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Marketing Research Review

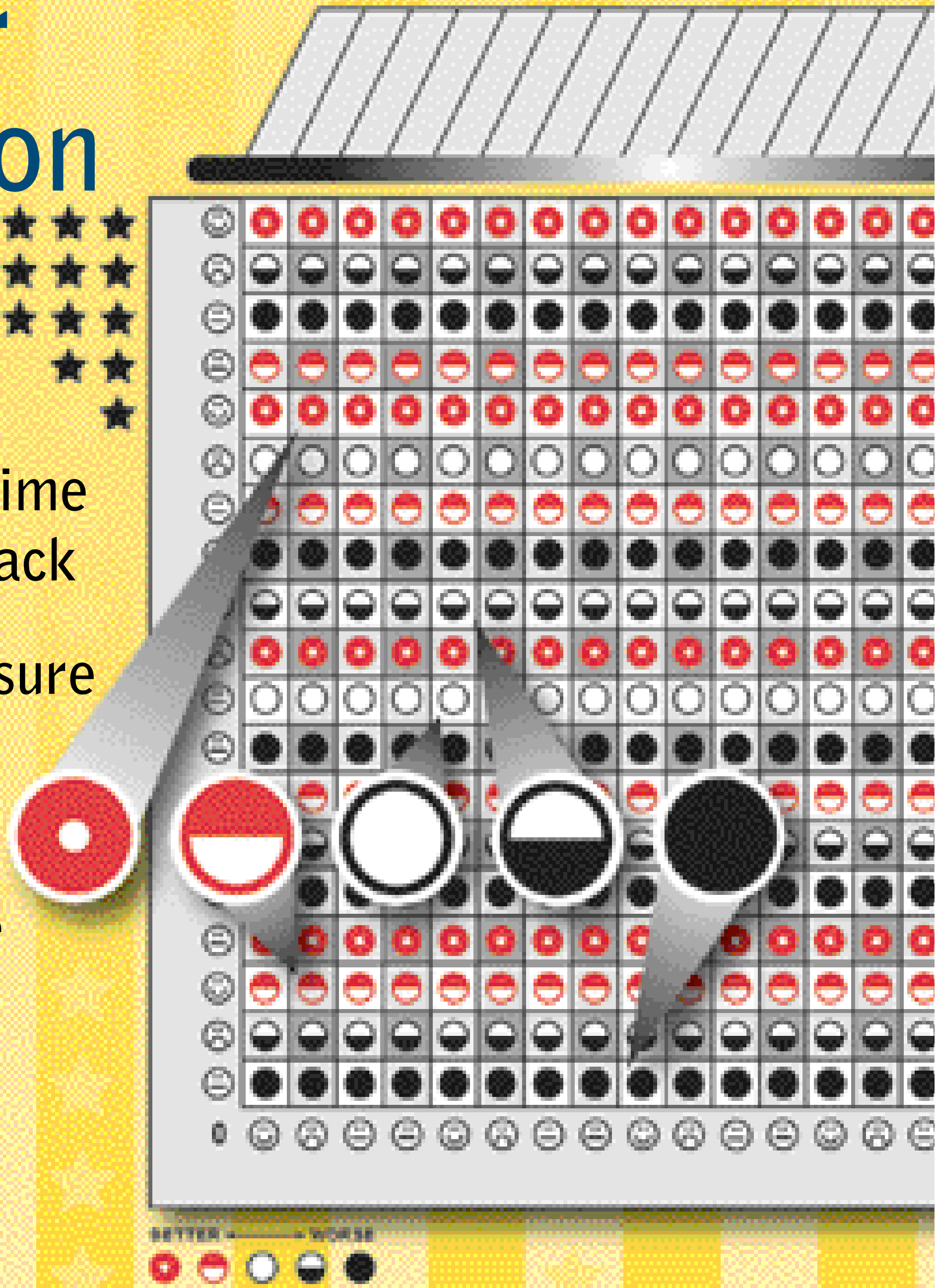
OCTOBER 2005

Customer satisfaction issue

> Honeywell warms to real-time customer feedback

> Should we measure dissatisfaction instead?

> Listening to the silent majority



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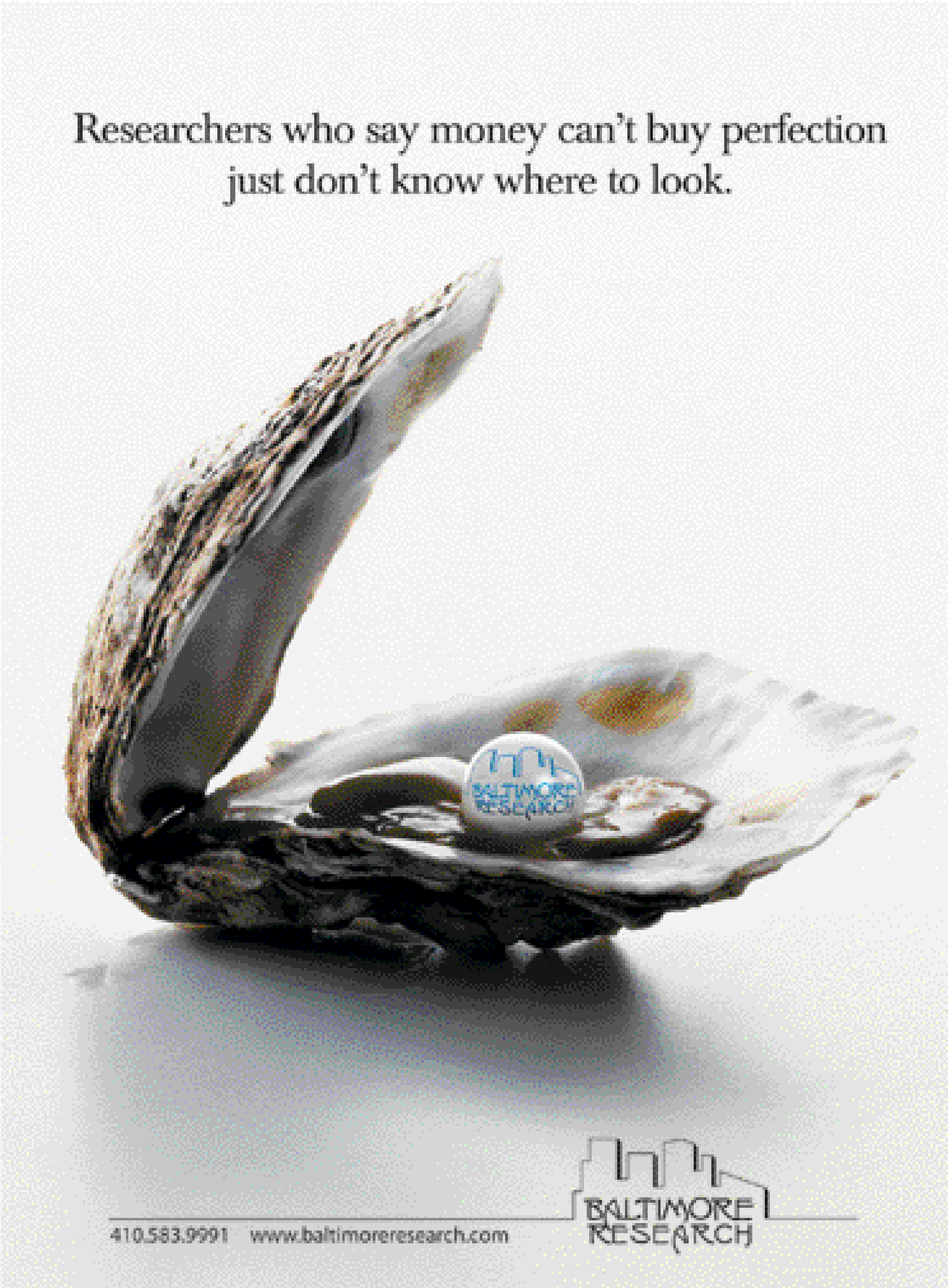
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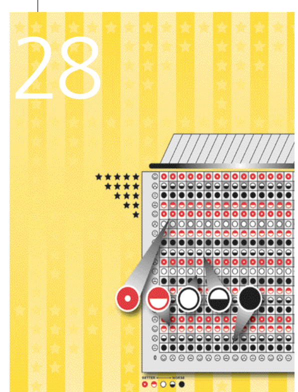
contents

case history

techniques

columns

departments



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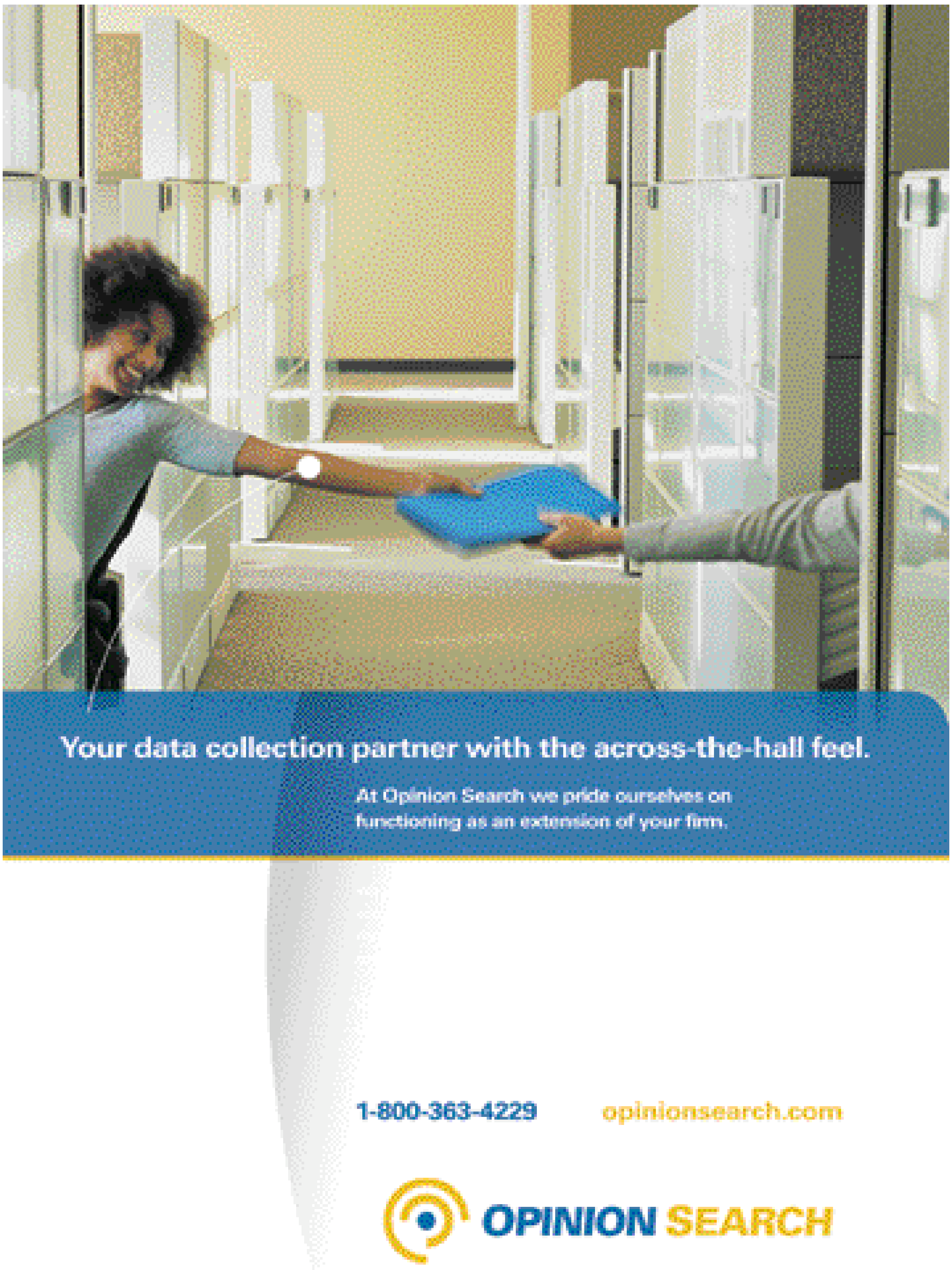
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news and notes on marketing and research

Harris joins BCS fray

Arguing about sports is as popular as watching the events themselves, and no aspect of the sporting world has caused more debate recently than college football's Bowl Championship Series (BCS) standings. The standings – which are used to determine national rankings and, by extension, postseason bowl placements and match-ups – have long been derided as flawed, as has the methodology used to compile them – except by fans whose teams have been ranked No. 1, of course.

Harris Interactive, Rochester, N.Y., has entered the belly of the rankings beast. Beginning this season, the standings formula will consist of the USA Today Coaches Poll, a new Harris Interactive College Football Poll and an average of six computer rankings (Anderson & Hester, Richard Billingsley, Colley Matrix, Kenneth Massey, Jeff Sagarin and Peter Wolfe). The BCS standings will continue to be computed in the same manner as last year, with equal weight given to each of the three components.

"The addition of the Harris Interactive College Football Poll allows us to continue with the BCS formula as it existed in 2004," says BCS Coordinator and Big 12 Commissioner Kevin Weiberg. "This consistency was desired by commissioners, administrators and coaches. We are very comfortable with the approach Harris has taken in constructing this new poll."

The Harris Interactive College Football Poll will rank the top 25 teams on a weekly basis during the 2005 season, September 25 through December 4. The panel, comprised of former coaches, players, administrators and media (in approximately an 80 percent/20 percent split), with a goal of 114 participants, has been randomly drawn by Harris Interactive from among more than 300 nominations supplied by the conference offices and Notre Dame athletics director Kevin White, and is a statistically reliable representation of all 11 Division I-A conferences and independent institutions.

Harris Interactive assigned each nominee an identification number and randomly sent invitations. Each potential panelist received an overnight letter explaining the voting process and inquiring about their interest and commitment. Harris Interactive followed up with phone calls to determine willingness to participate. Panelist slots are filled by conference, each represented equally, all randomly selected to be invited to participate from among its list of nominees. The names of all voters will be released prior to the start of the season.

Harris Interactive will post the poll results to its Web site each Sunday. For the December 4th poll, individual votes will be made public. The first BCS Standings of the 2005 season will be released October 17th. Arguments will no doubt begin shortly thereafter.

Apparently, the incentives were too effective

The Associated Press reported in July that an employee of a New York office of research company Ipsos was charged with embezzling more than $1 million from the company after audits revealed she was allegedly stealing cash intended to be used as survey incentives.

Police said the 25-year-old woman was hired in 1999 and was responsible for armored car deliveries of bundles of cash in ones, fives, 10s and 20s that were to be mailed with surveys. Arraigned on charges of grand larceny and falsifying business records, she allegedly stole the money over a period spanning December 2003 to July 8, 2005. She covered up the thefts by making larger-than-necessary requests for money and falsifying business journals. According to the *New York Post*, investigators have recovered only $29,000 of the missing money.

Rate that product placement

With various advertising vehicles being declared dead seemingly daily (recent victims: network TV, your morning newspaper), marketers have been scrambling for new ways to get their products in front of consumers. One of the hottest is product placements on television shows. Nielsen Media Research and Nielsen Entertainment announced in August the launch of a research study which will assess the factors impacting product placement effectiveness. The study's initial participants include: CBS/UPN Television Networks, Discovery Television, Magna Global, Mediacom, OMD, PHD, Sprint, The Weather Channel, and Zenith Optimedia.

Nielsen Media Research has been tracking the physical characteristics of product placement since the beginning of the 2003-2004 broadcast season. The objective of the study is to look beyond the on-screen appearances and determine how the context of a placement's execution can impact consumer response. The relationship viewers have with a specific program, as well as their familiarity with the brand and product category featured, as related to the effectiveness of placements, will be analyzed. Nielsen Entertainment has also been testing the effectiveness of product placement in television, and, beginning in 2006, in film as well.

In-store audio ads make an impression

Consumers are receptive to in-store audio advertising, with more than half (55 percent) of shoppers recalling commercials heard while shopping, according to a study by Arbitron Inc., New York.

The Arbitron Retail Media Study: The Impact of Retail Audio Broadcasting found that nearly half

(46 percent) of U.S. primary household shoppers, age 18 and older, recalled hearing retail audio or in-store audio broadcasting during their most recent grocery store visit and more than half (57 percent) think ad-supported retail audio is an acceptable form of advertising. Among these shoppers who recalled hearing a retail audio ad, more than 40 percent made a purchase they were not planning to make. More than one-third (36 percent) purchased a different brand from they one they originally intended after hearing a retail audio commercial or promotional announcement.

"It is clear that retail audio broadcasting as a national broadcast advertising vehicle is effective, with a high recall rate and the power to influence consumer purchasing decisions as they shop," says Diane Williams, analyst, custom research, Arbitron. "With the consolidation of supermarket chains and advances in technology, retail audio broadcasts in stores can function like a broadcast network."

The majority (94 percent) of primary household shoppers – who recalled hearing audio retail commercials – heard spots for sales items available in the grocery or drugstore. Nearly three-fourths (72 percent) of these shoppers recalled hearing promotions for items that were not necessarily on sale. Seven in 10 of these shoppers have a positive attitude toward retail audio advertising.

The majority (93 percent) of primary household shoppers, 18 or over, visit a grocery store each week and more than two-thirds (69 percent) spent 30 minutes or more in the store during their most recent shopping trip. Women compose the majority of shoppers who recall hearing audio during their most recent trip to the grocery or drugstore. Women, age 35 and older, make up nearly 60 percent of the retail audio broadcast audience.

A total of 1,002 people were interviewed for the Arbitron Retail Media Study: The Impact of Retail Audio Broadcasting in September 2004. Telephone interviews were conducted with primary household shoppers, age 18 and over, chosen at random from a national sample of Arbitron's Spring 2004 survey diary keepers. The Arbitron Retail Media Study: The Impact of Retail Audio Broadcasting and previous studies are available at www.arbitron.com.

Some newspaper readers now rely on Web editions

Findings from the Nielsen//NetRatings @Plan Summer 2005 release on online versus offline newspaper consumption show that 21 percent of Web users who read newspapers have transferred their readership primarily to the online version, while a majority, or 72 percent, of online users who consume newspapers primarily still access print editions. Seven percent of online users who consume newspapers split their time evenly between the online and offline editions.

The research focused exclusively on Internet users who consume newspapers and excluded online users who obtain their news from other online news and information sources. "A significant percentage of newspaper readers have transferred their preference from print to online editions," says Gerry Davidson, senior media analyst, Nielsen//NetRatings. "Accordingly, many online editions now feature original content and have developed an online strategy that includes online message boards and editorial blogs, which leverage the medium's strengths of interactivity and immediacy."

A greater proportion of male readers than female readers access their newspapers primarily online. Men who primarily read online newspapers make up 53 percent of online readers while women comprise 47 percent. In comparison, women make up 57 percent of those who read newspapers primarily in print.

Nytimes.com led the top five online newspapers with an audience of 11.3 million unique visitors during May 2005, followed by usatoday.com with 9.2 million readers and washingtonpost.com with 7.4 million viewers. Rounding out the top five were latimes.com with 3.8 million and San Francisco Chronicle (sfgate.com) with 3.4 million unique visitors.

"Not surprisingly, the top online newspapers tend to be located in metropolitan cities where both population

continued on page 78


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names of note

Dick R. Wittink, the George Rogers Clark Professor of Management and Marketing at the Yale School of Management, died on June 4 at age 59. Wittink was noted for his work in the study of conjoint analysis. He served as the editor of the *Journal of Marketing Research* and was elected with a lifetime appointment to the Royal Dutch Academy of Sciences in May 2001.

Joe Belden, who in 1940 founded the Texas Poll, the first statewide opinion survey and a model for others that followed, died on June 16 at his home in Washington, D.C. He was 90. He founded *Belden Associates* in Austin in 1941, then served as a Navy officer in Washington and Panama in World War II before resuming his polling enterprise. He sold his interest in Belden Associates and retired in 1980. He received the lifetime achievement award from the American Association for Public Opinion Research in 1991.

Correcting a June Names of Note entry, **Randa Bell** has been named vice president marketing and client services at *ASDE Survey Sampler Inc.*, Gatineau, Quebec. The earlier entry incorrectly reported her new position as vice president.

Thomas Carley has been named senior vice president for strategic planning at *The New York Times*.

Heather Stern has been named director of marketing and client development for a new joint venture between *AARP* and *The Kantar Group* aimed at researching the 50+ market.

Carol Shellock has joined Atlanta research firm *Brain Surgery Worldwide* as executive director of account services. She will be based in Philadelphia.

Alex Chow has been named CFO of the *Pulse Group*, a Sydney, Australia research process outsourcing company.

Walker Information, Indianapolis, has added **Jack Shaw** to its board of advisors. **Steve Walker** has been named chairman of the board and **Frank Walker** has been named chairman emeritus.

Shaw **Anton**

Rebecca Anton has been named managing director of operations and quality at *Polaris Marketing Research, Inc.*, Atlanta.

Firm, an Oslo-based research software company, has named **Ken W. Østreng** CFO. In addition, **Bengt Thuresson** has been named chairman of the board and **Øystein Moan** and **Berit Svendsen** have been appointed to the board of directors. **Henning Hansen** has been named president and CEO.

InsightExpress, a Stamford, Conn., research firm, has announced several new hires: **Courtney Brown** as project manager; **Meredith Klein-Hertzel** as customer service representative; **John Pemberton** as director of research development and consulting; **Ronald Wainer** as senior account executive; **Michele McDonald** as senior account executive within the emerging markets sector; **Lauren Ash** as project manager within the customer service organization; **Ryan Price** as account executive, emerging markets; **Todd Thomas Trautz** and **Russell Kehoe** as research manager; **Lacey Fabrizio** as market research analyst; **Marie Minyo** as group director; **Marriott Dowden** as a director in the consumer packaged goods sector; and **Megan Rome** as director of marketing solutions. **Lisa Miller** has been promoted to the position of vice president, finance. **Jason Tiffer** has joined the Los Angeles office as an account manager. In the San Francisco office, **Jenna Hensel** has been named project manager and **Angie Urbanek** has been named market research manager.

Jamie Turner has joined Atlanta marketing firm *Bennett Kuhn Varner* as director of consumer insights.

Turner **Engelsma**

Bruce Wells has been named CIO of *Synovate*. **Okke Engelsma** has joined Synovate Healthcare as senior quantitative director, and will be based in the London office. In addition, the firm's youth research units have now been organized into a new specialist division - Synovate YC - to be headed up by Senior Vice President **Ian Pierpoint**. He will be based in Chicago. **Paul Cooney** will continue to be based in London after being named CIO enterprise solutions.
Elsewhere, Synovate has announced a number of senior appointments in its Central/Eastern Europe, Middle East, Africa (CEEMEA) region. **Tony Rhodes** has become COO for Central/Eastern Europe (CEE), based in Nicosia, Cyprus. **Albert McLean** has been named COO for Middle East/Africa (MEA), located in Johannesburg. Synovate also named **Andy Dalziel** chief financial officer for MEA. **Jon Salters** has been promoted to managing director for Sub-Saharan

continued on page 92

Do qual and quant online with Maritz/Invoke product

St. Louis-based Maritz Research has partnered with Invoke Solutions of Wellesley, Mass., to launch a new Maritz research product called Dynamic Insights, which leverages Invoke's technology platform to combine both qualitative and quantitative researching techniques in live Internet sessions. Dynamic Insights will be used to capture real-time customer feedback for clients in Maritz's target industries - automotive, financial services, hospitality, information technology, telecommunications and retail.

Maritz Research examines three dynamics related to a brand's success: choice, experience and loyalty. The company will use the Invoke-driven Dynamic Insights product to help other clients gain the customer insight needed to make decisions about new product concepts, new marketing initiatives, brand positioning and customer loyalty programs.

A Dynamic Insights session combines the adaptive questioning of a focus group with large samples. It leverages the results from this visual and interactive dialogue to gain insight into the opinions and reactions of session guests with the ability to adapt questioning on-the-fly. For more information visit www.maritzresearch.com.

Biannual report looks at shopping and eating attitudes

St. Petersburg, Fla., research firm HealthFocus International has released its biannual report entitled The 2005 HealthFocus Trend Report: National Study of Public Attitudes and Actions Toward Shopping and Eating. The 2005 HealthFocus Trend Report is the culmination of 16 years of trend data and is designed to help companies and trade organizations identify current and future consumer behaviors toward health, diet, nutrition, buying habits, and perceptions. The study is conducted in the United States as well as 30 countries in the Americas, Asia, Europe, and the South Pacific. For more information visit www.healthfocus.com.

Survey tracks mortgage origination process

Ann Arbor, Mich.-based consulting firm CFI Group, Inc., is now offering its Mortgage Origination Satisfaction (MOS) survey, which will measure customer experience with the loan origination process for 10 of the top mortgage lenders in the country.

CFI Group will interview a statistically valid sample of recent customers from each of the mortgage lenders in its survey. MOS program subscribers will then receive company customer satisfaction scores and competitive benchmark scores as well as scores for the key drivers of customer retention and satisfaction. In addition, subscribers will be able to compare their results against those in the industry. All results will be posted on a secure Web site.

The MOS program will identify the drivers of satisfaction and calculate the linkages between aspects of the origination process and the customers' behavior. Additional analysis includes customer satisfaction with the lender representative and how they handle the lending process, cycle time of closing a loan and documentation of the loan.

MOS asks mortgage lending customers to gauge their satisfaction using the same methodology employed by the American Customer Satisfaction Index, which is managed through the University of Michigan's Ross School of Business. For more information contact David Baker at 734-623-1331 or visit www.cfigroup.com.

New reporting suite from Decipher

Decipher, Inc., a Fresno, Calif., research firm, has launched a reporting suite that lets users automate post-field production. The new reporting features automate the post-field production process including clean, labeled SPSS data file generation, open-ended response coding and integration and PowerPoint presentation creation with editable charts/graphs. The process involves parsing data, creating a report, and adding the data to the client's secure report area. If a report already has been created it will append only new data, e.g., automated updating for tracking studies.

