase of 37 percent from $9.7 million in 2003. Firm's EBITDA result was $1.2 million in 2004, compared with $67,000 in 2003. Firm continues its positive development from 2003, when the growth was 40 percent compared with the previous year. In Q4 of 2004, EBITDA was $1.2 million compared with $0.4 million in Q4 of 2003. Revenue in Q4 of 2004 was $4.8 million compared with $3.5 in Q4 of 2003. Revenue outside Scandinavia increased from 83 percent in 2003 to 86 percent in 2004. This trend is expected to continue in 2005.

Arbitron Inc., New York, reported fourth-quarter 2004 revenue of $72.9 million, an increase of 11.4 percent over revenue of $65.4 million during the fourth quarter of 2003. Costs and expenses for the fourth quarter increased by 13.9 percent, from $54.5 million in 2003 to $62.1 million in 2004. Earnings before interest and income tax expense for the quarter were $16.9 million, compared with EBIT of $16.1 million during the comparable period last year. Interest expense for the quarter declined 35.1 percent, from $2.6 million in 2003 to $1.7 million in 2004, due to reductions in the company's long-term debt.

Net income for the quarter was $9.6 million, compared with $8.7 million for the fourth quarter of 2003. Net income per share for the fourth quarter 2004 increased to $0.31 (diluted), compared with $0.28 (diluted) during the comparable period last year.

For the year ended December 31, 2004, revenue was $296.6 million, an increase of 8.4 percent over revenue of $273.6 million for 2003. EBIT for 2004 increased 6.2 percent to $98.4 million compared with $92.7 million in 2003. Net income for 2004 increased 21.4 percent to $60.6 million compared with $49.9 million in 2003. Net income per share (diluted) in 2004 was $1.92 per share (diluted), compared with $1.63 per share (diluted) last year.

The effective tax rate of 33.9 percent was lower in 2004 than the effective tax rate of 38.5 percent in 2003 because certain reserves for tax contingencies were reversed in the third quarter of 2004 due to guidance in an IRS notice. Also in the third quarter of 2004, the valuation allowance on the deferred tax assets related to state net operating loss carryforwards was reduced due to higher actual and projected taxable income in the applicable states. The net benefit of these changes was $4.2 million or $0.13 per diluted share in 2004.

Opinion Research Corporation, Princeton, N.J., announced that 2004 revenues are expected to be within the previously issued revenue guidance of $194 to $196 million but that it was reducing its 2004 net income guidance from $3.0 to $3.2 million or $0.46 to $0.50 per diluted share to $1.9 to $2.1 million or $0.29 to $0.32 per diluted share. These results include a second quarter 2004 refinancing-related charge which reduced net income by $1.6 million and diluted earnings per share by $0.26.

This revised guidance will result in a continuation of the positive trends in revenues and earnings reported in the prior quarters of 2004. The reduced guidance for 2004 is primarily the result of cost increases on certain contracts in the U.S. market research segment, as well as lower revenues and earnings in the teleservices segment, where demand in the fourth quarter was below expectations and historical fourth quarter levels.

Names of Note

continued from page 10

director of the firm's new Shanghai office.

GfK Martin Hamblin has promoted **Martine Leroy-Sharman** to general manager of the U.K.-based Global HealthCare office. She has also been appointed to join GfK Martin Hamblin's board. **Stephen Grundy**, group general manager, will now direct his attention to building GfK Martin Hamblin's Healthcare business at an international level. He will continue to be a member of both the GfK Martin Hamblin board and the GfK HealthCare strategic business unit board. There have also been two other senior appointments within GfK Martin Hamblin Global Healthcare: **Saeed Mumtaz** has been named divisional director and **Mike Mallinson** has been added to establish a payer, pricing, reimbursement and market access practice within the division.

Research firm *Harris Interactive*, Rochester, N.Y., announced a number of executive management changes. **Gordon S. Black** resigned as executive chairman on December 31, 2004, concurrent with the expiration of his employment agreement. Black will continue as a director of the company. **Robert E. Knapp** was elected chairman, effective January 1, 2005. Knapp continues to serve as CEO, the position he has held since joining the company in January 2004. Also effective January 1, 2005, **Frank J. Connolly Jr**. joined Harris Interactive as executive vice president and CFO. Connolly will also serve as the company's treasurer. **Bruce A. Newman** has been named executive vice president, finance. He will remain corporate secretary. **David B. Vaden** has been promoted to executive vice president.