Decipher's automated reporting provides access to survey data online regardless of the data collection method or supplier. Clean data can be pulled down in any format including column binary, WinCross and labeled SPSS.

With Decipher's automated PowerPoint presentation builder, report production staff can turn cross-tabs from their portal into PowerPoint presentations with editable charts and graphs. For more information visit www.decipherinc.com.

NetCollect 3.1 now shipping

Seattle-based Apian Software, Inc. has released NetCollect 3.1, a new version of its online survey software plug-in to SurveyPro. SurveyPro with the NetCollect plug-in gives surveyors a point-and-click program to create surveys and reports for both paper and Web. No programming is required.

This new version offers several new features, including Web server load protection, respondent pause-and-resume functionality, randomization, data preload, support for SQL server, and enhanced design options.

Data from paper, Web, and kiosk surveys can be combined in a single database to produce reports, or can be

continued on page 82

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research industry news

News notes

Arbitron Inc., New York, has been awarded three new patents for its Portable People Meter (PPM) system, covering enhancements to the amount of information that can be embedded into the inaudible PPM codes and improvements to the PPM's ability to detect inaudible codes. The "Encoding Multiple Messages In Audio Data and Detecting Same" patent (#6845360) covers the ability of the PPM system to handle multiple layers of identification codes simultaneously. This allows the PPM to track, for example, the network originating the program, the local station broadcasting the program and specific commercials aired within the program. The multi-layer codes can also contain a time stamp that indicates when a program was originally broadcast. The time stamp allows the PPM to determine if a broadcast was time-shifted by the PPM survey participant or delayed by the network affiliate.

Separately, Arbitron announced that four retailers in the Houston market have agreed to participate in the market trial of the Portable People Meter system. More than 50 store locations operated by these retailers throughout Houston will play audio programming in their stores that has been embedded with unique PPM identification codes supplied by Arbitron. When an Arbitron PPM survey participant enters one of these retail outlets, the Portable People Meter will detect the codes and report that the individual has been exposed to its in-store audio programming. The retailers that have agreed to encode in-store audio include: Best Buy (16 locations); Gap (18 locations); Gallery Furniture (one location); Old Navy (15 locations). According to Scarborough Research, these outlets in aggregate were visited by at least 63 percent of the adult population over the course of the past year.

Acquisitions/transactions

New York-based **Millward Brown** has acquired online research firm **Dynamic Logic.** Nick Nyhan, president, Dynamic Logic, and Ronit Aviv, CTO, founded the company in 1999. Dynamic Logic, headquartered in New York City, has 65 employees, with offices in Chicago, San Francisco, Los Angeles and London. Nyhan will remain president of Dynamic Logic, which will now be known as Dynamic Logic - A Millward Brown Company.

Nielsen Media Research, New York, has acquired **AudioAudit**, a provider of broadcast verification technology services for the advertising industry. Financial details were not disclosed.

Germany-based **GfK Group** has acquired a 100 percent holding in **SoHealthAsia** in Hong Kong. Founded in 2003, SoHealthAsia has branches in Hong Kong and Singapore and specializes in market research and consultancy in the pharma and health care markets.

Separately, GfK Group acquired a 33 percent holding in **Research Matters AG**, a Swiss pharmaceutical market research specialist. The two companies also agreed the gradual increase of the GfK stake over the next few years. In 2004, the company's nine full-time employees achieved sales totaling EUR 3.3 million

The NPD Group, Port Washington, N.Y., has acquired **STS Market Research**, a Cambridge, Mass., company serving the fashion industry. As part of the acquisition, NPD has also acquired the STS longitudinal research panel, AccuPanel. The transaction was completed July 1, 2005. Arthur Spar, formerly chairman and CEO of STS, becomes vice president, NPD Fashionworld, the fashion-tracking division of NPD. Other STS staff joining NPD include Susan Merrill, now director, client development for NPD Fashionworld, and

continued on page 86

Calendar of Events October-November

The Society of Insurance Research will hold its annual conference/workshops and exhibit fair on October 16-19 at the Tradewinds Island Resort, St. Pete Beach, Fla. For more information visit www.sirnet.org.

The Qualitative Research Consultants Association will hold its annual conference on October 19–22 at the Beverly Hilton Hotel. For more information visit www.qrca.org.

ESOMAR will hold its annual Latin American conference on October 23-25 in Buenos Aires, Argentina. For more information visit www.esomar.org/latinamerica2005.

Anderson, Niebuhr & Associates will hold a workshop on analyzing and reporting questionnaire data on October 27-28 in Minneapolis. For more information visit www.ana-inc.com.

The Marketing Research Association will hold its annual fall education conference and technology forum on November 1-3 at the Hyatt Regency Lake Las Vegas Resort. For more information visit www.mra-net.org.

IIR will hold its annual market research event on November 6-10 at the Sheraton Palace in San Francisco. Quirk's readers can receive a 15 percent discount on registration fees by using the code XM1728QW and registering via phone at 888-670-8200 or via e-mail at register@iirusa.com. For more information visit www.themarketresearchevent.com.

ESOMAR will hold a conference on qualitative research on November 13-15 in Barcelona, Spain. For more information visit www.esomar.org.

ESOMAR will hold Consumer Insights 3 on November 15-17 in Barcelona, Spain. For more information visit www.esomar.org.

By John V. Colias

Choice modeling analytics - the benefits of new methods

Over the past two decades, the marketing research industry has witnessed an explosion of choice models based on survey data to quantify the value of product attributes and to predict market outcomes.

Choice approaches measure the value of products to customers by quantifying the unique contributions of attributes that combine to define the product. This brief article aims to help researchers understand the benefits of several technical advances in choice analysis. Our discussion will address the following advances: improved experimental design algorithms; segment- or customer-level models; model calibration.

Advances in these areas have provided significant benefits:

• increased realism of market scenarios presented in survey choice tasks;

• more reliable survey responses;

• easier survey tasks without reducing the scope of deliverables;

• respondent-level models that enable targeting of customers willing to pay more for specific product features;

• testing of more complete and complex models of purchase decision-making;

• greater accuracy of market share and revenue estimates.

First, let's set the stage by describing the kinds of research questions addressed by choice models. From this backdrop, we will understand how the benefits of new methods are realized.

Editor's note: John V. Colias is vice president and director of the Advanced Analytics Group at Arlington, Texas research firm Decision Analyst Inc. He can be reached at 800-262-5974 or at jcolias@decisionanalyst.com.

Key marketing questions in choice modeling studies

The fundamental question addressed by choice models (sometimes called choice-based conjoint) is: "How do changes in brand, price and product features impact market share?"

Choice modeling is a good approach to determine how a product or service should be priced to maximize revenue or profits or grow market share. While choice modeling can be developed from actual market choices, marketing researchers focus on survey-based choice modeling, where customers decide which and how many products to buy in hypothetical market scenarios presented. Compared to the actual marketplace, surveys provide a place where new price levels and new product features can be tested with ease, enabling the researcher to predict the impact of many possible price and feature changes on market outcomes.

Choice modeling enables researchers to determine what combination of product features or what bundles of products in a product line would most improve revenue or profit. Research findings help firms develop new products,


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fine-tune promotional strategy and develop service packages that appeal to large groups of customers.

For a new brand or product entering a market, choice models determine a brand or product's projected acquisition of market share and revenue and its impact on market share and revenue of existing brands or products (i.e., incremental and cannibalized share and revenue).

Improved experimental design algorithms

Experimental designs select combinations of attributes and levels for each alternative in a market scenario. The combinations are selected to ensure that the relative value to customers of each part of a brand or product (e.g., price, size and packaging) can be measured with maximized reliability.

Improved experimental design software has enabled researchers to produce more realistic scenarios to test in survey choice tasks. For example, suppose one wireless communications provider offers multiple service plans. It would be unrealistic for the same brand to offer two wireless plans that are identical in all aspects, except that one includes more minutes and a lower monthly fee than the other. Today, experimental design software can avoid such combinations of attributes while still producing experimental designs with high reliability.

Another benefit of improved experimental design software is that survey choice tasks can be made easier for the respondent while still handling complicated products that have many features.

For example, respondent survey choice tasks that elicit a choice from among multiple personal computer brands, where each brand is described by 15 or more attributes, can be quite tiring. Newer software can produce partial profile choice designs that select a subset, say five, out of the total set of 15 or more attributes to present in each choice scenario. Only five attributes vary across brands, so only these five attributes need to be shown to respondents. Showing only five attributes per choice task reduces the amount of time required to read through each scenario and the overall length of interview and increases the quality of respondent choices. Reduced respondent burden offers a huge advantage in today's lifestyle because survey respondents have many demands on their time and want shorter interviews.

Segment- or customer-level models

Segment-level models have unique parameters for each sub-segment of the total population of customers. During model development, segments of customers (who share similar market responses to changes in product prices and features) are discovered and separate model parameters are produced for each segment.

Customer-level models have unique parameters for each individual customer or survey respondent. Since every individual truly has unique tastes and preferences, customer-level choice models are more realistic. For example, one customer might be very price sensitive and brand loyal, while another might be moderately sensitive to price but not loyal to any brand. Customer-level modeling uses survey responses to: determine the most likely distributions (across customers) for price and brand preference parameters; and estimate each individual respondent's price sensitivity and brand preferences.

Segment-level models are produced by latent-class (LC) models and customer-level models are produced by hierarchical Bayes (HB) models. However, LC models can deliver customer-level parameters also by assigning respondents to a most probable segment, or by weighting segment-level parameters based on the respondents' probabilities of segment membership.

LC and HB models use very different statistical algorithms to produce the final model parameters, and in many cases the final results are similar. This author has estimated both LC and HB choice models using the same source data and found similar patterns of responses.

In general, HB methods enable researchers to investigate more complex decision-making processes. For example, a recent application (Allenby and Gilbride, 2004) applies an HB model with two decision-making stages. First, consumers use a screening process to decide which products to consider. Second, consumers make a purchase decision among the products that are considered. This HB model not only delivers relative preferences for the various product features, but also estimates customer-level threshold values for price and feature functionality that must be exceeded in order for a product to be considered. As you can see from this example, HB gives sophisticated researchers extreme flexibility to try out new models of consumer behavior.

Segment- and customer-level models have enabled companies to:

- develop new products and services for targeted sub-groups of the total population (based on customer-level model parameters);
- improve retention and acquisition campaigns by targeting segments or individuals that exhibit high preferences for particular product features (based on customer-level model parameters);
- test more complete and complex models of purchase decision making.

Calibration of choice models

With really new products – that is, new concepts yet to

be introduced to category buyers – choice models based on survey data usually will produce biased results. For example, placing a new product into an existing competitive set can produce a predicted market share that is too low. On the other hand, exposing a new product concept to respondents before showing choice scenarios will almost always produce a predicted market share that is too high.

For existing products, price and feature elasticities can be biased if the survey questionnaire's choice scenarios provide too much or too little information relative to real market scenarios or omit the impact on market choices of busy lifestyles and attitudes towards change.

Choice models can be calibrated to reduce bias in model predictions. The mathematics behind calibration of choice models can be explained in terms of the random utility model – the most used utility specification employed by practitioners of marketing research. The random utility model assumes that total utility (attractiveness of a product in terms of its attributes) is the sum of a measurable component (systematic utility) and a random component (random utility).

Total Utility of Brand A = Systematic Utility + Random Utility

In their simplest form, choice models specify systematic utility to be a sum of part-worth utilities (worth of each part of the product) minus the worth of the money required to purchase. For example, the total utility for a $2 bottle of Heinz ketchup would be the sum of part-worth utilities for brand name, type of bottle and size of bottle minus the worth of $2.

Systematic Utility = Part Worth of Heinz Brand + Part Worth of Glass + Part Worth of 14 oz. - Part Worth of $2

When using survey responses to estimate part-worth utilities, utilities may be biased. In order to reduce or eliminate bias that causes inaccurate predictions, researchers can calibrate choice models by adjusting utilities to better predict actual market choices.

While all serious practitioners acknowledge that choice models can produce market shares and price and feature responses that differ substantially from those of actual markets, different calibration solutions have been implemented.

Traditional calibration solutions include:

• Don't calibrate, but use the choice model results as valuable inputs for strategic and tactical decision making.

• Calibrate brand part-worth. Adjust part-worth utilities for brands to force a choice model to produce market shares from an external source: for example, scanner data or a forecast.

• Rescale price or feature part-worth utilities. Proportionately rescale price and feature part-worth utilities based on the relative variability of random utility from survey responses vs. actual market choices.

• Calibrate brand part-worth and rescale price or feature part-worth utilities. Not only adjust brand utilities but also rescale price and feature utilities.

Several new solutions are being investigated in academic and business circles to improve choice model calibration. First, recent research on rescaling of price and feature utilities includes very detailed comparison of survey choice models with household scanner data (Renkin, Rogers and Huber 2004). This research has focused on how much to rescale price utilities so as to minimize differences between survey choice model and household scanner data model predictions.

A new area of research that offers promise is the use of point-of-sale survey tasks that give respondents an incentive to state their true willingness to pay (Wertenbroch and Skiera, 2002). Information about respondents' true willingness to pay can be used to simulate the slope of a demand curve and then rescale price utilities in survey-based choice models.

Based on personal experience, market share predictions for really new products can be greatly improved by incorporating additional survey responses. For example, survey responses that measure positive attitudes about a new brand or product concept statement can be combined with choice model simulations to deliver more reliable first-year market predictions. Further research should be done to validate this approach.

Finally, laboratory experiments have been proposed (Allenby et. al., 2005) to understand the amount of adjustment of brand, price and feature utilities for different types of customers, bringing calibration to the individual customer level.

All of these calibration approaches have as their goal to increase the accuracy and reliability of market share and revenue predictions from choice models.

Implications for marketing researchers

Recent advances can reduce survey length for choice modeling research, increase ROI for target marketing programs and deliver more accurate market simulators to measure bottom-line revenue impacts. These benefits can be realized even for complicated products with many attributes.

Reduced survey length and increased ability to handle complex products results from using improved experimental design software and partial profile designs.

The increased ROI in target marketing programs results from using hierarchical Bayes and latent class choice models to develop individual respondent-level choice models that predict responses to promotions. These individual- or customer-level models can themselves be modeled using traditional database or data mining approaches to populate an internal customer database, and can subsequently be used for targeting individual customers.

Calibrated market simulators that incorporate individual-respondent part-worth utilities, aggregated to market outcomes and properly calibrated, can improve the ability to predict bottom-line revenue impacts of product line extensions and restages. | Q

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By David Neubert

Don't slot me:
the power of verbatims

Multiple-choice surveys are designed for easy quantification to facilitate analysis and graphical presentation of results. In addition, they are designed to slot respondents based on preselected focal parameters. For example, if the interest is on product taste, questions will focus on a predetermined set of comparisons ("Which did you like better, A or B?") or on a predetermined set of descriptors (sweet, sour, bitter). These questions miss any interest outside of the given descriptors (has a bite, like saccharine, vinegary) and will miss additional attitude influencers (looks oily, feels pasty).

In addition, multiple choice surveys design a framework of questions to work in a box manner, starting with a general question and successively narrowing the question focus until the response is direct and pointed. Therefore, these surveys are always biased with leading questions based on the predetermined focal elements. Additionally, many of these surveys are impractically lengthy.

Until recently, open-ended questions (verbatims) that ask the respondent to express their opinion were difficult to quantify. Most verbatim analysis has been done by slotting the respondents into predetermined categories or by doing a quick read, establishing categories based on the initial perusal of the responses, and bucketing the respondents based on these categories.

Now new technologies in mining text built on linguistic and statistical methods of analysis can extract specific interests and group interests based on principle linguistic components and word/phrase relationships (collocations). Market researchers can take advantage of these tools to mine verbatims and deliver analyses that give clients the power to explore and discover elements beyond the pre-determined slots.

Customers want to tell you what they think

Radio talk shows, TV reality shows - people love to talk and we love to listen. It's human nature. People want to express themselves. They want to be heard. Most customers want to voice their opinion and most clients want to get "voice of the customer" responses. Indeed, direct, pointed, and passionate responses are the stuff that product developers, account team managers and post-sales support staff crave.

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Principle component analysis examines the essential makeup of verbatims and what natural buckets form from adjectives and adverbs, nouns, verbs and specific emotive words and sensory descriptors. Non-contextual words (i.e., a, an, and, the, these, those) are removed from the verbatims, creating a list of contextual words, along with frequency distributions and collocation relationships. Contextual words can then be sorted by product names, descriptors, sensory details, motivations, actions and by any number of other categories.

Collocation analysis examines the major contextual words and phrases to see what words and phrases are

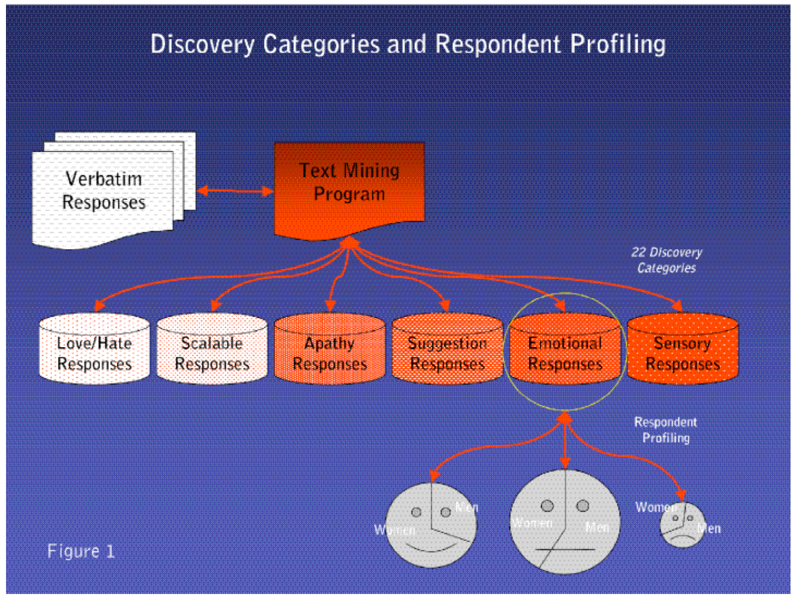

Figure 1

associated with or are neighboring the terms of interest. For example, which descriptors do respondents use to refer to a specific product? A table showing specific descriptors (and descriptor groupings) can be generated for each product. This analysis is extremely effective in determining critical elements associated with each specific area of interest. In addition, products and suggestion collocations can be listed by finding products that are associated with suggestion flags like "could you," "would you," you should," "can you," "I need…" This can be extremely useful in building customer relations and feedback to low-level product and service managers.

Finding attitude and intent components

Both principle components and collocation analysis let the verbatims speak to you and form the foundation for determining respondent attitude and intent. Attitude describes a feeling whereas intent describes movement and acceleration. For example, "I like your product and might buy it" vs. "I love your product and we will budget for it." The word "like" vs. "love" demonstrates attitudinal differences and the words "might buy" vs. "we will budget for it" demonstrates differences in intent.

By comparing principle components and collocation analysis with demographic information, verbatims can give groupings and profiles of the respondents (see Figure 1). For example, if we examine taste as a principle component, and determine specific groupings as dictated by collocation analysis (e.g., Group 1 – bitter, sour, acidic, tart; Group 2 – sweet, sugary, syrupy), we can compare this information to determine if there is any relationship between Group 1 and various demographic variables (e.g., adults prefer Group 1 and kids prefer Group 2).

The valuable specific demographic relationships to responses provided by this important extension of verbatim analysis can help your clients focus their marketing budgets.

Building strategic influences

Verbatims can be used to build strategic value for clients. Marketing and sales, product development, post sales support and many other areas can benefit from verbatim analysis. Verbatims can even build an important foundation for communication between low-level managers and customers – moving your CRM programs from "customer listening" into "customer-manager communications." When automated, this tool offers an even stronger ROI, with market research taking an integrated role in strategy planning and management. |Q


Competitive secrets revealed.
"We compete globally by conducting thousands of telephone, online, and personal interviews, worldwide, in days."
"The ability to monitor brand health with the integrated Net-MR platform is a huge competitive advantage."
"We saved millions in hardware and software development by switching to Net-MR on an ASP basis."
Founder/President
Regional MR Firm
Brand Manager
Consumer Package Goods Manufacturer
Vice President
Global Market Research Firm
TOP SECRET
We won't reveal their identities, just their secret:
Net-MR™ Software.
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Versatile support for every research task, online. Sophisticated multi-mode data collection is seamlessly integrated with project management, panel management, analysis, and reporting.
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> customer satisfaction research

By Anthony Pichnarcik

It's automated and controlled

Real-time customer feedback system drives enterprise-wide action at Honeywell

Automation and Control Solutions (ACS), an $8 billion unit of Honeywell, Phoenix, Ariz., has 40,000 employees who apply sensing and control expertise to create safer, more comfortable and productive environments. My team, global voice of customer (VOC), gathers intelligence that helps ACS better understand buyer behavior, and facilitates and drives action responding to that intelligence. Specific objectives are:

• Pre-sales: to understand brand awareness, perception and vendor selection criteria, to gain access to and win more business opportunities and revenue.

• Post-sales: to identify continuous improvement opportunities in ACS project, installation and support services, and facilitate and drive those improvements, to enhance customer satisfaction, loyalty, recurring revenues, and profits.

Before 2003, our customer intelligence was only rudimentary. Until that time, the VOC team used telephone surveys and static reports to obtain customer intelligence. This approach had severe limitations: 1) phone surveys were labor-intensive and expensive; 2) tying reports back to customers for follow-up was difficult and time-consuming; 3) reports arrived many weeks after surveys were conducted; and 4) the VOC team could neither track nor manage follow-up. Without a coordinated, systematic and timely way to link customer feedback to mainstream ACS operations, we were limited in our ability to respond to data showing that service cancellations were increasing and profitability was suffering.

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To address these concerns, from 2003 to the present, we have partnered with CustomerSat, Inc., a Mountain View, Calif., research firm, to institute six online feedback programs. Three of these feedback programs are continuous and event-driven for strategic customer touch points: global win/loss, project installation, and service and support. Three are periodic: customer value analysis (CVA) and brand awareness surveys of our entire market, and a customer survey of preferred communications channels.

These programs correspond to each of the five stages of our customers' experience with ACS (depicted in Figure 1): awareness of and perceptions of our brand and our competitive positioning (stage 1); why customers chose ACS or our competitors (stage 2); the satisfaction of our customers with all aspects of our solutions and services (stages 3 and 4); and why customers chose to continue, expand, or discontinue service (stage 5).

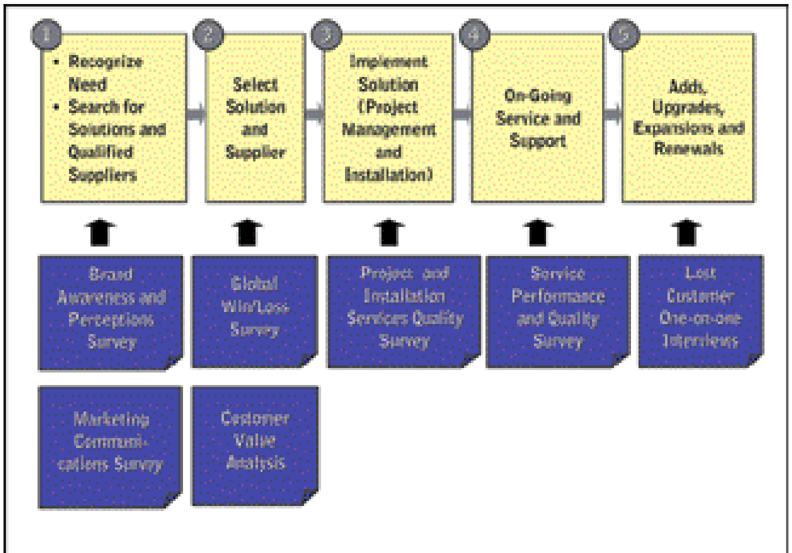
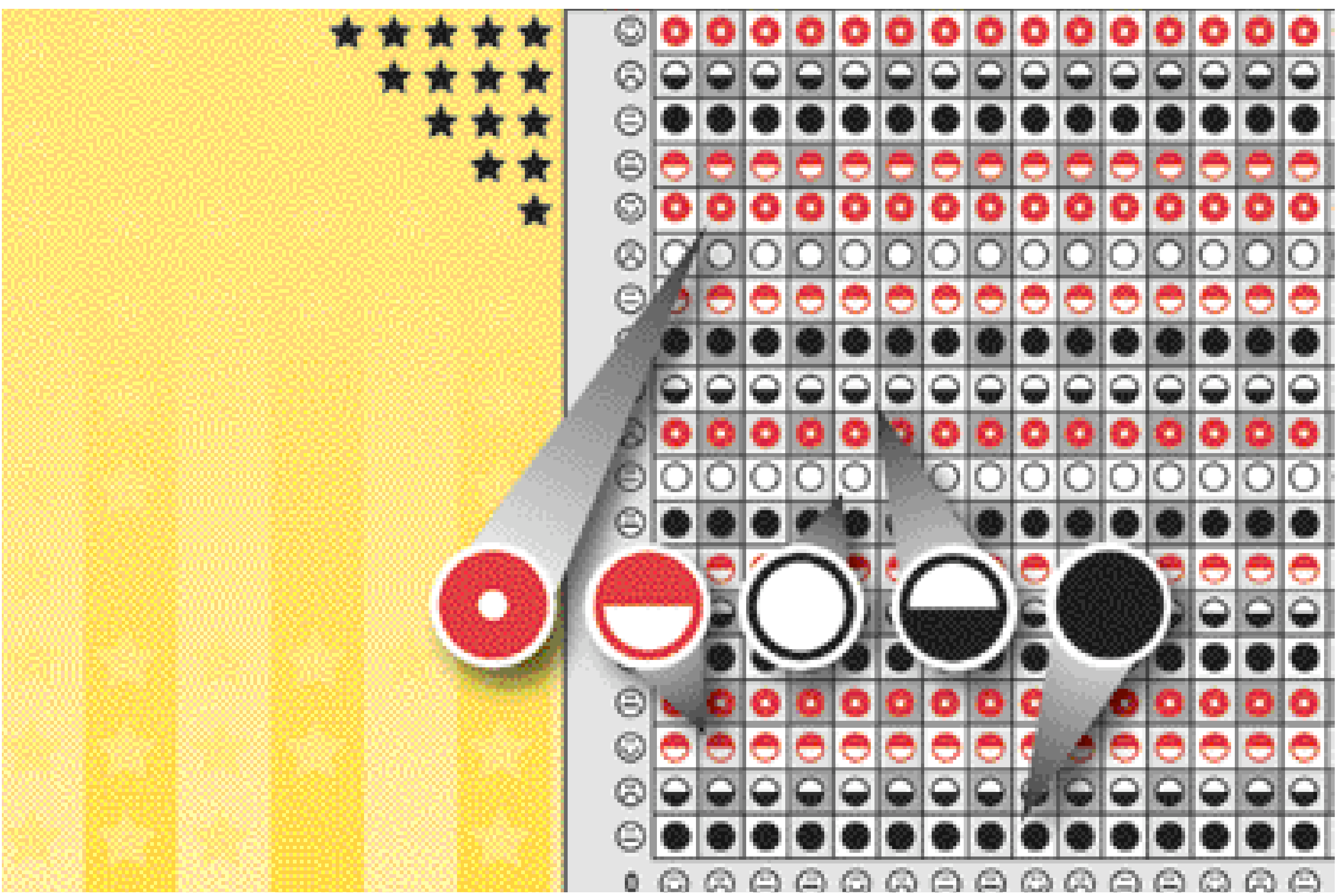


Figure 1

Taking our customer feedback program online was critical:

• Online data collection, dashboards, alerts and case management let us distribute intelligence to the right ACS people in real-time, let them act on it immediately, and most



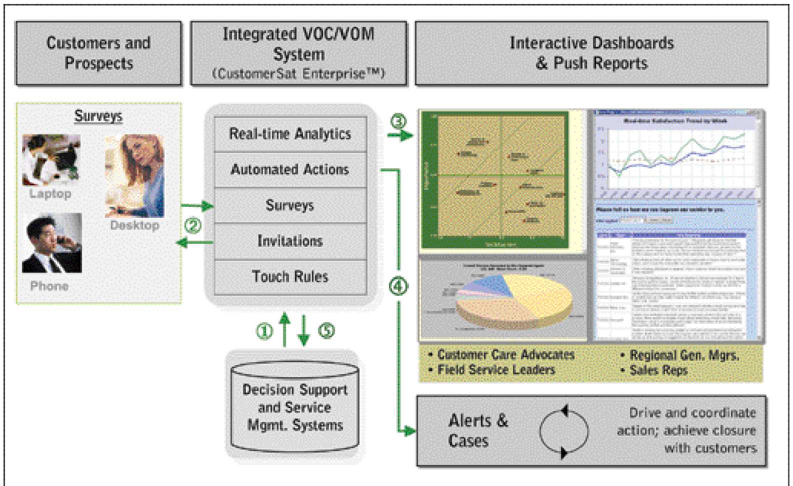


Figure 2a

ACS VOC/VOM system drives and coordinates action. 1) Customer sample is exported from decision support and service management systems. Touch rules protect customers from being over-surveyed. 2) E-mail invitations are sent; respondents click on unique URLs to complete surveys. Non-respondents escalated to phone center. 3) ACS-wide interactive dashboards are updated in real-time; push-reports periodically e-mail current status. 4) Real-time alerts e-mailed, and cases opened, based on satisfaction scores and customer tier (surrogate for value), assigned to case managers and case teams based on region and tier. Cases must be closed before deadline or else escalated. 5) Decision support and service management systems are updated with customer data.

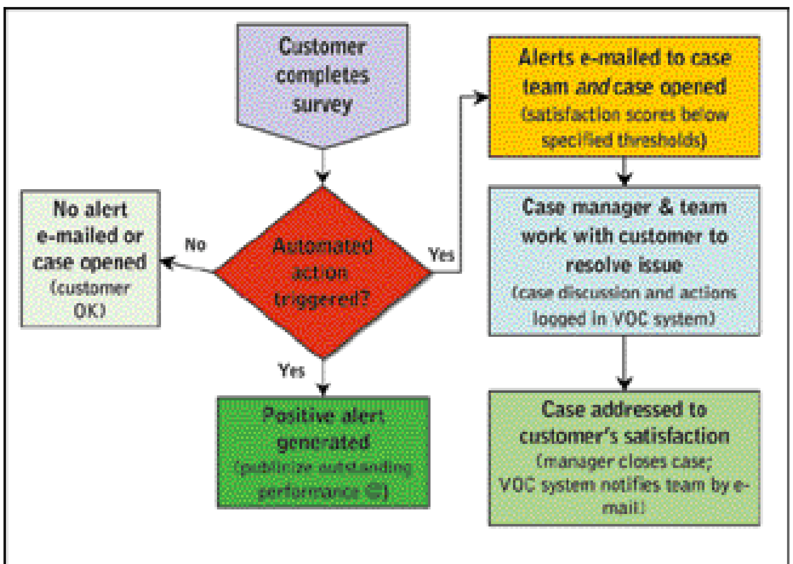


Figure 2b

Survey responses generate alerts and automated case management in the CustomerSat Enterprise system to facilitate timely follow-up and closure on issues.

importantly, track and manage follow-up actions.

• Our customers include building owners, facilities managers and engineering contractors. Some are at plants and construction sites during the day and are unavailable to respond to phone surveys. Conversely, others prefer phone. To accommodate everyone, our online surveys automatically escalate to call centers for non-respondents to e-mail invitations and for those without e-mail.

• Since the phone interviewers enter responses into the same online surveys to which we invite other respondents by e-mail, we are no longer tied to one call center supplier, giving us new vendor independence and negotiating leverage. The balance of power has shifted from vendor to ACS.

• Our online database enables or facilitates our applying sampling rules across surveys and respondents, aggregating results across surveys, and better predicting customer retention.

• Online is less expensive, both to gather data and disseminate it, than phone.

We now provide more than 200 ACS professionals with dashboards, automatic action alerts, and cases driven by survey feedback (Figures 2a and 2b).

After using this customer feedback system for six months, cancellations were 40 percent lower in a pilot group that received surveys and follow-up as a result of alerts and cases, than in a control group that did not, preserving several million dollars in service contract revenue. ROI was over 100 percent/yr. because online feedback costs are small, while assets leveraged – the entire customer-facing organization – are large.

Implementation

In mid-2003, we phone interviewed over a hundred ACS customers to 1) identify key loyalty metrics such as percent of preventative maintenance of HVAC systems completed on-schedule, responsiveness, technical expertise, etc., for each of our business processes; and 2) determine what quantitative level of service for each metric customers considered excellent, satisfactory, acceptable, and poor. These definitions were used to calibrate and link survey results to operational metrics. In the future, we plan to conduct these pre-survey interviews via moderated online discussions, allowing more customers to participate and enabling customers to interact with each other.

Also in 2003, we conducted two large-scale, blind (Honeywell not identified) market-wide online surveys. A brand awareness study told us the top attributes customers look for when selecting a service provider. A

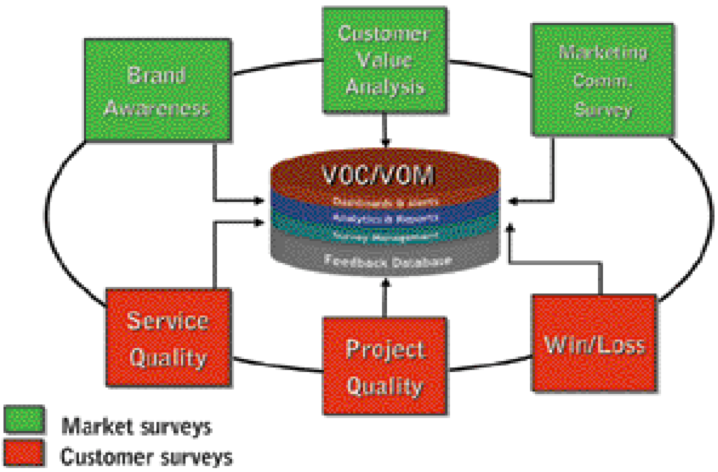


Figure 3

Our online feedback database provides a central repository for VOC/VOM data that improves analysis and insight; enables cross-survey sampling and invitation control; and cross-survey analytics. A planned service contract retention survey is a "win-loss" style survey for existing customers upon renewal or cancellation of a service contract.

customer value analysis survey confirmed that findings of the telephone interviews do apply to our entire market. To help design the CVA study, we engaged Bradley Gale as consultant.

These studies provided the foundation for an integrated system of six surveys (Figure 3).

For the brand awareness and CVA surveys, a sample was obtained from both internal sources and external sample providers. For the event-based surveys and customer communications survey, a sample is drawn from sales and service tracking systems. As of June 2005, over 12,000 responses have been received across all surveys; response rates average 30 percent.

All six surveys drive key ACS actions and insights (Figure 4). For example, as a result of the CVA study, we 1) adjusted some of our targets for customer-facing metrics to comply with thresholds that customers deemed to be "excellent" performance; 2) began tracking certain metrics for the first time; and 3) reviewed service area coverage to ensure that emergency response times could be met.

Through their dashboards, managers can "pull" information from the system 24/7 to use in strategic planning, presentations, and account reviews. In addition, my team and I report to the organization quarterly, reviewing survey findings with executive management, regional leadership, and individual regions. With offline feedback and reporting, my group was isolated. With online feedback systems, we have become integral to and facilitate business operations.

On-Line Survey	Primary Beneficiaries			Representative Insights Gained
	Mktg	Sales	Svc	
Brand Awareness	•			1. Awareness of Honeywell compared to major competitors in our markets of interest. 2. Consumers familiarity with and perception of the Honeywell brand 3. Customer preference among suppliers and relative strengths & weaknesses.
Customer Value Analysis (CVA)	•	•	•	1. Measurement of ACS Price/Performance position relative to key competitors (value maps) 2. The relative value of improving our service offering. 3. How customer measure service quality and supplier performance
Service & Support - customer satisfaction & loyalty	•	•	•	1. Near real-time measures of customer sat, loyalty & performance by attribute (CTQs) 2. Key predictors of customer loyalty 3. Identification and action alerts for "at-risk" customers, case history & tracking. 4. Comparisons of regional performance - best practices s
Project & Installation Services - customer satisfaction & loyalty	•	•	•	1. Near real-time measures of customer sat, loyalty and performance by attribute (CTQs) 2. Key predictors of customer loyalty 3. Identification and action alerts for "at-risk" customers, case history & tracking. 4. Comparisons of regional performance - best practices
Global Win / Loss	•	•		1. In-depth and objective understanding of why we win and lose customers 2. Competitive pricing strategies and data 3. Key criteria for how customers select providers 4. Honeywell's competitive position
Customer Communications	•	•		1. Customers' preferred channels & info sources throughout the purchase process 2. Frequency and use of information sources 3. Impact of information sources on purchase decision

CTQ = Critical to Quality (Six Sigma)

Figure 4: Selected Insights and Primary Beneficiaries by Survey

Innovative approach

Our approach to obtaining ongoing customer feedback is innovative in several ways:

• Integrated e-mail and phone. We integrate self-administered e-mail and interviewer-assisted phone surveys in two ways. First, our system recognizes whether a customer is able or has requested to be surveyed online via e-mail or by phone, and then automatically drives the customer record to the e-mail invitation queue or to a phone interviewer's queue with auto-dialer support. Second, if a customer does not respond to an e-mail invitation and reminder to a survey, the record is escalated to the phone interviewer queue. This integrated approach has given us the highest overall response rates by the most economical means. A flag available for crosstabbing tracks whether the survey was conducted via e-mail or phone. The mix is gradually shifting (towards e-mail), so to eliminate bias, we report e-mail and phone mean scores separately. For the service and support survey, for example, the mean score for overall satisfaction by telephone was significantly higher than for surveys conducted by e-mail. The differences are significant at the 90 percent confidence levels.

• Call center productivity, speed, and independence. 1) Since our outsourced call centers access our online surveys from their interviewers' PCs, no CATI software or programming/set-up is required at the call centers – just Internet access. The call centers become productive faster, and we don't have to have two separate systems for e-mail and phone. 2) With normal CATI, results are at least a day old; with online surveys, survey results are available within minutes of interviewers keying responses in. 3) Our surveys are now easily transportable from call center to call center, which helps us manage our suppliers. We now have the flexibility to use hundreds of different phone center suppliers, if we wished, rather than a select few.

• "Bounce" processing. When sending out e-mail invitations, we receive large volumes of "bounced" e-mail messages: out of office, mailbox full, user unknown, etc. Some of these messages are critical for updating e-mail databases; others can be ignored. Managing them is labor-intensive and time-consuming. CustomerSat provides the VOC team an automated bounce e-mail manager that receives, interprets, categorizes and files these bounced e-mail messages. Parsing technology sorts messages of different types into separate e-mail boxes that we can access directly. This system eliminates labor-intensive tasks, improving productivity and enhancing the quality of service the VOC team delivers to internal customers.

• Customer "touch" rules. With multiple surveys running concurrently, we need controls to protect cus-

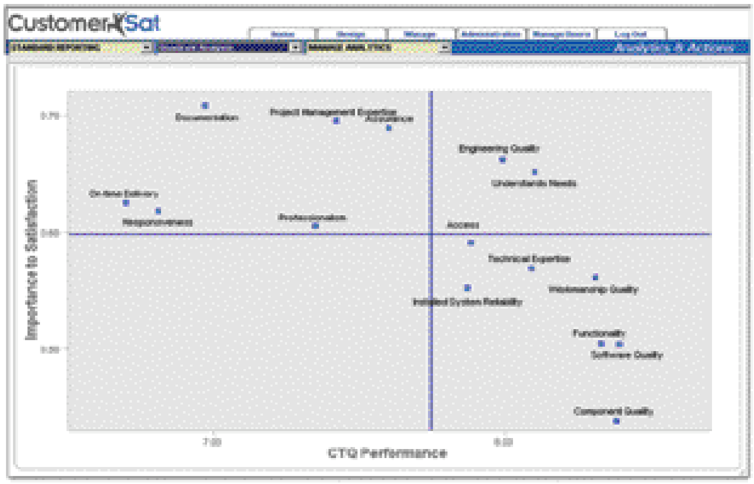


Figure 5

Online quadrant charts help set priorities. They use correlation analysis between each performance metric and a desired business outcome, such as overall satisfaction or likelihood to recommend, to calculate importance. These charts use the combination of (low) performance and (high) importance to prioritize action. Here, on-time delivery is a top priority. Customer care advocates and field service leaders apply filters to pinpoint priorities for different customer and market segments. (Data point labels disguised.)

tomers from being over-surveyed. CustomerSat implemented survey-specific and global invitation rules that ensured, for example, that certain customers would receive no more than one invitation to any or all surveys more frequently than once every 180 days. Doing so helps preserve the goodwill of our customers and increases our response rates overall.

Driving action

Our online survey system directly drives and coordinates ACS-wide action through Web browser-based analytics dashboards, real-time action alerts, and feedback-driven case management.

• Information-rich dashboards. Online crosstabs, trend lines, correlations (Figure 5), open-ended suggestions, significance testing, positioning charts (Figure 6), and other statistics are generated and updated in real-time through Web-browser-based dashboards tailored to each of the 200+ ACS sales, service, and account management professionals. Filter tools allow users to slice-and-dice results any way desired. A high degree of coordination and alignment arises when so many of our professionals are armed with real-time data feeds.

Online analytics allow drill-down from ratings in frequency distributions to summaries of responses comprising those ratings to detailed individual scores and open-ended responses. Results can be analyzed by region, branch office, field service leader, or product line. Decision-makers can examine factors that affect customer satisfaction and loyalty on global, regional, state and local levels.

• Alerts. When a customer satisfaction score falls below thresholds that we specify, or if the customer asks to be contacted, the system does two things. First, a detailed action alert is automatically e-mailed to the Blackberry, laptop, or desktop PC of people responsible for that customer, including field service leaders, customer care advocates, sales representatives, and regional general managers. Alerts highlight the question response(s) that triggered them, and contain links allowing recipients to directly view the entire survey response and associated respondent-describing fields (such as customer name, address, phone, and contract size) for contacting the customer, if appropriate.

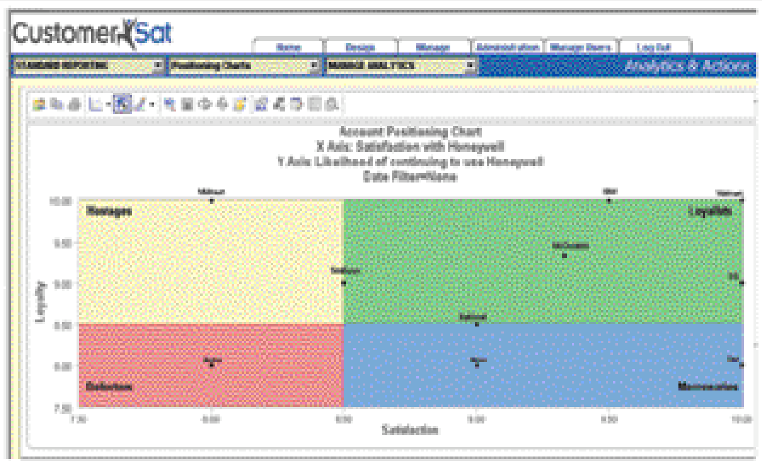


Figure 6

Online positioning charts let us: position customers (used here), products and industries based on satisfaction and loyalty; see at a glance which fall into which satisfaction-loyalty quadrants; and customize strategies for managing customers, industries or products by quadrant. Inspired by satisfaction-loyalty charts from *The Service Profit Chain*, by Harvard Business School professors Heskett, Sasser and Schlesinger, positioning charts let us choose any rating questions as the X- and Y-axes, any question or field as the data points, and apply any desired filter to the charts as well. (Data point labels disguised.)

• Cases. Second, the system automatically opens cases and, using business rules, assigns them to case managers and teams. Online case management enables team members to share information and coordinate responsive actions. Case severity and deadline are based on satisfaction scores and in some cases on the customer's "tier," a surrogate for total customer value. The case manager closes the case when the customer concern is addressed. Cases are automatically escalated if not closed before their deadlines. As a result, online feedback directly drives action throughout ACS. In the past, case management has been part of CRM systems that track and manage purchases, inquiries, and other customer behaviors. We see case management as critical to feedback systems that track and manage customer attitudes as well.

To date, over 750 cases have been generated. One example: survey ratings from a government customer receiving HVAC mechanical maintenance from ACS generated an action alert and case. Our customer care advocate (CCA) called the customer to investigate, which led to a face-to-face meeting among the customer, CCA, and field service leader responsible for the account. The meeting resulted in a solution to the initial problem and the opportunity to upgrade the customer's entire system. The case was closed. Rapid response has consequently also generated upgrade revenues.

Measuring ROI

Measuring ROI was critical to ensure ongoing funding and management support. We used two methods:

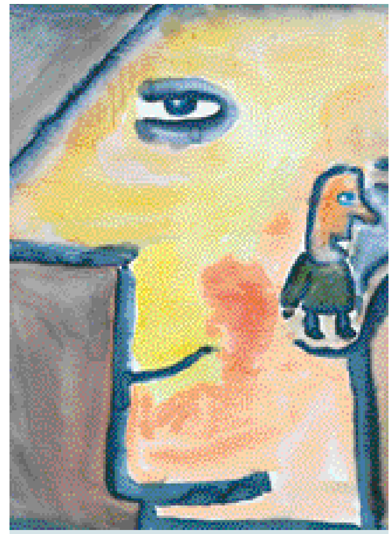
1) A pilot with control group to measure the impact on customer renewals. After six months, cancellations were 40 percent lower in the pilot group that received surveys and follow-up as a result of alerts and cases than in the control group that did not, preserving several million dollars in service contract revenue.

2) A formal ROI calculation in which we modeled revenue as the sum of revenue from new customers won; from existing customers retained; and from customers lost during a six-month period. Online VOC impact was highest on revenues from customers that would otherwise have been lost; next highest for retained customers; and lowest, but still significant, for revenue from new customers, which benefits from improved word-of-mouth and referenceability of existing customers. We estimated changes in each of these revenue components from online feedback, and used NPV of discounted cash flows to rigorously calculate ROI, which was over 100 percent/yr. The reason: online feedback costs are small, while assets leveraged – our entire customer-facing organization – are large.

These two measures of success provided a strong validation of our online feedback approach. | Q

customer satisfaction research

Voice lessons



By Randy Brandt

To gain maximum insight and decision support from marketing research, CRM, and other sources of customer and market data, an organization must develop an integrated voice-of-the-customer (VOC) architecture. Properly designed and implemented, an integrated VOC architecture enables an organization to: deploy "listening posts" for all key touch points, elements and episodes of the total customer experience; integrate and analyze the data from these listening posts in order to develop a comprehensive understanding of the total customer experience; and link critical aspects of the total customer experience to: a) financial and other "downstream" business results; and b) internal processes, human resource, and other "upstream" enablers.

Building an integrated VOC architecture means more than just gathering data about customer experiences and relationships. It also requires:

• organizing these data in a manner which maximizes their comparability and complementarity;

• defining how customer experiences and relationships are linked to key financial and other business results; and

• establishing how the management of operations and employees is connected to and has a direct impact on key elements of customer experiences and relationships.

Organizing voice-of-the-customer data

Initially and periodically throughout the research process, many organizations conduct exploratory focus groups to ensure that all critical elements of the total customer experience have been identified. The inventory of customer experience elements produced by this exploratory process typically is used as a starting point for designing or updating survey attribute rating questions. However, there is no reason to stop there. The same inventory may be used to capture and organize other VOC data such as customer verbatims from inbound channels of communication (e.g., comment cards, e-mails, telephone calls, etc.), survey ratings, open-ended feedback from customer contact employees, and observations made by mystery shoppers. After all, if the discovery process has fulfilled its objective, there should be few, if any, VOC data points that cannot be aligned with one of the cate-

Implementing an integrated voice-of-the-customer architecture

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gories in the master inventory of customer experience elements. (This is most likely to be true in the case of verbatims or open-ended statements referring to relatively specific or granular aspects of the customer experience. Classifying more general or vague statements may be more difficult, but these types of statements usually do not furnish much insight anyway, unless it is possible to drill down into them in order to clarify what the customer means.)

Once all VOC data are organized within these common categories or attributes, such data are rendered comparable, and it is possible to determine if conclusions drawn from one data source are supported by findings drawn from the other sources.

To illustrate, suppose that a hotel chain has assembled the following types of data:

• unfavorable comments and complaints from in-room comment cards;

• attribute ratings from guest satisfaction surveys;

• open-ended statements from front-desk and other guest-contact employees.

When a common set of categories or attributes has been used to organize the data from these three sources, it is possible to integrate these data using a technique called convergence mapping.

The convergence map illustrated in Figure 1 shows how comparable data from comment cards and guest surveys may be integrated. An attempt has been made to position each attribute of the guest experience using the relative frequency of complaints from comment cards as coordinates for the vertical axis, and the percentage of dissatisfied ratings from guest surveys as coordinates for the horizontal axis.

Figure 1
Convergence Map of Guest Comment Card and Survey Data

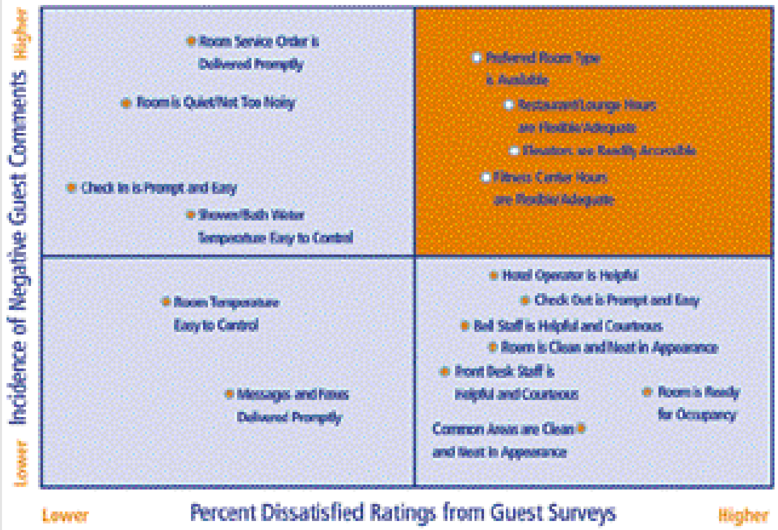


Figure 1 draws attention to the attributes in the upper right-hand quadrant (highlighted orange). Results suggest that these attributes should be targeted for improvement because:

• a relatively high proportion of all complaints from comment cards pertain to these attributes; and

• the percentage of dissatisfied ratings from guest surveys is also relatively high for each of these attributes.

In other words, more than one data source leads to the same conclusion regarding which attributes are key sources of customer dissatisfaction.

Similar convergence maps would be constructed in order to integrate feedback from guest contact employees with both comment card and guest survey data. To the extent that comparisons among these three data sources consistently point to the same subset of attributes, managers may be increasingly confident that these attributes should be the targets of improvement and innovation initiatives. If attribute importance information is available, it may be juxtaposed on the convergence map to facilitate further prioritization of issues for improvement. In the end, highest priority would be given to those attributes that are most important or have the greatest impact on overall customer satisfaction and loyalty and appear to be in need of improvement based on problem or dissatisfaction data obtained from multiple VOC sources.