Arbitron Inc., New York, has named **Julian Davis** director, urban media services. **Pierre Bouvard** has been named president, Portable People Meters and international.

Maritz Research, St. Louis, has named **Bernard Elam** account manager, retail research group. **Paul Robert** has been named account manager, financial services research group.

Jack Campisi has been promoted to senior account director, *VideoMarker* services at Stamford, Conn.-based FocusVision Worldwide. In addition, **Michael Brooks** has been promoted to sales manager - West region, **Shane Leuis** has been named senior account director for the central territory, and **Allison Herz** has been named senior account director for the Northeast territory.

Kevin Moran has joined

Markitecture, a Norwalk, Conn., research firm, as president of Markitecture Syndicated Studies, a new division within Markitecture. He will be based in Cave Creek, Ariz.

Overland Park, Kan., consulting firm the *Management Network Group, Inc.* has named **Paul Petersky** vice president, market research at TMNG Marketing, TMNG's marketing consulting subsidiary.

Eleo Hensleigh has been promoted to the newly created position of chief marketing officer and executive vice president for marketing and brand strategies at the *Disney-ABC Television Group.* In her new role, Hensleigh will manage marketing and brand strategy initiatives, research departments and synergy efforts for the group.

New York brand consultancy *Interbrand* has promoted **Julie Curhan Cottineau** to executive director, consumer branding.

John V. Colias has joined *Decision Analyst Inc.*, Arlington, Texas, as vice president and director of the advanced analytics group.

Jane Washburn has been named senior vice president, chief marketing officer at *Beverly Enterprises*, a Fort Smith, Ark., health care services firm. She will be responsible for branding, marketing, market research, business development and strategic planning.

Mark Turim has joined *Research International,* Chicago, as group COO. He has also been named CEO of Latin America. In addition, **Mary Lou Barney** has joined the firm as the new full-time global business director for Coca-Cola.

Debra Isdal-Giroux has joined Philadelphia-based research firm *LinguiSearch, Inc.*, as vice president and senior research consultant. She will head up the firm's West Coast office and be based in Phoenix.

Netherlands-based information firm *VNU* has named **Susan D. Whiting** executive vice president of the Media Measurement & Information (MMI) group, effective April 4, 2005. Whiting will replace **Mike Connors** as head of MMI. She was named president and CEO of Nielsen Media Research since in 2002, a role she will continue to fulfill. In addition, as of the same date, **Michael Marchesano** of VNU Business Media U.S. will lead Nielsen Entertainment, which will remain as a division of MMI. Marchesano was named president and CEO of VNU Business Media U.S. in 2001, a responsibility he will continue to hold.

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2005

Data Processing and Statistical Analysis Directory

>>>

The 2005 Directory of Data Processing and Statistical Analysis was compiled by sending listing forms to firms we identified as providers of data processing and statistical analysis services. This year's directory lists over 300 firms, arranged alphabetically. In addition to the company's vital information, we've included the types of data processing services they provide (coding, data entry, data tabulation, scanning services and statistical analysis). A cross-reference of these services is also offered for your convenience.

The Directory of Data Processing and Statistical Analysis begins on page 82.

The cross-reference of data processing services begins on page 103.

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(See advertisement on p. 70)

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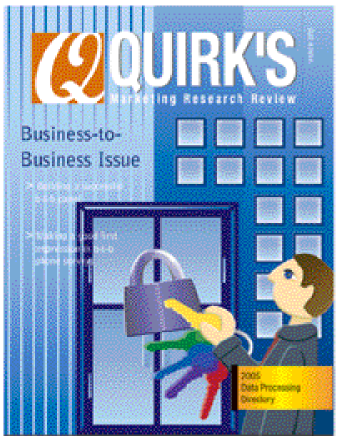

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Trade Talk

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But on the prepackaged foods side, you don't always eat a whole can of soup or a whole loaf of bread or use a pound of sugar or a box of salt. There are a lot of opportunities for innovation on prepackaged foods," Corlett says.