The key benefit of integrating comparable VOC data is increased managerial confidence in the accuracy and validity of marketing insights. That is, rather than having to rely on results from a single data source (none of which is without its limitations or potential biases), decision makers are able to corroborate findings and conclusions using multiple sources – sort of like getting a second or third "opinion" before investing organizational resources to improve customer experiences and relationships.

Integrating the voice of the customer with other business process and performance metrics

There is a general belief among many marketers that individual experiences or "moments of truth" contribute to the cumulative perceptions a customer formulates about a brand or firm. These perceptions, in turn, are thought to determine the customer's overall brand preference or loyalty. To the extent that a customer is loyal to a brand, he or she is more likely to repurchase or buy different products or services offered by the brand, and to recommend the brand to others. Ultimately, such repurchase and referral behavior directly impacts financial and other "downstream" business results.

Most managers have a mental picture of the road to business results that is consistent with the above description. However it is not often documented or shared organization-wide. To ensure that such organizational knowledge is captured and leveraged, another key step in implementing an integrated VOC architecture is creation of a business blueprint that links the customer experience to other business process and performance metrics. Generally speaking, the blueprinting process should be guided by the following basic questions:

• What customer purchase and related behaviors generate top-line revenue and other financial or business outcomes?

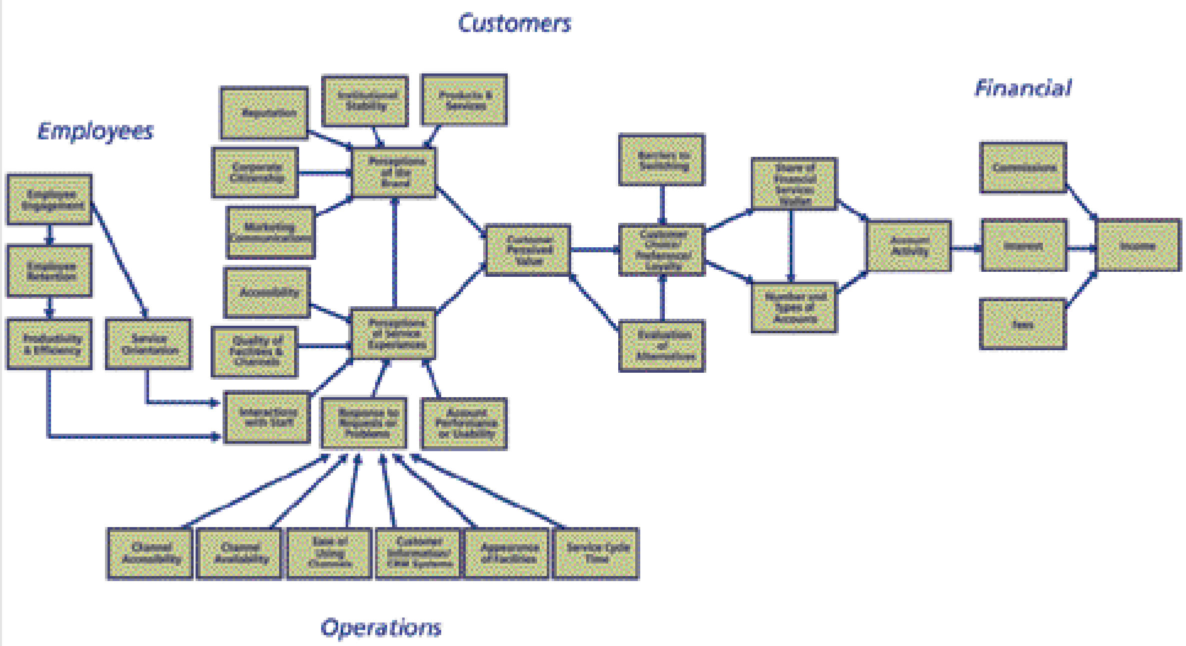
• How does the customer experience relate to and impact customer purchase and related behaviors? What are the experiential and attitudinal drivers of such customer behaviors?

• What are the employee and/or partner enablers or means of addressing the drivers of customer behaviors?

• What are the operational and business process enablers or means of addressing the drivers of customer behaviors?

In essence, focusing the blueprinting process on the preceding questions yields a customer-centric value chain analysis. The blueprint furnishes a detailed illustration of the hypothesized relationships among key operational, product, employee and customer elements which, if they are managed effectively, lead to desired

Figure 2
Hypothetical Business Blueprint for Retail Banking



financial and other business outcomes.

Typically, managers from marketing, finance, operations and human resources each have detailed knowledge about a specific part of the business. For this reason, blueprinting usually is best performed by a cross-functional team of managers and data stewards who can pool and document their individual perspectives in order to produce the most comprehensive and panoramic view of the business enterprise.

A hypothetical blueprint for retail banking is illustrated in Figure 2. For this particular bank, it would provide the basis for identifying the operational, employee, customer and financial variables for which data should be captured. In addition, the blueprint suggests how these variables are related, which furnishes a basis and direction for how the data should be integrated and analyzed.

The benefit of blueprint development extends beyond providing guidance in integrating customer experience with other business process and performance metrics. As importantly, the blueprint facilitates managerial consensus regarding how to align people and processes in order to achieve desired business results by "doing the right things well" in the eyes of customers. This will prove to be particularly valuable when the time comes to take actions to address the customer-driven issues that have been targeted for improvement.

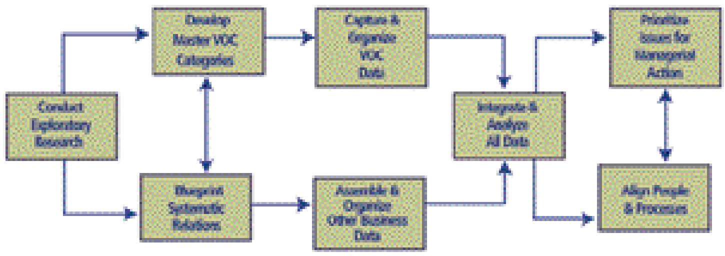
A recommended approach

In most cases, an integrated VOC architecture will be comprised of multiple sources of customer experience data. In addition, these customer experience data will have connections to financial and related downstream business performance metrics, as well as process, operational, human resource and related upstream data.

A recommended approach to implementing an integrated VOC architecture, illustrated in Figure 3, incorporates and basically flows from completion of the activities described earlier.

The initial step in the process requires completion of an exploratory research phase in which review of

Figure 3
A Process of Developing and Implementing an Integrated VOC Architecture



secondary data is supplemented with qualitative research to identify the product, service, cost, relationship and brand image elements that comprise the total customer experience. The exploratory research phase also provides an opportunity to explore the objectives and envisioned applications of the integrated VOC architecture with key stakeholders (i.e., individuals who will sponsor, own, and/or use the VOC process and results).

The exploratory research process should be conducted in a manner that provides inputs required to complete the next two parallel steps. The elements of the total customer experience identified via secondary and exploratory qualitative research are used to create a master category system. This master category system will provide the framework for capturing and organizing all customer experience data. Discussions with key stakeholders should include a blueprinting exercise that documents systematic relationships among operational, human resource, customer and financial elements of the business enterprise. This blueprint will furnish a basis for assembling and organizing an appropriate mix of VOC and other data that will be the focus of linkage analyses.

Once appropriate data have been captured and organized, the next step is the integration and analysis of these data. Data integration and analysis should center on two related objectives:

• developing convergent intelligence that supports identification and prioritization of customer-driven issues for managerial action; and

• linking VOC data to both upstream and downstream elements of the business enterprise blueprint in order to furnish insights that facilitate alignment of people and processes to achieve desired business results.

Designing and implementing an integrated VOC architecture using the preceding approach yields a variety of benefits, enabling an organization to:

• make maximum use of available customer experience data - multiple data sources work in a complementary, rather than separate fashion;

• increase managerial confidence in the accuracy of conclusions drawn from these data;

• demonstrate the business consequences of effective (or ineffective) management of customer experiences and relationships;

• identify and improve effectiveness in managing the operational and employee enablers of positive customer experiences and relationships.

Increase effectiveness

An organization cannot be truly customer-driven in the absence of an integrated VOC architecture. Gathering and analyzing data on customer experiences and relationships is a necessary, but not sufficient condition to ensure implementation of such an architecture. In addition, an organization must integrate all VOC data using a common set of categories representing all key aspects of the total customer experience and establish the relevance of VOC data to other key business process and performance metrics.

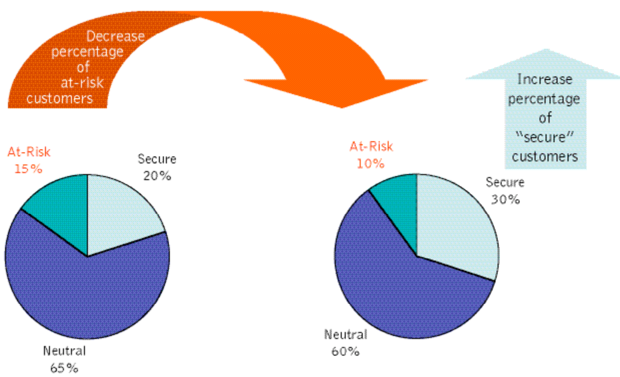
By implementing an integrated VOC architecture, an organization can increase its effectiveness in defining customer-driven priorities for managerial action and aligning people and processes with these customer-driven priorities to achieve desired business results. | Q

You have to measure it to avoid it

By Al Fitzgerald

The typical goal of satisfaction and loyalty research has been to identify and track the percentage of a brand's loyal customers with the hope of increasing the percentage of secure customers and reducing the percentage of at-risk customers. This is usually done by asking questions in three key areas: 1) overall satisfaction, 2) likelihood to repurchase and 3) likelihood to recommend. Secure customers are defined as those that report high scores on likelihood to recommend, likelihood to repurchase, and overall satisfaction. Neutral customers give middle ratings

Figure 1: Typical objective of loyalty research



Dissatisfaction surveys may be better than satisfaction surveys

on at least some of the three questions. At-risk customers give a low rating on any of the questions. The strategy behind this has been to identify and track the percentage of customers who fall into each loyalty category with the hope of increasing the percentage of secure customers and reducing the percentage of at-risk customers.

It is a major assumption that a secure customer will continue to buy, or at least have a strong affinity to, the brand even if a competitor lowers price or improves features.

The typical definition of a secure customer is flawed
High ratings on likelihood to recommend, repurchase, and satisfaction are correlated with loyalty scores – but they do not predict loyal behavior.

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Loyalty is the propensity, in the short term, to continue to purchase a brand even if competitors' products are less expensive, have better availability or have better features. Essentially, true loyalty means that a customer will make an uneconomic decision – they will stand by a brand and continue to purchase it even if it is more expensive or has been passed by technologically or feature-wise.

While many loyalty studies are able to show high correlation coefficients (R-square) with loyalty scores, these do not prove causality. The high R-square stats typically indicate a high correlation – but what is correlated is not necessarily causal. Therefore, while typical loyalty studies are good at predicting loyalty scores they are much poorer at predicting loyal behavior. That is, when a brand's price or feature set becomes temporarily non-competitive, the brand's secure customers buy from the competition. Clearly these secure customers are not very loyal after all.

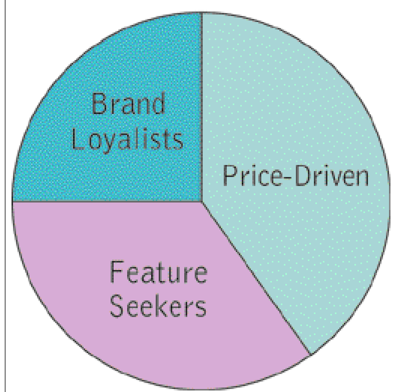
Here is a fictional example: Let's say there is a Mobil gas station near a customer's home. It is very clean and convenient. A customer always buys gas there. He gives this station the highest marks on likelihood to recommend, likelihood to repurchase, and overall satisfaction, typical questions used to assess loyalty. However, if a Texaco station opens across the street and its price is one cent cheaper, this particular customer switches to Texaco!

That is why we need to know more than the standard three questions when assessing satisfaction and loyalty.

What defines true loyalty?

To understand true loyalty, we must understand what motivates a person to buy or use a brand or service. All customers can be segmented into one of the following three groups: price-driven, feature seekers, or brand loyalists (Figure 2).

Figure 2



Each group has its own motivation for purchase:

• Price-driven customers. Their purchases are based on price primarily. They seek a good deal. They are more influenced by price differences than by feature or brand differences in a product.

• Feature seekers. They are driven to buy the "latest and greatest" and differentiate between products based on concrete, tangible features. They are often willing to pay a premium to get a fully-featured product and may be unwilling to compromise for a brand that does not have the specific features they seek.

• Brand loyalists (intangible feature seekers). Often standardize on one brand. These buyers perceive that it is the brand that is important and will delay a purchase if their preferred brand is temporarily unavailable. They are often less price sensitive and will purchase name brands, even at high price premiums. Brand loyalists will classically buy their preferred brand even if the brand is lagging behind competitors on features/service specifications. These buyers believe that their brand will eventually catch up and are not highly influenced by the "latest and greatest" whiz-bang feature.

Only brand loyalists can be loyal to a brand

In our gas station example, we saw that a secure customer who rated the Mobil station high would immediately switch to Texaco if Texaco's price was one cent lower. Why? The customer is price-driven. This customer likes the Mobil station well enough. But when a competitor with acceptable features and lower prices arrives, the price-driven customer switched brands. Price driven customers are not loyal to brands! Likewise, feature seekers are not loyal to brands! Since many early adopters seek out the latest and greatest gadgets, they seek out the best features. If a new product enters the market with an improved feature set, the feature seekers will immediately switch to the brand with the best features. Feature seekers often agree with statements such as "all companies are alike."

Only the brand loyalists are loyal to brands. Why? Brand loyalists actually do seek features, but they seek intangible features. The intangible features of a brand are extremely important to these customers. Often times these intangible features include reliability, compatibility, trust, service and support, perceptions of the firm's financial stability, or that the firm is "an industry leader." Many of these intangible features (which brand connotes) overcome the "FUD factor" (fear, uncertainty and doubt). Essentially, "brand" is a surrogate for a basket of intangible features which are difficult to independently assess. Therefore, these customers rely on the brand's reputation when making purchases.

Know them, retain them

Many firms do not know their customers' loyalty traits and make mistakes when seeking to enhance loyalty. For example, the Mobil station may try to retain its secure customers by planting nicer flowers, having cleaner restrooms or providing more additives in its high-end fuels. However, none of these actions will increase loyalty for our example customer. Instead, Mobil, if it knew that this customer was price-driven, would use these funds more wisely by lowering the price of its fuel. This would make our example customer less likely to switch brands. Some customers will put up with bad service, poor quality or inconvenient hours and continue to purchase long-term. They continue to purchase because these characteristics are less important to them than price or features.

Actions that will retain price-driven customers will be different than actions needed to retain brand loyalists or feature seekers. If a firm were to discover that 10 percent of its customers were unhappy (i.e., low ratings on recommend, repurchase and/or satisfaction) what strategy should it employ? The strategy depends entirely on who is unhappy:

• If the unhappy customers are primarily the price-driven customers, there is much less to worry about because these customers are not loyal anyway and will likely continue to buy as long as the brand maintains a competitive price.

• If the unhappy customers are feature seekers, there is less to worry about unless somehow the product is not delivering a promised feature/service. Remember that feature seekers will switch brands on their next purchase if another brand offers a more attractive feature set. Strategically, a firm should allocate its budget to stay on the cutting edge of features in order to keep feature seekers.

• If the unhappy customers are disproportionately brand loyalists, then it is a more serious problem. Brand loyalists desire the intangible features that brand connotes. If a customer is dissatisfied, it is likely that this results from the brand's inability to deliver on a key intangible feature – such as reliability, compatibility, or service/support. Strategically, it is critical to identify the offending area and make quick corrections to retain these loyal customers.

Dissatisfaction studies, not satisfaction studies

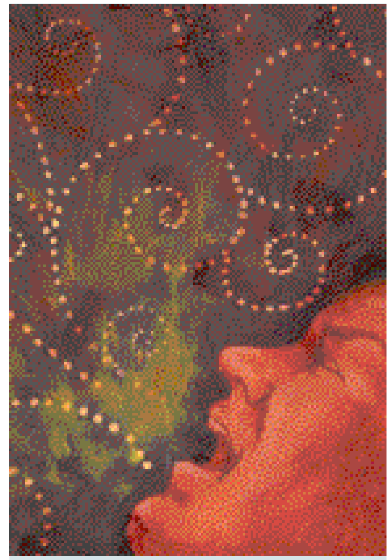
We have seen above that it is very important to understand which type of customer is dissatisfied. But many satisfaction studies survey too few dissatisfied customers to help us make the right decisions!

For example: Let's say a typical satisfaction study lasts 20 minutes with 400 customers surveyed. In a typical study, roughly 10 percent of customers are dissatisfied. The percentage is rarely higher than 10 percent because dissatisfied customers quickly become non-customers and are excluded from future surveys. In this example, we would only speak with 40 unhappy customers and this may not identify all important areas affecting satisfaction.

Instead, we should focus on surveying dissatisfied customers. All studies have a limited budget. Instead of surveying 360 satisfied and only 40 dissatisfied customers, it would be a better use of interviewing dollars to focus on those who are NOT satisfied. We suggest using overall satisfaction as a screening question. We track the percentage who are satisfied, overall, to see if this percentage changes over time. However, we only ask additional questions to those who are dissatisfied. Typically, for the same budget, we can find 250-300 dissatisfied customers rather than 360 satisfied and only 40 dissatisfied. This approach dramatically increases the number of dissatisfied customers who are surveyed. Therefore we gain substantially more detail on how to avoid future dissatisfaction problems. We also are able to understand who is dissatisfied – the brand loyalists, the price-driven or the feature seekers. After all, unless we know who is dissatisfied, we are not able to allocate our limited resources optimally. | Q

customer satisfaction research

What you don't know can hurt you



By Jared Heyman

We've all had this experience: You walk into the store to buy something, say, a small appliance for your kitchen. You walk up and down the aisles looking for this item, but have a hard time locating it due to poor signage. You ultimately find the product you are looking for, but aren't sure which is the best brand for your needs. Although you would have appreciated the help of a salesperson, no one is around so you just choose the lowest priced offering.

Your wait in the checkout line takes just a couple minutes longer than you think it should. Once it's your turn at checkout, the cashier is neither rude nor polite. You pay for your new product and carry it out the door.

What just happened? From the perspective of the store, another satisfied customer just made a routine purchase. Everything went smoothly and this customer will surely come back in the future...why would they think otherwise?

From your perspective, the experience was very mediocre. It wasn't bad enough to complain to management, but just disappointing enough to make you hesitant to come back. Maybe next time you'll try the competing store down the road.

This unfortunate scenario is repeated every day in every industry - not just retail. In fact, studies show that only 5 percent of dissatisfied customers file a complaint. What happens to the other 95 percent?

Customer satisfaction research gives voice to the silent majority

The "silent majority" is as powerful a force in the business world as it is in politics. But despite their enormous power, most companies allow this 95 percent to remain unheard. Many operate under the assumption that they know their customers, and when a customer is dissatisfied they will swiftly hear about it and be able to correct it.

That assumption is just plain wrong.

Dissatisfied customers are a slow, silent killer. They defect one by one, often without making a sound. What's worse, they often bring other customers or potential customers down with them - slowly, silently and viciously.

Luckily, there is a way to give voice to this otherwise silent majority and fix many problems before they cause customers to defect: customer satisfaction surveys.

Editor's note: Jared Heyman is founder and CEO of Infosurv, Inc., an Atlanta research firm. He can be reached at jared.heyman@infosurv.com.

Our firm has distilled the survey process into five easy steps that any company can take to design and execute an effective customer satisfaction survey program. The process is quick, inexpensive, and guaranteed to yield invaluable results.

Step one: the buy-in phase

An otherwise well-planned and -executed customer survey program can be rendered useless without the proper level of organizational buy-in. Everyone in your organization must be made aware of the upcoming customer survey program, educated as to its benefits, and committed to acting upon the results.

Experience shows that a memo released from the company's CEO touting the importance of the customer satisfaction survey program is a fast and effective way to get employees on board. Not only does this demonstrate the value of the survey program to upper management, but also alerts salesmen and account representatives that the silent majority is about to be heard.

As you may have guessed, the boost to customer service begins almost immediately.

Step two: survey design

A well-designed customer satisfaction instrument is essential to the collection of valid, reliable, actionable data. Typical customer satisfaction surveys are designed to measure overall satisfaction, product-specific satisfaction, timeliness of delivery, customer service process satisfaction, returns and exchanges process satisfaction, and interest in new products and services. Naturally, these topic areas will vary by industry. It's important to hit upon all aspects of the customer experience which might affect a customer's likelihood to remain loyal.

The best-designed surveys measure the importance of each item along with satisfaction. By isolating the most important issues, companies can prioritize the areas for improvement.

A survey instrument is a measuring tool - and as with any measuring tool, the measurements it takes are only as accurate as the tool itself. Since measuring customer sentiments can be tricky, we consider the questionnaire design stage the most sensitive in the process.

Most customer satisfaction surveys are composed of a series of positive statements in which customers rate their level of agreement on a five-point Likert scale (i.e., agree strongly, agree somewhat, neither agree nor disagree, disagree somewhat, disagree strongly). Typical statements might include, "The time I spent on hold waiting for a sales rep was acceptable," or "My product was delivered in a timely manner." Notice how these statements measure subjective, rather than objective, matters. It is not the place of a customer satisfaction survey to ask about actual hold times or delivery times - you can glean this data from your phone and shipping logs. A customer satisfaction survey should measure perceived hold times and delivery times. As the saying goes, perception is reality.

Common pitfalls to avoid in the questionnaire design stage are vague or double-barreled questions/statements. A vague question is one that may be interpreted differently by different respondents, and therefore yields less reliable data. An example is, "Company X sells high-quality products." Let's assume that Company X sells disposable pens. Does quality refer to how sturdy the pen feels in your hand? Or how long the pen will last? Or does it mean that the pen supplies a smooth flow of ink?

Since every customer's perception of quality is different, Company X is better served by asking specific questions, less open to individual interpretation. Better-designed survey statements may include, "Company X pens last longer than similar brands," or, "Company X pens provide a smooth flow of ink."

A double-barreled statement is one that asks respondents to react to more than one thing at the same time. A classic example is, "Invoices are clear and free of errors." How does one respond to this statement if invoices are clear, but tend to have lots of errors? What if they never have errors, but are nearly impossible to decipher?

The statement above should be separated and the vague term "clear" should be replaced by something more specific. Better statements are, "Invoices are easy to interpret," and, "Invoices are free of errors."

Step three: survey administration

The main goals of the survey administration stage are to achieve the maximum response rate possible while avoiding the introduction of respondent bias. Response rate is calculated by dividing the number of completed surveys by the total number of potential survey respondents. If a company invites 100 customers to take a survey and 25 of them complete it, the company has achieved a 25 percent survey response rate.

Though customer survey response rates will vary depending on the nature of your client interactions (transactional vs. relationship) and the degree to which clients feel they have a stake in your organization, experience shows that any survey response rate can be boosted through the use of respondent incentives, regular survey reminders, and a few other techniques.

Offering survey respondents something for their valuable time is important, even if it's of relatively little monetary value. Our customer survey clients are often surprised by how something so simple as entry into a $50 cash prize drawing can dramatically increase survey response rates. Other effective respondent incentives include a free sample of your own product or service, or a small donation to the customer's charity of choice.

Regular survey follow-ups are also important as they remind the customer how valued and anticipated their feedback is to you. It also carries your survey back the top of their ever-growing to-do list. These follow-ups can come in the form of an e-mail reminder for online surveys or a postcard reminder for paper-based surveys.

Respondent bias is introduced when those customers who complete the survey are not representative of the customer population in general. A classic example of respondent bias is the story of a market research firm in the late 1930s that was charged with measuring consumer interest in a new high-end automobile. The firm administered via telephone a well-designed questionnaire to a large sample of U.S. consumers. The survey results analysis concluded that consumers had a strong interest in the new automobile, and would likely buy it in droves.

Based on the strong survey results, the automobile manufacturer produced and launched its new product, which proceeded to flop in the market miserably. What happened? The research firm failed to recognize that U.S. consumers with a telephone were not representative of the population overall. In the 1930s, unlike today, only the most affluent households could afford a phone. Despite everything else going smoothly, this survey failed because respondent bias was introduced.

The modern equivalent to this

dilemma is when companies try to administer a customer survey online to save cost, even when only 10 percent of their customers have Internet access. My firm specializes in online surveys, and we still dissuade clients from doing a survey online if the majority of their customers don't have Internet access and a base level of computer proficiency.

Step four: survey analysis

The survey results are in. Now what? Blending the feedback of hundreds or thousands of customers into a single coherent voice can be tricky, but is of vital importance if meaningful conclusions are to be reached. The most common method of identifying trends in customer survey responses is through a range of mathematical techniques called statistical analysis. We are all familiar with the statistical concept of a mean or average - a basic statistical value calculated by adding a series of numbers and dividing by their quantity.

The mean analysis is useful, but represents only one tool in a good tackle box of statistical analysis methods. Other handy statistical techniques include standard deviation analysis, frequency distribution analysis and regression analysis. Although the mathematics behind these techniques goes beyond the scope of this article, I will briefly explain what each is good for in the realm of customer satisfaction survey analysis.

Standard deviations are useful for calculating the level of agreement that respondents exhibited to each survey question. The lower the standard deviation, the closer responses tended to hover around the mean. For example, if Question X had a mean response of 3 with a standard deviation of .5, and Question Y also had a mean response of 3 but with a standard deviation of 1, we know that customers felt a similar level of satisfaction with both issues but there was more agreement when it came to Question X.

Frequency distribution analysis simply counts the number of times respondents answered each question each possible way. This technique is useful not only for delving deeper into Likert scale responses but also analyzing verbatim questions. One little-known use of the frequency distribution technique is to code verbatim comments into categories and then count the number of times each type of comment occurred. This presents a handy way to convert cumbersome qualitative data into succinct statistical conclusions.

Regression analysis measures how often certain survey responses tend to correlate. Looking at such correlations can tell us things about respondents' sentiments that they may not have even been consciously aware of. For example, if we notice that respondents who are very satisfied overall tend to also indicate an excellent relationship with their sales consultant (and vice versa), we might infer that positive salesperson relationships lead to satisfied customers. Of course you must bear in mind the old statistical adage, “Correlation does not imply causation,” and test such correlations with other survey data before drawing conclusions.

Step five: implementing the results

Far too many well-designed, -administered and -analyzed customer surveys fail to yield positive change due to a simple lack of results implementation. We recommend that if an organization is not ready to make changes for the better, it should save time and money by avoiding the customer survey process altogether. The results implementation stage is where the proverbial rubber meets the road. Every report summarizing survey findings must end with an action plan, including a list of actionable recommendations along with the names of those responsible for each change and a deadline for their completion. Intended changes must be realistic, achievable in the short-medium term, and most importantly, backed by data.

Many organizations find that survey results confirmed their existing suspicions. Even if this is the case with 100 percent of the results, however, the survey project was not done in vain. Quantitative results in the form of graphs and numbers are much more compelling and actionable than hunches or anecdotal evidence.

It is important to remember that a customer satisfaction survey is not an isolated event, but rather the beginning of a continual improvement cycle. Even while the results of the first customer survey are being implemented, plans must be made for the next survey administration. I recommend that survey be readministered at least every six months. Luckily the first survey administration is always the hardest, as subsequent administrations are simply a matter of repeating an already-established process.

In addition to testing your organization’s success in acting on the survey results, subsequent survey administrations also test the pulse of customer satisfaction over time. By plotting how satisfaction measurements change over months and years, organizations can identify trends and plan accordingly. If customer satisfaction levels are decreasing, you know that action must be taken quickly to avoid a future decrease in sales. On the other hand, customer satisfaction measurements increasing over time imply an impending rise in sales - especially once you consider the many positive referrals that satisfied customers tend to provide.

Companies that have committed to an ongoing customer satisfaction survey process will often tell you that it’s one of the best investments they have ever made. Many can’t imagine how they would get by without the instantaneous and actionable feedback that their surveys provide. Those companies who fail to give a voice to their own silent majority do so at their peril. | Q

Less may be more

By Vivek Bhaskaran

Conducting an effective customer satisfaction program

Businesses today realize that one of the keys to success in the competitive marketplace is effective customer management. Companies see customer relationship as a strategic advantage and have invested a lot of effort in making sure that customer relationship management (CRM) is high on the priority list. However, few companies have invested effort in terms of having a continuous measurement strategy that can signal potential dips in real-time.

With the explosive growth of do-it-yourself research projects using online surveys, conducting customer satisfaction surveys has become more of an in-house operation. Many companies are asking themselves, How can we improve if we can't effectively measure?

For a customer satisfaction program to be effective and accepted, it should be more than just one survey that is sent out to all your customers annually. It should be an ongoing strategy of continuous measurement and improvement based on the feedback received. Validation of the improvements can be measured directly in the forms of satisfaction indices.

This article will discuss the different features and characteristics (and possible mitigation strategies) of conducting an effective customer satisfaction program for your business.

The core tenets: satisfaction, importance and loyalty

Most customer interaction studies have a couple of core issues that we'd like to measure:

a) Satisfaction – How satisfied are your customers with respect to the various services and attributes of your engagement with them?

b) Importance – What is really important to your customers and what is not?

c) Loyalty – What do your customers think about you really and how do they perceive your services? For most businesses, customer retention directly affects their profitability.

For each of the core tenets above we'll summarize two things:

1) effective strategies for presentation and data collection;

2) options for data-analysis and interpretation.

Satisfaction

Effective strategies for presentation

For the most part, a five-item scale (very dissatisfied-very satisfied)

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battery of options has a fairly low degree of cognitive stress. The five-point scale has enough options usually to accommodate the spectrum of social perception. A battery of options (matrix) is generally preferred for the following reasons:

1. It gives users a reference point. For example, asking a user to rate their satisfaction with the product purchase experience on one screen and customer service experience on another screen does not give the same frame of reference.

2. Less visual real estate is occupied - this leads to a more effective presentation.

The basic principle is to put together a list (between three and seven) of components of your service that you'd like to measure. Add in a final overall satisfaction rating also.

Options for data-analysis and interpretation

a) Mean score across all the respondents for each option. You can assume a score of 1-5. Obviously the closer the mean for each of the options is to 5 the better you are.

b) Relative mean score. Here you look at the mean of each of the options when compared to each other. This will give you a good idea about the relative satisfaction scores when the components are put against each other.

c) It is important to collect the overall satisfaction score along with the component satisfaction scores. There are a couple of reasons for this:

• The overall satisfaction score should be close to the average satisfaction scores of the individual components. If the overall satisfaction is way out of line from the other component scores it usually means that there is some form of bias taking place, or we are missing out some component in the matrix.

• Regression analysis can be performed on the data to give out importance scores for each of the components.

Importance

Generally, when customers are comparison shopping, they are really comparing options that are important to them. Measuring importance of the different components of your product or service is a little more challenging than measuring satisfaction. This is because importance is generally relative. Different people have widely different perceptions of importance and need. Accordingly, we simply cannot take the same approach we took with measuring satisfaction. A five-point scale (not very important-very important) is simply not going to give you the data that can be called actionable. Moreover, having another five-point scale that looks and feels very much like the previous (satisfaction) scale becomes monotonous and uninteresting. Always strive to make the survey engaging.

Effective strategies for presentation

The easiest and the most effective way of measuring importance is having a simple multiple choice question (select more than one option) - display all the components and have your users choose the top three factors that they consider important. This approach has the following advantages: users can check three out of a list of seven items; users don't have to worry about ranking the three items they are selecting; users don't feel overwhelmed with another battery of questions. It also has disadvantages: detailed segmentation cannot be obtained; it is not possible to determine the relative importance on a per-user level.

Options for data-analysis and interpretation

There are two parts to the data analysis that can guide us here. Basic frequency analysis as well as TURF analysis:

a) Frequency analysis

We can do a simple frequency analysis of all the respondents. The top three important issues for all the respondents should be visible immediately. The relative frequencies can give you an idea of the importance ratings for each of the options.

b) TURF analysis

TURF analysis is traditionally used

to measure reach in multiple-choice questions (with users allowed to choose more than one option) – however, TURF can also be used in other contexts such as measuring importance. TURF analysis allows you to look at the data from an option reach perspective. It answers questions like: "If I address this component/option, what percent of my customers will I connect with?"

Loyalty

One of the most effective measures of loyalty is to measure the degree to which your customers will vouch for you. If your customers go out of their way to recommend your product or service to others, it's an effective measure of their perception.

Effective strategies for presentation

Again, simplicity is the key. A single question can get you a measure of how loyal your customers are towards you. Asking your customers how likely are they to recommend your product or service to their colleagues and friends gives you a fairly good indication of how they perceive your service or product.

Options for data-analysis and interpretation

For a positive growth environment, the mean should be between 1 and 1.5. Most of your customers should feel good about recommending your services or products to others.

A great deal of research has already been done and shown that customer loyalty is intrinsically tied to the fact that people still value word of mouth.

The satisfaction index

What is a customer satisfaction index? Indices are very popular in part because of their ability to effectively and accurately represent the underlying data with a single number. The indices in absolute terms do not have much value. It is the rise (or fall) of the value of indices that actually make a difference.

Generally, indices are developed based on specific models. These models are specific to industries and are really beyond the scope of the current discussion. However, it is fair to say that indices are mathematical representations of the different components of the data that you collect.

Non-response bias

With the online survey process, long and unwieldy online surveys are becoming very popular. It is relatively easy and tempting to create long surveys so that granular data points are collected. While on one hand this gives you all the data you need to make and affect business decisions, it also introduces in important concept in online research called non-response bias. What exactly is non-response bias? Let's say you have 200 customers, and you send out a customer satisfaction survey to all of them. You get a response rate of 20 percent. The question is, do these 40 customers speak for all your customers? How confident are you that the responses that 20 percent of your customer base is giving you can be taken and applied to most of your customers? What if only the very satisfied or the very dissatisfied customers actually took the time to complete the survey? Non-response bias is the bias or the skew in the analysis and interpretation of your data due to the fact the large percentage of your respondents did not complete the survey. While there are many effective ways for making sure your response rates are high enough, the primary factor responsible for not completing a survey is the length of the survey. Keep your surveys short and simple.

Less is more

The question becomes, how do you balance out your analytical and business requirements and still keep your surveys interesting and short to keep your response rates high? Obviously, it's a balancing game here. However, there are certain steps that can help with this issue:

a) Design the survey to collect data that is actionable. Do you really need to survey a large segment of your market? Or would a shorter survey on a smaller scale get you the answers you need?

b. Always allow users to enter comments in open-ended text. Monitor this while in testing mode. This can give you some very quick insight into what users think about your survey in general.

b) Anecdotal vs. tracking surveys. Think about the methodology you are going to use to collect data. Are you going to do a one-time survey or is the data going to be collected over a large period of time for continuous tracking? Continuous tracking surveys can be short and still accomplish the analysis objectives. Single (one-time) surveys usually need to collect more data. Can your business and data collection objectives be prioritized and multiple surveys sent out over the course of the customer life cycle to collect data?

- Send pre-sales surveys to potential customers.
- Send post-sales surveys to newly acquired customers.
- Send regular satisfaction surveys to ongoing customers.
- Send exit/close-out surveys to customers who are walking away.

c) Keep cognitive stress to a minimum. What is cognitive stress? Have you ever filled out a survey/form where you were asked to distribute 100 points over a set of say five items? It's not rocket science but it frustrates a lot of people. This frustration will directly affect the response rate.

Executive visibility

The success of a customer satisfaction program in a large part will depend upon how comprehensively and cohesively can the data be presented to the business decision makers. One of the challenges that in-house (as well as external research) projects face constantly is that if the data is significantly different from what the business decision makers think, it is often dismissed as anecdotal or a one-time phenomenon. To mitigate this issue, explore running a program that is continuous so real-time feedback can be provided to the executive management on demand. Solutions like customer satisfaction dashboards come in very handy for such buy-in and also builds confidence in the research solution.

Manage the requirements

The key to success for any customer satisfaction research study is dependent upon how well you manage the conflicting data analysis requirements with the need for simplicity. Customer satisfaction studies need not be all-encompassing. They can be short and give you the necessary data points needed for to make informed business decisions. You can leverage technology to segment out populations that warrant further research (very unsatisfied users, etc.) and try to delve into the reasons for their customer experience. Remember, you can never improve what you cannot measure effectively. | Q

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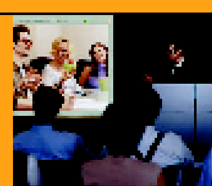

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customer satisfaction research

Beyond mere measurement

By David Rich

At most firms, customer service departments have become complaint departments, or worse, a place to return purchases. The companies themselves seem acutely aware of this problem, as evidenced by the anecdotes I've gathered from visiting and talking with service organizations over the past decade. They tell me that they spent years carefully measuring customer satisfaction and managing individual customer experiences. They then invested in sophisticated IT infrastructures and added new (primarily online) channels to reach their customers better. They achieved their profitability gains from these innovations. A small but growing percentage – the more progressive among them – now recognize that in order to generate increased profits and share prices, they need to integrate these developments into a more comprehensive concept.

Customer experience management, they say, is that concept, because it takes the silo approach (marketing research, operations, channel management) and transforms it into an approach that focuses on the customer in his or her entirety. What's new about customer experience management is partially that it views the customer as a whole series of interactions across a variety of channels. But more than that, what is new is the idea of specifically changing service firms' organizational structures to make the idea of customer experience management a reality.

Achieve satisfaction through customer experience management

Customer satisfaction

From a global perspective, customer satisfaction measurement is considered to be progressive. Anyone who doubts this should spend time doing consumer research in Russia or China. In the 1960s, as the service sector began to rise rapidly in the U.S. economy, the concept of satisfying customers and measuring their satisfaction arose. Service companies began appointing customer satisfaction managers and making them responsible for all measurements relating to the consumer. Telephone and paper surveys, as well as, later, comment cards, served as the primary data collection devices available to customer satisfaction managers. In the late 1980s, emerging interactive voice response (IVR) and Web-based technologies began to replace the

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traditional comment card. Regardless of whether a company measured customer satisfaction through telephone interviews, intercept surveys, online surveys, IVR systems, focus groups, or, ideally, a combination of all these media, the most important thing a service company could do was to continually get feedback from customers and make it easy for customers to provide this feedback.

However, it became clear that measuring customer satisfaction or reviewing IVR/comment card data alone was not enough for service managers trying to retain and grow their customer base - it was like using a hammer alone to build your house. First, customer satisfaction measurement relied solely on customer feedback. This provided only one view of a larger picture. Managers also found that with IVR, like the comment card, it was difficult to determine whether the customers whose satisfaction they were measuring were high-value, profitable lifetime customers or one-off customers. This segmentation doesn't matter to the customer of course, but it certainly matters to the company. What's more, IVR was predominantly used to draw the complaints of dissatisfied customers. The resulting data were often skewed towards negative information. Sharing results of negative survey data is not a great way to motivate ever-important employees! In short, customer satisfaction measurements, whether telephone surveys, comment cards or IVR, weren't helping companies avoid customer dissatisfaction, and they weren't identifying opportunities for top-line growth well enough.

Service managers recognized that in order to construct their house of happy customers, they needed complementary tools.

Customer experience measurement

In order to get a better, more immediate handle on opportunities and issues at various points of service, service managers needed the saw that could work alongside IVR's hammer. They turned in large numbers to mystery shopping, which measured the exact degree to which standards of service and operations were being met. Mystery shoppers provided objective insight into a detailed set of actionable metrics - price and promotions auditing, customer service, merchandising, facility operations, human resources and management standards. Because of the robustness and precision of mystery shopping data, mystery shopping became a de facto standard for the vast majority of service companies around the world. It provided companies real-time data and tactical control; at a very granular level, they had specific information for improving their business.

For example, by sending mystery shoppers to numerous locations simultaneously, corporate marketing could determine which establishments were adhering to important standards. By sending mystery shoppers out over time to the same locations, companies could determine whether certain operations were declining or improving. And managers could determine whether their new concept of asking the customer whether they wanted a store credit card was being followed through on and by whom. Interestingly, it was not only marketing departments that used mystery shopping. In equal numbers, human resource and operations managers found mystery shopping to be an essential part of their constant need to train the service company workforce and monitor facility conditions.

Of course, it was not perfect! What it lacked - direct customer feedback - customer satisfaction measurement had. Managers did not choose one tool over the other. Instead, they measured customer satisfaction using primarily phone surveys and their IVR tool; and they measured customer experiences and employee adoption of new techniques using, typically, their mystery shopping tool. By the 1990s, IVR and mystery shopping were among the most trusted tools in customer service kits around the country.

Customer relationship management

Enter the software and Internet boom of the mid- and late 1990s. Enabled by the emergence of user-friendly databases and interfaces, service managers could review real-time, point-of-service information on customers. The software applications, grouped under the rubric of customer relationship management (CRM) applications, enabled service organizations to catalog the many interactions they had with customers. CRM applications reported activity, stage and type of customer, and provided tools for maintaining and enhancing a company's relationship with its customers. Anyone who has gone to a new hotel within a chain they regularly patronize and experienced the receptionist asking, "Ms. Jones, would you like your bed turned down as usual this evening?" has experienced the power of CRM. Within corporations today, CRM often works alongside customer satisfaction and customer experience measurements, but unfortunately it rarely works cohesively with them.

The Internet

While they were gaining this CRM tool, service organizations also became empowered to reach customers through the new channel of the Internet. Web sites popped up like dandelions, with customers' experiences reaching new lows: they couldn't get onto sites, they got kicked off of sites, the connections were too slow, they couldn't find their shopping carts, they were falsely charged through fraud, etc. Customers were unhappy, and something needed to be done.

Service firms' e-commerce departments began to talk about the customer experience, at first internally, and then externally. Tracking software arose to track the customer's experience on a Web site, as well as to follow up on that experience. But could this new way of thinking about the customer as not a satisfaction score or a point of service but as a continuum of interactions and impressions be applied not just to Web sites but across channels and across the organization as a whole?

Customer experience management

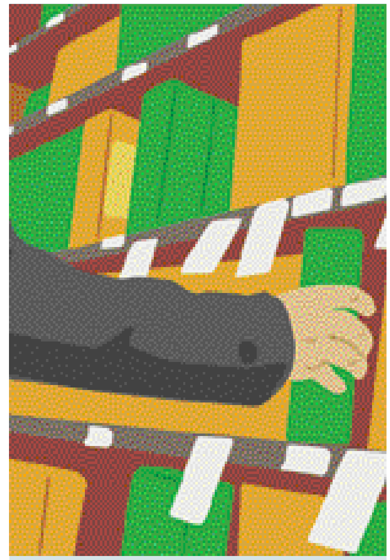
It could, and this continuum of interactions is known today as customer experience management, or CEM. If IVR is the hammer, and mystery shopping the saw, then CEM is the service company's blueprint: It incorporates customer satisfaction and customer experience measurements, as well as CRM, into one complete view of the customer across channels, including the Internet. Many service organizations are talking about CEM as among their most important priorities, yet I have found that most companies' organizational structures have not caught up to this reality. Almost all major companies have departments that individually measure and manage each of the three components of CEM. For instance, marketing research measures satisfaction and determines customer needs, marketing manages channels and measures customer experiences, operations manages store/associate performance through mystery shopping, and sales or IT manages CRM. But few companies have one department or manager that integrates all of these into one holistic view of the customer experience.

I believe that these slow-to-adopt service firms will begin to suffer for this mistake and that those companies that not only talk about CEM but also explicitly organize around CEM will surpass their peers in delighting their customers and growing their business. It's highly likely that they'll also delight their shareholders.

The recognition that the customer experience drives the top line, the bottom line, and shareholder value has not been missed by most organizations. It is the development of the new organizational structure to support the customer experience management concept that now requires executive leadership and a long-term budget. The tools for measuring, managing and monitoring customer satisfaction and store performance will always be needed. Decisions on when and how to use them should now be made by someone whose responsibility is more than handling complaints or improving store operations but rather ensuring customer delight. |Q

A recommended approach

Using choice grids to understand your market and the forces that shape it



By Richard Cohn
and John Leggett

Technological advancements in accessing customer transaction information and improved analytical processes are having profound effects on many business activities. Sales and marketing activities are not exempt from these advancements and may become significantly transformed by these changes.

These new opportunities to link customer information (e.g., tracking the process from the customer's exposure to marketing communications to purchase) and to analyze it (e.g., mining customer data to identify patterns of behavior) are assumed to be good for marketers because it increases their understanding of the customer.

A customer-centric approach may be a true advancement in product development and service activities, but it has several shortcomings in sales and marketing. The first shortcoming is the limitation of knowing only what information is in the customer database. For example, if the purchase response to a direct mail or Web-based marketing communication is tracked, we only know which customers were exposed to these specific communications and their subsequent purchases. We do not typically know what other marketing communications from both our company and competitors had an impact on the purchase decision.

The second shortcoming of a customer-centric approach is that marketing insights come from understanding not only the customer but also the non-customer. After all, it is the non-customer or the potential customer that should be the true target of the marketer's interest. Understanding the differences between the company's customer and its non-customer is often the key to sales growth.

The marketer's goal is to understand the market and the forces that shape it. The customer-centric approach may keep the marketer from seeing the forest because of the trees. This article argues for analytical approaches that are more comprehensive than a customer-centric approach. Two analytical approaches are described. One is to understand the impact of marketing communications on brand purchases[1]. The other is to understand the basis of brand choice. These analytical approaches provide more complete and more actionable understanding of the sales and marketing environment than could be

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gained from even the most sophisticated mining of customer data.

These two approaches are not new. They were developed and used in large-scale proprietary research programs during the past 12 years. The understanding gained from these research programs was used almost exclusively for high-level marketing decisions (e.g., assessments of new product introductions, advertising campaigns, and new marketing channels). In the past, the research was not used to increase rank-and-file sales and marketing staffs' understanding of the market. In the final section of the article we argue that this use, keeping the staffs enlightened and up to date, has even greater value than for major single event decision-making.

Understanding marketing communications and their impact

Four approaches

The need to understand the impact of all marketing communications to accurately assess the impact of any marketing communication is illustrated with the following scenario:

On Monday, Nick is watching TV and sees a commercial for Brand A. The commercial is effective in stimulating Nick's interest in buying the product and he is impressed with Brand A's attributes. On Tuesday, Nick visits Brand A's Web site to learn more about the product. He also reads some product reviews from a neutral journalistic source (e.g., *Consumer Reports*). On Wednesday, Nick gets a mailing that promotes Brand A and he talks to his friend who recommends the brand. On Thursday, Nick goes to the store and discusses the product with a saleswoman. She convinces Nick that Brand A does have great attributes and that he can get Brand B with the same attributes for less money. Nick purchases Brand B.

Figure 1

Day	Exposed to Marketing Communication Type	Reaction to Communication	Brand Purchase Intention
Monday	TV Advertising	Positive	Brand A
Tuesday	Brand's Website, Product Reviews	Positive	Brand A
Wednesday	Direct Mail, Word-of-Mouth	Positive	Brand A
Thursday	Salesperson	Negative	Brand B

We could call this scenario a "linear chain of marketing communication exposures" but the more common term "shopping" will do fine. Nick's shopping experience, a series of exposures to marketing communications, is summarized in Figure 1.

Consider four analytical approaches for understanding the impact of marketing communications on Nick's behavior. We will reject the first three approaches, but they are worth reviewing because they illustrate problems with past and current approaches.

Approach I is the "old old-fashioned market research approach." Exposure to marketing communications is measured independently of sales (e.g., Nielsen ratings of the Monday television program that carried the advertising, number of hits on Brand A's Web site, number of pieces in the mail drop). There are only aggregate counts of exposure to specific marketing communications and sales and no linking of the two at the level of the individual consumer. We just know how many people watched television, visited the Web site, received the direct mail, and bought Brand A. There could have been high levels of advertising exposure, Web site visits and direct mailings. However, the marketing staff would incorrectly conclude that the communications were ineffective (i.e., did not receive a positive reaction and did not result in Brand A preference) because by the end of the week all the Nicks in the market ended up buying Brand B. This "old old-fashioned market research approach" is undoubtedly still the most common practice.

Approach II is the "new old-fashioned market research approach." This approach uses traditional telephone interviewing tracking surveys to measure exposure to a single marketing communication type (typically television or print advertising) and brand purchase intention. The purpose of this approach is to assess the single marketing communication type (e.g., a television commercial advertising campaign). If Nick is interviewed on Tuesday or Wednesday and asked whether he saw the Brand A television commercial and his brand preference, the survey results will be an accurate assessment of the advertising. If Nick is interviewed on Thursday or any day thereafter, his answers will mislead Brand A marketers about the effectiveness of the advertising. Nick will say he saw the Brand A commercial and he prefers (actually bought) Brand B.

Approach III is the "new online research approach." This approach does not survey Nick. It only identifies Nick as a visitor to the Brand A's Web site on Tuesday. Since there is no subsequent Brand A purchase (which would add Nick to the Brand A customer database and perhaps link the purchase to his previous visit while shopping) there is not much information gained from this approach. At worst, marketers might incorrectly assume that the Web site information is not effective because it did not result in a sale to Nick when, in fact, he had both a positive reaction to the Web site information and it strengthened his preference for Brand A.

What would the "new online research approach" tell the marketer if the result of Nick's shopping was different? What if he did not speak with the saleswoman on Thursday and he bought Brand A? This would result in a customer record with an indicator that he had visited the Web site before the purchase. Would the marketer be correct in attributing his purchase to the Tuesday Web site visit and in concluding that the Web site had a powerful impact that caused him to purchase Brand A? The Tuesday visit may have been a cause but was it was not the proximate cause (Nick's Wednesday mail and his friend's recommendation came later). The Web site visit was (perhaps) not even a direct cause (his visit to Brand A's Web site caused him to go to neutral journalistic source for product reviews that were more convincing). This "new online research approach" not only can make the marketer not see the forest for the trees, it could make him build marketing programs with the wrong lumber.

Our recommended approach, Approach IV, the "comprehensive marketing communication model approach," uses telephone interviewing tracking surveys of persons in the product market (both Brand A customers and non-customers).

The approach is based on simple premises about the correct way to determine the impact of a marketing communication on brand purchase intent.

- To assess the impact of a single marketing communication, the relationship between exposure/reaction and brand purchase intention must be analyzed in the real world content of multiple influences[2].
- These multiple influences

include a comprehensive set of the brand's own marketing communications, competitors' communications, non-advertising communications (e.g., press reports, product reviews, word-of-mouth commentary), and current brand usage experience.

The simple relationship between exposure to a marketing communication and purchase intention (or actual behavior), either at an aggregate (Approach I) or individual customer level (Approaches II and III) is inconclusive and can often lead to incorrect conclusions about the impact of the communication and to bad marketing decisions. Other marketing communications (from the company or its competitors) can overpower the positive effect of a good communication or mask the negative impact of a bad communication.

As indicated in Figure 2, these different marketing communication types can influence different ratings of the brand's attributes. For example, the television advertising may have a positive effect on Nick's perception of Brand A's prestige, while the Web site information and product reviews may affect his perceptions of the brand's availability and reliability. The salesperson contact may affect his perception of the cost or relative value of the brand. The comprehensive analytical approach uses a multivariate technique to analyze the relationships between the brand's specific attribute ratings and the overall brand rating. Comparing this rating with other brands' ratings determines brand purchase intent.