In a typical grocery store, the meat and produce departments pose no problem for the single consumer. Only need one steak or one potato? No problem. And makers of personal care products have caught on to the needs of these consumers and are offering smaller-sized shampoos and styling aids, for example. But it gets tough in the middle aisles, where the oversized packages of pasta, spices, condiments and dry goods lurk.

Marketers who want to reach these consumers shouldn't do it by pointing out their single status, Corlett says. "The worst thing you can do is spotlight them as different. It's like marketing to a special age group. You don't talk to teens about acne or women over 50 about lined skin. Talk to them about benefits, such as the benefits of choice. Make both the large economy size and the smaller single-portion size innovative and affordable."

Corlett says some product makers may find that the innovations they introduce for single consumers catch on with those living in larger households. "Focus on the features and benefits that are specifically attractive to households of one and then watch and see how many other households value the benefits. When marketers create and promote innovative features and benefits for a particular population segment, they often end up attracting a much broader audience. The features and benefits go beyond the target audience. For example, the big-button phone or the levers instead of doorknobs - which were designed for older consumers - are now a product of choice for many people."

Make room

Big-box retail and grocery centers will no doubt continue getting bigger but the market may also have to make room for some smaller, cozier outlets. "We have a retail environment that has been very focused on families stocking up and it's sort of the antithesis of what the single-person household needs. But they are certainly a driving force in the extraordinary growth of places like Whole Foods and smaller independent retailers and specialty stores," Corlett says.

From the looks of things, the impact of single-person households is just beginning to be felt. | Q

corrections

On page 106 of the January issue, in the listing for Dynamic Advantage, Inc., in the 2005 Mystery Shopping Providers Directory, incorrect phone and fax numbers were listed. The correct phone and fax numbers are 866-870-1251 and 818-238-1257, respectively.

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trade talk

By Joseph Rydholm, *Quirk's* editor

It's all about me

Segments, groups and niches. That's what most marketing and advertising focuses on reaching. Well there's a new target audience and it's growing fast. It's the group of one.

Data from a How America Shops study by New York research firm WSL Strategic Retail gives a look into the needs and wants of single-person households, a classification that encompasses 26 percent of the U.S. population and ranges from older consumers who may have lost a spouse due to death, divorce or separation to those under 30 who are choosing to marry later and later. "Certainly society is now creating an environment in which single people can thrive," says Candace Corlett, a principal at WSL Strategic Retail. "There is also a culture of young people delaying adult responsibility, sometimes forever, and those who are just not signing on for the 'couples' way of life. So we have singles at both the young and the old ends of the spectrum."

The study found 37 percent of the one-person households were in the 18-to-35 age range, 42 percent in the 36-to-54 range, and 21 percent were 55 and older.

While 59 percent of those in households of four or more people are optimistic about their financial future, only 31 percent of singles feel the same way. But compared to a similar study conducted in 2003, the number of respondents saying they had become more careful about their spending habits in 2004 declined by 15 percent, and the number that said they had postponed major purchases declined by 11 percent.

Likely to splurge

Though 70 percent of the single-person households have incomes of less than $50,000, they are free to spend that money on themselves and their pets. And spend they do. Compared to consumers from households of four or more people, they are more likely to splurge for a good cup of coffee (54 percent; 38 percent), specialty foods (59 percent; 46 percent), and pet products (52 percent; 23 percent). "Single people are more about self-indulgence. Whole Foods, for example, does a great job of catering to that, responding to an audience that is 'all about me,'" Corlett says.

Single consumers are less interested in going out of their way to save a buck. While 38 percent of single respondents said they would "go a little further to shop at a store if I can save money," 60 percent of those in households of four or more said they would do the same.

And they're not always in a hurry to finish shopping: 41 percent of singles said they would go out of their way to seek one-stop shopping, compared to 58 percent of multiple-person households.

Sense of community

These consumers are less likely to shop in the larger stores such as mass merchandisers and warehouse clubs and also less likely to shop at dollar stores. Small, local stores seem to hold the most appeal.