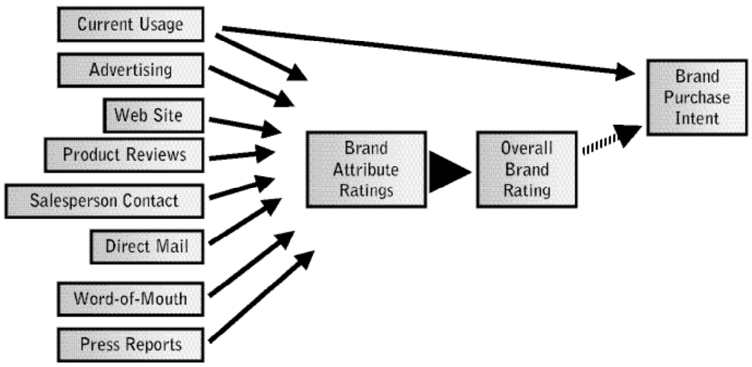
The model also includes current usage as a determinant of both brand attribute ratings and brand purchase intent. Personal experience or lack of experience with the brand has an obvious and important effect on brand evaluation and brand preference that needs to be taken into account in any assessment of the impact of marketing communications[3].

Examples of the comprehensive approach's value

Nick's shopping scenario is loosely based on an important marketing event that was analyzed using this comprehensive approach. The introduction of the personal computer for home use was a marketing challenge for the OEMs. While most of the manufacturers were experts in industrial (i.e., B2B) marketing, selling the product to residential end-users (i.e., B2C marketing) was definitely a new experience in the early 1990s that called for new products, new communications, and new distribution channels. With everything changing at the same time, it was important to be able to interpret the success or failure of each change from the industrial marketing standard so that appropriate and rapid adjustments could be made.

One of the major OEMs had been using the comprehensive approach for several years in its industrial marketing programs so the application to the new home

Figure 2



The Comprehensive Marketing Communications Model

market went smoothly. The core interview for the tracking surveys was adapted to the home purchase decision-maker. In those pre-Internet days, the communications were primarily broadcast advertising and heavy doses of product reviews and word-of-mouth commentary. Current brand usage (based on office-based experience) also played an important part in determining brand purchase intention.

The initial results indicated a positive, although not blockbuster, reaction to the advertising communications and the product reviews. Yet brand purchase intention and actual sales were not reflecting these positive marketing program results. The comprehensive approach revealed the culprit. The brand's distribution channels had for the first time included independent retail outlets. The research indicated that salesperson contact was having a negative effect on ratings of the brand's cost (relative value) attribute. Like Nick, potential customers were being drawn into the retail outlets with a predisposition to buy Brand A and then convinced by the retail outlet's sales force that Brand B was just as good and less expensive than Brand A. This insight lead to new communications with a value focus and a change in the relationship between the manufacturer and the independent retail outlets. The other three analytical approaches could not have provided this insight.

An even earlier anecdote illustrates the importance of measuring the impact of competitors' marketing communications. An early version of the comprehensive approach was used in the 1980s to assess the impact of a home stereo equipment national advertising program. The advertising focused on several attributes of a good home stereo system but made little mention of the system's sound quality. Purchase interest in the brand did not improve with the new advertising and the sound quality ratings of the brand began to decline.

The culprit was identified as the major competitor's soaring rating on sound quality. The high levels of exposure and positive reaction to the competitor's advertising that focused on sound quality overwhelmed the other brand's communications. Copy research on both brands' campaigns indicated that each brand's advertising was effective in communicating the intended message and stimulating purchase interest. However in the real world of multiple influences, the competitor's communications were having the greater impact.

The comprehensive approach gave the marketer a true understanding of his market and the forces that shaped it. He did not incorrectly assume that his advertising was a bad execution. He understood it was competitive forces that were driving brand purchase intent. This understanding gave him a range of actions other than the incorrect one of firing the ad agency.

The comprehensive approach to measuring the impact of communications is really a tool bag that marketers can draw from when they need to diagnose or fix a problem. Since the information is collected on an ongoing basis through tracking surveys, the tool bag is readily available. It allows the marketer or his colleagues in advertising, sales management or public relations to assess the impact of current communications and decide what, if anything, needs to be done. The information has been valuable to public relations staffs in the face of negative press reports. The tracking nature of the approach provides trend analysis with a built-in pre-event and post event comparison.

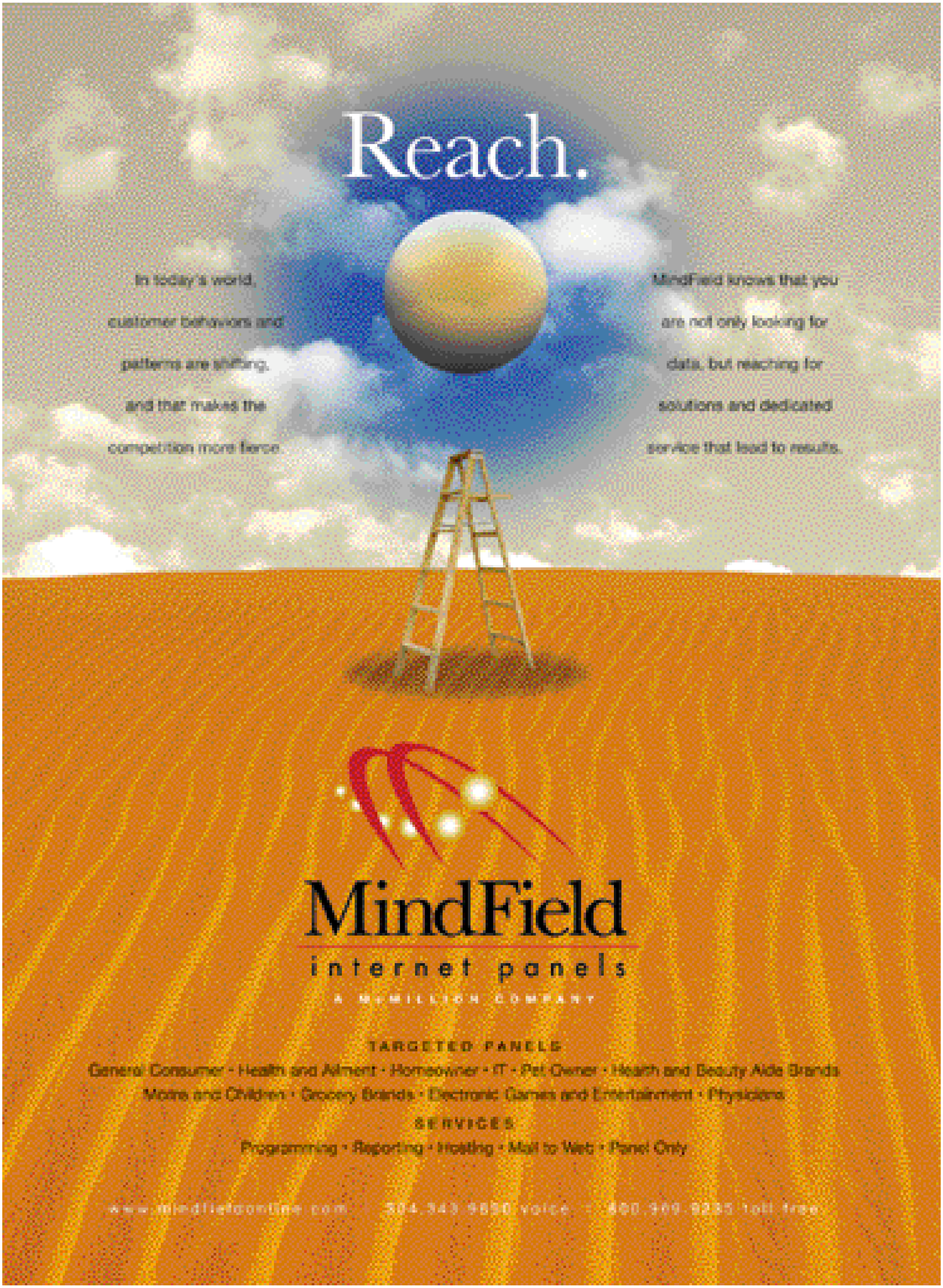
The comprehensive approach to measuring the impact of marketing communications has important advantages over the other approaches in both its accuracy and range of uses throughout the company. It also produces a by-product that several companies find equally valuable: a simple but powerful way to understand brand choice.

Understanding brand choice

Understanding why Nick bought Brand B is not as simple as concluding that the saleswoman's comparison of Brand A and Brand B was the last (most proximate) communication he heard. The sequence in which Nick received communications about the brands may not be that important.

After Nick heard the saleswoman and all the other communications he made a choice between Brand A and Brand B. It is obviously important to the marketer to understand that choice.

The approaches to understanding brand choice are even more varied than the approaches to understand-



Reach.
In today's world, customer behaviors and patterns are shifting, and that makes the competition more fierce.
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ing the impact of marketing communications. They range from interrogating consumers right after the purchase to more formal qualitative (focus group) and quantitative (choice modeling) approaches. Each of these can be highly valuable to the marketer depending on his current state of knowledge and specific interests.

The recommended approach, choice grid analysis, is useful because of its intuitive simplicity and comprehensiveness. The graphic form of the analysis is easy to understand.

Three basic types of information are required for choice grid analysis.

- The consumer's ratings of the importance of specific attributes in choosing a brand.
- The consumer's first and second brand choices.
- The consumer's ratings of his first and second brand choices on specific attributes.

A choice grid uses the information on the importance of specific attributes (e.g., cost, prestige, reliability, availability, and service) and the ratings of first and second choices (Brands A and B) on the specific attributes.

For example, choice grid one (Figure 3) displays the importance of specific attributes on the horizontal axis and the difference in attribute-specific ratings of Brand A and Brand B on the vertical axis.

Figure 3

Choice Grid 1
First Choice = Brand A
Second Choice = Brand B

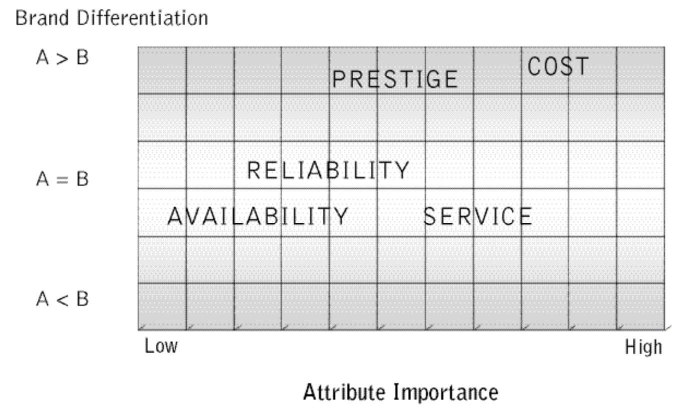
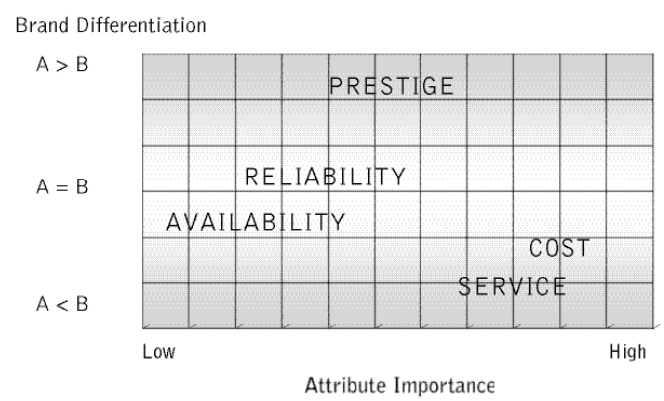


Figure 4

Choice Grid 2
First Choice = Brand B
Second Choice = Brand A



(The horizontal axis scale, labeled attribute importance, is the percent of consumers that say the attribute is "very important" in their decision of which brand to purchase. The vertical axis, labeled brand differentiation, is the difference in Brand A's and Brand B's ratings on the attribute. The difference in rating is scaled in terms of the test statistic value from a paired t-test (each survey respondent has rated both brands on each attribute). In this simplified example, Brand A is considered better than Brand B on those attributes towards the top of the chart, equal to Brand B on those attributes towards the middle of the chart, and inferior to Brand B on those attributes towards the bottom of the chart.)

Choice grid one is based on interviews with consumers who prefer Brand A to Brand B. Among these consumers, two attributes (cost and service) stand out as being

very important in their brand choice. They think that Brand A is better than Brand B on one of these important attributes (cost) and that the two brands have roughly equivalent service. Note that those who prefer Brand A think that the brand has more prestige, but that this is a relatively unimportant attribute to them.

While this choice grid tells us what determines preference for Brand A, there is an equally important choice grid that indicates what drives preference for Brand B.

Choice grid two (Figure 4) is based on interviews with consumers, like Nick, who prefer Brand B to Brand A. In this simple example, they are similar to consumers who prefer Brand A in the importance of most brand attributes. The big difference between those who prefer Brand A and those who prefer Brand B is their perceptions of the relative cost of the brands. Those who prefer Brand B also think that the brands are not equivalent in service quality.

(Differences in the importance of brand attributes between consumers who prefer different brands are uncommon if the product has a commodity status. Some marketers are successful in convincing consumers that their brand not only possesses more of a particular attribute than does competitive brands but also that this attribute should be given more weight in their brand choice decision. In this example, those who prefer Brand B to Brand A are slightly more price sensitive and concerned about service than are those consumers who prefer Brand A.)

A complete understanding of what determines choice is gained by comparing the two choice grids. The marketer examines differences between the choice grid of those who prefer Brand A and the choice grid of those who prefer Brand B. Marketing communications should focus on these attributes. In this example, the perceptions of the cost advantage and the service advantage of Brand B are critical. Note that it would do little good to focus communications on Brand A's advantage of prestige because both those who prefer Brand A and those who do not already recognize its superiority.

Through a series of choice grids that compare Brand A with different competitive brands, the marketer can develop a comprehensive understanding of brand choice and provide the company's sales and marketing staffs with the information they need to deliver effective sales presentations and other forms of marketing communications.

An example of the value of a choice grid analysis

A dramatic example of the value of choice grid analysis involved both marketing and product development decisions. The leading manufacturer in an industry was preparing to introduce a new version of its product to attract the high end of the market. Somewhat coincidentally the company had started the comprehensive approach to studying the impact of its marketing communications and, as a by-product, was collecting the information for choice grid analysis.

Although the marketers had a gut feel for the strengths and weaknesses of the brand, they were surprised by the choice grid analysis. They knew their strengths but were unaware of the importance of their weaknesses in determining preference for rival brands.

A key weakness was the attribute of quality of workmanship. Testing of the soon-to-be-introduced high-end product indicated that it might fail at a rate that would reinforce the perception of poor workmanship. This is an especially significant problem for a flagship product.

The choice grid analysis caused the company to delay the product introduction until it and the word-of-mouth commentary it would generate would improve the perception of workmanship quality. Comparisons of choice grids over the next few years that showed a steady improvement in perceived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quality of workmanship supported the wisdom of the company's decision.

Using this understanding to drive sales and marketing programs

The use of the comprehensive approach to understand the impact of marketing communications and choice grid analysis to understand brand choice has proved valuable in executive level decision-making. Marketing communications have been altered, distribution channels changed and product development enhanced by the improved understanding of the market and the forces that shape it.

It is very likely that this improved understanding did not reach the lower levels of sales and marketing staffs, including sales and service representatives who have face-to-face contact with current and potential customers. It is these staff members who need the most actionable and up-to-date information on the market and their brand's position in it.

The dissemination of the information from these approaches to a wider audience of sales and marketing staff is the next important value enhancement. Regular communication of the information through easy-to-access and flexible channels such as online communications can extend the use of the information from major strategic decisions to lower-level staffs' tactical decisions that, when added up, determine the success of many companies.

While there may be concerns with the wider dissemination throughout the organization, such as the security and possible misinterpretation of the information, these are not insurmountable barriers to expanded use. There is a powerful competitive advantage to having all the company's marketing and sales forces know why customers prefer their brand and why non-customers prefer another brand. | Q

Notes

1 Marketing communications should be broadly construed to include all relevant types that can affect brand choice. These include traditional media advertising, new media (e.g., a brand's Web site), contact with salespersons, and communications that originate from sources other than the brand (e.g., press reports, journalistic product reviews, word-of-mouth commentary).

2 The measurement of reaction to each type of communication is as important as measuring mere exposure. Many types of communications, even advocacy types such as advertising, direct mail and salesperson contact, produce a neutral or negative reaction. It is critical to know the percentages of the market that react in different ways to each communication and to determine how many of each of these exposure/reaction subgroups intend to purchase the brand.

3 The current usage determinant (i.e., whether the person is a Brand A customer or non-customer) often leads to a more complex analysis than is indicated by the model. In many applications of the model, levels of exposure and reaction to the individual marketing communications and their relationships to individual brand attributes differ significantly between current customers and non-customers (i.e., there are interactions between the variables in the model). When this is evident, the relationships in the model are analyzed separately for subgroups of customers and non-customers.

Survey Monitor

continued from page 10

and broadband access rates are higher, which correlates with greater Web page consumption," says Davidson. For more information visit http://nielsennetratings.com.

Offers of money back, points snare credit card seekers

According to the Customer Focus 2005: Credit Card study, by Baltimore marketing firm Vertis, which identifies the most appealing incentives for adults to sign up for a credit card, 29 percent of men 18-24 years old are interested in receiving points for merchandise/airline tickets, while 14 percent of women in the same age category prefer an initial sign-up bonus such as a rebate or coupon. For 27 percent of men 25-34 the most alluring offer was money back on purchases. Meanwhile, 34 percent of women 25-34 expressed most interest in receiving points for merchandise/airline tickets.

Additional findings from the study identify direct mail as an effective method to provide information on credit cards, with 53 percent of credit card holders claiming they became aware of their last credit card through this medium. The study also identified an increase in awareness among 18-24-year-old males, with 62 percent stating they received information on their last credit card in a direct mail offer, compared to 39 percent in 2002.

Getting an extended or higher limit on a credit card was only appealing to 8 percent of the credit card holders surveyed. Similarly, the membership status of the card (gold/platinum) appealed to 7 percent of those credit card holders surveyed.

As for the types of financial direct mail read by adults, 76 percent of 18-34-year-olds read direct mail on new credit card offers, compared to 66 percent of total adults surveyed. Fifty-eight percent of 45-54-year-olds read information on balance transfers, compared to 47 percent of total adults surveyed. On the other hand, 66 percent of 55-64-year-olds read financial direct mail on new credit card options for their current card, compared to 61 percent of total adults.

Forty-four percent of total adults pay off their credit card balance each month, compared to 51 percent in 2002. Sixty-one percent of adults 65+ stated they pay off their credit card balance each month, compared to 75 percent in 2002. Thirty percent of 18-34-year-olds are making a partial payment to their credit card and their balance is shrinking, compared to 46 percent in 2002. Four percent of 35-44-year-olds are making a partial payment to their credit card and their balance is growing, compared to 11 percent in 2002. For more information visit www.vertisinc.com.

What drives the one-bag shopper?

One-bag shopping trips (12 items or less) are one of the most frequent and most focused types of shopping trip according to findings of the BIGresearch and MARS Advertising semi-annual Shopper Mindset survey. The survey of over 5,500 customers was conducted in June 2005.

"One-bag shoppers are like smart bombs when it comes to shopping," says Anne Howe, senior vice president, market intelligence, at MARS. "Convenient location drives store selection, which is usually a grocery store that is easy to get in and out of. Their mission is to replenish household needs or to buy specific products, their purchases are almost always planned; their moods range from 'tired' to 'hurried' or 'hungry,' and they are usually shopping because someone else asked them. They also limit their movement within the store to just a few departments.

"Understanding the needs of the one-bag shopper and providing an environment to assist them in finding what they need quickly offers incremental sales opportunities for manufacturers and retailers," says Howe. "A notable opportunity exists in the health and beauty care area, which is under-represented on this trip, and in the grocery channel overall." To get a free report of the findings visit www.bigresearch.com/mars.htm.

Quick facts on one-bag shoppers

Average age: 45.9
Average income: $47,836
Married: 46.5%
Single: 25.1%
Percentage making 2-3 trips a week: 38%

Top three reasons for one-bag trip
1. Replenish household needs
2. Find something specific
3. Prepare special meal

Top three reasons for purchasing at particular store
1. Convenient location
2. Easy in-and-out
3. Lowest prices

Top three categories purchased
1. Fresh foods
2. Packaged foods
3. Beverages

Influential media influences on one-bag shoppers
1. In-store promotions
2. Word of mouth
3. Special displays

Upscale men dominate adult iPod ownership

As reported by the Center For Media Research, a national phone survey of adults over the age of 18 by the Pew Internet & American Life Project found that more than 22 million American adults own iPods or MP3 players. Twenty-nine percent of them have downloaded podcasts from the Web so that they could listen to audio files at a time of their choosing.

Of the 22 million adults who own iPods: 13 percent of men have the players, compared to 9 percent of women; 16 percent of African-Americans and English-speaking Latinos own iPods/MP3 players, compared to 9 percent of non-Latino whites; 19 percent of those ages 18-28 have iPods/MP3 players; 14 percent of those ages 29-40 have them; 11 percent of younger Baby Boomers (ages 41-50) have them; 6 percent of older Baby Boomers (ages 51-59) have them; 6 percent of those 60-69 have them; 1 percent of those 70 and older have them.

IPods/MP3 players are for the upscale: 18 percent live in households earning more than $75,000; 13 per-

cent live in households earning $50,000 to $75,000; 9 percent live in households earning $30,000-$50,000; 7 percent live in households earning less than $30,000.

Consumers ready to place trust in food firms

According to a national study by New York researchers FIND/SVP, food retailers and manufacturers are increasingly becoming trusted advisors on nutrition, health and cooking information to today's consumers. Conducted in June 2005 among 1,000 consumers, the FIND/SVP study found 78 percent of those surveyed would trust nutritional advice from a food retailer.

When asked which educational tools are useful sources of information in-store, consumers said the package's label (64 percent) and in-store signs (51 percent) such as point-of-purchase displays or other signage were their top sources. Consumers were also asked to name their preferred retailer communications channels for receiving general information. Interestingly, they preferred old reliable channels, with 35 percent using coupons/FSIs and 22 percent using the Sunday newspaper over e-mails (11 percent) and Web sites (4 percent).

"Today's savvy consumer is looking for quick, in-store nutritional information on the foods they buy," says Jessica Hogue, co-author and business analyst, FIND/SVP, Inc. "This presents a unique opportunity for food retailers and manufacturers to deliver on this need, change consumer purchasing habits and foster greater customer loyalty, while also building brand awareness."

Despite the rise in popularity of health food stores and mass merchandisers, 72 percent of the consumers surveyed ranked traditional supermarkets as the primary source of food and beverages for consumers at home. Following supermarkets were mass merchandisers (20 percent), club stores (4 percent) and health food stores (3 percent).

When visiting the above stores, consumers were asked what were the deciding factors in making a purchase (consumers were able to select more than one answer). Not surprisingly, 93 percent said price was a determining factor. Sixty-nine percent ranked the expiration date next. More than half of respondents said nutritional content (59 percent) and calories/fat content (53 percent) were also extremely important.

"Consumers are overloaded with information and conflicting reports on what is healthy. One day fat is bad, the next it's carbs and now it's trans fat. Instead of empowering consumers, this abundant amount of information is confusing them," says Julie Chmielewski, co-author of the study and business analyst, FIND/SVP, Inc. "Those few companies that have jumped on this opportunity have seen success in building a trusted bond with the consumer. More can be done to leverage this consumer need." For more information visit www.findsvp.com.

Whither the poor beer-swilling slob?

An analysis of beer consumers (ages 21+) by Scarborough Research, New York, indicates that today's beer drinkers are more likely to be between the ages of 21-34 and affluent. According to the Scarborough analysis, 44 percent of U.S. adults ages 21 and older drank beer during the past month. These beer consumers include more than half (51 percent) of all 21-34-year-olds. Beer drinkers are 17 percent more likely than all consumers to be in this age group. They also tend to have higher incomes. Today's beer drinkers are 23 percent more likely than all consumers to have an annual household income of $100k+.

With affluence comes other high-end spending habits. Today's beer drinkers are 17 percent more likely than all consumers to plan to buy new/lease a luxury vehicle in the next 12 months. They are 12 percent more likely to have a home with a market value of more than $500k.

Scarborough's analysis reveals that Milwaukee is the top local market for beer drinkers, as more than half (54 percent) of consumers 21+ there drank any beer during the past month. The Twin Cities (Minneapolis/St. Paul) and Denver follow with 53 percent and 51 percent, respectively. At the bottom of the list are Salt Lake City (23 percent of consumers 21+ drank any beer during the past 30 days), Charleston, W.Va. (27 percent), Knoxville, Tenn. (28 percent), and Roanoke, Va. (29 percent). For more information visit www.scarborough.com.

continued from page 14

exported to outside programs like SPSS. Data from Web and paper versions of a survey can also be combined into a single report.

This new version can be used with most Windows Web servers, and is also fully compatible with Apian's QuestionWeb hosting service. Whether hosting with Apian, or on an internal Web server, survey administrators now have access to a control panel that provides tools to upload surveys, control the start and stop time of surveys, cap the number of respondents, download data, and view online reports 24/7. For more information visit www.apian.com.

E-Tabs offers Enterprise Lite

U.K.-based research software firm E-Tabs has released E-Tabs Enterprise Lite, an entry-level version of its automated reporting and charting software, E-Tabs Enterprise. The Enterprise system can be used to auto-generate an entire presentation based a library of preferred slide templates. Previously, most clients used Enterprise for repetitive-type projects such as continuous tracking studies or multi-segment reports, but with the introduction of this new capability, automation can be applied to save time and enable researchers to focus on finding insights rather than typing numbers and worrying about formatting. For more information visit www.e-tabs.com.

Survey Europe with the OmniTaxi

London research firm Research Now has debuted an online research service, the OmniTaxi. The Research Now OmniTaxi has been designed to provide clients with an alternative to omnibus research. Unlike standard omnibus surveys, the new service is not conducted according to a set weekly or monthly timetable. By dispensing with the pooling of multi-client questions associated with traditional omnibus surveys, the new service allows individual clients to focus on their chosen target sample sourced from Research Now's Valued Opinions family of online panels across Europe, which has more than 600,000 panelists. In addition to the U.K., a fully translated OmniTaxi service will be available in France, Germany, Italy and Spain. Key benefits of OmniTaxi include: the ability to choose sample size (500, 1,000 or 2,000); the ability to choose the target sample, (e.g., principal grocery shoppers, Vodafone customers, online gamblers); and the ability to commence research whenever the client chooses. For more information visit www.researchnow.co.uk.

Inquisite creates Partner Program

Inquisite, Inc., Austin, Texas, has created the Inquisite Partner Program, a network of "subject matter expert" companies who are dedicated to best practices in survey research, business intelligence and technology application. These partnerships are designed to help Inquisite customers maximize their technology investment and create an enterprise feedback culture.

The Inquisite Partner Program brings together four types of Inquisite partnerships and their specific values under one program. Current partnerships with distribution partners, which are based on the reselling or licensing of Inquisite software, will be included. Three new programs for content partners, consulting partners and technology partners have been added to provide additional data sources, intellectual content, services and complementary technology.

Inquisite has also enhanced its centralized partner support, including access to software and support, a variety of new training options, enhanced co-marketing programs and improved partner communications.

Among the organizations that have joined the program are consulting companies Applied Skills & Knowledge, Gelb Consulting, ReRez and Sentient Services. Technology partners Catapult Systems, Talkingpoint, and Motion Computing help expand the technology platforms available to Inquisite customers. For more information visit www.inquisite.com/partners.

Alliance lets firms network their call centers

Itracks, a Saskatoon, Saskatchewan, research firm, and New York-based Digisoft Computers, Inc. announced a strategic alliance and the release of Itracks' Virtual Call Center Network (VCN) utilizing Digisoft's Web-based call center software product, eTelescript. Itracks' VCN is an ASP-based data collection solution which will enable companies to network global call centers and agents. Working with Itracks on this custom solution, Digisoft will provide the call center software for VCN, and Itracks, the hosted environment. The agreement makes Itracks the exclusive ASP provider of Digisoft's eTelescript to the market research industry.

VCN is designed to enhance productivity by enabling call centers to share resources, locate agents globally, balance workloads, and access overflow capabilities on an as-needed basis. VCN will connect call centers over the Internet using a shared platform on a project-by-project basis while storing the data in a central location. For more information visit www.itracks.com.

Outdoor media planning tool debuts

New York-based Interactive Market Systems (IMS), a provider of information systems for the advertising industry, and Arbitron Inc. will work together to market IMS' new outdoor media planning tool, Outdoor Navigator, a media planning tool designed to help agencies and advertisers plan outdoor advertising using the same tools and terminology they use to evaluate other media.

IMS Outdoor Navigator features an industry-accepted U.S. reach-and-frequency model that produces both national and local schedule metrics. Agency media planners and outdoor operators can use IMS Outdoor Navigator to evaluate market-level outdoor schedule delivery for over 480 demographic breaks across

Nielsen's 210 television markets and Arbitron's 287 radio markets. Clients can also export schedules into MediaMix, the IMS application that calculates using random duplication, multimedia reach in conjunction with television, print, radio, Internet, cinema and other media.

The new service uses Scarborough data as a primary input. In addition, IMS Outdoor Navigator incorporates newly audited Daily Effective Circulation (DEC) data from the Traffic Audit Bureau (TAB). For more information visit www.arbitron.com.

New GIS, data products from ESRI

Redlands, Calif.-based GIS firm ESRI is shipping ArcGIS 9.1 Publisher and ArcReader 9.1. ArcGIS Publisher allows users to publish maps and GIS data that can be viewed with ArcReader. New for version 9.1 is the ability to publish and display 3D maps and data.

ArcGIS Publisher is an extension to the ArcGIS Desktop products (ArcView, ArcEditor, and ArcInfo) that lets users create published map files that can be shared and viewed by anyone with ArcReader. ArcReader is a free mapping application that allows users to view, explore and print maps and globes. For more information visit www.esri.com.

ESRI is also now offering its 2005/2010 data in demographic reports and maps on Business Analyst Online at www.esri.com/bao. These data updates reveal changes and trends in regional growth, household wealth and employment and include: 2005/2010 demographic data updates and forecasts from ESRI; 2005 consumer expenditure data from ESRI; 2005 data from ESRI's segmentation system, Community Tapestry; 2005 market potential data from Mediamark Research Inc. and ESRI; and January 2005 business data from infoUSA. Geographic changes include: updated boundaries for designated market areas; boundaries for the 109th Congressional District; November 2004 zip code boundaries; and updated core based statistical area (CBSA) boundaries.

Service monitors Crohn's disease and ulcerative colitis

Synovate Healthcare has launched the Inflammatory Bowel Disease Monitor in both the U.S. and Europe. The Synovate Healthcare IBD Monitor is based on a representative panel of physicians who regularly report on their treatment of Crohn's disease and ulcerative colitis patients across the U.S. and Europe so that changes over time can be tracked. The Monitor collects physician perceptions of the market and the disease, as well as patient record information, so this can be compared and validated with the "actual patient" data. Doctor and patient segmentation models can also be developed using data from the monitors, enabling tracking on how the disease is perceived, managed and treated over time. For more information visit www.synovate.com/ healthcare.

Revised edition of Tomlinson GIS book

A revised and updated second edition of Roger Tomlinson's book *Thinking About GIS: Geographic Information System Planning for Managers*, which provides guidance for implementing a geographic information system, is now available from ESRI Press. This paperback edition adds 2004-2005 computer performance numbers, cost-benefit analysis, data handling loads, and more. Tomlinson uses planning methodology that focuses on the simple concept that managers must think first and decide what they want from a GIS. Tomlinson developed the methodology described in *Thinking About GIS* for senior managers who oversee GIS and other information technologies and for more technical managers who implement these systems. *Thinking About GIS: Geographic Information System Planning for Managers* (ISBN 1-58948-119-4, 328 pages, $19.95) is available at bookstores and online retailers or can be purchased at www.esri.com/esripress.

Two new products from Simmons

Simmons, Fort Lauderdale, Fla., has launched SCOR (Simmons Consumer Opportunity Rating), which merges consumer products and behaviors measured by Simmons in over 200 U.S. markets with Experian's direct marketing database. With SCOR, users can identify Experian consumer prospects that have a propensity for any of the consumer variables measured by Simmons, including: demographics, media usage, shopping behaviors, brand usage and preference, product usage, lifestyles and attitudes or opinions. For more information contact Mark Fauntleroy at 954-427-4104 or visit www.smrb.com.

Separately, Simmons has released the 2005-2006 edition of TV BehaviorGraphics, its behavioral targeting system that identifies consumers of products and services based on their television viewing behavior. The system, which was introduced in 2002, classifies Americans into 32 consumer segments that capture both the U.S. general market and the Hispanic population. The latest edition features enhanced program and lifestyle data as well as six new consumer behavioral clusters to reflect the increasing diversity of American television.

With versions available for adults, teenagers and children, TV BehaviorGraphics is based on consumer preferences for broadcast, cable and syndicated television programming. It was developed through an integration process that merges the Nielsen National Television Index and National Hispanic Television Index with the Simmons National Consumer Survey. Adults from both datasets are then clustered together based on common television viewing patterns. The result is a single system of behavioral segments that reflect the media and marketplace preferences of both general market and Hispanic consumers.

The newest edition features 32 behavioral segments (including a non-clustered group) falling into three classifications to help clients better reach their targeted consumers: 15 BehaviorGraphics segments that are common to both Hispanic and general market adults; nine segments that are exclusive to general market adults alone; eight segments that are exclusive to the Hispanic population.

Among the more new clusters:

Makeover Mavens: Represent well-off consumers who watch home-makeover programs on cable networks. They pursue a lifestyle that's centered on the home and are passionate about decorating and home improvement.

Investigators: Traditional, family-centered adults who enjoy watching crime dramas on network TV as well as following real-life criminal cases in the newspaper, TV news and news.

Curiosos: Both committed to family and home, and cosmopolitan in their interest in world affairs and the latest developments in technology and fashion, this group of Hispanic adults enjoys Spanish-language morning programs and loves to watch telenovelas. For more information contact Eileen Merken at 954-427-4104 x120 or visit www.smrb.com.

Track movie perceptions with Movie BehaviorGraphics

Simmons Market Research Bureau, New York, and Culver City, Calif., online research firm OTX have joined forces to create a new way to track consumer behavior in the movie business. The new service, called Movie BehaviorGraphics, creates a link between OTX's Movie Dailies, a motion picture awareness and interest tracker, and the Simmons National Consumer Study (NCS), which includes everything from the products people buy and the brands they prefer to their lifestyles, attitudes and media preferences.

Movie BehaviorGraphics is a behavioral targeting system used to identify the best prospects for a motion picture based on consumers' "Have Seen" movie-going behavior over a recent six-month period. The system integrates the database of OTX's Movie Dailies, which has been developed over the past three years and includes over 500 movie titles, with the Simmons NCS, which is conducted semi-annually among a total sample of 25,000 consumers ages 18 years and over. The linkage allows for the creation of a multi-segment cluster system that classifies consumers into distinct groups based upon their movie viewing behavior. For more information contact Evan Goldfarb at 269-857-1335 or Bruce Friend at 310-736-3456.

Service helps mine store-level data

ACNielsen Canada has introduced "what's in store," a global solution for the management of store-by-store census data. The "what's in store" application showcases the ability to turn a retailer's weekly point-of-sale data into actionable information for manufacturers to collaborate with their retail partners at the store address level. By providing manufacturers with weekly item-level information through a thin client, Web-based tool and user-friendly interactive access, ACNielsen helps users assess new item presence and sales rates by store; optimize assortment at the store level; understand success drivers for user-defined store groups; and measure the effects of promotional program execution. For more information visit www.acnielsen.ca.

Briefly

U.K. research firm RSM has released data from the fifth wave of its online survey of research professionals. Researchers on the client side and the research company side were asked to give their views on trends and issues affecting the market research industry. For more information visit www.rsm1.com.

Pittsburgh research firm Direct Feedback has added video streaming capabilities using ActiveGroup. For more information visit www.dfresearch.com.

Sydney-based research firm Pulse Group has launched Planet Pulse, its proprietary online community portal. Planet Pulse will initially offer both B2C as well as B2B panels, as it explores the potential of specialty panels in the near future. For more information visit www.planet-pulse.com.

New York-based Ipsos has added a new weekly online omnibus polling tool to its twice-weekly national telephone omnibus. Data for the Ipsos U.S. Express Online Omnibus is collected through random sampling of the company's 800,000+ member online panel. The Ipsos U.S. Express Telephone Omnibus is fielded twice weekly among a nationally representative sample of 1,000 adults. For more information visit www.ipsos.com.

Arlington, Texas-based research firm Decision Analyst has created a Database Analytic Services Group designed to help companies improve marketing through more effective use of their databases. Along with traditional database marketing services - including database design, data cleansing, modeling and lead selection - the Database Analytic Services Group will offer direct marketers the range of Decision Analyst's marketing research services. For more information visit www.decisionanalyst.com.

Scarborough Research, New York, has formed a newspaper advisory board. The board will bring together research, sales and marketing executives from newspapers across the country and will provide guidance to Scarborough as the company evolves its services to meet the changing research needs of the newspaper industry. The first meeting was scheduled for September 13-15, 2005. For more information contact Gary Meo at 512-250-2206 or gmeo@scarborough.com.

New York-based AARP Services, a wholly-owned subsidiary of the American Association for Retired Persons, and research firm The Kantar Group have formed a joint venture agreement to provide research and advisory services focused on the 50+ consumer. The new company will leverage the capabilities of AARP Services and Kantar to develop products and services to meet client and industry needs. For more information visit www.kantargroup.com.

Research Industry News

continued from page 16

Carol Parker, now director, AccuPanel for NPD Fashionworld.

New York-based **Nielsen Media Research International** has acquired **Korea Advanced Digital Data Inc.** and its subsidiary, **BasisNet**, a South Korea advertising monitoring and intelligence company. Financial details were not disclosed.

London-based **Synovate** has acquired Italian market research company, **AMT Consulting Srl.** AMT has sales offices in Rome and Milan, together with an operation center in Bari.

Netherlands-based information company **VNU** and research firm **IMS Health**, Fairfield, Conn., announced a definitive agreement to merge in a stock-and-cash transaction valued at EUR 5.8 billion ($7.0 billion). The combined company will have pro forma 2004 revenues of approximately EUR 4.7 billion ($5.6 billion), pro forma annual EBITDA of about EUR 1.1 billion ($1.3 billion), and an EBITDA margin of approximately 23 percent. The company would be listed on both the Euronext Amsterdam and the New York Stock Exchange. Under the terms of the agreement, IMS shareholders will receive $11.25 in cash and 0.60415 VNU shares for each IMS share. VNU shareholders will hold approximately 65 percent of the combined company and IMS shareholders approximately 35 percent.

Upon completion of the merger, VNU will be led by a management team comprised of executives from both companies. Its executive board will be headed by Chairman and CEO Rob van den Bergh and will include David Carlucci as deputy CEO and chief operating officer; Rob Ruijter, VNU's CFO, as chief financial officer; and Nancy Cooper, IMS' CFO, as chief transformation officer. The combined company will have a 10-member supervisory board, four of whom are members of the IMS board of directors, including David M. Thomas, chairman of IMS, who will become vice chairman of the VNU supervisory board.

The merger, which is expected to close in the first quarter of 2006, is subject to approval by the shareholders of VNU and IMS, regulatory approvals and other customary closing conditions. The executive and supervisory boards of VNU and the board of directors of IMS have each unanimously approved the transaction.

Alliances/strategic partnerships

Midgam Research and Consulting Ltd., a full-service research firm in Israel, has joined the **Harris Interactive** Global Network of independent market research companies.

RBC Financial Group and **Ipsos Public Affairs** have agreed to publish the RBC CASH Index (Consumer Attitudes and Spending by Household). The CASH Index is a monthly national survey of consumer attitudes on the current and future state of local economies, personal financial situations, savings and confidence to make large investments. RBC immediately assumed sponsorship of the index, which has been in existence since 2002. The RBC CASH Index will be released at the end of the first full week of each month. In addition to the Overall RBC CASH Index, RBC and Ipsos will publish four indices calculated and comprised from specific questions within the CASH Index Survey. These additional indexes include the Current Consumer Index, the Consumer Expectations Index, the Jobs & Employment Index, and the Purchasing & Investing Index.

Research International in the U.K. and **Bare Associates International** (BAI), Fairfax, Va., have linked up to provide global mystery shopping services. Research International and BAI both developed a Web-based system for recruitment and data capture through to final delivery to clients via client portals.

Millward Brown has appointed Vietnamese market research company **Customer Insights** (CI) as its licensee in Vietnam. CI is based in Ho Chi Minh City (Saigon) with field offices in Ha Noi, Da Nang, Nha Trang, Can Tho and Hai Phong.

IMSA, the International Mystery Shopping Alliance, has appointed **Nextep Promotion** to its global business alliance of mystery shopping companies. Established in 2000, Nextep has a field force of over 1,000 mystery shoppers covering Russia as well as the Ukraine and Kazakhstan.

Market Insite Group, Mill Valley, Calif., has merged with France-based **Asterop SA**. The new company, Asterop Inc., will offer business intelligence tools to the retail, real estate and banking industries, with offerings for the insurance, consumer products and automotive industries to follow.

Walker Information, Indianapolis, has added **Millward Brown Asia Pacific** to its global network. As a part of the network, Millward Brown Asia Pacific will add stakeholder relationship management to its existing product line.

Survey Sampling International (SSI), Fairfield, Conn., has formed an alliance with **Save the Children.** Coinciding with SSI's $25,000 donation to Save the Children is the launch of its new panelist charity program under which panel members can elect to donate their awards to Save the Children.

Association/organization news

The Advertising Research Foundation (ARF), the **American Association of Advertising Agencies**, and the **Association of National Advertisers, Inc.** (ANA), have formed a joint initiative to encourage industry-wide adoption of "consumer engagement" as a media measurement metric to complement

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traditional measures of consumer exposure. The initiative is called MI4 (Measurement Initiative: Advertisers, Agencies, Media and Researchers).

A joint committee has been formed to shepherd the research project. The initial phase of the committee's investigation is to 1) define engagement as a metric and 2) propose a large-scale industry research effort to validate engagement as a planning, tracking and return on media investment (ROMI) metric to complement exposure and frequency.

"MI4 will be a collaborative initiative," says Barbara Bacci-Mirque, executive vice president, ANA. "ANA members have told us that, in the face of media fragmentation and consumer control over how they receive advertising messages, new forms of advertising are needed to reach today's consumers. In this age of accountability, new metrics are necessary to adequately reflect the impact of nontraditional messages."

The MI4 initiative received endorsements from joint committee members including the Procter & Gamble Company, Ford Motor Company and Masterfoods, in addition to agency and association partners.

The ARF has named Joseph T. Plummer chief research officer. His primary role is to insure that the ARF provides industry leadership on critical advertising and marketing issues and determines how those issues can be "positively impacted by intelligent and creative research." Prior to his new role, Plummer served as executive vice president, director of research and insight development for McCann-Erickson WorldGroup.

The Southwest Chapter of the Marketing Research Association (MRA) has announced seven scholarship awards for 2005. The seven members and/or their employers, their classes and the dollar amounts awarded are as follows: Lisabeth Clawson, Clawson Research, RIVA 303 advanced moderator training, $1,000; Rachelle Cooper, Information Alliance, human resources and management, $1,000; David Galloway, Galloway Research Service, MRII principles of marketing research, $949; Randi Houts, Tammadge Market Research, information security, $500; Elaina McGrew, ingather research, business, marketing and public speaking, $1,000; Veronica Pang, Galloway Research Service, Excel, level, 1, 2 and 3, $735; Bertha Perez, Galloway Research Service, computer sciences, $570.

The Professional Researcher Certification program (PRC) established by the **MRA** is now offering a specialty education track for qualitative research consultant. The new track is the first of its kind in terms of specialty or niche track in the program and offers three levels of expertise: associate, practitioner and expert.

The track was led and developed by MRA's qualitative consultant committee: Louise Kroot-Haukka of Louise Kroot Associates, George Sloan of Customer Strategy Consulting, and Carla Lindemann of Issues & Answers Network, Inc. The committee consisted of qualitative researchers who hold memberships in various industry associations.

Kroot-Haukka views the new track as a strong opportunity for qualitative researchers. "I believe that this will help to define the profession for new people who are exploring the possibility of entering," she says. "It will also help to define the ways that more experienced professionals can enhance their skills and abilities. It will be a win-win situation for qualitative research consultants."

PRC is open to all marketing and opinion researchers. It encompasses all segments of the profession - from end user to interviewer. MRA membership is not required for PRC. For more information visit www.mra-net.org.

Awards/rankings

Garcia Research, Burbank, Calif., won top honors (in the under $5 million in revenues category) at the Latin Business Association's Sol Awards in Los Angeles. Separately, the *San Fernando Valley Business Journal* honored company founder Carlos Garcia with its Small Business Entrepreneur Award.

In June during the annual conference of Canada's Marketing Research and Intelligence Association, **Claros Research Corporation**, Calgary, Alberta, was awarded the Murray Philp Altruistic award for its work with Calgary's Glenbow Museum. The award is given annually to a Canadian marketing research company that worked on a pro-bono or reduced fee basis for a not-for-profit organization.

Orem, Utah-based research firm **PGM Incorporated** has been awarded the 2005 Best of State award in the category of business services: data services for the state of Utah. The awards were created to recognize outstanding individuals, organizations and businesses in Utah.

In June, Rob Monster of Seattle research firm **GMI, Inc.** was named Ernst & Young Entrepreneur Of The Year for the Pacific Northwest, in the software and technology category. Monster was selected from 19 finalist companies by an independent panel of judges comprised of local business, academic and community leaders.

New accounts/projects

Miller Brewing Company has extended its contract with **ACNielsen U.S.**, Schaumburg, Ill., and will continue to use ACNielsen as its preferred provider of sales analysis and consumer insights.

TNS has been awarded a new television audience measurement contract in Singapore. The contract will be operated on behalf of **MediaCorp**, Singapore's largest broadcaster, and will last for five years. The new service will comprise a PeopleMeter panel of 750 households representative of the population of Singapore and begins on January 1, 2006. Viewing information will be retrieved overnight and audience figures for the previous day's viewing will be available the following morning. The data will be made available through the TNS television audience analysis system InfoSysTV.

Asia Internet Plaza Corporation, a provider of online panel and research services to organizations in Japan, Asia and other international markets, has selected **Confirmit** from Oslo-based Firm to power its largest panel with the intent to serve research companies seeking global or Asia-specific research.

Advertiser Perceptions has commissioned the **Harris Interactive Service Bureau**, Rochester, N.Y., to manage its new online syndicated tracking study, Power Metrics, which is providing information for Advertiser Perception's clients. Nearly 40,000 respondents (roughly 10,000 in each of four waves) will complete the syndicated study in its first year.

New companies/new divisions/relocations/expansions

New York-based **NetRatings, Inc.** has opened an office in Brisbane, Australia. The office is headed by Greg Chamberlain, business development manager for Nielsen//NetRatings.

Wilson Research Strategies, Washington, D.C., has opened a new office to support the firm's work in the San Antonio-Austin corridor. It has one satellite office in Oklahoma City. This is the firm's first office in Texas. The company appointed Senior Vice President Tara Niebergall as head of the new San Antonio office.

EMH Opinion Sampling has moved to a new address at 1401 21st St., Suite 370, Sacramento, Calif., 95814. The phone number remains the same.

The GfK Group has formed GfK Custom Research, North America. Martin R. Lautman has been named CEO of the group, which includes GfK ARBOR, GfK CRI, GfK Schiappa and Caribou Lake, as well as GfK NOP and GfK Automotive, the two companies that grew out of GfK's recent acquisition of NOP World.

M/A/R/C Research, Irving, Texas, has opened an office in New York, at 437 Madison Ave., 4th Floor, and named Joan Treistman its executive vice president.

Microtab, Inc., has moved to 10945 State Bridge Rd., Suite 401-260, Alpharetta, Ga., 30022-5676. Phone 770-664-9244. Fax 770-664-9798.

Data Development Worldwide has opened an office at 505 Montgomery St., 11th Floor, San Francisco, Calif., 94111. Phone 415-874-3210. Fax 415-874-3211.

Company earnings reports

For the first half of 2005, Netherlands-based **VNU** reported revenue increased 2 percent to EUR 1,648 million from EUR 1,623 million, and EBITDA was up 6 percent to EUR 296 million from EUR 280 million. Reported profit for the half year was negatively impacted by currency translation effects.

On an organic basis, however, revenues increased 6 percent and EBITDA grew 11 percent. EBITDA growth benefited slightly from a favorable comparison with the prior year, when a restructuring charge in its marketing information group, offset by the release of a real estate provision, resulted in a net negative impact to EBITDA of EUR 4 million.

In the first half of 2005, organic revenue for the marketing information group was up slightly more than 4 percent, with nearly all ACNielsen regions delivering solid growth. Growth was especially strong in the developing markets of Asia, Latin America and ACNielsen's emerging markets region, which includes Eastern Europe. ACNielsen Europe, however, continued to experience slower growth as a result of difficult market conditions. In the second half of 2005, VNU expects the group's revenue growth to accelerate, based on improved performance in Europe, the introduction of several new advisory services products and the continued expansion of ACNielsen's consumer panels, resulting in full-year growth of approximately 4-5 percent.

Organic EBITDA grew 19 percent, and EBITDA margins increased to 12.9 percent from 11.5 percent in the first half of 2004.

After a slow first quarter and a better second quarter, growth within VNU's advisory services group is expected to accelerate in the second half, as performance picks up in its business units and new products and services begin to produce results.

The media measurement and information group delivered organic revenue growth of 11 percent in the first half, driven by strong performances from Nielsen Media Research in the U.S., and from NetRatings. Organic EBITDA grew 19 percent versus the prior year.

For the full year, VNU expects the group's organic revenues to grow at least 10 percent.

Nielsen Media Research had a strong first half, as the business continued to grow on the strength of its National Sample expansion in the U.S., and the introduction of Local People Meter service in New York, Los Angeles, Chicago and San Francisco during 2004 (Local People Meter service was introduced in Philadelphia and Washington, D.C. in mid-2005).

NetRatings, VNU's 60 percent-owned Internet audience and advertising measurement business, delivered strong revenue growth in the first half. Results were driven by growth from the NetView audience measurement service in the U.S., the expansion of the MegaPanel service to measure e-commerce activity, and a strong performance from SiteCensus products. The company's EBITDA loss in the first half was (EUR 2.1 million), compared with (EUR 3.6 million) in the prior year.

For the second quarter 2005, ended June 30, New York-based **Arbitron Inc.** reported revenue of $69.8 million, an increase of 7.3 percent over revenue of $65.1 million during the second quarter of 2004. Costs and expenses for the second quarter increased by 4.5 percent, from $53.1 million in 2004 to $55.4 million in 2005. Earnings before interest and income tax expense for the quarter were $18.6 million, an increase of 17.2 percent over EBIT of $15.9 million during the comparable period last year.

Income tax expense for the second quarter declined 45.1 percent, from $5.5 million in 2004 to $3.0 million in 2005 due in part to the previously announced reversal of certain tax liabilities for contingencies related to prior periods.

Net income for the second quarter increased by 78.7 percent from $8.6 million in 2004 to $15.4 million in 2005.

Net income per share for the second quarter 2005 increased to $0.48 (diluted), compared with $0.27 (diluted) during the comparable period last year.