Rather than seeking a bargain, some of these consumers may be looking for a sense of community, Corlett says. "When you don't have a built-in family unit, you look to connect in the community and it is much easier to do that in the small local drug store or the small local book store. We are also seeing a return to smaller grocery environments. Main street shops…that's what the Wal-Mart Neighborhood Market is about, for example."

Singles also exhibit a lot of brand loyalty, especially in household and personal care products, reporting lower levels of brand switching than respondents in households with four or more people. They are willing to pay a bit more for convenience but are often forced to weigh whether it's worthwhile to pay more for products in single-serve packages or pay less for larger packages but end up throwing out a product that spoils.

"On the paper goods side, it's pretty transparent: they want smaller sizes.

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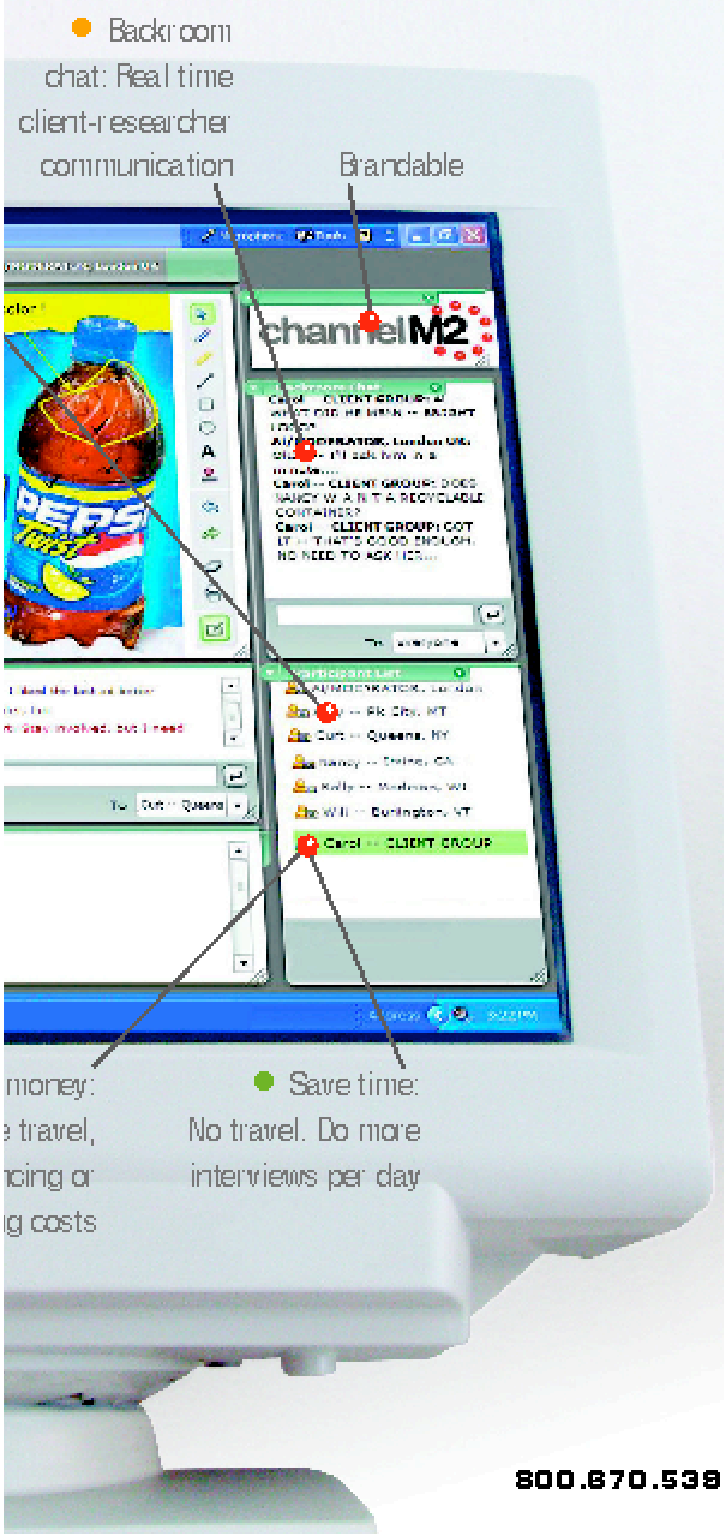

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