For the six months ended June 30, 2005, revenue was $149 million, an increase of 5.2 percent over the same period last year. EBIT was $51.3 million, compared to $47.8 million in 2004. Net income for the six months was $35.2 million or $1.11 per share (diluted), compared with $26.7 million or $0.85 per share (diluted) during the comparable period last year.

Paris-based **Ipsos** posted first-half 2005 revenues of EUR 321.8 million, up 12.5 percent compared to first-half 2004. Negative currency effects depressed revenue growth by 1.4 percent, while newly-acquired companies had a positive impact of 6.1 percent. Organic growth amounted to 7.8 percent.

All business lines contributed to Ipsos' growth, but to varying degrees. Generally speaking, the most internationally-integrated business lines - particularly those involved in advertising research and customer relationship management research - delivered stronger growth than business lines that have maintained a local client base and organization.

Ipsos' growth rates varied from one region to another. Growth was very strong in emerging markets, supported by a buoyant market, robust positions in several key countries (e.g., Brazil, Mexico and China) and market share gains among multinational businesses as well as local clients.

For the first time, combined revenues from Asia-Pacific, the Middle East and Latin America accounted for 20 percent of consolidated revenues in first-half 2005.

Growth in North America held steady, underpinned by a balanced performance across all client segments and business lines.

Growth in Europe slowed down slightly, coming in below Ipsos' 5 percent annual target for this region. This was mainly due to sluggish economic conditions, prompting many clients to keep a check on their marketing expenditure, especially in mass market industries. This slowdown is also attributable to an unfavorable comparison basis, as growth in Europe was far stronger in the first half of 2004 than in the second. Despite these factors, Ipsos is confident that it is on track to meet or exceed its 5 percent annual growth target.

For the second quarter ended June 30, 2005, **Opinion Research Corporation,** Princeton, N.J., reported revenues were $51.8 million versus $49.4 million in the prior year's second quarter. Social research revenues were up over 12 percent to $36.2 million versus $32.3 million in last year's second quarter. Market research revenues totaled $13.2 million versus $13.8 million in the prior year's second quarter. Teleservices revenues were $2.4 million versus $3.3 million in last year's second quarter.

Net income for the quarter was $1.3 million, or $0.20 per diluted share, as compared to a loss of ($237,000), or ($0.04) per diluted share, in last year's second quarter. Last year's second quarter was impacted by a refinancing charge that reduced net income in the quarter by $1.4 million and diluted earnings per share in the quarter by $0.22.

The income tax provision in both periods is higher than statutory rates due to the fact that the firm is not deriving tax benefits from non-U.S. and state losses.

Second-quarter revenues for New York-based **NetRatings** were $17.1 million, an 18 percent increase over revenues of $14.5 million in the second quarter of 2004. In accordance with generally accepted accounting principles (GAAP), net loss for the second quarter of 2005 was ($1.9 million), or ($0.05) per share, on approximately 36 million shares. This compares with a net loss of ($4.3 million), or ($0.12) per share, in the second quarter of 2004, on approximately 34.4 million shares.

On an EBITDA basis the company reported a second-quarter loss of ($577,000) or ($0.02) per share. This compares with an EBITDA loss in the second quarter of 2004 of

($909,000), or ($0.03) per share. NetRatings' second-quarter 2004 results included a one-time, $1.8 million insurance recovery, favorable to both GAAP and EBITDA results. Excluding this item, NetRatings' year-over-year results improved from an EBITDA loss of ($2.7 million) in the second quarter of 2004 to an EBITDA loss of ($577,000) in the second quarter of 2005.

At **SPSS Inc.,** Chicago, second-quarter net revenues totaled $58.1 million, compared to $53.0 million in the second quarter of 2004, with earnings per diluted share of $0.21, compared to a loss per share of ($0.05) in the same period last year. New license revenues were $24.4 million in the second quarter of 2005, up 17 percent from $21.0 million in the second quarter of 2004. This increase was driven by continued double-digit growth in the core tools business.

The company's operating margin in the second quarter of 2005 was 13 percent. Reported operating income for the second quarter of 2005 increased $9.6 million to $7.3 million, compared to a loss of ($2.3 million) in the prior-year period. Operating expenses for the quarter dropped by over 8 percent from the same period last year. During the second quarter of 2005, SPSS incurred $0.3 million in unusual pre-tax charges related to its ongoing effort to restructure costs. Results for the second quarter of 2004 included approximately $2.5 million of pre-tax charges related to the company's accounting review and restatement and downsizing of certain European field operations.

For the six months ended June 30, 2005, net revenue totaled $115.5 million compared with $110.1 million for the same period in 2004. New license revenue for the first half of the year was $50.4 million, an increase of 10 percent from $45.8 million in the same period in 2004.

Operating income for the six months ended June 30, 2005 was $11.3 million with an operating margin of 10 percent. During the first half of 2005, the company incurred $2.0 million in planned unusual pre-tax charges related to restructuring for future cost savings. Operating income for the six months ended June 30, 2004 was $1.7 million, including unusual pre-tax charges of $2.5 million.

Reported earnings per diluted share for the six months ended June 30, 2005 were $0.34, compared with $0.06 for the same period in 2004.

IMS Health, Fairfield, Conn., announced second-quarter 2005 revenues of $433.3 million, up 14 percent (12 percent constant dollar), compared with revenues of $379.6 million for the second quarter of 2004. Second-quarter diluted earnings per share on an SEC-reported basis was $0.41, up 52 percent, compared with $0.27 in the 2004 second quarter. Second-quarter adjusted diluted earnings per share was $0.34, compared with $0.29 per share in the same period of 2004, an increase of 17 percent. Net income on an SEC–reported basis was $93.2 million, up 43 percent compared with net income of $65.1 million in the year-earlier quarter. On an adjusted basis, net income for the second quarter of 2005 was $77.8 million, up 12 percent, compared with net income of $69.5 million in the prior year.

Operating income in the second quarter was $103.3 million on an SEC-reported basis and $110.7 million on an adjusted basis, compared with operating income of $102.5 million on both an SEC-reported and adjusted basis in the year-earlier period. Adjusted operating income excludes a charge of $7.4 million for costs associated with the proposed merger of IMS and VNU, N.V. Operating income rose 1 percent on an SEC-reported basis and 8 percent on an adjusted basis (7 percent constant dollar).

Adjusted results for the second quarter of 2005 exclude the merger-related costs mentioned above, certain net pre-tax income items totaling $5.1 million, and certain net tax benefits of $17.6 million, including a $24.3 million tax benefit related to a technical correction Congress passed in the American Jobs Creation Act of 2004 (AJCA).

Adjusted results for the 2004 second quarter exclude certain net pre-tax expense items totaling approximately $0.4 million, as well as certain net tax provisions of approximately $4.0 million.

Names of Note

continued from page 12

Afica. **Tomasz Jakubowski** and **Bozena Bobrowicz** have been appointed joint general managers of Synovate Poland. This follows the move of **Michalis Michael,** former managing director of Synovate in Central Europe and Russia, from Warsaw to Chicago to take up a new post as head of global online and panel marketing and operations. *Synovate* has also named **Peter Huijboom** CEO global client relationships.

Karl Feld has been named vice president, primary data division, at *Johnston, Zabor, McManus, Inc.*, a Durham, N.C., research firm.

Portland, Ore., research firm *Doxus* has named **Erin Leedy** and **Dan Bruner** senior researcher. The firm has also hired **Amy Reyes** as a senior editor and named **Vinay Dowray** and **Rich Jones** researcher/analyst.

Stephan Thun has been named vice president, managing director at *Maritz Research Europe*.

NetRatings, Inc., New York., has named **Andrew Reid** managing director Australia. He will be based in Sydney.

Angela Mariana Freyre has joined *Nielsen Media Research*, New York, as senior vice president, deputy general counsel for legal and strategic affairs.

ACNielsen, New York, has named **Robert I. Tomei** president of global consumer panel services.

Judy Oppenheim has been named director of research at *R/GA*, a New York advertising agency. **Barbara Canning Brown** has been named director of analytics/CRM.

The Mattson Jack Group, Inc., a St. Louis health care consulting firm, has added three to its advanced methods group, based in the firm's Philadelphia office: **Mylinda R. Willsey** has been appointed quantitative methodologist; **William Serad** has been named senior director of advanced methods; and **Xinghe (Henry) Lu** has been named senior statistical analyst.

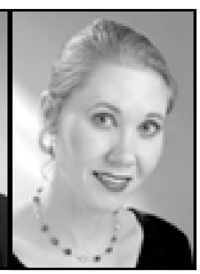
Market Strategies, Inc. (MSI), Alexandria, Va., has appointed **Jack Fyock** vice president of the health care sector of its government, foundation and academic research division.

Martin R. Lautman has been named CEO of *GfK Custom Research*, North America, a new group within GfK encompassing GfK's custom research businesses as well as GfK NOP and GfK Automotive, the two companies that grew out of GfK's recent acquisition of NOP World .
Separately, **Karen Ahlgrim** has joined GfK Custom Research Inc. as senior director, account management, in Dallas. **Laura Latshaw** has joined GfK Custom Research Inc. as senior director, account management in Philadelphia. In Chicago, **Leah Robinson** has been named senior director, account management.

Ahlgrim

Latshaw

Robinson



Templeman

Sigma: Research Management Group, Cincinnati, has promoted **Debra Templeman** to project manager.

Opinions... of Sacramento has named **Zeyad El Sayed** director of operations.

Peter Cain has been named director, econometric analysis, *Millward Brown Optimor*, London. **Michael Simpson** has been named vice president, global human resources, at *Millward Brown*. In addition, **Christine Schoeff** has been appointed vice president, human resources and organizational development, *Millward Brown North America*.

Research International has appointed **Brooke Courtenay** managing director, Thailand. **Serene Wong** has assumed the new position of CEO South Asia and **Rosalynn Tang** has taken over as managing director, Singapore. In the Stamford, Conn., office, **Alastair Bruce** has been named global head of healthcare. **Mike Patrick** has been named senior vice president. He is based in Phoenix.

Chicago-based *Information Resources, Inc.*, has named **Sunil (Sunny) Garga** president of its analytic insights group. Separately, **Thomas J. Blischok** has joined IRI as president of retail solutions, strategic consulting, and integrated solutions.

Global Market Insite, Inc., Seattle, has named **Larry Schack** vice president of global client services, and promoted **Mark Houston** chief marketing officer.

Mark Menne has joined the San Francisco office of *Data Development Worldwide* as vice president.

Lightspeed Research, Basking Ridge, N.J., has named **Karen Rabinowicz** North American CEO. She will be based in New York City and Basking Ridge.

Mediamark Research Inc., New York, has formed a new division, MRI Market Solutions, and tapped **Sharon Polansky** to run it.

Rob Iles has been named managing director of *Schwartz Consulting Partners, Inc.*, the Tampa-based full-service division of Schwartz Research Services, Inc. In addition, **Stephanie Salerno** has been named research solutions manager.

U.K. research firm *ESA* has named **Bernice Perkins** data processing executive and promoted **Stephen Choonos** to marketing executive.

Michael Hyatt has been named data processing executive, and **Jeminee Patel** has been named senior executive. **Michael Virks** has joined the analysis team as data processing manager while **Melanie Banks** has been named business improvement administrator.

Greenfield Online, Wilton, Conn., has announced four promotions: **Michael McCrary** to vice president West Coast sales; **Terence McCarron** to vice president East Coast sales; **Colin Livingston** to manager, client development; and **Pete Aitkin** to manager, client development.

Jennifer Huston has been promoted to the newly created position of director, Portable People Meter implementation, at *Arbitron Inc.*, New York.

G&S Research, Carmel, Ind., has named **Ryan Foxworthy** project manager and **Wendy Martin** analyst.

Pat Pellegrini has been named senior vice president of *TNS Media Research*, New York.

C&R Research, Chicago, has made two additions to its qualitative InVision group: **Casey Sloan** has been named research director and **Liria Barbosa** has been named qualitative research analyst.

MORPACE International, Inc., Farmington Hills, Mich., has appointed **Susan L. Cornish** as vice president.

Steve Saxty has joined *J.D. Power and Associates*, Westlake Village, Calif., as executive director, marketing solutions for the U.S. Auto Group.

Chicago research firm the *Blackstone Group* has named **Ken Seeger** vice president of marketing and client services and named **Norman Kane** vice president of client development.

Mill Valley, Calif., research firm *MarketTools, Inc.*, has named **Amal Johnson** CEO.

Tara Olson and **Sherrie Aycock,** owners of Winston-Salem, N.C.-based *AllPoints Research, Inc.*, have been named president and president-elect of the North Carolina chapter of the National Association of Women Business Owners. Olson took office on July 1, and will remain in office for a full year, at which point Aycock will assume the role of president.

Baltimore, Md., marketing firm *Vertis* has named **Jim Litwin** vice president of marketing research.

Litwin Triestman

Joan Triestman has joined *M/A/R/C Research*, Irving, Texas, as executive vice president. In addition, **Janet Savoie** has joined as senior director, client development.

Itracks, a Saskatoon, Saskatchewan research firm, has named **Isaac Renfro** corporate account executive, Atlanta.

At eQuesta, the online division of London research firm *Fieldwork International*, **Sarah Flinn** has been named U.K. managing director. In addition, **Matthew Seabrook** has taken over for Flinn as the manager of eQuesta. And **Peter Boyle**'s title has changed to global managing director.

Alan Steele has joined *Euro RSCG 4D* Chicago agency as president of Euro RSCG Discovery North America.

Atlanta research consulting firm *Marketing Data Management Associates* has added **Joel Reish** as senior research consultant and **Amy Hebard** as senior study design and analysis consultant in its affiliate consultant team.

Paris-based *Ipsos* has named **James T. Smith** chairman and CEO of Ipsos in North America. Smith replaces **Simon Kooyman**, who is taking a sabbatical. In addition, **Fred Church** has been named vice president for the company's health practice in North America. And **Becki Meyer** has joined the consumer products division of Ipsos-Insight as vice president in its Cincinnati office.

Rodney A. Carver has joined *Decision Analyst*, Arlington, Texas, as director of the company's newly created database analytic services group. **Clint Klein** has been named senior director of business development. And **Ming-Hong Huang** has been named vice president of the company's database analytic services group.

New York-based *Arbitron Inc.* has named **Sean R. Creamer** executive vice president, finance and planning, and chief financial officer. He replaces **Bill Walsh**, who announced his intention to retire by the end of the year. The firm has also named **Anthony D. Sciulli** vice president, manufacturing and supply chain management.

St. Petersburg, Fla., research firm *HealthFocus International* has named **Rohit Vaidya** vice president for research and analysis.

TNS has appointed **Marie Lee** to the newly created position of director AP global accounts. She will be based in Bangkok.

The NPD Group, Port Washington, N.Y., announced three new hires: **Ed Manzitti** as director of primary research; **Neil Strother** as research director, mobile devices; **Chand Vyas** as senior account manager. Also moving into the group from other NPD divisions are **Eileen Brown**, director of business development and **Ellie Burgess**, director of program management.

Ronin Corporation has named **Marek Vaygelt** U.K. general manager, based in the company's London office.

2005

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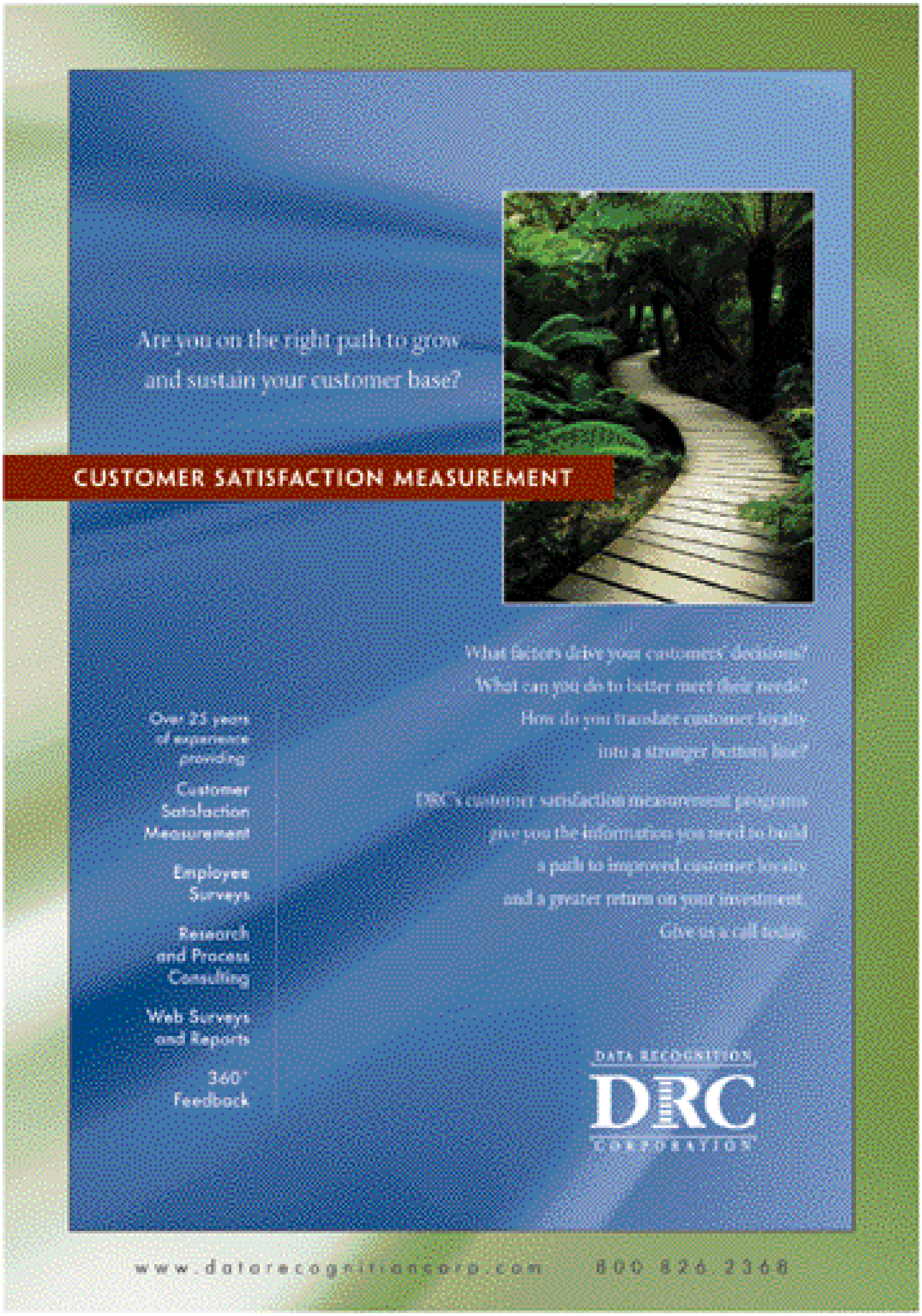
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By Joseph Rydholm, *Quirk's* editor

Some satisfying reading

Britain's Market Research Society (MRS) and publisher Kogan Page continue their fine series of market research books with two new titles. The first, *Researching Customer Satisfaction and Loyalty*, does an outstanding job of answering or at least touching on nearly every question you might have as you contemplate a satisfaction research program.

The realms of customer satisfaction/loyalty/relationship management seem particularly rife with authors and theorists who spout their grand ideas with precious little idea of how much work it will take to build the programs they champion. No such danger here. Author Paul Szwarc has worked on both the client and provider side and thus brings a well-rounded view to his writing.

Don't get me wrong - theory is certainly important and provides a useful framework. Szwarc does devote a short chapter to theories and strategies of measuring satisfaction, offering a brief look at approaches such as Six Sigma and Simalto. But the bulk of the book is grounded in the real world. Chapters cover: the use of qualitative and quantitative techniques to research satisfaction; the process of developing an internal satisfaction research process and finding the right vendors; sampling; and the all-important analysis and reporting of the findings. Also instructive is the chapter that looks at the satisfaction process from the consumer's point of view. It's crucial to keep the respondent in mind throughout the research process, by making questionnaires fun and interesting and by respecting respondents' time and privacy.

Customer relationship management is among the topics explored in the other new MRS title, *Customer Insight*. Using the term "insight" as a catch-all, the 11 chapters (each written by a variety of authors) cast a wide net, looking beyond the "mere" measurement of satisfaction and exploring how customer insights are obtained. In addition to research, the book looks at database marketing, loyalty programs and customer care initiatives. I found the how-to chapters on organizing and managing consumer insight programs and processes most interesting and potentially helpful to readers, as they provide useful benchmarks against which to compare your own firm's internal processes.

Shades of gray

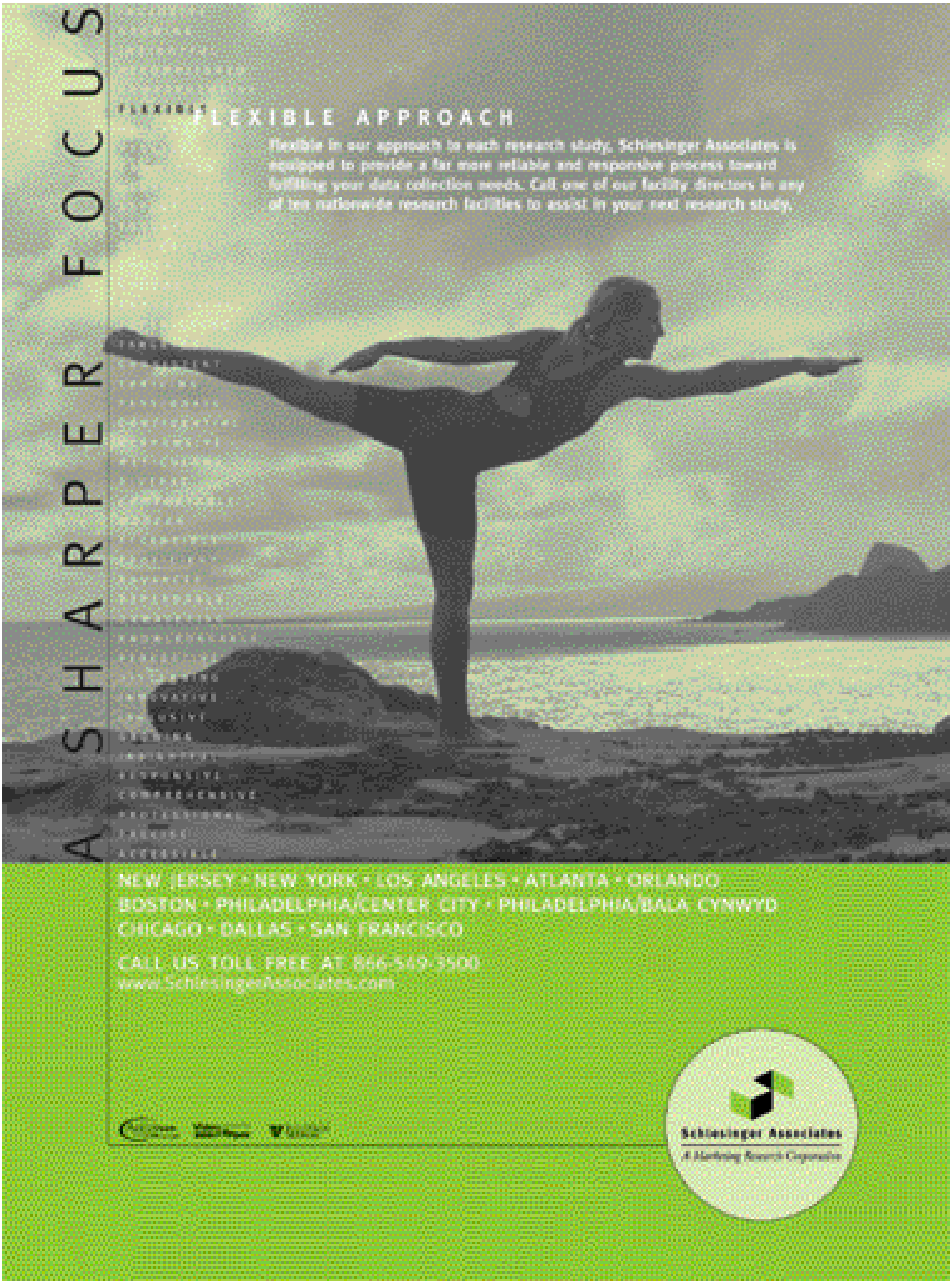
Like many other management trends and fads over the years, the loyalty movement rests on a number of beliefs, most of them proffered and regurgitated by loyalty proponents themselves until they become unquestioned truths. But in any truth there are usually shades of gray.

The new book *Loyalty Myths* examines some of these long-held "truths" and, as the situation warrants, refutes, debunks or clarifies them.

Customer loyalty is certainly an admirable pursuit, but it is not the cure-all many make it out to be. It is difficult to achieve, hard to measure, and, as the book shows, is not a sure guidepost to corporate success. One of the main takeaways is that there is no one-size-fits-all approach for creating loyalty. What works for one firm may not work for another - something many of the loyalty pundits seem to conveniently overlook. In addition, customers in all industries are fickle. Their actions and motivations can change in an instant.

Authors Tim Keiningham, Terry Vavra, Lerzan Aksoy and Henri Wallard candidly admit they have perpetuated a myth or two themselves (as has this publication), such as the statement that it costs five times more to acquire a customer than to retain a customer. But by dispelling some of the fallacies surrounding the loyalty movement, and offering in the closing chapter some guidelines to properly manage customer loyalty, their aim is to help readers ask the right questions and frame their search for information and, ultimately, build their own program on a series of truths rather than myths. |Q

Researching Customer Satisfaction and Loyalty *(258 pages; $37.50), by Paul Szwarc, and* Customer Insight *(288 pages; $32.50), by Merlin Stone, Alison Bond and Bryan Foss, are published by Kogan Page (www.kogan-page.co.uk).* Loyalty Myths *(254 pages; $24.95) by Timothy Keiningham, Terry Vavra, Lerzan Aksoy and Henri Wallard, is published by Wiley (www.wiley.com).*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